

*Core Financial & HR Enterprise System Project*

*Research and Evaluation Process*



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FEBRUARY 2021

**CORAL  
GABLES**<sup>®</sup>  
THE CITY BEAUTIFUL

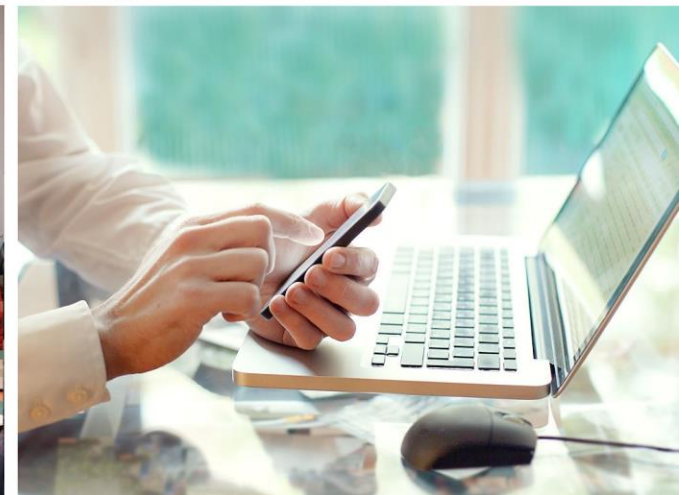




CITY OF CORAL GABLES  
CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT  
RESEARCH AND EVALUATION PROCESS  
ENTERPRISE BUSINESS CAPABILITIES: POST-MODERN ERP (1)



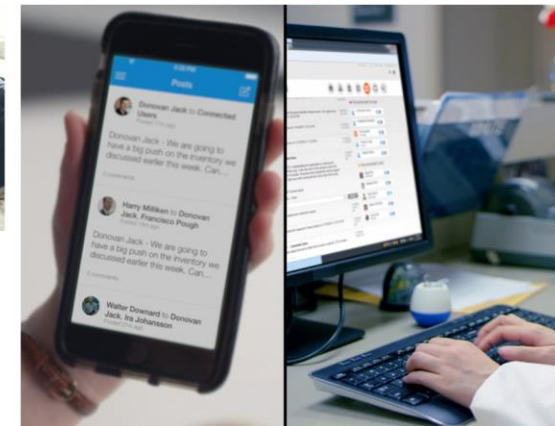
CUSTOMER-FOCUSED / PEOPLE-CENTRIC. EXCELS IN USER EXPERIENCE. INTUITIVE, USER-FRIENDLY. FOSTERS COLLABORATION AND EFFICIENCIES. CONVENIENT AND ACCESSIBLE, ANYWHERE, ANYTIME.





# CITY OF CORAL GABLES CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT RESEARCH AND EVALUATION PROCESS ENTERPRISE BUSINESS CAPABILITIES: POST-MODERN ERP (2)

DATA-DRIVEN. REAL-TIME VISIBILITY. ACTIONABLE DASHBOARDS, EXECUTIVE REPORTING. AGILE/RESPONSIVE. HORIZONTAL & VERTICAL INTEGRATION. AI, MACHINE LEARNING, PREDICTIVE ANALYTICS. INTEROPERABLE BI.





CITY OF CORAL GABLES  
CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT  
RESEARCH AND EVALUATION PROCESS  
ENTERPRISE BUSINESS CAPABILITIES: POST-MODERN ERP (3)



INDUSTRY 4.0, BI 4.0. FUTURE-READY. ROBOTIC PROCESS AUTOMATION. AI, MACHINE LEARNING. CLOUD-BASED. IOT INTEGRATION. BLOCKCHAIN-READY. ADVANCED FINTECH VISUALIZATION. XR-READY.



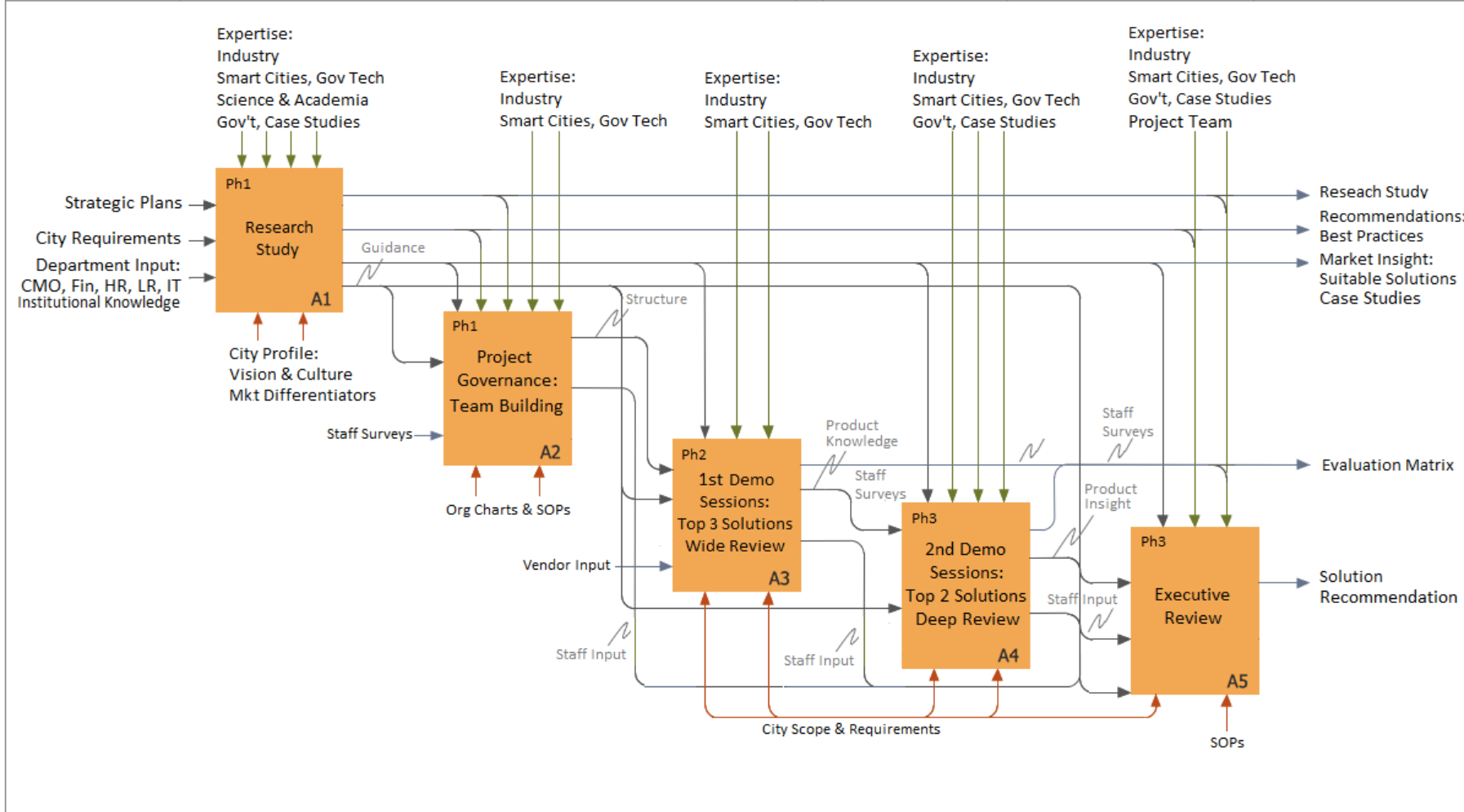


# CITY OF CORAL GABLES

## CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT

### RESEARCH AND EVALUATION PROCESS

Electronic file name:	Author: Raimundo Rodulfo, PE, PMP	Date: 12/06/2019	X	WORKING	READER	DATE	CONTEXT:
IDEF-1_CGIT_FinHR-ERP-Research-Evaluation-Process_2018-2019	Project: Core Financial & HR Enterprise System	Rev: 1.0		DRAFT			■
	Notes: City of Coral Gables			RECOMMENDED			
				PUBLICATION			



Node: <b>A0</b>	Title: <b>Research and Evaluation Process, 2018-2019</b>	Viewpoint: <b>Executive Steering Team</b>
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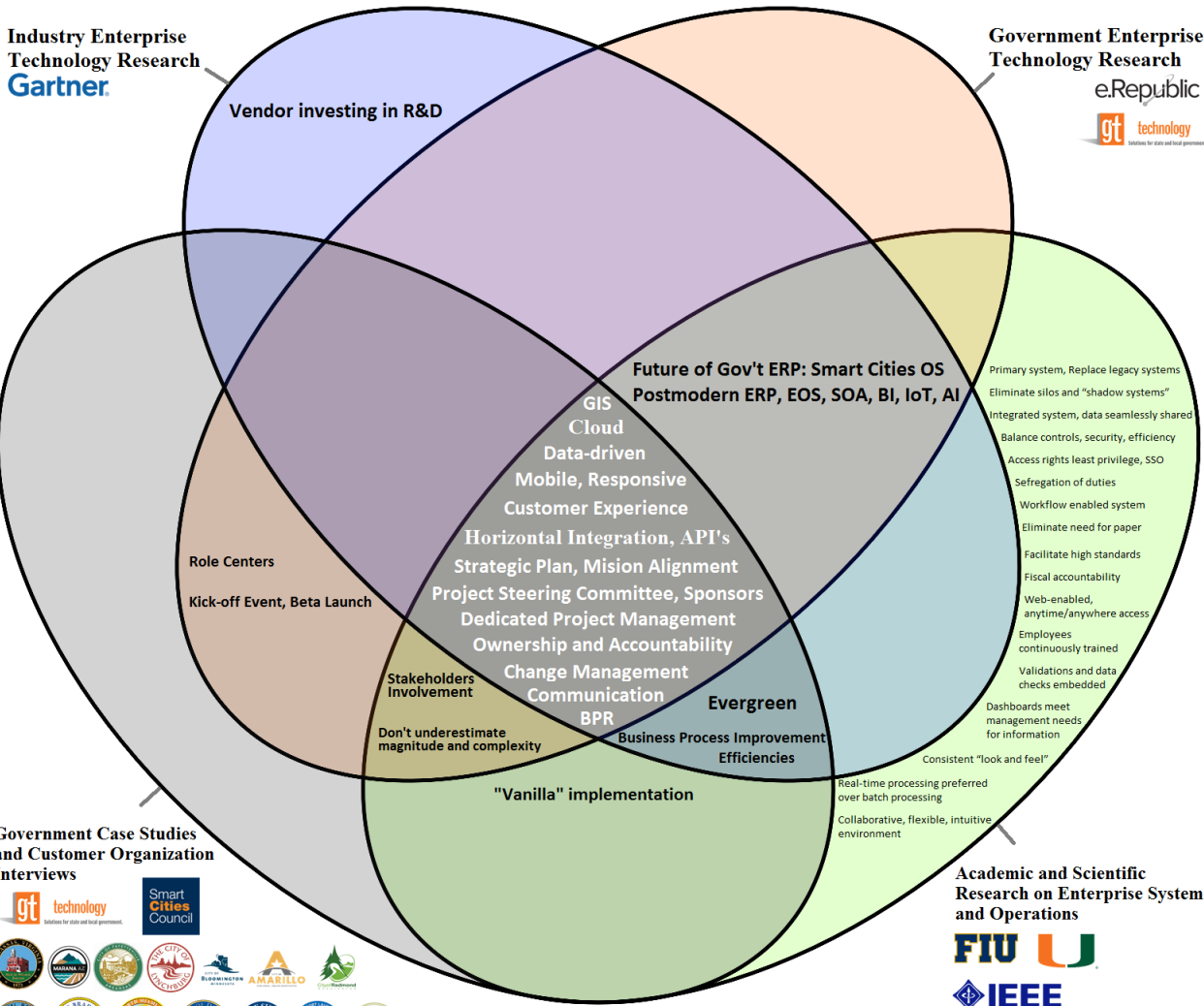
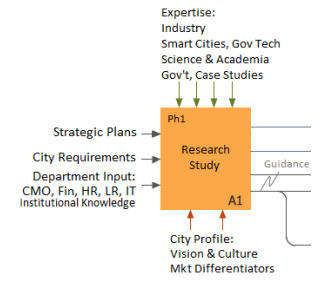


# CITY OF CORAL GABLES

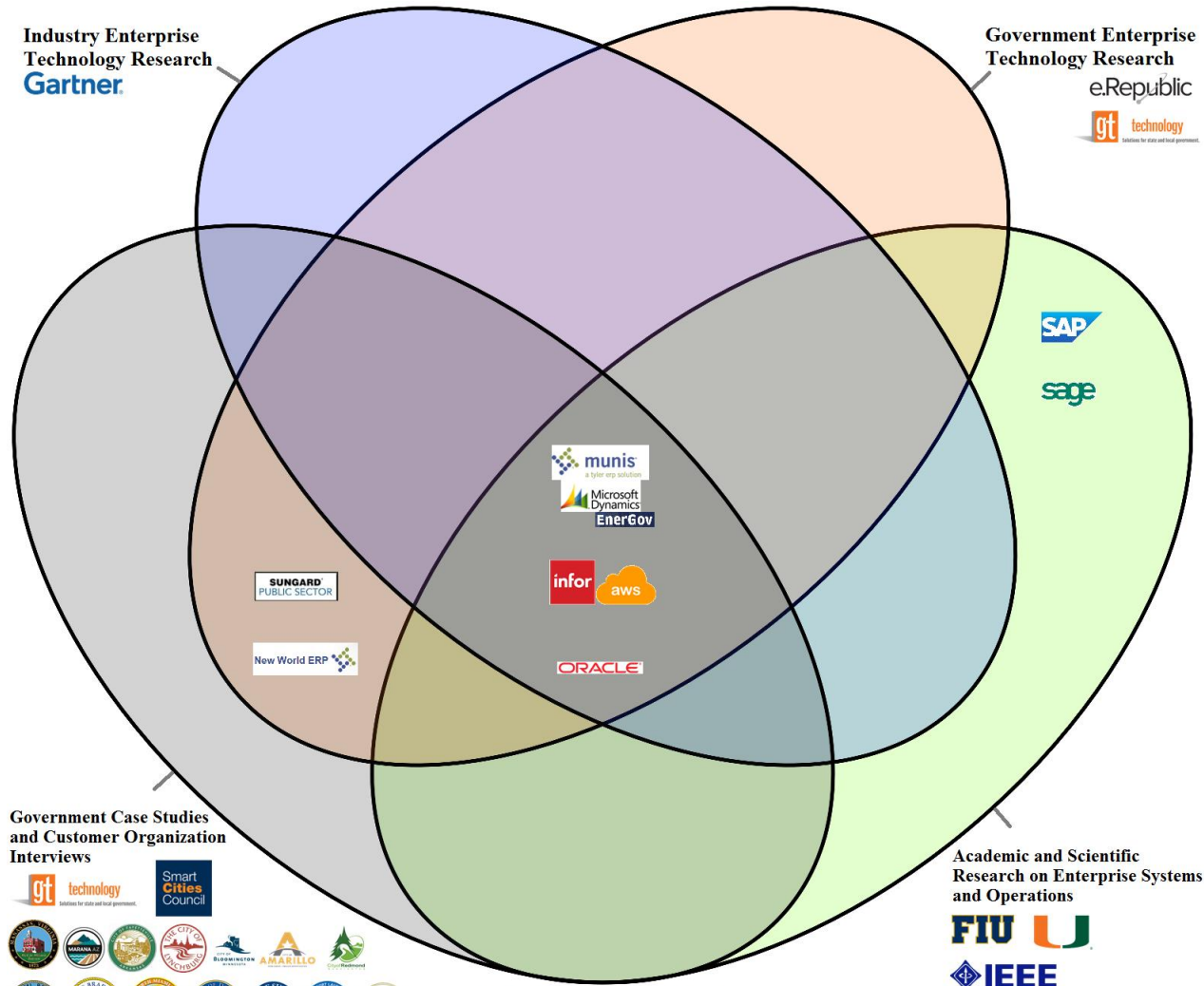
## CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT

### RESEARCH AND EVALUATION PROCESS - PHASE 1: RESEARCH STUDY

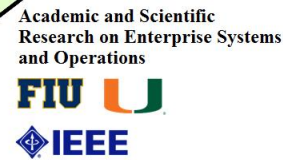
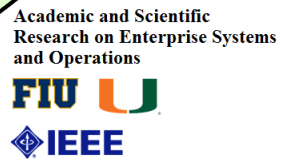
#### RECOMMENDATIONS: BEST PRACTICES, SUITABLE SOLUTIONS, CASE STUDIES



VENN DIAGRAM

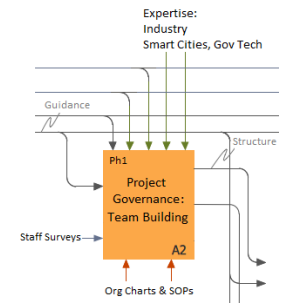


VENN DIAGRAM





CITY OF CORAL GABLES  
 CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT  
 RESEARCH AND EVALUATION PROCESS - PHASE 1: PROJECT GOVERNANCE / TEAM BUILDING  
 EXECUTIVE STEERING TEAM & WORKING GROUPS



**EXECUTIVE STEERING TEAM**

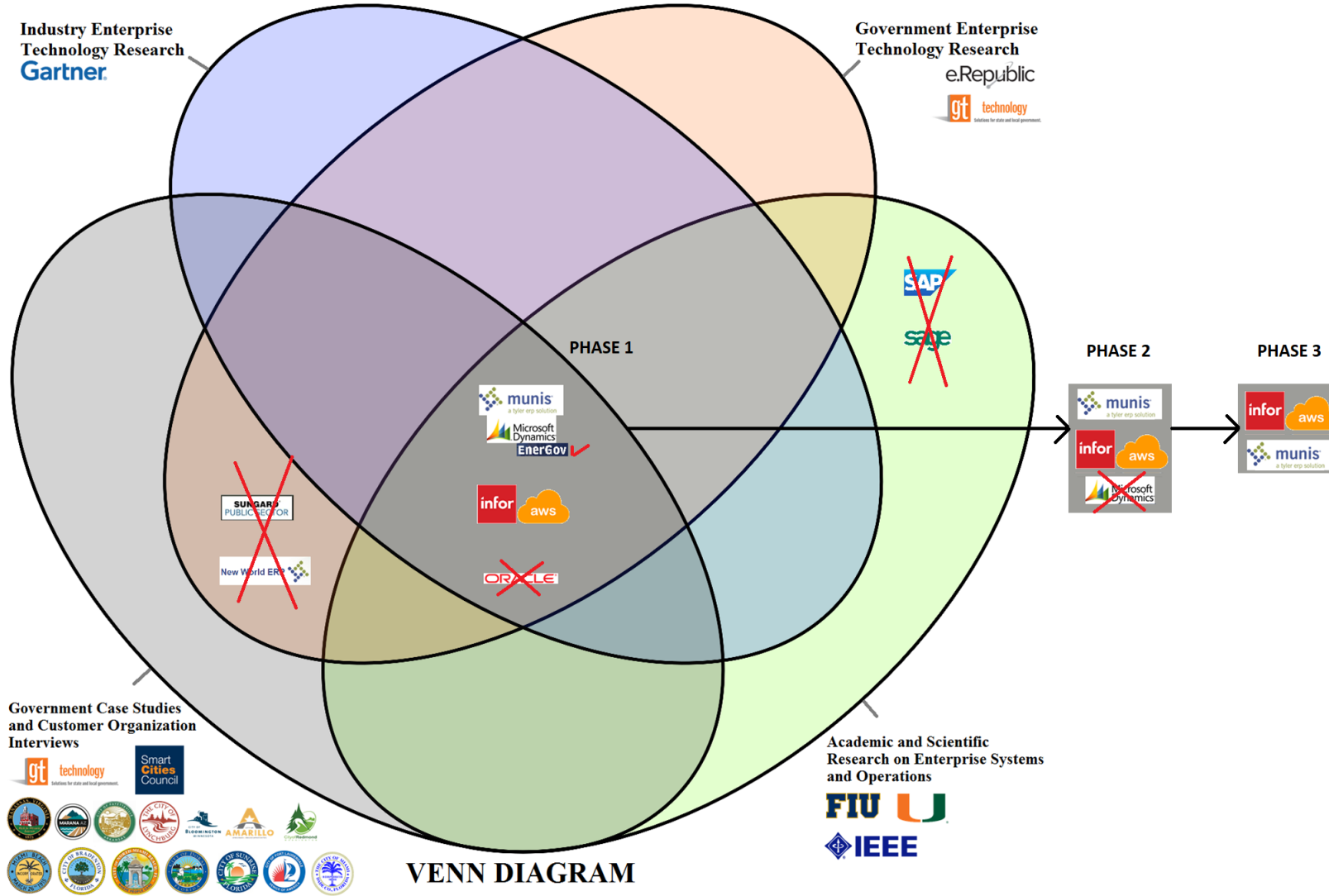
DEPARTMENT	STAFF	TITLE	ROLE	Discipline
City Manager's Office	Peter Iglesias	City Manager	Executive Steering Team	Management
	Ed Santamaria	Assistant City Manager	Executive Steering Team	Management
City Attorney's Office	Miriam Ramos	City Attorney	Executive Steering Team	Legal
	Cristina Suarez	Deputy City Attorney	Executive Steering Team	Legal
City Clerk's Office	Billy Urquia	City Clerk	Executive Steering Team	Records
Finance	Diana Gomez	Finance Director	Executive Steering Team	CFO
Human Resources	Karla Green	Human Resources Director	Executive Steering Team	HR
	Maria Milian	Assistant Human Resources Directors	Executive Steering Team	HR
Labor Relations & Risk Management	Raquel Elejabarrieta	Labor Relations & Risk Management Director	Executive Steering Team	Labor Relations & Risk Mgt
Information Technology	Raimundo Rodulfo	IT Director	Executive Steering Team	IT
	Lemay Ramos	IT Applications Manager	Executive Steering Team	IT

**WORKING GROUPS**

DEPARTMENT	STAFF	TITLE	ROLE	Discipline
Finance	Sally Ola Ola	Assistant Finance Director	Working Group Member	Core Financial GL/AR/AP
	Keith Kleiman	Assistant Finance Director, Management & Budget	Working Group Member	Budget/Project Accounting
	Celeste Walker	Assistant Finance Director, Procurement	Working Group Member	Procurement
	Pete Chircut	City Treasurer	Working Group Member	Licensing and Utilities
	Mirtha Dziedzic	Controller	Working Group Member	Payroll
Human Resources	Michelle Mendizabal	Compensation Specialist	Working Group Member	HR
	Kenneth Ingersoll	Compensation Manager	Working Group Member	HR
Labor Relations & Risk Management	David Ruiz	Risk Manager	Working Group Member	Risk Management
City Attorney's Office	Brigette Chen	Paralegal and Assistant to the City Attorney	Working Group Member	Budget & Payroll
City Clerk's Office	Desiree Ligouri	Senior Administrative Analyst	Working Group Member	Budget & Payroll
Police	Krizia Giambanco	Administrative and Fiscal Affairs Manager	Working Group Member	PD Procurement & Payroll
Fire	Nichole Sumarriba	Budget Analyst	Working Group Member	FD Procurement & Payroll
Information Technology	Adriana Mendoza		Working Group Member	Technology & Integration
	Monica Conde		Working Group Member	Technology & Integration
	Chris Cowen		Working Group Member	Technology & Integration, Data
	Sean Meadows		Working Group Member	Technology & Integration
	Peterson Pierre-Louis		Working Group Member	Technology & Integration, GIS



# CITY OF CORAL GABLES CORE FINANCIAL & HR ENTERPRISE SYSTEM PROJECT RESEARCH AND EVALUATION PROCESS - PHASES 2 & 3: DEMO SESSIONS



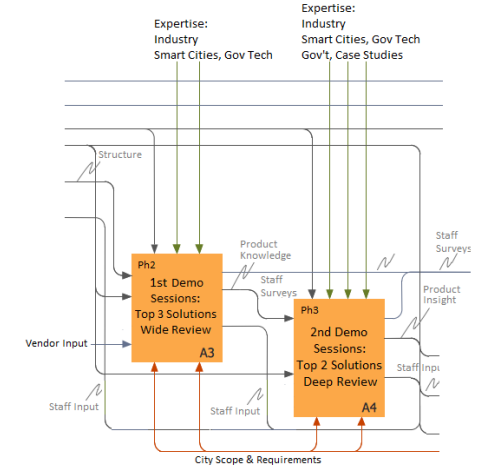
Industry Enterprise  
Technology Research  
**Gartner**

Government Enterprise  
Technology Research  
e.Republic  
**gt technology**

Government Case Studies  
and Customer Organization  
Interviews



Academic and Scientific  
Research on Enterprise Systems  
and Operations  
**FIU** **U**  
**IEEE**





CITY OF CORAL GABLES  
CORE FINANCIAL & HR  
ENTERPRISE SYSTEM  
PROJECT  
RESEARCH AND  
EVALUATION PROCESS -  
PHASES 2 & 3: DEMO  
SESSIONS  
EVALUATION MATRIX –  
VENDOR INFORMATION &  
PLATFORM

Criteria	Tyler Munis	Infor	Microsoft Dynamics
Vendor information	Tyler Tech - 40 years in business. More than 14,000 clients spanning agencies, school departments, large and small counties. Partnered with Microsoft, Esri, Cloud Security Alliance, and IAPP.	Infor - <a href="#">Global</a> leader in business cloud software products for companies in industry specific markets. Infor builds complete industry suites in the cloud and efficiently deploys technology that puts the user experience first, leverages data science, and integrates easily into existing systems. Over 68,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation.	Microsoft - Cloud-based ERP solution that automatically pulls systems and process together to manage financials, sales, manufacturing, service, and operations in one environment. Includes a complete suite of business analytics tools that analyze complex data and delivers comprehensive insights throughout your organization.
Dedicated project management & customer support	Yes	Yes	Yes
Technical Support	Yes	Yes	Yes
Business Analysts & Process review/efficiencies/optimization	Yes	Yes	Yes
Training for users (employees, customers, vendors), kick-off events, beta-launch support	Yes	Yes	Yes

<b>Application &amp; Content Management Platform</b>			
	-	-	-
Platform name & version	<a href="#">Munis</a>	<a href="#">Infor: CloudSuite (OS), Coleman (AI), Birst (Analytics), Nexus (Network)</a>	<a href="#">Microsoft Dynamics 365, PowerBI, PowerApps, FLOW</a>
Versioning/Updates/Upgrades	Evergreen	Evergreen	Evergreen
Internet Hosted / On-premise	Hosted	Hosted	Hosted
Intranet Hosted / On-premise			
Cloud platform	Yes	Yes	Yes
Hosted service provider Technologies	SQL, SaaS	AWS	Azure
HTML version	HTML5	HTML5	HTML5
Cybersecurity Features	SSO, user authentication, SSL encryption	Role-based Access, AD integration, SSO, authentication	SSO



CITY OF CORAL GABLES  
 CORE FINANCIAL & HR  
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 PROJECT  
 RESEARCH AND  
 EVALUATION PROCESS -  
 PHASES 2 & 3: DEMO  
 SESSIONS  
 EVALUATION MATRIX –  
 FEATURES, MODULES &  
 FUNCTIONALITIES (1)

Criteria	Tyler Munis	Infor	Microsoft Dynamics
Accounts Payable	Yes	Yes	Yes
Accounts Receivable	Yes	Yes	Yes
Automated Processes	Yes	Yes	Yes
Bid/Contract Management	Yes	Yes (auto notifications on milestones and thresholds)	
Electronic Signatures	Can insert/attach a DocuSign doc to contract/requisition, but no direct integration	Yes (compatible with DocuSign & Adobe)	Yes
Billing and Cashiering	Yes	Yes	Yes
Budget Preparation	Yes	Yes	
Tax Billing and Collections	Yes	Yes	
Cashiering	Yes	Yes	Yes
Citizen Self Services	Yes	Yes	
Citizen Transparency	Yes	Yes ( <a href="#">OpenBook</a> )	
Employee Expense Reimbursement	Yes	Yes	
Employee Self Service	Yes	Yes	Yes
Finance API	Yes	Yes	Yes
General Ledger	Yes	Yes	Yes
Talent Management	Yes	Yes	Yes
Human Resources	Yes	Yes	Yes
Inventory	Yes	Yes	
Licensing and Utilities	Yes	Yes	
Payroll	Yes	Yes	Yes
Permits and Code Enforcement	Yes		
Procurement	Yes	Yes (module can integrate with eCommerce sites)	
Project and Grant Accounting	Yes	Yes	
Purchasing	Yes	Yes	
Recruiting	Yes	Yes	Yes
Risk Management	Yes	Yes	
Telestaff Connectivity	Yes	Yes	
Vendor Self Service	Yes	Yes	Yes
Work Orders, Fleet and Facilities	Yes	Yes	
Parking Tickets	Yes		



CITY OF CORAL GABLES  
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 RESEARCH AND  
 EVALUATION PROCESS -  
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 SESSIONS  
 EVALUATION MATRIX –  
 FEATURES, MODULES &  
 FUNCTIONALITIES ( 2 )

Criteria	Tyler Munis	Infor	Microsoft Dynamics
Implementation and System Management Services	Yes	Yes	
Automated Content Management	Yes	Yes	Yes
A.I. and Machine Learning Features		Yes (COLEMAN)	Yes
Customer Experience - customer-centric/driven	Yes	Yes	
Data Features - Analytics & Reporting Services	Yes	Yes (BIRST)	Yes
Disaster Recovery	Yes	Yes	Yes
GIS horizontal integration & ESRI API interfaces	Yes	Yes	Yes
Horizontal Integration with citywide Enterprise Systems (API's for all Transactions Fin-HR-Py-Reports, real-time & batch process capabilities, <a href="#">Cartegraph</a> , <a href="#">RecTrack</a> , ESRI, Microsoft, EnerGov, Cashiering, POS, eCommerce, <a href="#">OpenData</a> & other clearing houses, Data platforms, Azure/AWS)	Yes	Yes	
Microsoft Office Integration	Yes	Yes	Yes
Mobile friendly & Mobility features	Yes	Yes	Yes
Responsive user interface (multi-device/OS/platform adaptive)	Yes	Yes	Yes
Future-ready (R&D, product roadmap, FinTech features, IoT, AI, ML, Cloud, Mobile, Social, exponential tech, etc.)	Partial, pending on full integration with <a href="#">Socrata</a>	Yes, Industry 4.0 (AI, ML, RPA, Cloud, IOT, APIs)	Yes
Role-based Access		Yes	Yes
Customizable, configurable, personalize UX		Yes (with tile blocks, looks like dashboard)	Yes
Multi-browser compatibility		Yes	Yes
Time-keeping interfaces	Yes	Yes	Yes
Data Migration	Yes	Yes (can migrate from SQL databases, consulting BA & migration services provided)	Yes



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RESEARCH AND  
EVALUATION PROCESS  
- PHASES 2 & 3:  
DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (1)

Criteria	Tyler Munis	Infor	Microsoft Dynamics
A. System: what is your initial view on the capability and processing of the system?	Diana Gomez: Excellent Keith Kleiman: Excellent Karla Green: Good Sally Ola Ola: Excellent Celeste Walker: Good Maria Milian: (Good) Jose Rodriguez: Acceptable Mitranand Bhagirathi: Good Kenneth Ingersoll: Good <b>AVERAGE SCORE: 4.22</b>	Diana Gomez: Excellent Keith Kleiman: Excellent Karla Green: Excellent Sally Ola Ola: Excellent Celeste Walker: Excellent Maria Milian: Excellent Jose Rodriguez: Good <b>AVERAGE SCORE: 4.86</b>	Sally Ola Ola: Deficient Celeste Walker: Deficient Pete Chircut: Good Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Good Maria Milian: Acceptable
B. System: what is your initial view on the flexibility of the system?	Diana Gomez: Excellent Keith Kleiman: Excellent Karla Green: Acceptable Celeste Walker: Good Sally Ola Ola: Excellent Maria Milian: Good Jose Rodriguez: Acceptable Mitranand Bhagirathi: Good Kenneth Ingersoll: Acceptable <b>AVERAGE SCORE: 4.00</b>	Diana Gomez: Excellent Keith Kleiman: Excellent Karla Green: Good Celeste Walker: Excellent Sally Ola Ola: Excellent Maria Milian: Good Jose Rodriguez: Good <b>AVERAGE SCORE: 4.57</b>	Sally Ola Ola: Deficient Celeste Walker: Deficient Pete Chircut: Acceptable Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Good Karla Green: Good Maria Milian: Acceptable
C. System: what is your initial view on the usability ('friendliness') of the system?	Diana Gomez: Excellent Keith Kleiman: Good Kenneth Ingersoll: Good Karla Green: Acceptable Jose Rodriguez: Acceptable Celeste Walker: Good Sally Ola Ola: Excellent Maria Milian: Good Mitranand Bhagirathi: Good <b>AVERAGE SCORE: 4.00</b>	Sally Ola Ola: Excellent Celeste Walker: Good Karla Green: Good Diana Gomez: Excellent Maria Milian: Excellent Keith Kleiman: Good Jose Rodriguez: Excellent <b>AVERAGE SCORE: 4.57</b>	Sally Ola Ola: Deficient Celeste Walker: Acceptable Pete Chircut: Acceptable Diana Gomez: Deficient Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Deficient Maria Milian: Deficient
D. Opinion on suitability: do you believe as an individual you could use this system?	Diana Gomez: Yes Keith Kleiman: Yes Kenneth Ingersoll: Yes Karla Green: Yes Jose Rodriguez: Yes Celeste Walker: Yes Sally Ola Ola: Yes Maria Milian: Yes Mitranand Bhagirathi: Yes <b>AVERAGE SCORE: 5.00</b>	Sally Ola Ola: Yes Celeste Walker: Yes Karla Green: Yes Diana Gomez: Yes Maria Milian: Yes Keith Kleiman: Yes Jose Rodriguez: Yes <b>AVERAGE SCORE: 5.00</b>	Sally Ola Ola: No Celeste Walker: Yes Pete Chircut: Maybe Diana Gomez: No Keith Kleiman: No/Maybe Kenneth Ingersoll: Yes Karla Green: Maybe Maria Milian: Maybe



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DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (2)

Criteria	Tyler Munis	Infor	Microsoft Dynamics
E. Opinion on suitability: do you believe the city of Coral Gables could use this system?	Diana Gomez: Yes Keith Kleiman: Yes Kenneth Ingersoll: Yes Karla Green: Yes Jose Rodriguez: Yes Celeste Walker: Yes Sally Ola Ola: Yes Maria Milian: Yes Mitranand Bhagirathi: Yes <b>AVERAGE SCORE: 5.00</b>	Sally Ola Ola: Yes Celeste Walker: Yes Karla Green: Yes Diana Gomez: Yes Maria Milian: Yes Keith Kleiman: Maybe/Yes Jose Rodriguez: Yes <b>AVERAGE SCORE: 4.71</b>	Sally Ola Ola: No Celeste Walker: No Pete Chircut: Maybe Diana Gomez: No Keith Kleiman: No/Maybe Kenneth Ingersoll: No Karla Green: Maybe Maria Milian: Maybe
F. General Ledger (performance/functionality rating)	Diana Gomez: Excellent Keith Kleiman: Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Kenneth Ingersoll: Good Mitranand Bhagirathi: Excellent <b>AVERAGE SCORE: 4.57</b>	Diana Gomez: Excellent Keith Kleiman: Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Celeste Walker: Excellent <b>AVERAGE SCORE: 4.67</b>	Sally Ola Ola: Deficient Celeste Walker: Pete Chircut: Acceptable Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Acceptable
G. Accounts Receivable (performance/functionality rating)	Diana Gomez: Excellent Keith Kleiman: Good Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Kenneth Ingersoll: Good <b>AVERAGE SCORE: 4.33</b>	Diana Gomez: Good/Excellent Keith Kleiman: Good/Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Celeste Walker: Excellent <b>AVERAGE SCORE: 4.50</b>	Sally Ola Ola: Deficient Celeste Walker: Pete Chircut: Acceptable Diana Gomez: Deficient/Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Acceptable
H. Accounts Payable (performance/functionality rating)	Diana Gomez: Excellent Keith Kleiman: Good/Excellent Kenneth Ingersoll: Good Karla Green: Good Jose Rodriguez: (Good) Sally Ola Ola: Excellent <b>AVERAGE SCORE: 4.42</b>	Diana Gomez: Good/Excellent Keith Kleiman: Good/Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Celeste Walker: Excellent <b>AVERAGE SCORE: 4.50</b>	Sally Ola Ola: Deficient Celeste Walker: Pete Chircut: Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Acceptable
I. Budget Preparation (performance/functionality rating)	Diana Gomez: Excellent Keith Kleiman: Good/Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Kenneth Ingersoll: Good Mitranand Bhagirathi: Good <b>AVERAGE SCORE: 4.36</b>	Diana Gomez: Good/Excellent Keith Kleiman: Excellent Sally Ola Ola: Excellent Karla Green: Excellent Jose Rodriguez: Good Maria Milian: Good Celeste Walker: Excellent <b>AVERAGE SCORE: 4.64</b>	Sally Ola Ola: Poor Celeste Walker: Pete Chircut: Diana Gomez: Deficient/Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Acceptable



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RESEARCH AND  
EVALUATION PROCESS  
- PHASES 2 & 3:  
DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (3)

Criteria	Tyler Munis	Infor	Microsoft Dynamics
J. Human Resources (performance/functionality rating)	Karla Green: Acceptable Maria Milian: Good Jose Rodriguez: Acceptable Sally Ola Ola: Excellent Keith Kleiman: Good/Excellent Diana Gomez: Good/Excellent Kenneth Ingersoll: Acceptable <b>AVERAGE SCORE: 3.86</b>	Karla Green: Good Maria Milian: Excellent Jose Rodriguez: Excellent Sally Ola Ola: Excellent Keith Kleiman: Good/Excellent Celeste Walker: Excellent <b>AVERAGE SCORE: 4.75</b>	Sally Ola Ola: Acceptable Celeste Walker: Pete Chircut: Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Poor Karla Green: Acceptable
K. Payroll (performance/functionality rating)	Diana Gomez: Good Keith Kleiman: Good/Excellent Sally Ola Ola: Excellent Karla Green: Acceptable Jose Rodriguez: Good Kenneth Ingersoll: Acceptable Maria Milian: Acceptable <b>AVERAGE SCORE: 3.79</b>	Diana Gomez: Good Keith Kleiman: Good/Excellent Sally Ola Ola: Excellent Karla Green: Good Jose Rodriguez: Good Celeste Walker: Excellent Maria Milian: Good <b>AVERAGE SCORE: 4.36</b>	Sally Ola Ola: Deficient Celeste Walker: Pete Chircut: Diana Gomez: Acceptable Keith Kleiman: Deficient/Acceptable Kenneth Ingersoll: Acceptable Karla Green: Acceptable Maria Milian: Deficient
L. Contract Management	Celeste Walker: Acceptable Diana Gomez: Good <b>AVERAGE SCORE: 3.50</b>	Celeste Walker: Good <b>AVERAGE SCORE: 4.00</b>	
M. Procurement	Sally Ola Ola: Excellent Celeste Walker: Good Diana Gomez: Good <b>AVERAGE SCORE: 4.33</b>	Celeste Walker: Good Diana Gomez: Good/Excellent <b>AVERAGE SCORE: 4.25</b>	



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DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (4)

Criteria

N. Please include your feedback, comments, and any notes taken from the Demo session.

Tyler Munis

**Diana Gomez:** I really like the look & feel; believe that it will help simplify many of the daily tasks performed by my employees; seems easy and intuitive to get information and reports; transparency functionality is a plus. (Munis will simplify many of the tasks performed by staff and will make getting detail information (reports) easier. Transparency portal appears robust enough to satisfy the needs of the city.) (HO) - I believe the transition would be easier with Munis. The system has many if not all the capabilities that we need to perform our functions.

**Keith Kleiman:** I think Munis is a great choice for us. I'll be anxious to see if the other softwares we are going to demo will be any better. (This system most closely resembles Eden which offers an immediate sense of comfort and familiarity. That said, this system and Infor both satisfy Budget Office needs. However, as discussed at the end of yesterday's demo, having a sandbox to play in for each system would/could help make the final selection.)

**Kenneth Ingersoll:** Human Resources needs an ERP solution that includes more automation of processes in order to cutdown on human error and increase accuracy and efficiency. My initial view of the system shows that at least a good portion of processes can be automated. I believe there will need to be some adjustments, but overall is a superior solution over EDEN by far. The only other solution would be a system like SAP or Oracle which will increase costs. (Lack of compatibility with DocuSign is a concern for Human Resources since we are moving forward now with full implementation. Our desire is to have this functionality embedded into the new ERP so that it becomes an integral part of our onboarding and benefits enrollment processes. Concern regarding forced use of Executime vs Kronos. This is a proprietary system that wants to force the use of their own programs within their framework. Doesn't seem to accept too many outside 3rd party applications. Is an Evolutionary system from EDEN. There is an overall familiarity with how this system will work. However, this may not be the best solution overall for Human Resources.)

Infor

**Celeste Walker:** I believe the system is compatible with the functionality required by the Procurement department. The system demonstrated advanced capabilities over our existing system and many of the desired features for a new ERP system.

**Karla Green:** The system appears to be very robust and functional and user-friendly. However, unfortunately we were not able to see a demo on all functionalities of the HR applications due to the lack of time. They mainly concentrated on the applicant tracking module. Would have loved to see other menus and functions under the HR processes/modules.

**Diana Gomez:** Based on what I saw, I thought the system would be able to accommodate our needs in a simple, straight-forward way. (HO) – The system appears to be able to perform all the functions that we need in a very easy and user-friendly manner. I believe if set up correctly, the system will provide many benefits to the city and users.

**Maria Milian:** Impressive Capabilities

**Keith Kleiman:** The system appeared to be sleek and modern. The actual demo was limited, but I did get the impression that Infor could work for us. The Transparency Portal was very user friendly but the graphics were flat and antiquated looking. (HO) – The system appears to satisfy our needs from a budget user perspective.

**Sally Ola Ola:** Global Ledger – customizable for ADHOC reports and for user preferences. Alerts pop out for warning/errors. System appears intuitive. Payables – can assign invoices to AP staff for task management. Project accounting – has feature to set up project component as “billable”; set up of deliverables for grant reporting, funding source allocation is available. Budget – has features for budgeting and costing of every position. Budget book and narrative templates are available. Open data feature is “flat”.

Microsoft Dynamics

**Sally Ola Ola:** Based on the presentation, my impression is that the system is strong on data analytics. However, it is not designed to capture the complexities of a government entity and its industry specific processes, operations and reporting. The system is more suited to private and purely business operations. It does not highlight the processes that are critical to government such as advanced budgeting, position budgeting, project and grant management and compliance, lien process, GIS/Land management system. Adoption of this system would require substantive configuration and alignment with other systems such as Energov to work effectively for government like us. There is limited, if none at all, any government entities which implemented this system that we can obtain customer satisfaction and feedback on their experience with the system.

**Celeste Walker:** Procurement Module - I didn't see enough of the system to make an informed opinion on the functionality of the system.

**Pete Chircut:** The System excellent for a private organization and it is working its way towards the public sector. In my observation the system will work for the public sector as their clientele in this sector expanded. They only have Miami Parking System in their list of public sector and this organization does not include a lot of different area of the public sector at this time.

**Diana Gomez:** Didn't feel we got to see much of the functionality in order to know if it would be a suitable system. Overall did not seem intuitive or user friendly. Would need to configure/conform to our processes instead of having built in best practices. Did not seem to be tailored to government use.

**Keith Kleiman:** This had to be one of the poorest demos I have ever seen. The demo did not give me any confidence about the system's functionality. Overall, the demo was so bad that I couldn't fairly rate the system.



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DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (5)

Criteria

Tyler Munis

**Karla Green:** (Munis system seem very easy to use. Advantage is that we are familiar with the screens given the similarities with Eden. In the other hand, I feel somewhat apprehensive given the experience we had with Eden when that system was presented to us, it appeared to be very robust and once the final product was delivered many of the functionalities were claimed to be add on items that were not purchased. Hopefully, this would not be the case if Munis turns out to be the selected vendor.) (H/O) I found the system to be deficient in the following areas:  
No mid payroll automatic calculations on deductions so we would have to continue with the current process.

Upon hiring at any given point during the year, other than beginning of the calendar year, it appears that we would have to execute a manual configuration of remaining pay as the system appears to not have capability to automatically calculate remaining payroll periods for the rest of the calendar year.  
Manual upload of external vendors will be required, function not automated enough.  
FMLA tracking solution does not appear better than Eden.  
Not sure if we will be able to automate retro calculations for supplemental payments, such as: flat value, special premium units.

**Celeste Walker:** (The procurement module appears to have the features that would be useful to move the division forward with technology and functionality.)

Infor

Asset accounting – has feature to set up capitalization criteria by gl codes, invoice, projects. Asset capitalization interface after invoice approval.  
Procurement – supplier portal is available. “shopping list” feature for purchase requisition/order. Bid template is available.  
Utility – can be customized for waste/false alarm and tenant billing. Lien process is part of the workflow. Case management workflow replace the event reporting/counting for false alarm.  
Live integration with CAD and/or import of spreadsheet for incident listing.  
Human Capital management – has features which facilitates the creation and monitoring of vacancy report. System is linked to job search engine such as indeed, [linkein](#). Has onboarding workflow. Employee portal allows for employee updates, election of benefits. Has features which facilitates assessment of candidates based on established criteria.  
Payroll – time entry feature and time off request are mobile capable; Infor has a separate solution for time entry; able to communicate with Chronos and other leading time system solution; paystub separates pre and post-tax wage bases and deductions, balancing report every pay period end, garnishment amount can be set up as calculated amount based on court order, frequency and limits; manual check/special payroll can be processed as hard coded information without system setup for special purposes, use of pay plan set up for hour type (in Eden).

Microsoft Dynamics

**Kenneth Ingersoll:** The system appears to be very robust with a lot of capabilities. I was unable to determine the usability of the system due to a lack of demonstration of any of the Human Resources functions. The HR Environment in the system was basically unpopulated which made it very difficult to evaluate. The session failed to show how user friendly the system is. In addition, the HR Module appears to need a lot of help from IT in order to populate.

**Karla Green:** I felt this system is not very user-friendly. It is apparent it provides a lot of features which we would not utilize. Would love to see a system geared towards public sector and a system that would highlight/conform to best practices within the public sector.

**Maria Millian:** Based on the presentation, this system did not appear to include many of the core HR functions needed and would therefore need customization. Overall, the information displayed on dashboards and functionality of HR modules seemed lacking.





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DEMO SESSIONS  
EVALUATION MATRIX –  
SURVEY RESULTS (6)

Criteria

Tyler Munis

**Jose Rodriguez:** Munis comes across as a robust, capable ERP system. It is not as visible appealing as other systems which were demonstrated but seems capable of meeting all the functions which are required. From a recruitment viewpoint, I would rate the system 7 out of 10.

**Munis** is an obvious upgrade from the EDEN system which we use today but still has its limitations. With application tracking and onboarding the process is not as flexible as I would have wanted. The system has the familiarity of EDEN in layout which may make the re-training of employees easier, but the trade off in functionality is a hurdle. On several occasions during the demonstration we were advised that the system was not capable of meeting our request. There was also examples of this ERP not being as intuitive to other systems which we have had demonstrated.

Overall, **Munis** is an acceptable ERP but leaves some to be desired. It will fill many of the gaps which EDEN currently presents. However, will leave open other gaps which are filled by other ERP systems. **Munis** would not be my first choice.]

Infor

**Jose Rodriguez:** Infor was a great ERP system. The system is very robust, capable and most importantly user friendly. I suspect that the training which will be associated with bringing my staff up to speed will be minimal. The compatibility with DocuSign is a major plus as we are shifting to this program for orientation and onboarding processing. The applicant tracking modules were visually appealing, thoughtfully laid out, and easy to operate. The onboarding functions also came across as very user friendly. Infor is my top choice for ERP system. I rate this ERP a 8.5 out of 10 from a recruitment viewpoint.

Microsoft Dynamics



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 EVALUATION MATRIX –  
 SURVEY RESULTS (7)

Criteria

Tyler Munis

Infor

Microsoft Dynamics

**Sally Ola Ola:** MUNIS is a suitable ERP System for the City plus the fact that it is part of Tyler Technologies which is mainly a public sector focused system provider. In addition, the transition from EDEN will be less challenging since they already have extensive experience in transitioning EDEN clients to Munis and have identified the kinks in the process. We will have more Munis clients to get feedback from regarding experience with Munis compared to Infor. Munis and Infor are very similar in terms of user accessibility, dashboard/hub set up, workflow integration.

MUNIS is a suitable ERP System for the City plus the fact that it is part of Tyler Technologies which is mainly a public sector focused system provider. In addition, the transition from EDEN will be less challenging since they already have extensive experience in transitioning EDEN clients to Munis and have identified the kinks in the process. We will have more Munis clients to get feedback from regarding experience with Munis compared to Infor.

Munis can take our EDEN database and migrate it to Munis as they are very familiar with the schema of EDEN database. The general layout of the hubs and cards are user friendly. For payroll, Munis has large library of pay codes calculations which we can use as applicable to us and no need to start from scratch. For general ledger, the set-up of accounts is user friendly and offers more strings/fields to provide layers of information groupings and reporting.

**Maria Millan:** Based on the brief presentation, this system appears to have the necessary capabilities. However, I am concerned that this system does not work with DocuSign. As we were planning to begin using DocuSign with new-hires and existing employees in the future, this might be an issue.

**Mitranand Bhagrathi:** I feel the Munis is a definite upgrade over EDEN. I think it offers a lot of user friendly features which allows for greater flexibility than we currently have. My opinion is we should engage other municipalities which have migrated to Munis and poll their thoughts on how well the system serves their needs. Get all the pros and cons.



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SURVEY RESULTS (8)

Criteria	Tyler Munis	Infor	Microsoft Dynamics
O. IT General Comments from Demos	The demo showed that <u>Munis</u> has user friendly, robust functionalities and capabilities that are very similar to the current user experience in the legacy system (EDEN)	The demo showed an impressive enterprise business capability platform which incorporates modern looks and user interfaces that are also intuitive and easy to use. Infor also possesses data-driven functionalities and advanced features more in tune with today's Enterprise Technology (Industry 4.0)	
IT overall assessment	<p><u>Munis</u> is an overall system that has not yet fully embraced data driven capabilities, automation, and industry 4.0 functionalities. Gartner Inc, IT leading consulting firm has not featured Tyler <u>Munis</u> in their Enterprise Software quadrant since 2015.</p> <p><u>Munis</u> seems to have minimized the development of the application and it is stagnant. While it is an improvement on the legacy system (EDEN), it has not shown a clear trend to keep up with the demands for technology growths of the future. It is an upgrade from the current legacy system with a better user interface and some additional functionalities</p>	<p>Infor is an enterprise system that has gained a lot of market share over the last years due to their high investment in research and development (R&amp;D). They embrace the Industry 4.0 features, functions and capabilities such as AI, ML, RPA, IOT, Cloud-based and mobility. Infor has been placed for the last 3 years in the Gartner Inc, technology magic quadrant in multiple categories both as visionary and market leader.</p> <p>Infor seems to be at the forefront of technology advancement in the industry and has a lot of room for growth in the coming years. The simplicity of the customization of the interface allows for user satisfaction and inhouse customization.</p>	
<b>References</b>			
Customer Reference	City of Hartford, Connecticut	MD County	-
	Manazas, VA - <a href="https://www.manassascity.org/">https://www.manassascity.org/</a>	Cumberland County, PA	-
	City of Victorville, California	Ft. Lauderdale (HR, Payroll, Finance)	-
	City of Plant City, Florida	Parkland, FL	-
	Bloomington, MN / <a href="https://www.bloomingtonmn.gov/">https://www.bloomingtonmn.gov/</a>	Pembroke Pines (HR, Payroll, Finance)	-
	City of Miami Beach, Florida		-
	City of Amarillo, TX / <a href="https://amarillo.gov/">https://amarillo.gov/</a>		-
	Clermont County, Ohio		-



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 EVALUATION MATRIX -  
 SURVEY RESULTS: FINAL  
 SCORING

**Final Scoring Table:**

Criteria	VENDOR	
	MUNIS Score (avg)	INFOR Score (avg)
A. System: what is your initial view on the capability and processing of the system?	4.2	4.9
B. System: what is your initial view on the flexibility of the system?	4.0	4.6
C. System: what is your initial view on the usability ('friendliness') of the system?	4.0	4.6
D. Opinion on suitability: do you believe as an individual you could use this system?	5.0	5.0
E. Opinion on suitability: do you believe the city of Coral Gables could use this system?	Yes (5.0)	Yes (5.0)
F. General Ledger (performance/functionality rating)	4.6	4.7
G. Accounts Receivable (performance/functionality rating)	4.3	4.5
H. Accounts Payable (performance/functionality rating)	4.4	4.5
I. Budget Preparation (performance/functionality rating)	4.4	4.6
J. Human Resources (performance/functionality rating)	3.9	4.8
K. Payroll (performance/functionality rating)	3.8	4.4
L. Contract Management	3.5	4.0
M. Procurement	4.3	4.3
	<b>4.3 (Good)</b>	<b>4.6 (Excellent)</b>





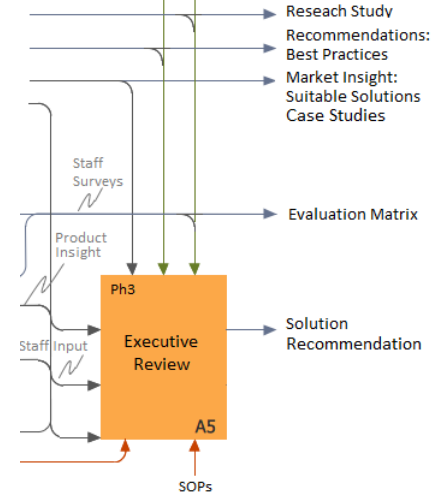
# CITY OF CORAL GABLES

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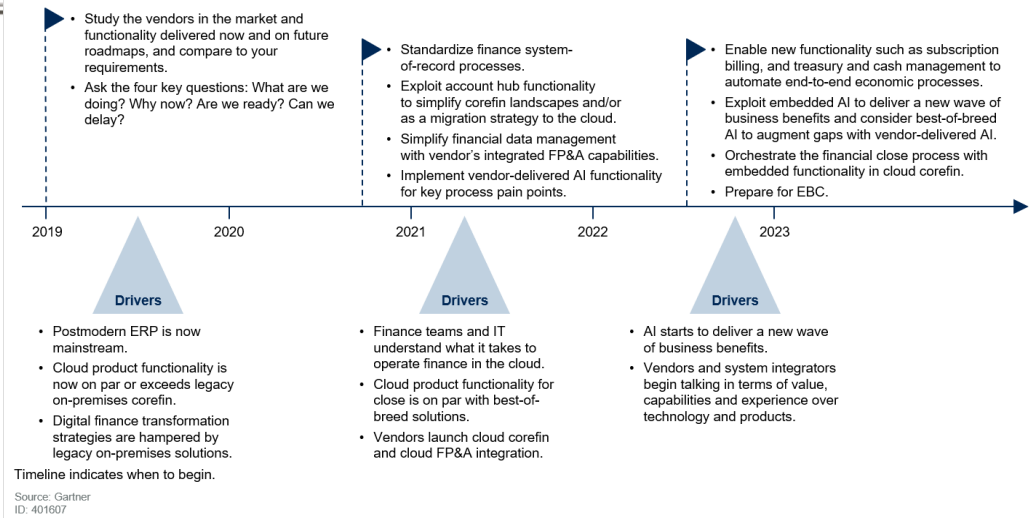
### RESEARCH AND EVALUATION PROCESS

#### PHASE 3: EXECUTIVE REVIEW AND SOLUTION RECOMMENDATION

Expertise:  
 Industry  
 Smart Cities, Gov Tech  
 Gov't, Case Studies  
 Project Team



#### Strategic Roadmap Timeline for Cloud Core Financial Management Suites



**Investment Analysis:** On 16 January 2019, Infor announced an agreement to receive a \$1.5 billion investment from shareholders KED and Golden Gate Capital. This investment builds on KED's investment of more than \$2 billion in early 2017 and represents a vote of confidence in Infor's products, technology and management team. KED has a track record of making money on its investments, so it obviously believes Infor is worth significant additional investment. The new investment represents a major vote of confidence from Infor's investors.

Product or Service Scores for Discrete Manufacturing				Product or Service Scores for ERP Functionality for Midsize Enterprises				Product or Service Scores for Project/Asset-Intensive Manufacturing				Product or Service Scores for Modern Technology Architecture				Product or Service Scores for Multiple Geographic Deployments				Product or Service Scores for Process Manufacturing			
Infor (CloudSuites [LN])	3.97			Epicor Software (Epicor ERP)	3.77			Infor (CloudSuites [LN])	3.98			Microsoft (Dynamics 365)	3.85			Oracle (Oracle ERP Cloud)	3.82			Microsoft (Dynamics 365)	3.85		
Infor (CloudSuites [M3])	3.86			Microsoft (Dynamics 365)	3.75			Microsoft (Dynamics 365)	3.85			Oracle (Oracle ERP Cloud)	3.85			Infor (CloudSuites [LN])	3.73			Infor (CloudSuites [M3])	3.83		
Microsoft (Dynamics 365)	3.81			Oracle (Oracle ERP Cloud)	3.74			Infor (CloudSuites [M3])	3.78			Epicor Software (Epicor ERP)	3.77			Microsoft (Dynamics 365)	3.72			Epicor Software (Epicor ERP)	3.77		
Epicor Software (Epicor ERP)	3.78			Infor (CloudSuites [LN])	3.73			Epicor Software (Epicor ERP)	3.76			Oracle (NetSuite ERP)	3.74			SAP (S/4HANA Cloud)	3.72			QAD	3.77		
QAD	3.77			Oracle (NetSuite ERP)	3.72			QAD	3.66			Infor (CloudSuites [LN])	3.70			Epicor Software (Epicor ERP)	3.71			Infor (CloudSuites [LN])	3.73		
SAP (S/4HANA Cloud)	3.72			SAP (Business ByDesign)	3.71			SAP (S/4HANA Cloud)	3.65			SAP (Business ByDesign)	3.70			Oracle (NetSuite ERP)	3.70			SAP (S/4HANA Cloud)	3.70		
Oracle (NetSuite ERP)	3.65			Infor (CloudSuites [M3])	3.70			Oracle (NetSuite ERP)	3.63			SAP (S/4HANA Cloud)	3.70			Infor (CloudSuites [M3])	3.69			Oracle (Oracle ERP Cloud)	3.65		
Oracle (Oracle ERP Cloud)	3.64			SAP (S/4HANA Cloud)	3.68			Oracle (Oracle ERP Cloud)	3.63			Infor (CloudSuites [M3])	3.66			QAD	3.66			Infor (CloudSuite Industrial)	3.64		
Plex	3.62			Acumatica	3.64			Infor (CloudSuite Industrial)	3.62			Acumatica	3.63			SAP (Business ByDesign)	3.63			Oracle (NetSuite ERP)	3.63		
Infor (CloudSuite Industrial)	3.61			QAD	3.63			Plex	3.56			QAD	3.63			Infor (CloudSuite Industrial)	3.60			Plex	3.60		
SAP (Business ByDesign)	3.58			Infor (CloudSuite Industrial)	3.62			Rootstock Software	3.48			Plex	3.59			QAD	3.60			SAP (Business ByDesign)	3.58		
								SAP (Business ByDesign)	3.48			Infor (CloudSuite Industrial)	3.58			Acumatica	3.58			Acumatica	3.44		
												Rootstock Software	3.52			Rootstock Software	3.43						
												IQMS	3.34			IQMS	3.29						
												Ramco Systems	3.32			Ramco Systems	3.27						



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FEBRUARY 2021

*Thank you*

[www.coralgables.com/smartcity](http://www.coralgables.com/smartcity)

