

**Schedule “D”  
Statement of Work**

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## II. Background & Objectives

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The City's current Community Development Services system was originally purchased and implemented in 1995, and as such pose several challenges the City is looking to solve with the purchase and implementation of CityView. The following considerations are driving the need for this project:

- The current environment is quite dated and requires that some tracking activities be conducted in spreadsheets and other databases ultimately requiring duplicate entry processes.
- The industry trend is to drive access to customers with web and app based delivery models that are not available with the current community development services environment.
- Management requires better access to data, information and reporting that is currently unavailable or significantly restricted.
- City personnel find the current environment to be difficult to use and understand and significantly increases the time it takes for a new employee to be productive.
- As a result of current limitations to functionality and access to data, City personnel have developed work-around processes that are impacting City business and the Information
- Technology Department's ability to provide support.
- Software integrations with the current systems are extremely difficult, limited or unavailable.

Collectively, the above challenges place a burden on staff, making it difficult to provide the exceptional levels of service given to customers, time-consuming to administer current systems, and tough to keep pace with growing demands.

The objectives of this project are to license and implement CityView software in order to:

1. Eliminate the need for manual interfaces and duplicate data entry.
2. Provide a robust and flexible portal and mobile solution to improve customer service through online services.
3. Provide easier access to accurate data and reporting for management.
4. Improve the time it takes for new employees to be productive by providing an easy to use and understand solution. Standardize business processes, rules, fees and document outputs to save time, improve service and facilitate easier training of new employees.
5. Eliminate many of the work-around processes, staff currently use to access information and improve service offerings of the City's business.
6. Improve communication and information flow among departments.
7. Lessen the burden on IT for system support.
8. Build the structure for future upgrades and improvements so that product enhancements can be enjoyed by end-users to improve productivity and service delivery.

CityView is selected to help the City manage and overcome these challenges and meet the project objectives. The following statement of work describes the activities that will be undertaken in the implementation of CityView at the City of Norman, OK.

## III. Scope

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The Project scope:

1. Install CityView Property Information, Permits and Inspections, Planning, Code Enforcement, (Business) Licensing, Service Requests and Cashiering modules as well as CityView Portal (licensed for Property Information, Permits & Inspections, Planning, Business Licensing, Service Requests, and Code Enforcement), CityView Mobile (for Permits & Inspections and Code Enforcement inspections) and CityView Electronic Plans Review (which includes licensing Bluebeam Revu (eXtreme) and Bluebeam Studio Prime).
2. Install CityView integrated extensions including CityView Esri ArcGIS Server mapping extension, CityView Supported EDMS Extension, CityView MS Word Add-in, CityView MS Outlook Add-In, CityView MS Exchange Extension and CityView Web Services (Selectron Technologies IVR) Extension.
3. Collect City-specific data through a series of remote and onsite (17 days - five (5) days for data collection, 10 days conversion and interfaces and 2 days of project management days) data collection for lookup table values, fees, letters, workflow-specific values (assigned to, required dates, responsible departments, resource groups, email triggers), reviews, inspections, submittal requirements, business types and classifications, renewal periods and processes, expiration dates and processes, violations and corrections codes, and other related values for Permits & Inspections, Planning, Code Enforcement, Service Requests, and Business Licensing. This data will be collected, providing the CityView Project Team relevant documentation, such as fee schedules and letter templates, and by City's completion of the CityView workbook for each specific CityView module.
4. Collect City-specific requirements for a total of up to four (4) custom workflows across the modules licensed. The four (4) custom workflows include two (2) for Permits & Inspections and two (2) for Service Requests. This portion of the budget is assigned to either developing distinctly new workflows or making equivalently effort-intensive changes to the CityView Select workflows that exist in the product. Should changes greater than accounted for be required, additional budget may be requested.
5. Provide a hardware and software infrastructure questionnaire for completion by City. Review questionnaire response and provide Infrastructure Assessment Report on any possible deficiencies in hardware and/or software infrastructure as far as suitability for optimal running of CityView is concerned.
6. Remotely complete the Initial Installation of CityView environments (production & test) on client's network site. Test to ensure proper operation. CityView will manage the CityView installation through upgrades etc., throughout the life of the implementation. Includes up to 3 installs.
7. Configure the CityView modules for Property Information, Permits & Inspections, Planning, Code Enforcement, (Business) Licensing, Service Requests, Cashiering, Portal, Mobile, and Electronic Plans Review using the data collected in the workbooks. This will include the following:
  - a. Lookup table data.

- b. Custom data fields for specific data capture requirements.
  - c. One-time configuration of fees specific to the permit, project, case, and license types being tracked through the system.
  - d. Refinements to the CityView Select workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of sub-workflows based on City's requirements.
  - e. Configuration of up to four (4) custom workflows two (2) for Permits & Inspections, two (2) for Service Requests), or equivalently effort-intensive changes to CityView Select workflows.
  - f. Adjustment of the existing CityView scheduled processes for license renewals and permit expirations. These include: LC Add Delinquency Fee, LC Business Late Fee (Interest), LC Business Late Fee (Penalty), LC Business License Renewal, LC Business License Renewal - Tax Exempt Businesses, LC Merge and generate renewal notices, Permit Expiration: Set Permit Status to Expired, Permit Application Check Invalid Licenses, Permit Expiration: Add Generate Expiration Warning Notice Activity, Permit Expiration: Add Generate Expiration Notice Activity, and Permit Expiration: Add Progress Inspection Activity
  - g. Configuration of up to fifteen (15) letter templates for Permits & Inspections, ten (10) letter templates for Planning, fifteen (15) letter templates for Code Enforcement, seven (7) letter templates for Business Licensing, five (5) letter templates for Service Requests, and three (3) letter templates for Cashiering (55 total letters).
  - h. Additional configuration (workflows, letters, etc.) as required or desired by City and mutually agreed to through written change order.
8. Capture City's relevant historical, electronic data as defined in the following table and convert this into CityView. **Costs are estimates to be confirmed upon review of the data.**

Type of Electronic Information	Requested Conversion Item	Source
Property, owner and address data		GIS
Licensing	Business Licenses, charges, and classification codes	Sunguard Naviline
Code Enforcement and Inspections	All active cases, case actions, case violation information, generic inspection information, user setup and code files	GovQA
Permitting data	All active building permits with associated information including	Sunguard

	general permit information, application names, miscellaneous information, structure setup, application tracking, permit setup, application fees, application documents, inspections results	Naviline
Planning and Zoning	Project information, project/location cross reference; planning action information, ley date, project letter, zoning, allowable use, and project and code information	Sunguard Naviline

No other data sources are assumed to be involved.

9. CityView will configure the Electronic Document Management System (EDMS) integration framework for integration with City's EDMS (Laserfiche), for posting electronic documents from CityView to City's EDMS and dynamically retrieving them from City's EDMS.
10. Develop property integration with the City's central parcel data (assumed to be GIS as stated in data conversion section above) using CityView's property integration tool.
11. Set up the export for exporting cash receipting information to City's General Ledger system (Tyler Munis) from CityView Cashiering.
12. Create the following additional interfaces from CityView to:
  - a. Authorize.net integration
  - b. Utility Billing – Harris Advanced CIS & Utility Billing – Licensing (BL – 32) would like to verify that no overdue Utility Billing exists before issuing business licenses. UB provider to provide an interface for CityView to validate UB status.
  - c. Selectron Technologies IVR – CityView will configure web services to work with Selectron Technologies IVR. Will require some assistance from STI.
  - d. Tyler New World – City of Norman to work with Tyler New World to provide an interface/export where Permits data is available to CityView. If Alarm Permits are included then in project scope additional configuration services will be needed.
  - e. Item 67 under Permit Integration - System provides the ability to perform transactions tendering both with a cash register and with an integrated cash register drawer.
13. Create customizations or configurations as described in CityView response to RFP 1617-24 ERP Software Suite - Specifications worksheet for Permitting (Line 4), Permitting (Line 33) and 100 hours (includes project management and QA) for creation of custom reports as part of the Project's scope.
14. Implement user security settings according to customer completion of organizational role spreadsheets defining the out the box organizational roles inherent in the solutions.

15. Deliver pre-configured reports for Permits and Inspections, Planning, Code Enforcement, (Business) Licensing, and Cashiering including the following reports:

<b>Permits &amp; Inspections</b>	<b>Planning</b>	<b>Licensing</b>	<b>Code Enforcement</b>
Outstanding Fees Fee Paid in Full Inspection Outcome Inspection Schedule Inspections by Inspector Average Daily Inspections Inspections To Do Permit Status Summary (By Status) Permit Status Summary (By Type) Permit Status Summary (By Contractor) Permit Value Permit Turn-Around Deposits and Bonds Summary Escrow (By Revenue Account #) Permit Locator Permit Turn-Around Detail Report Permit Time Spent Application Review Tickler Building & Safety Revenue Report Certificate of Occupancy Listing Public Works Permit Status Summary Review – Decision Date	Project Applications Planner Projects Outstanding Plan Reviews Project Fees Expired Projects Planning Activities Plan Review Time Scheduled Hearings Planning Turnaround Project Locator Planning Turn-Around Deposits and Bonds Summary Escrow (By Revenue Account #) Project Locator Mailing Labels Development Review Status (with maps) Land Developer Review Log Monthly Project Status Report (sorted by Project Number) Monthly Project Status Report (sorted by Date Entered) Project Expirations Submittals Report (Sorted by Planner)	Business Status Past Due Licenses One Day Business Licenses Inactive Business Licenses Unreported Gross Revenue Did Not Report Gross Earnings Tax Exempt Businesses Emergency Contacts Total Amount Billed Deposits and Bonds Summary Escrow (By Revenue Account #) Licensee Locator Licensee Details Report Outstanding Fees Fees Paid in Full Excise Tax	Case Status Cases Follow-up Case Summary Citations by Violation Type Incident History Case Locator Inspection To Do Inspection Schedule Deposits and Bonds Summary Escrow (By revenue Account#) Adhoc Template Weed Abatement Zoning Code Report Compliance Report
<b>Cashiering</b>	<b>Other</b>		
Payment Detail Payment Detail (By Cashier) Daily Cash Out (By Revenue Account Number) Daily Cash Out (By Payment Type) Daily Cash Out (By Payment Type) With Fee Types Daily Cash Out (By Fee Type) Daily Cash Out (By Receipt)	Transactions Audit Report Distribution List Report		

Reversals Daily Cash Out for Cashier (By Payment Type) Fee Maintenance General Cashiering Report Payment Detail By Transaction			
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16. Conduct three (3) remote validation and review sessions for each of Permits and Inspections, Code Enforcement, Planning, Service Requests, and Business Licensing with the appropriate subject matter experts ("SMEs"). Additional corrections and modifications will be captured and corrected from each session.
17. Conduct twenty and 1/2 (20.5) days of end-user training consisting of (18.75) days onsite and (1.75) days remote user training.
18. Conduct seven (7) days of advanced user training (onsite and remote) to include configuration (4 days onsite), reporter (2 days onsite), and system administrator training (1 day remote).
19. Conduct seven and 1/2 (7.5) days of onsite Go-Live Facilitation to ensure comfort with the new system.
20. Ongoing support and maintenance of the software under the CityView Software License and Support Agreement.

Exclusions:

1. Provision of hardware, databases and third party software.
2. Setup and support of network infrastructure supporting CityView.
3. Letters over and above the fifty-five (55) included in the budget, unless agreed to through change order.
4. Customizations and interfaces other than those specified above or agreed to through change order.
5. Custom workflows other than those specified above, unless agreed to through change order. CityView workflows are delivered and tailored during the implementation, with sub-workflows connected or disconnected as described in the Inclusions.
6. Additional Batch/Scheduled processes other than those specified above or agreed to through change order.
7. Reports other than those delivered as part of the products (described above) or specified in the customizations section above, unless agreed to through change order.
8. Non-standard configuration – standard configuration would be what is provided in the "Inclusions" above and what comes preconfigured in the system. Examples of non-standard configuration would include: modifying record-level security from what is pre-defined; defining organizational role security criteria other than those defined in the out



of the box organizational roles (e.g. read-only access to some sheets, read-write to others); creating batch processes other than those defined in the product for permit expirations and license renewals; creating business rules defining specific outcomes that are tied to specific users of the system only (e.g. message box reminding of a process that needs to be followed but where that message box is only invoked where a specific users is logged into the system). While these are not included in the Project's scope, the configuration tools are provided for City to undergo such configuration itself.

## IV. Work Approach

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The implementation will involve five phases: Project Planning, Scheduling and Data Collection; Configuration; Review and Validation; User Acceptance Testing; End User Training and Go-live Support.

City sign off is required before initiating a new phase. This provides key milestones in the Project to review progress, confirm objectives, and detail the activities and timelines for the next phase. Sign off involves acceptance that all pertinent deliverables have been made and confirmation of the budget and timeline for the next phase.

### **Phase 1: Project Planning, Scheduling and Data Collection**

#### **Project Kickoff**

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The CityView Project Manager will review all documentation with respect to the implementation in order to prepare the materials for the Project kickoff and conduct the official project kick-off.

CityView will prepare the Project Plan which will include but not be limited to the Implementation Plan and Communication Management Plan.

#### **Remote Infrastructure Review**

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CityView will analyze City's existing infrastructure to identify any potential areas that may result in sub-optimal performance. CityView's Infrastructure Review Specialist will verify remote accessibility, available bandwidth and techstack compatibility and advise City's network specialists of the hardware and software prerequisites required to optimize the performance of City's system. CityView will conduct this review remotely, off-site.

Should CityView Workspace be required at remote City facilities (offsite facilities, not directly connected to LAN, i.e. where performance could be an issue), CityView latency/load testing will need to be done to check performance of CityView at these remote sites.

#### **Initial Installation**

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CityView will conduct a trial installation for the purposes of testing the network infrastructure for use of CityView, to provide training for the network administrators on its installation, and to provide an environment for testing integrations dependent on the City's other systems. The development environment hosted by CityView, however, will still be the principal environment for configuration, validation and refinement.

#### **Product Walkthroughs/Data Collection**

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CityView will provide the City with a data collection workbook, as well as guidelines on how to complete the document. This is accompanied by walkthroughs/demonstrations of the pertinent CityView modules to provide the City's SMEs with an understanding of the workings of each of the modules and their data requirements for configuration.

The walkthroughs ensure City's users:

1. Learn the basics of the activity-based workflows.
2. Learn how to complete the workbooks.
3. Learn how to provide the data for City's fees, letters, lookup tables, and scheduled processes named above.
4. Understand the data mapping process.

5. Data Collection sessions are also conducted and designed to impart the skills City's SMEs require to complete their data collection assignments. Users are provided with an in depth knowledge of CityView table structures and the formats required to streamline the data collection process. Each session will be from two (2) to four (4) hours, depending on the product. Sessions will be held for each of CityView Permits and Inspections (two (2) sessions), Planning (two (2) sessions), Code Enforcement, Service Requests, and Business Licensing.

Data collection will involve remote and onsite services. Onsite time will be devoted to five (5) days for data collection, 10 days conversion and interfaces and 2 days of project management days all for the collection of the specifics for up to four (4) City workflows to be created as well as ten (10) days for the definition of data conversion and interface requirements. A total of seventeen (17) days of onsite time is accounted for.

This stage is also used to better understand the customization requirements.

The main deliverable at the end of the Data Collection phase is the completed City workbooks for each product and the "Scope Document."

### **Budget Validation**

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Once all of the data is collected from City, the CityView Project Manager (the "CityView PM") will review requirements in accordance with this Statement of Work and the other Contractual Services Agreement documents to identify anything that is not accounted for in the scope. The CityView PM will also validate any estimates made as part of this proposal, including:

1. Data conversion requirements.
2. List of customizations and interfaces

If budget validation reveals that any estimates provided were insufficient, the CityView PM will inform City of such and prepare appropriate change order requests. The next steps will not commence until sign off on budget validation and data collection occurs. This protects both parties against the risk of unclear expectations.

## **Phase 2: Configuration**

### **Data Conversion**

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Data conversion will commence once both parties are comfortable with the output of the data mapping exercise. CityView's specialist will create the scripts that parse, derive, and translate the source data into the ideal format for CityView. To reduce the time and effort associated with this phase CityView requires that the City provide data in one of the following formats: SQL Server, .mdb, .dbf, or .txt. The initial data conversion will run the scripts to provide a means for verification of correctness during the validation stage of the Project. CityView will complete a final iteration (using the same scripts) immediately prior to go-live.

### **Data Conversion Assumptions**

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Data migration services are priced based on the following general assumptions:

1. Data has been cleaned according the suggested guidelines.
2. Both parties have reviewed and signed off data mapping before proceeding to data conversion.

3. CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training and Go-live Support, and one complete refresh at go-live. CityView will make all other fixes using targeted scripts. CityView can perform additional complete refreshes if the parties mutually agreed through a written change order.
4. City provides data in one of the required formats: SQL Server, .mdb, .dbf or .txt.
5. CityView will complete the final iteration using the same scripts. Should changes occur that affect the scripts, a change order will be required prior to any delivery.

### Configuration

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CityView will configure the CityView products based on industry best practices and with the data collected and signed off from Phase 1: Data Collection. CityView will create a single development environment and the Implementation Specialist will lead the configuration of that environment. This will involve the following components:

1. **Letter Template Development** – CityView's letter generator will be used to create up to 55 letter templates according to electronic samples provided by City with data merge tags defined. City is provided the letter generation tools for its SMEs to can create additional letters to meet additional or future requirements.
2. **Fees, Valuation, Work Items, Classifications** - All the fees are configured in City's CityView environment. Fee configuration is a one-time load. Should the fee schedule provided to CityView be changed or updated prior to go live, and additional configuration is required, a change order will be required.
3. **Activities Workflow** – All the CityView Select's workflows will be configured with City specific requirements for assigned to, required dates, email notifications, responsible departments and resource groups. In addition, existing sub-workflows may be removed, or added to the main workflow, depending on City's specific processes. Should the required changes to the CityView Select workflows be significant and go beyond the refinement activities mentioned above, additional costs may apply through mutually agreed change order. CityView will configure up to four (4) custom workflows or equivalently effort-intensive changes to CityView Select workflows.
4. **Custom data fields** - Custom data fields to meet City's specific data capture needs will be defined for each pertinent table where they are required and configured accordingly, along with the business rules to apply these data fields where appropriate.
5. **Lookups** – All lookup data defined during Phase 1 Data Collection, is entered into the system.
6. **Security** – Users are assigned to the roles and given permissions that are pre-defined in the products, based on information collected during data collection. Should additional user-level and record level security be required other than as defined in the solution's organizational roles, additional costs may apply.
7. **Batch Rules and Scheduled Processes** – the named CityView Select batch rules and scheduled processes will be refined according to the requirements for permit expiry and license renewal.

### Customizations

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Customizations, both those in the scope of work and any agreed to as a result of data collection and change order will be undertaken at this point.

### Interfaces

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Interfaces, both those in the scope of work and any agreed to as a result of data collection and change order will be undertaken at this point.

### Quality Assurance (QA)

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CityView undertakes quality assurance activities throughout each of the above phases (Data Conversion, Configuration, Customization and Interfaces). All customizations and interfaces are tested by CityView's QA Team prior to the applicable software build being released to City. The quality of the configuration and data conversion are reviewed by a peer review committee which includes the CityView Project Team, members of CityView's research and development staff and management, and occasionally City's SMEs.

### **Phase 3: Review and Validation**

The CityView PM will work with the City to establish the Review and Validation Plan, i.e. to determine when certain review and validation sessions will be given and who should attend.

### Review and Validation

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CityView will undertake a series of three (3) remote review and validation sessions with City's SMEs, for each of Permits and Inspections, Code Enforcement, Planning, Service Requests, and Business Licensing, to work through the validation of the configuration based on the data collection workbooks and scope document.

These sessions will be led by CityView implementation specialists. Eventually, the SME's will be expected to lead some sessions for each module. By the final session the City's SMEs will have reviewed and validated the bulk of the configured system and be able to:

- Navigate the system through City-specific processes and workflow.
- Generate and test fees.
- View and validate look up tables.
- Generate and test letters and documentations which have been configured.
- Use scenario-based examples to test and validate automated business rules

Review and Validation will be conducted against the development environment, hosted by CityView. During the Review and Validation sessions CityView will document any changes, corrections, or deficiencies for further action. A customer feedback mechanism is provided within the environment for immediate feedback and reporting of issues to our implementation specialists and developers as it is expected the City's SMEs will conduct additional reviews without the CityView Implementation Specialist present.

### In Scope Refinements

In scope corrections from the process of Review and Validation will be conducted. If out of scope issues are raised through Validation, these will be handled through approved change orders.

## **Phase 4: User Acceptance Testing**

### User Acceptance Testing

On completion of the third Review and Validation session, City will have a period of two (2) weeks for final User Acceptance Testing on its own completely installed test system. The CityView Implementation Specialist will monitor City's feedback and continue to make any in scope corrections. Provided the acceptance criteria have been met, City is asked to formally accept the delivered solution for go-live.

## **Phase 5: End User Training and Go-live Support**

### Final Environment

After the final environment receives City sign off, CityView will perform a data conversion to establish an environment that can be used for training purposes.

### User Training

CityView conducts on-site training for all of the front line and advanced users identified in the training plan.

### Final Conversion Run

Immediately prior to go-live, CityView will conduct the final data conversion for Go-Live.

### Go-live

During go-live, CityView will be onsite for seven and 1/2 (7.5) days of onsite go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training. It is recommended that the City consider having an additional CityView resource onsite to support the staff on CityView software during the first weeks after go-live. Budget for this is not included here. The CityView and City's project teams will discuss this to determine the City's needs prior to scope sign-off.

During go-live facilitation the CityView Project Team will work with City to record any known issues. The CityView Project Team is responsible for the resolution of these known issues. Thirty (30) days after go-live, CityView will request a formal letter of acceptance (the Statement of Completion, pursuant to the Contractual Services Agreement) that substantiates the product has been delivered and is being used successfully in a live, production environment to accept permit, planning and license applications, generate fees, record fee payments and generate correspondence associated with all items previously listed. In the case of a partial go-live, a Statement of Completion will be requested for that part of the solution that has gone live.

The Pre- and Post-Implementation Support Plan is comprised of a strategy for transitioning to Support and then the Support and Maintenance Agreement itself. During the first six (6) weeks after go-live, the CityView Project Team will begin to familiarize and transition the Project to CityView's Technical Support Group. At the end of six (6) weeks the CityView PM will arrange a formal hand-off involving City, the CityView PM and the CityView Technical Support Team

formalizing the transition of any new defects, bugs and support issues to the Technical Support Team.

## IV1 Training plan

The training program is designed to provide your end users with the ability to use CityView for their day to day activities and your Subject Matter Experts (SMEs) with the skills to maintain your solution. The table below details the training plan.

### Training Plan

Course	Objectives		
<b>CityView End User Training (onsite)</b>	This course is designed to train the City's users on the business use in order to fulfill their daily work activities. The course provides specific instruction on how to navigate and complete tasks within CityView. It will cover tasks such as completing an application, adding contacts, attaching files, tracking activities and outcomes, applying and paying fees, producing correspondence, mapping basics, and running reports. Users are able to: <ol style="list-style-type: none"> <li>1. Understand the key concepts that make up the business process.</li> <li>2. Be able to navigate and complete tasks relevant to day today activities.</li> <li>3. Be able to walk through a business activity based workflow.</li> </ol>		
	<b>Duration: 18 days*</b>	<b>Users: End Users as defined below</b>	<b>Maximum#: 10/session</b>
<b>Configuration &amp; Maintenance Training (onsite)</b>	This course is focused on enabling users to configure, maintain and evolve their business process within the CityView environment. Concepts that will be covered include Letter Generation, Maintaining your Activity Based Workflow, Fee Maintenance, Holiday Configuration and Maintaining Lookup values. Users will be able to: <ol style="list-style-type: none"> <li>1. Create and modify Letters.</li> <li>2. Create and modify Fees.</li> <li>3. Improve and evolve the Activity Workflow.</li> <li>4. Keep your system current by updating Lookup tables and creating and maintaining custom attribute fields.</li> </ol>		
	<b>Duration: 4 days</b>	<b>Users: Advanced</b>	<b>Maximum#: 6</b>
<b>CityView Reporter Training</b>	CityView's fully integrated SSRS-based CityView Reporter and custom report designer provide all of the features that you would expect from other industry-standard reporting tools. In this course, students will learn about creating simple reports, including pivot reports, detailed reports, charts, graphs, filters, subsections, and aggregate fields. Additional topics may include: complex report writing, views, and on-form expressions		
	<b>Duration: 2 days</b>	<b>Users: Advanced</b>	<b>Maximum#: 4</b>



<b>CityView System Administrator Training (remote)</b>	<p>This course is designed to provide administrators responsible for managing CityView with the general knowledge of how to install and upgrade versions of CityView, change user rights and manage security. The advanced course will go into additional detail on the architecture of the CityView platform as well as how to maintain the CityView Portal.</p> <p>Course participants will walk through typical system maintenance and troubleshooting examples, which will teach them the tools, techniques and terminology applicable to CityView, enabling them to not only support the business users in their organization but also to communicate more effectively with CityView's Technical Support team. They will be exposed to our best practices approach for Security Maintenance; and, they will learn the processes for installing and upgrading the CityView environments.</p> <p>Students will be instructed in the use of the CityView Manager client, and they will gain an understanding of the architecture behind CityView. Additional topics that may be covered include: configuration of Microsoft Exchange, Web Server settings, LDAP settings, Mapping, and Document Management settings.</p>		
	<b>Duration: 1 day</b>	<b>Users: Advanced</b>	<b>Maximum#: 4</b>
<b>CityView Mobile End User Training (onsite)</b>	<p>This training will focus on the highly intuitive CityView Mobile.</p>		
	<b>Duration: 0.75 day</b>	<b>Users: 17</b>	<b>Maximum#: 10</b>
<b>CityView Portal Instructional Training (remote)</b>	<p>This training will focus on the highly intuitive CityView citizen Portal, to provide a select group of City's users with the knowledge of how to navigate Portal processes so that they can answer citizen questions on the use of Portal.</p>		
	<b>Duration: 0.75 days</b>	<b>Users: 10</b>	<b>Maximum#: 10</b>
<b>Bluebeam Markup Training (remote)</b>	<p>This training will focus on basic use of Bluebeam markup tools.</p>		
	<b>Duration: 1 day</b>	<b>Users: 20</b>	<b>Maximum#: 10</b>
<b>Go-live Facilitation Assistance (onsite)</b>	<p>Ten days of go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training (as described in the Work Approach above).</p>		
	<b>Duration: 7.5 days</b>	<b>Users: All</b>	<b>Maximum#: N/A</b>

Training is provided on City-provided hardware.

\* 18 days End user training divided as follows:

CityView Basics Training 7 x ½ day sessions (3 ½ days total)

Permits and Inspections 2 x 1 ½ day sessions (3 days total)

Planning 2 x 1 ½ day session (3 days total)

Code Enforcement 2 x 1 ½ day session (3 days total)

Business Licensing 1 x 1 ½ day session (1 ½ days total)

Service Requests 1 x 1 1/2 day session (1 ½ days total)

Cashiering 1 x ½ day session (½ Day total)

Electronic Plans Review 2 x 1 day sessions (2 days total)  
CityView Mobile 2 x ¾ day sessions (1 ½ days total)

### IV2 Matrix of Responsibilities and Work Products

The following table provides a summary of the Project. Responsibility and the lead for each step in the Project are defined and the deliverables received by City are presented.

Step	Responsibility	Lead	Deliverables
Project Kickoff	CityView	CityView PM	Hosted Development Environment, Project Plan
Infrastructure Review	CityView	CityView Infrastructure Review Expert	Infrastructure Review Document
Initial Installation	Share	CityView PM	Client-site installed initial Environment
Data collection, including Data Mapping and customization/interfaces analysis	Share	CityView PM	Completed workbooks & signed-off Scope Document, including Budget Validation
Configuration	CityView	CityView PM	Configured Development Environment, ready for Validation & Refinement
Data Conversion	CityView	CityView PM	Configured Development Environment, ready for Validation & Refinement
Customizations and Interfaces	CityView	CityView PM	Implemented functionality in Hosted Development Environment, ready for Validation & Refinement
Review and Validation Sessions	Share	CityView PM	Completed Validation sessions
Refinements based on Review and Validation sessions	CityView	CityView PM	Development Environment for Final Acceptance Testing
User Acceptance Testing	City	City PM	User acceptance of the fully delivered system based on test scripts
User Training (including advanced training)	Share	CityView Trainer	Completed training
Go-live	Share	CityView PM	Live production environment

### IV.3 Documentation

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Documentation is available through CityView Connect, CityView's on-line content management system. This is the source for the most updated CityView information at any time. City can search for a particular topic or browse through the menu items. The Product Training Guides will step City through a full training session for a particular topic.

CityView Connect is accessible directly and within the CityView modules. By clicking the Help button, direct access is provided to the content in CityView Connect.

Documentation is targeted to three main groups: business users, system administrators and application developers. Documentation is provided at every level of training, focused on the enabling objectives of the training in question.

CityView Connect is the main source of documentation for the City throughout implementation of the Project and beyond. With each CityView release, detailed release notes document the changes to the release both for new features, feature changes, and bug fixes. Any exceptions or changes for installation and upgrade are also noted.

CityView offers the following documentation:

- System technical documentation
- System end user's documentation
- On-line Help Desk documentation
- System/Architecture diagrams
- Scope Documentation including – signed-off data collection materials

## V. Post Implementation Support

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Detailed in Schedule C, CityView Service Level Agreement.

## VI. Technical Environment

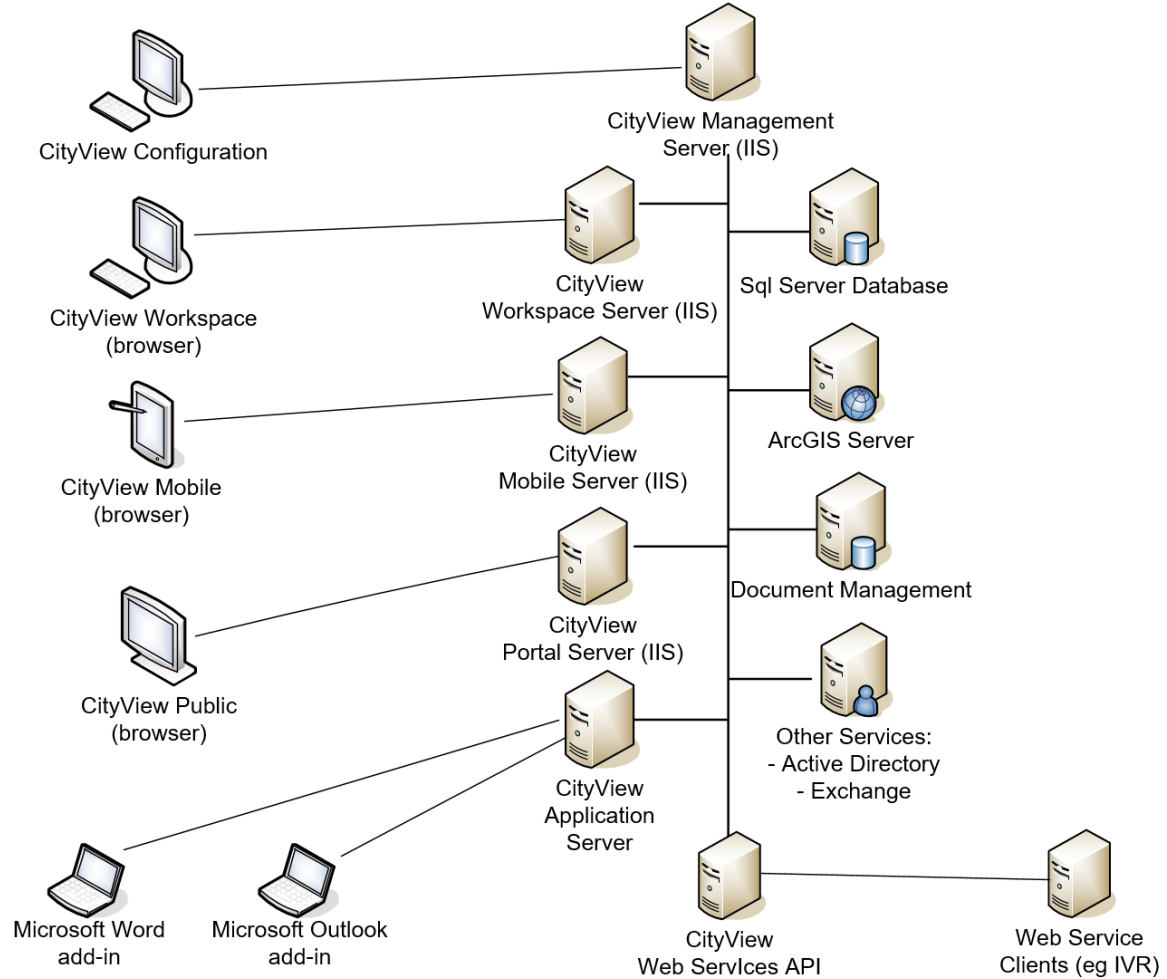
The table below outlines the hardware and software requirements to operate CityView. This is followed by a diagram depicting a typical installation. Additional information is provided in the following pages regarding recommended servers, database sizing considerations, third party software, and compliancy tables.

### Hardware and Software Requirements

CityView Browser Client	
<b>Supported Browsers</b>	Chrome Edge IE 11* Firefox
CityView Servers	
Hardware	Software
Windows Server with minimum 4 cores recommended 8 Gigabytes (GB) of RAM or higher recommended 1 gigabytes (GB) of available hard disk space <b>Installation of CityView server components is not supported on domain controllers</b>	<b>Operating System:</b> Microsoft Windows Server 2008 or higher Microsoft .Net 4.6.1 framework is required for Application, Management, and Web Servers <b>IIS:</b> Internet Information Services 7 or greater is required for CityView Management and CityView Web Servers <b>Map components:</b> ArcGIS Server 9.3\9.3.1\10\10.1\10.2.2\10.3.1\10.4 supported ArcGIS Online supported
Configuration Console Client	
Hardware	Software
Windows PC with 2GHz clock speed recommended 2 gigabytes (GB) of RAM or higher recommended 400 megabytes (MB) of available hard disk space	Operating System: Microsoft Windows 10, 8.1 and 8 (32 bit and 64 bit), 7 SP1 (32 bit and 64 bit), Microsoft .Net 4.6.1 framework must be installed
Database Server	
Supported RDBMS	Hardware
Microsoft SQL Server 2012 and 2012 R2 Microsoft SQL Server 2014 Microsoft SQL Server 2016	Windows PC with 2GHz Xeon processor recommended 8 GB of RAM 2 GB to 5 GB hard drive space, dependent on

**\*About Internet Explorer** - as of January 12, 2016, Microsoft only supports the most current version of Internet Explorer, therefore there may be some formatting issues.

### CityView Component Architecture



Server components can be combined onto hardware as necessary.  
 Separate environments are recommended for: Production, Testing, Training.



## Data Sizing Projections

There are several services that are typical in our deployment strategy:

1. **SQL Server** – can be scaled to include failover clusters. Typical day-to-day operation of CityView will not tax the server as most queries will pull less than 10 records per table at a time. This service works directly with Management Server, Application Server and Portal server processes. Typical permit applications require 1MB of disk space.
2. **CityView Management Server** – this is a service that runs in IIS, typically processing login requests, and configuration settings for the software. The only time where the service impacts performance on a server is when a build of the application occurs, typically during maintenance periods. All services need to be able to communicate with this server.
3. **CityView Workspace Server** – this is a service that runs in IIS and provides the server side processing for the primary Workspace browser user interface most staff will use. This service needs sufficient hardware resources to handle the load. If performance is not ideal, it is certainly possible to have multiple servers deployed to handle load balance or latency concerns.
4. **CityView Application Server** – this service handles general server side application processing not handled by more specialized servers. This includes scheduled processes, letter generation and document access.
5. **CityView Mobile Server** – Mobile Server IIS service acts as a gateway to the software for field staff users, and directly queries SQL Server during operation. There is an extremely small footprint for the service, and small memory/CPU overhead. If performance is not ideal, it is certainly possible to have multiple mobile servers deployed to handle load balance or latency concerns.
6. **CityView Portal Server** – Portal Server IIS service acts as a gateway to the software for browser and mobile users, and directly queries SQL Server during operation. There is an extremely small footprint for the service, and small memory/CPU overhead. If performance is not ideal, it is certainly possible to have multiple portal servers deployed to handle load balance or latency concerns.
7. **Document Management/Content Management Server** – often handled by third party services, e.g. SharePoint, Laserfiche, TRIM, etc. This can also be defined as a Windows file share (SMB) where we typically recommend 5MB of space per permit for file storage (PDF, DOC, JPG).

## Recommended Server Requirements

The following provides the recommended Server Requirements.

These server configurations have been developed to meet the performance requirements and provide a reasonable level of hardware fault tolerance and growth:

### Recommended Servers

Recommended servers:	
<b>Database Server Configuration</b>	
Module	Description
Processor	2+ Ghz 2 Core processor (Intel Xeon or AMD Opteron)
Memory	32GB
Storage	RAID-5, 4 (3 + 1 Hot Spare) x 73GB 15K RPM Ultra 320 SCSI (or substitute SSDs for better performance)
Network Adapter	Gigabit Ethernet Adapter
Power Supply	Redundant Power Supplies
Operating System	Windows 2012 Server or higher, Standard Edition
<p>Storage Configuration: Drives would be configured with three drives in a single RAID-5 set with the fourth drive as a hot spare. This will provide a total of 140Gb of storage which should be adequate. If additional storage is required, adding more drives is more cost effective than increasing the capacity of all drives.</p> <p>A multiple processor capable server is recommended to provide immediate scale-up potential. The CityView system can be scaled out with the addition of more servers and distributing the CityView components to dedicated servers.</p>	

CityView Management and Application Server Configuration	
Module	Description
Processor	2+ Ghz Dual Core processor (Intel Xeon or AMD Opteron)
Memory	8 GB
Storage	RAID-1 or RAID-5, Storage requirements < 1Gb
Network Adapter	Gigabit Ethernet Adapter
Power Supply	Redundant Power Supplies

<b>Operating System</b>	<b>Windows 2012 Server or higher, Standard Edition</b>
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<b>CityView Workspace Server Configuration</b>	
<b>Module</b>	<b>Description</b>
<b>Processor</b>	<b>2+ Ghz 8 Core processor (Intel Xeon or AMD Opteron)</b>
<b>Memory</b>	<b>32 GB</b>
<b>Storage</b>	<b>RAID-1 or RAID-5, Storage requirements &lt; 1Gb</b>
<b>Network Adapter</b>	<b>Gigabit Ethernet Adapter</b>
<b>Power Supply</b>	<b>Redundant Power Supplies</b>
<b>Operating System</b>	<b>Windows 2012 Server or higher, Standard Edition</b>

<b>CityView Portal Server Configuration</b>	
<b>Module</b>	<b>Description</b>
<b>Processor</b>	<b>2 Ghz Dual Core processor (Intel Xeon or AMD Opteron)</b>
<b>Memory</b>	<b>8 GB</b>
<b>Storage3</b>	<b>RAID-1, 2 x 80GB 7200 RPM SATA</b>
<b>Network Adapter</b>	<b>Gigabit Ethernet Adapter</b>
<b>Power Supply</b>	<b>Redundant Power Supplies</b>
<b>Operating System</b>	<b>Windows 2012 Server or higher, Standard Edition</b>
Note this server will require firewall port availability, Port 80 TCP to CityView Management Server, and Port 1433 for communication to SQL Server.	

<b>CityView Test Server Configuration</b>	
<b>Module</b>	<b>Description</b>
<b>Processor</b>	<b>2 Ghz P4 (or equivalent Virtual Machine)</b>
<b>Memory</b>	<b>8 GB</b>
<b>Storage3</b>	<b>80GB 7200 RPM SATA or ATA-133</b>

<b>Network Adapter</b>	<b>Gigabit Ethernet Adapter</b>
<b>Operating System</b>	<b>Windows 2012 Server or higher, Standard Edition</b>

<b>CityView Mobile Configuration</b>
<p>Mobile devices – this is a Web, browser-based interface that can be utilized by a very large array of devices. Please note that for tablets and smartphones, the browsers themselves can have different navigational methods of handling file attachments (Upload and download). Ideally, lower latency works best when handling upload/download of large file attachments with our product. 3G network connectivity is adequate however.</p>

## Required 3rd Party Components

Aside from Excel, all of the below come as part of CityView, or are downloadable (IIS).

Alternate versions are **not** supported.

✓ Required

✓ Supported

Product	CityView Configuration Console	CityView Management Server	CityView Application Server	CityView Portal, Mobile, and Workspace Server	CityView Web Service API
SynCFusion Essential Studio for .Net 12	✓	✓			
Data Dynamics Active Reports 4.3		✓	✓		✓
TxText Control for .Net 15.1		✓	✓	✓	✓
jQuery				✓	
Excel 2003, 2007, 2010, 2013, 2016 (for exporting Grids, Activity Calendar)					
IIS		✓		✓	

IIS 10 (Integrated Mode)		✓		✓	✗
IIS 8.5 (Integrated Mode)		✓		✓	✗
IIS 8 (Integrated Mode)		✓		✓	✗
IIS 7		✓		✓	✓
IIS prior version		✗		✗	✗

**Supported Technologies**

Database Support		Microsoft Exchange (for Calendaring)		CityView Mobile, Device Support	
32-Bit	✓	Office 365 Exchange	✓	iOS 4 or higher (iPhone, iPad, iPod)	✓
64-Bit	✓	Exchange 2013	✓	Android 2.3 or higher	✓
Sql Server 2016	✓	Exchange 2010	✓	Windows phone 7 or higher	✓
Sql Server 2014	✓	Exchange 2007 (legacy)	✓	Other devices	✗
Sql Server 2012 R2	✓	Exchange Prior Versions	✗		
Sql Server 2012	✓	<b>Email Support</b>			
Sql Server prior versions	✗	SMTP	✓	Soap Toolkit 3.0	✓ <sup>1</sup>
		mailto:	✓	Soap/XML Version 1.2	✓ <sup>1.2</sup>
				Office XP Web Services Toolkit	✓ <sup>2</sup>
<b>Signature Pads</b>					
ePad Vision	✓	ePad II / ePad USB	✓	Brother Label printer	✓
<b>Document Management System Support</b>		<b>CityView Portal Browser Support</b>		<b>CityView Mapping Support</b>	
SharePoint 2016, 2013, 2010	✓	IE 11*, Microsoft Edge	✓	ArcGIS Server, Standard or Advanced Edition v10.4	✓
HP Trim v7.3 (CityView Desktop only)	✓	Firefox 52 or higher	✓	ArcGIS Server, Standard or Advanced Edition v10.3.1	✓
Laserfiche 9, 10	✓	Chrome 57 or higher	✓	ArcGIS Server, Standard or Advanced Edition v10.2.2	✓
Laserfiche WebAccess 9, 10	✓	Prior versions, Other browsers	✗	ArcGIS Server, Standard or Advanced Edition v10.1	✓
Laserfiche Weblink 9, 10	✓	<b>Payment Processor Support</b>		ArcGIS Server, Standard or Advanced Edition v10.0 with SP4	✓
PaperVision (Versions 78 & 79)	✓	PayPal's PayFlow Pro v 4.3	✓ <sup>3</sup>	ArcGIS Server Standard or Advanced Edition v9.3 (legacy)	✓
eB	✓	Active Class	✓	ArcGIS Online	✓
OnBase 16.0.0.17	✓	PayGOV	✓	ArcGIS Server Basic Edition	✗
		iTransact	✓ <sup>3</sup>	ArcGIS Server prior versions	✗
<b>Hosted Platforms Support</b>		Moneris eSelect	✓	<b>Virtual Hosting Support</b>	
Terminal Services (Windows2008) 64bit	✓	Authorize.Net	✓	Microsoft Hyper-V	✓
Citrix 1.80 and Above	✓	MSB Nexus	✓	Microsoft Virtual Server 2008	✓
		Acculynk	✓		
<b>Microsoft Outlook Add-in Support</b>		Invoice Cloud	✓		
Outlook 2016, 2013	✓	BIS Online	✓	Revu eXtreme 17, 16, 15, 12, 11	✓ <sup>4</sup>
Outlook 2010	✓	Beanstream	✓	Revu CAD & Standard 17, 16, 15, 12, 11	✓

Outlook prior versions	*	Paymentus	✓	Revu 10 (legacy support)	✓ <sup>5</sup>
<ul style="list-style-type: none"> <li>ⓘ In testing</li> <li>? Not tested</li> <li>ⓧ Planned</li> </ul>				<ul style="list-style-type: none"> <li><sup>1</sup> Supported with Web Services API</li> <li><sup>2</sup> Supported with WebDAV API</li> <li><sup>3</sup> non-PCI Compliant</li> <li><sup>4</sup> Required to Prepare and Flatten documents</li> <li><sup>5</sup> Supported but not for Compare Operations</li> </ul>	

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## VII. Roles & Responsibilities

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Below is a description of the roles and responsibilities of each of the resources in the Project.

Your **CityView project team** is comprised of:

- **Executive Sponsor**
- **Project Manager,**
- **Implementation Specialists/Trainers,**
- **Infrastructure Analyst,**
- **Data Conversion/Interface Specialist,**
- **Application Development Team,**
- **Quality Assurance Team.**

### **Executive Sponsor**

The Executive Sponsor has the overriding responsibility for the outcome of the project in terms of project success and fiscal responsibility. The Executive Sponsor's responsibilities include:

1. Monitor the progress of the project
2. Empower the CityView Project Manager and the core project team to make decisions
3. Be the senior decision-maker for anything outside the authority of the Project Manager, as well as a senior executive and mediator for escalated issues
4. Support the Project Manager in accomplishing the implementation goals
5. Maintain an active relationship with the City.

### **Project Manager**

He/she is involved in both the facilitation of the project as well as hands-on work in each project phase to ensure that requirements are met and project deliverables are clearly defined. The responsibilities include:

1. Be the primary point of contact for the City's Project Manager
2. Ensure successful delivery of CityView's tasks
3. Participate, where necessary, in gathering of the business process requirements
4. In coordination with the City's Project Manager, create the project schedule and keep this schedule up-to-date throughout the project
5. Coordinate the scheduling of tasks for the implementation according to the project schedule
6. Manage the CityView project resources
7. Provide brief bi-weekly status update to the City's Project Manager
8. In coordination with the City's Project Manager, co-conduct the project Kick-off meeting
9. Review and approve CityView's data collection scope documents for Sign-off
10. Seek sign-off on all CityView deliverables and approval documents from the City's Project Manager



11. In coordination with the City's Project Manager, manage scope change control
12. Assist the City's Project Manager in defining the training and Go-Live plans
13. Support City in the Go-Live preparation steps
14. Hold review & status meetings with City's resources
15. Facilitate and provide timely resolutions to issues and concerns as it relates to CityView resources, project issues, etc.

### **Infrastructure Analyst & Development Environment Manager**

The CityView infrastructure analyst (IA) works with the City to review the City's hardware and software infrastructure as it pertains to the optimum functioning and performance of CityView. Typically the IA is also our Manager of Support and as such carries responsibilities of managing the customer's hosted development environment, facilitating updates and installs and troubleshooting issues. Responsibilities include:

1. Prepare and distribute the Infrastructure Review Questionnaire to the City, for collection of appropriate information required to analyze hardware and software infrastructure
2. Handle any questions and seek clarification on any items in ensuring the information received is complete, for the purpose intended
3. Assess the suitability of the infrastructure and deliver the Infrastructure Review report
4. Provide guidance on hardware sizing, third party software, Esri map development and configuration, installation guidelines
5. Coordinate initiation of the City's hosted Development Environment and manage this throughout the project, including updates and merges
6. Together with the City's technical administrator, coordinate installs at the client site
7. Prepare the Microsoft ClickOnce package for Configuration Console installs
8. Deliver the System Administrator Training

### **Implementation Specialists/Trainers**

The Implementation Specialist/Trainer (IS) will work closely with the City through on-site visits, follow up calls, training, and demonstrations in order to define the scope of the configuration effort. The IS configures your CityView environment and prepares the environment for the onsite activities. Typically the IS's also deliver the end-user training and Go-live assistance. Responsibilities include:

1. Provide progress status to the CityView Project Manager
2. Perform the data collection and work with the City's Subject Matter Experts (SMEs) to understand and collect the business requirements
3. Work with the SMEs in designing the CityView Activities workflows
4. Provide best practices recommendation and solutions where applicable
5. Compile the data collection documents for the scope document
6. Configure the Software based on the scope documents
7. Unit test the configuration
8. Provide configured system to Application Developer Team Lead and QA Team lead for configuration review and testing
9. Provide validation and acceptance testing support

10. Work with the City's SMEs to log Validation feedback and correct misconfiguration items
11. Work closely with the CityView, Developers and QA Lead to answer any business related question that might arise

Often the IS's are also the Trainers as they are qualified as such and they have the best understanding of the City's configured environment going into the training. Trainers have the following responsibilities:

1. Provide training to the different City groups as follows:
  - i. Subject Matter Experts
  - ii. Advanced Users
  - iii. End Users
2. Provide electronic copies of training materials where applicable
3. Provide electronic copies of training sessions' agendas
4. Leverage adult learning methodology and teaching techniques while documenting and escalating any concerns to the implementation Project Managers

#### **Data Conversion & Interface Specialist/s**

Responsible for analysis, design and testing of the interfaces between CityView and any 3<sup>rd</sup> party applications or databases. Responsible for the data conversion tasks of Organization's data sources. List of responsibilities include:

1. Evaluate interfaces functionality requirements
2. Provide recommendations on interfacing approaches
3. Identify Interfaces issues
4. Perform the analysis of the required interfaces
5. Evaluate a sample data structure provided by City to which CityView must create an interface
6. Create the design documentation of the required interfaces
7. Manage interfaces' design documents and revise according to City's review and comments
8. Forward the interfaces' design documents to the CityView Project Manager for review and approval
9. Unit test the interfaces to ensure they meet the specifications outlined in the design documentation
10. Work closely with the CityView Developers to answer any technical related question that might arise
11. Provide training support to the City's Technical Experts regarding the interfaces
12. Evaluate sample data structure from which CityView will be converting electronic data
13. Provide data conversion analysis with the City's Data Conversion Expert
14. Provide recommendations on data conversion approaches
15. Provide data conversion mapping review and assistance
16. Identify conversion issues
17. Develop data conversion scripts according to the final mapping documents

18. Perform the preliminary cut data conversion
19. Unit testing the preliminary cut data conversion
20. Modify data conversion scripts based on test results if necessary
21. Perform any other agreed on intermediary cuts of data conversion
22. Setup the production ready cut and briefly unit test the production ready cut data conversion
23. Provide assistance to the City's Data Conversion Expert in loading the preliminary cut of the converted data and test it
24. Communicate directly with the City's Data Conversion Expert on any data conversion related issue / question

### **Application Development Team**

Reporting to the CityView Project Manager, the Developers will be responsible for the development of any assigned custom reports or customization requirements. Below is a list of responsibilities to be performed by the Developers:

1. Create in-scope custom reports and unit test them
2. Create in-scope customizations and unit test them
3. Create in-scope interfaces and unit test them
4. Provide customizations and interfaces to the QA Team for unit testing
5. Periodically review the ISs configuration for adherence to best practices and efficiencies and provide guidance and oversight where necessary

### **Quality Assurance Team**

Responsible for testing the quality of your CityView Modules and any customizations and interfaces. They use a combination of automated and manual testing on your environment. Bug Tracker Tools, Unit Testing, and Manual Test Cases are used in a strategic test plan that results in a stable, error free application for delivery. Responsibilities include:

1. Maintain QA environments on the same version as the City's Development Environment for parallel testing and troubleshooting
2. Log test results, log issues in detail and provide issues logs to Application Development team
3. Provide unit testing as detailed within roles above
4. Provide advice on timing and readiness of version releases.

We envisage the **City's project team** is comprised of:

- **Executive Sponsor**
- **Steering Committee**
- **Project Manager,**

- **Subject Matter Experts (SMEs),**
- **Data Conversion Expert,**
- **Technical Analysts/Experts,**
- **Database Administrator,**
- **Systems and Network Administrators,**
- **Testers (often the same people as the SMEs),**
- **Application Administrators**
- **Trainers**
- **End Users**

### **City Executive Sponsor**

The Executive Sponsor provides the vision of the project in alignment with the City's corporate short term and long term goals and objectives. The Executive Sponsor's responsibilities include:

1. Participate on the project Steering Committee
2. Promote the project throughout the City
3. Monitor the progress of the project
4. Monitor the overall City impact
5. Empower the City Project Manager and the core project team to make decisions
6. Make timely decisions
7. Maintain the authority to set priorities, approve overall scope and settle issues / priorities that significantly affect the project and the City
8. Support the Project Managers in accomplishing the project goals
9. Provide a vision of the City's goals
10. Maintain an active relationship with CityView Management

### **City Steering Committee**

Should the City wish to form a Steering Committee for the project (internal to the City), the Steering committee typically develops the vision for the project in alignment with the City's short term and long term goals and objectives. The Steering committee is suggested to be composed of the City Project Sponsor(s), the City's Executive Sponsor and the City's Business Leads. The Steering committee has the following responsibilities:

1. Attend Steering Committee meetings
2. Set priorities
3. Approve scope and scope changes
4. Resolve escalated issues
5. Provide strategic guidance to achieve the define project goals
6. Promote the project throughout the City
7. Commit the required resources to the project and approve new ones when required
8. Monitor the project progress

9. Monitor the overall City impact
10. Approve extensions to project timeline or addition of new City resources to resolve City - side delays
11. Empower the City Project Manager and the core project team to make decisions
12. Generate timely decisions
13. Conduct periodic review of project progress
14. Make strategic decisions to manage business and project risks
15. Support both Project Managers to accomplish project goals
16. Have an active relationship with CityView management

### **City Project Manager**

The City Project Manager is responsible for the overall City deliverables and the day-to-day management of the project. This resource is the primary liaison between the CityView Team, the City's project team and the Steering Committee. Both Project Managers will work together to meet the objectives, address issues, facilitate resolution and participate in active management of the teams. Below is a list of responsibilities to be performed by the City's Project Manager:

1. Manage all City resources for project related activities
2. Manage the project (budget, timeline, quality, risks, scope, issues, deliverables, etc.) in cooperation with CityView's Project Manager
3. Communicate project status to the Steering Committee, the Executive Sponsor and the project team leveraging updates from CityView's status updates
4. Participate in the Steering Committee meetings
5. Create, maintain, manage and refine the project schedule with all its elements in cooperation with the CityView Project Manager
6. Maintain project standards especially Scope & Status reporting
7. Prepare, organize and co-conduct with the project kick-off meetings
8. Manage the delivery and coordination of City project tasks
9. Manage all project deliverables in coordination with CityView's Project Manager
10. Manage and streamline the issue management process in conjunction with CityView Project Manager
11. Manage project deviations and take necessary corrective actions
12. Participate in gathering of the City's business process requirements when required
13. Plan, manage and execute the Acceptance Test efforts
14. Plan, manage and execute the end user training efforts
15. Provide timely reviews and potential sign-offs on all project deliverables approval documents as presented by the CityView Project Manager
16. Review and accept project milestones
17. Manage the logistical activities of the end user training
  - a. Training facilities
  - b. Students booking
  - c. Scheduling of sessions
  - d. Monitoring and logging the end user attendance

18. Capture the end user feedback
19. Responsible for internal & project communication
20. Provide guidance to project team members
21. Lead the Go-Live preparation planning
22. Participate heavily in the Go-Live preparation tests
23. Must provide Go / No Go Decision throughout the project phases
24. Must be present for Go-Live

### **City Subject Matter Experts**

The Business Experts own the business process within their functional areas since they perform these day-to-day business processes. These people collectively form the knowledge base of the City's business process requirements. Such resources will be involved in the Data Collection, as well as approval of the Scope Documentation and testing and acceptance of the configured system. They will further verify that the new configured system meets the City's business requirements as outlined in the Scope Documentation. They will participate in making decisions regarding the business processes and they will help both Project Managers manage the project scope and all the associated deliverables. Below is a list of responsibilities to be performed by the SMEs

1. Attend data collection & validation training sessions
2. Participate in appropriate project team meetings
3. Work with the CityView IS to provide input into the analysis of the business requirements and review the Scope Documentation
4. Work with the CityView IS to validate the configuration through validation testing
5. Develop appropriate validation test cases based on business scenarios
6. Assist the City's Data Conversion Expert in data conversion validation & acceptance
7. Assist in the development of user procedures
8. Assist the project team in defining user access levels and privileges
9. Assist the project team in the Go-Live support planning
10. Provide end user post implementation Go-Live support where applicable
11. Assist the City's Project Manager in problem resolution
12. Support End User Training and documentation preparation
13. Must be present for Go-Live

### **City Data Conversion Expert**

The Data Conversion Expert will be involved with the CityView Data Conversion Specialist in analyzing, mapping, loading and testing the different cuts of data conversion. This resource must possess a strong knowledge of the existing data sources that will be converted from both the user and database ends of the existing systems that need to be converted. This resource will also learn about the database structure and the integrated tables (from data mapping documents provided by CityView) as this knowledge will help them relate to their existing data sources. This resource will also review and finalize the data mapping documents and will test the

data once the preliminary cut is completed by CityView. Below is a list of responsibilities to be performed by the City's Data Conversion Expert:

1. Act as the primary contact for CityView Data Conversion Specialist
2. Acquire knowledge from the CityView Data Conversion Specialist as analysis & mapping is performed
3. Understand the database structure through knowledge transfer and documentation provided by CityView
4. Provide file layouts, where available, for existing data sources
5. Provide data sources in an agreed to format
6. During the analysis, provide documentation pertaining to the current systems (existing user manuals, etc.) if available
7. Lead the analysis of the existing data sources as they relate to the database
8. Finalize and approve the data mapping documents once prepared and delivered by the CityView Data Conversion Specialist
9. Test and potentially accept the preliminary data conversion cut and any other subsequent data conversion cuts whether performed by CityView or the City's resources
10. In coordination with the Database Administrator, prepare any other database environments that might be required for data cuts
11. In coordination with the Database Administrator, prepare the production database for the final cut data load
12. Work in conjunction with CityView to identify and possibly resolve conversion issues by directly communicating them to the project team, CityView, users and management
13. Participate in the Go-Live preparation planning
14. Should be present for Go-Live

#### **City Technical and Advanced (Power) Users**

These resources are involved with the CityView resources to learn the report writing tool and system configuration. They *could* assist in these two functions once knowledge transfer is accomplished. Once trained they will have access to the tools to support the end users with any future configuration enhancements to the system. These resources could also work in conjunction with CityView to lead the interfaces (third party integrations) **analysis, definition and acceptance** testing. Below is a list of responsibilities to be performed by the City's Technical Experts:

1. Attend required Advanced training sessions (Configuration, Reporter Training)
2. Acquire the necessary knowledge from the CityView resources through training sessions and documentation
3. Participate in the analysis, design and acceptance testing of all interfaces to 3rd party systems (potentially)
4. Should be present for Go-Live
5. Other responsibilities depending on the degree of participation encouraged by the City

#### **City Database Administrator**

This resource will be responsible for setup and maintenance of the different databases (Testing/ Training and Production) during the initial project phase and for any subsequent requirement. Below is a list of responsibilities to be performed by the City's Database Administrator:

1. Setup the initial databases in conjunction with CityView resource(s)
2. On-going database configuration, monitoring, tuning and troubleshooting of the database environments
3. Manage production database growth
4. Provide support to the project team during the project implementation as identified in the project schedule
5. Manage the performance of the database
6. Establish and maintain database security and coordinate with application administration the application security levels
7. Include the databases in the normal backup routines and add them to the recovery management plan
8. Coordinate activities with City network and workstation administrators
9. Manage and execute database installation and upgrade patches
10. Participate in user access rights and privileges planning, definition & testing

#### **City Systems & Network Administrators**

These resources will be required to provide assistance to the project team on an as needed basis. Below is a list of responsibilities to be performed by the City's Systems & Network Administrators:

1. Prepare servers for initial software setup and configuration
2. Provide setup of servers and provide network connectivity
3. Setup required peripherals for the different environments
4. Provide setup of clients' workstations – deploy ClickOnce package for central deployment of CityView Configuration Console (not required to touch individual workstations)
5. Setup testing environments as requested by the City's Project Manager
6. Participate in Go-Live preparation tests
7. Should be present for Go-Live

#### **City End Users**

These resources will be trained on the proposed Modules and components. Below is a list of responsibilities to be performed by the City's End Users:

1. Attend and actively participate in the appropriate training sessions provided by CityView
2. Understand existing business processes as well as the project scope at a reasonable level of detail
3. Have good Windows navigation skills



## VIII. Schedule

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The project plan will be defined by the Project Managers as an initial step in the project.

## IX. Project Acceptance

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After delivery of the fully configured solution, we expect the City to undertake acceptance testing using self-generated testing scenarios. Should the testing identify any defects, CityView will provide in-scope fixes at no additional charge in parallel to, or immediately subsequent to, the acceptance testing.

After all fixes deemed essential for go-live are provided and retested, the code will be frozen and deployment will commence. Provided the acceptance criteria have been met, the City will be asked to formally accept the delivered solution for Go-live. Following go-live the CityView project team will work with the City to record any known issues. The project team is responsible for the resolution of these known issues. 30 days after Go Live CityView will request a formal letter of acceptance that substantiates the product has been delivered and is being used successfully in a live, production environment to accept permit applications, generate fees, record fee payments and generate correspondence associated with permit and license processing.

During the first 4 weeks after go-live, the project team will begin to familiarize and transition the project to the Technical Support group. At the end of 6 weeks the Project Manager will arrange a formal hand-off involving the City, the CityView Project Manager and the CityView Support group formalizing the transition of any new defects, bugs and support issues to the Support team.

## X. Change Order Management

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To ensure timely and effective delivery of the project, the scope will be tightly managed. Project change control procedures will be reviewed with the team at the beginning of the project to ensure that they are clearly understood. This review helps establish a common understanding of the need for project change control and the mechanics for implementing any changes to the scope of the project. Any alterations to the project scope, budget, or schedule will be documented and authorized via the Change Control process.

A Change Control refers to any modification and/or new development deviating from the baseline established in the Statement of Work and Scope Document. It includes changes to the software, database, training, consulting services, or related processes. Each modification (or group of modifications) to the Contract, Statement of Work, or Scope Document must be documented and approved by a Change Control Form. All potential changes are compared against the project baseline in terms of functionality, schedule, cost, upgrade capability, maintainability and resources. Change Control requests can be raised by any member of the CityView or City Project Teams.

The following steps will be followed with any changes to the baseline system:

- The change control process will begin with a team member identifying a function or design alternative not already identified as part of the baseline system or a function that is part of the baseline but because of design issues may impact cost, schedule, or resources
- The person requesting the change will complete a Change Control Form and forward it to the appropriate Project Manager to determine cost, resources, and schedule impact, and the PM will forward the request on to their counter-part. Once these are determined, approval by the CityView Project Manager and City Project Manager is required.
- Once approved (or denied), the change request is entered into the change control log and is placed on the agenda of the next Joint PM meeting

Any impact to the cost, schedule and/or resources will be elevated to City Project Sponsor and CityView Project Manager for their review. The Change Order Management process is detailed in Section XI of Schedule D of the Services Agreement.

**Sample Change Order Document**

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CHANGE ORDER DESCRIPTION			
Request Date:		Change #:	
Client / Project:			
Requestor:		Created By	
Description of the Requested Change:			
List of attached documents:			
Impact Assessment: Estimated impact to budget, work effort and schedule			
Total Estimated Cost:		Planned Delivery Date:	
Payment Terms:			

CHANGE ORDER APPROVAL			
Comments By:		Date:	
Comments:			
	Print Name	Signature	Date
Client PM:			
Client Executive:			
CityView PM:			
CityView Executive:			

## XI. Issues & Problem Resolution

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An issue refers to any matter that requires someone to make a decision, and about which no agreement has been reached or can be routinely reached. Typically, issues impede project progress until they are resolved. Change Control items may become issues if they're not dealt with quickly, but Change Control items are specific to the process of authorizing design changes that impact scope, schedule or budget whereas issues can be related to anything about the project that needs to be decided.

The CityView Project Manager will maintain an issue log and will assign responsibility for the resolution of project issues and reports progress to City's Project Manager and the CityView Project Team. Any Project Manager or team member can submit an issue for logging and resolution. Most project issues are expected to be resolved within the overall Project Team. If the issues are not resolved to the satisfaction of the Project Team, they may need to be escalated to the Project Executive Sponsor or appropriate level.

Typical project situations requiring escalation include conflicting resource demands threatening project staffing, group dependencies not being met, scope disagreements and issues with functionality of the project's deliverables nearing release time.

### **XII Escalation Process:**

CityView escalation levels in the order listed below:

1. Project Manager
2. VP, Professional Services
3. Project Sponsor

City escalation levels in the order listed below:

1. Project Manager
2. Steering Committee
3. Executive Sponsor

## XII. Matrix of Requirements

CityView's updated RFP responses to RFP 1617-24 ERP Software Suite - Specifications, updated in October 2017, are provided hereto and attached herein by reference. The following table presents modified responses to those requirements and supersedes the responses of February 13, 2017 for the purposes of the Statement of Work.

4.19 - Master Address			Master Address			
Number	Application Requirements	Priority	Availability	Cost	Required Product(s)	Comments
1	<b>General Requirements</b>					
2	System is the master record for all City addresses, rooted in a spatial database, and provides all address data to the City's other systems.	H	Y		CityView Property Information	
3	System's master address / geo-database is a centralized geo-database that is integrated with all other ERP module areas proposed which contain parcel, address and / or owner information (please use comments section to identify those which are integrated and those which are not integrated)	H	Y		CityView Property Information	Note - our assumption for all requirements - CityView's Property Integration is used to consume Parcel, Address and Owner data from the City's main parcel source, typically GIS, and the CityView data is updated from the City's main source on a frequency defined by the City

4	All other system modules which track information related to parcel numbers, addresses or other asset ID schemes allow the user to specify the parcel number, address, or asset ID in the transaction / information entered.	H	Y		CityView Property Information	
5	The street index includes address ranges for each street within the City	H	Y		CityView Property Information	As CityView will undoubtedly be consuming the property data from an external source (like GIS); therefore, it's not clear why this is required. Every address will come in from GIS; users won't typically be manually (free) typing street addresses such that verification against that range is necessary. If it is required for some reason, then we can put a start and end address attribute into our Street lookup table, but it would have to be manually updated after the initial data load (for new streets) because our routine load from GIS does not refresh that lookup table.
6	System provides the ability to associate multiple addresses with a parcel	H	Y		CityView Property Information	

7	System provides the ability to associate multiple parcels with an address	H	N		Not available	Workaround is the location description is put the parcel number. So say you had 123 Main Street and it was on parcel 00-100-0011 and 00-100-0012. Then we would create two addresses: 123 Main Street (00-100-0011) and 123 Main Street (00-100-0012). The user would then have to know which one they wanted to pick when they typed 123 Main Street in the auto-suggester because two are going to pop up and they'd have to know the correct parcel number in order to choose between them.
8	System provides alerts for addresses and for property owners. System's master address function is integrated to all other system modules receiving alerts created in that module and displaying them to the other modules, and allowing changes to the alerts within other modules.	H	Y		CityView Property Information	
9	System includes standard functionality to "attach" electronic documents to addresses, parcels or owners through integration with Laserfiche.	H	Y		CityView Property Information	



10	When transactional changes are identified (new parcel, split, combine) the system has the ability to automatically notify various staff (configurable) of the change.	M	Y		CityView Property Information	Theoretically, yes. We can trigger an email off of virtually any change. It's unclear whether the list of staff and agencies would change on a case by case basis. Also, if the assumption is we'll be running our standard property integration routine to synchronize with an external, authoritative source such as GIS or assessor, then some changes are occurring at a database level and business rules won't be firing to send off emails during that process.
11	System provides the capability to create a "house account" which represents the parent "building" record for other "apartment" address records	M	Y		CityView Property Information	
12	System's alert function integrates house accounts to other address records, where an alert on a house address places an alert on the (sub) apartment account.	M	Y		CityView Property Information	Address Alerts in CityView are tied to the parent Parcel record, so any alert on the Parcel will be visible for all addresses on that Parcel.
13	System provides ability to transfer all parcel and/or address information from a temporary parcel identification number and/or address to a permanent number, including all related	H	Y		CityView Property Information	

	license, permit and other transactional information					
14	The system will support a single customer record that is not duplicated within the system.	H	Y		CityView Property Information	
15	The system will support a single parcel record that is not duplicated within the system.	H	Y		CityView Property Information	
16	Ability to support a standard naming convention including segments for all streets and addresses	H	Y		CityView Property Information	
17	System tracks parcel and property information in a database accessible via common database tools (e.g. ODBC)	H	Y		CityView Property Information	
18	System is capable of integrating to the City's ESRI GIS to synchronize property information (e.g. parcel, street name, etc.) and for spatial displays and queries	H	Y		CityView Property Information	

19	System provides referential integrity to the parcel database at the system database level (i.e. not via the client application)	H	Y		CityView Property Information	
20	System can interface with Cleveland County's parcel database. Potentially live in the future.	M	M	\$9,636.00	CityView Property Information	Cost estimate assumes one source of parcel data for the parcel interface. Integration estimate is included with our proposal. Subject to discussion of requirements. No longer required as part of integration.
21	System can interface with the City's Public Safety system (Tyler/New World) to receive emergency notifications on parcels.	M	M	\$9,636.00	CityView Property Information	Integration estimate is included with our proposal. Subject to discussion of requirements.
22	System can interface with the City's enterprise asset management system (Cityworks) to record notifications on address or asset. (such as a broken water main)	M		\$9,636	CityView Property Information	Subject to discussion of requirements. Optional. City will issue a change order if required.

23	System can identify legally subdivided parcels to ensure that the parcels have been through the City's subdivision process. The Permitting module must be able to Flag/alert on an illegally subdivided parcel so that a building permit will not be issued. Flags must not be lost during update from County records unless specific criteria are met (plat approved by City Council).	M	Y		CityView Property Information	
24	Capacity to integrate changes to parcels/ ownership, both spatial and tabular, received from county while maintaining legal status and any alerts.	H	Y		CityView Property Information	

25	If an address is created that is not associated with a parcel, designated users will be alerted with follow-up alerts every 3 months until relationship to a specific parcel is made.	H	Y	CityView Property Information	Assumption is that the City does not have the Parcel Number from the assessor yet. CityView provides a Temp Address and Temp Parcel Number fields for exactly this reason. If someone needs to pull a permit at a particular address and the Parcel isn't in the system, they do not need to "create an Address". They just need to enter the Address into the Temp Address field, and then this will all be reconciled after the Parcel & Address data has been refreshed.
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4.5 - Business License			Business Licensing			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	<b>Software Requirements</b>					
2	System provides functionality to allow for remote entry of business license renewal applications over the Web, by applicants, as well as provide functionality to take payment for the renewal	M	Y		CityView Business Licensing	
3	System provides the ability to apply and pay for a new business license online.	L	Y		CityView Business Licensing	

4	System provides ability to assign user-defined business license codes to a business to identify the License Type.	H	Y		CityView Business Licensing	Business Classifications are assigned to the business and these can have codes
5	Ability to have multiple license type codes per business	H	Y		CityView Business Licensing	Multiple Classifications can be assigned to a business
6	<b>Account Financial Management</b>					
7	System provides configurable business license fee calculation tools that accommodate fees based on a combination of multiple components (e.g., fixed amounts, per unit amounts, minimums and maximums).	H	Y		CityView Business Licensing	
8	Ability to have license periods based on the date of the original application (i.e. different end dates), not necessarily a single annual cycle	H	Y		CityView Business Licensing	
9	System provides configurable fee calculation tools that can automatically create partial year pro-rations.	H	Y		CityView Business Licensing	
10	Ability to automatically determine fees and expiration dates from license type and fee codes.	H	Y		CityView Business Licensing	
11	Ability to exempt a business from a fee,	L	Y		CityView Business Licensing	

	either permanently or temporarily					
12	Ability to automatically assign penalties for late payment.	M	Y		CityView Business Licensing	
13	Ability to override fees and penalty assessments.	H	Y		CityView Business Licensing	
14	Ability to create additional charges on an existing license	H	Y		CityView Business Licensing	
15	Ability to reverse payment & apply NSF fee	H	Y		CityView Business Licensing	
16	Ability to display line items for fees on invoices.	H	Y		CityView Business Licensing	
17	Ability to revoke licenses and track revoked licenses.	M	Y		CityView Business Licensing	
18	<b>Workflow and Approvals</b>					
19	System provides a highly configurable workflow engine that allows for multiple-step routing of business license applications, based on license type and approvers	M	Y		CityView Business Licensing	
20	System provide "tickler" notification functionality on set parameters to ensure timely, efficient follow-up (e.g. a reminder for business license expirations)	M	Y		CityView Business Licensing	
21	<b>Printing and License Generation</b>					

22	Ability to prevent licensing until all related fees are paid off	H	Y		CityView Business Licensing	
23	Ability to provide for user defined print formats for licenses and renewal forms. Format to be determined by type of license	H	Y		CityView Business Licensing	CityView uses a MS Word Add-in for configuration of letter (form) templates, together with all the formatting and editing capability of Word. MS Word Add-In included in proposal.
24	Ability to print licenses and renewal notices on editable forms	H	N		Not Available	Editable forms are not available.
25	Ability to automatically assign license/registration numbers	H	Y		CityView Business Licensing	
26	<b>Module Integration Requirements</b>					
27	System integrates or interfaces with Microsoft Outlook or other system for scheduling appointments.	M	Y		CityView Business Licensing	Requires CityView MS Outlook Add-In. Included in our cost proposal.
28	<b>Business License module integrates with:</b>	-				
29	Accounts Payable and Purchasing modules, to confirm registration of business for all purchasing activity and to generate refunds	H	N			
30	Cash Receipt module for business license payments	H	Y		CityView Business Licensing	CityView has include its cashiering module so that payments can be processed by counter staff.



31	Community Development Permit / Inspections module, to enable permit process to confirm valid business license prior to permit approval and visa versa.	M	Y		CityView Business Licensing	
32	Utility Billing to ensure that there are no outstanding utility receivables prior to issuing a business license	M	M	\$9,636.00	CityView Business Licensing	Included in pricing worksheet.
33	Court Management software (Incode) to ensure that there are no outstanding warrants prior to issuing a business license	M	M	\$9,636.00	CityView Business Licensing	No longer required as part of project. Optional. City will issue a change order if required.
34	Electronic Citation Software (Brazos) ensure that there are no outstanding citations prior to issuing a business license	M	M	\$9,636.00	CityView Business Licensing	No longer required as part of integration. Optional. City will issue a change order if required.

35	Master Address / Parcel Management function	M	Y		CityView Business Licensing	
36	ESRI GIS system to associate a business license application or renewal with a GIS shape file and allows for viewing of other GIS layers in context of the business license location	L	Y		CityView Business Licensing	
37	Laserfiche to link supplemental documents to business licenses	L	Y		CityView Business Licensing	
38	System includes standard functionality to attach electronic documents to business license applications or renewals.	M	Y		CityView Business Licensing	

4.7 - Cash Receipting			Cashiering			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	<b>Point-of-Sale (POS) System</b>					
2	Ability to connect Point of Sale (POS) terminals to the financial system and perform extensive inquiry of customer account information	H			Master Address	Not included in CityView proposal.
3	Ability to quickly access a menu of receivable types when accepting payments over-the-counter.	H			Master Address	Not applicable

4	Ability to search by charge code/description when entering in a transaction.	H			Master Address	Not applicable
5	Ability to limit the list of AR and charge codes available based on the user's location.	H			Master Address	Not applicable
6	Ability to enter cash by denomination on an individual transaction.	M			Master Address	Not applicable
7	Ability to calculate the amount of change due back from amount tendered.	H			Master Address	Not applicable
8	Ability to void all or part of a transaction independent of batch status.	H			Master Address	Not applicable
9	Ability to image checks and associated attachments.	M			Master Address	Not applicable
10	<b>Payment and Receipt Processing</b>					
11	Ability to define batch payment creation (electronic checks, over the counter, mail, etc.).	H			Master Address	Not applicable
12	Ability to print customer name, customer address and operator on receipts.	H			Master Address	Not applicable
13	Ability to print user configurable comments and messages on the receipt.	H			Master Address	Not applicable
14	Ability to see the full account description when processing a receipt.	H			Master Address	Not applicable

15	Ability to have an unlimited number of detail lines per receipt	H			Master Address	Not applicable
16	Ability to take receipts offline in the system when the main system is non operational (down for maintenance, etc.) and upload after the fact.	M			Master Address	Not applicable
17	Ability to specify the sequence in which receipts are processed against outstanding receivables with the option of overriding the sequence. This would include outstanding receivables across all modules.	H			Master Address	Not applicable
18	Ability to prepare receipts for departments without a point of sale terminal.	M			Master Address	Not applicable
19	Ability to designate whether a transaction was post-marked on-time (i.e., use of effective dates) to avoid errors with interest charges.	M			Master Address	Not applicable
20	Ability to place receipts on "hold" for subsequent release by finance staff.	M			Master Address	Not applicable
21	Ability to release "held" receipts based on user authorization.	M			Master Address	Not applicable

22	Ability to have receipt number ranges or receipt number formats to be associated to a department or user.	M			Master Address	Not applicable
23	Ability to have receipts remain fully editable until the time they are printed and posted.	H			Master Address	Not applicable
24	Ability to use Optical Character Recognition (OCR), scan lines, or bar code readers for scanning receipts. Ability for user to override amount received as necessary.	H			Master Address	Not applicable
25	Ability to apply a payment to multiple invoices or G/L accounts.	H			Master Address	Not applicable
26	Ability to accept partial payments to reduce receivable amounts.	H			Master Address	Not applicable
27	Ability to process credit memos.	H			Master Address	Not applicable
28	Ability to support multiple depository bank accounts and create separate bank deposit slips.	H			Master Address	Not applicable
29	Ability to automatically allocate receipts to the appropriate GL account.	H			Master Address	Not applicable
30	Ability to enter comments (to be used internally) at time of receipt.	H			Master Address	Not applicable

31	Ability to define multiple payment types (i.e., EFT, money order) on the same transaction.	H			Master Address	Not applicable
32	Ability to reprint duplicate receipts.	H			Master Address	Not applicable
33	Ability to override who is making the payment versus the name on the account when processing a payment.	H			Master Address	Not applicable
34	Ability to flag an account that has a history of bad checks.	H			Master Address	Not applicable
35	System has the ability to process online payments, both one-time and recurring.	H			Master Address	Not applicable
36	<b>Deposits</b>					
37	Ability for customers to prepay account balances.	H			Master Address	Not applicable
38	Ability to process direct deposits and match them with the relevant customer invoice.	H			Master Address	Not applicable
39	Ability to cancel any direct deposit payment.	H			Master Address	Not applicable
40	Ability to enter a reason code to enter a reason for canceling the direct deposit payment.	H			Master Address	Not applicable
41	<b>Credit Card Processing</b>					

42	Solution conforms to Payment Card Industry (PCI) standards and has received PA-DSS certification.	H	Y		CityView Cashiering	CityView integrates with several Online Payment Processors (Payment Gateways) including Authorize.Net that are PCI compliant where the payments are processed. No Credit Card information is stored within CityView.
43	Ability to generate credit card authorizations.	H	Y		CityView Cashiering	Online payments only.
44	Ability to print credit card receipts with authorization number.	H			Master Address	Not applicable
45	Ability to support credit card refunds.	H			Master Address	Not applicable
46	Ability to support separate Merchant ID for each physical location for accepting credit cards.	H			Master Address	Not applicable
47	<b>Closing, Balancing and Depositing</b>					
48	Ability to close registers at the end of the day to a holding area until they are later approved and posted. Summary information is posted to the G/L with drill down capabilities and the detail receipt information posted to the individual modules.	H			Master Address	Not applicable
49	Ability to distinguish among cash, check or credit card payment and to provide separate totals at days end to assist in balancing the drawer.	H			Master Address	Not applicable

50	Ability to print deposit ticket with appropriate deposit reconciliation code.	H			Master Address	Not applicable
51	Ability to assign a bank bag number to each deposit slip.	M			Master Address	Not applicable
52	Ability to process NSF checks as a reversal to the original revenue posting.	H			Master Address	Not applicable
53	<b>Interfaces</b>					
54	Ability to provide Centralized Cashiering functionality that will receipt payments and update the appropriate receivable accounts in the other ERP modules (e.g., misc. billing/AR, utility billing, permits/inspections, business license, parks & recreation, fuel stations)	H			Master Address	Not applicable
55	Ability to accept overpayments and store a credit balance in the appropriate account/customer record or interface to Accounts Payable to generate a check for the difference between what was due and what was paid.	H			Master Address	Not applicable
56	Ability to establish and use validations from the G/L chart of accounts.	M			Master Address	Not applicable



4.14 - General and Technical			General & Technical			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	<b>Documentation</b>					
2	Ability to provide online software documentation for all software application modules.	H	Y		CityView	Documentation is available through CityView Connect, our on-line content management system. This is your source for the most updated CityView information any time. You can search for a particular topic or browse through the menu items. The Product Training Guides will step you through a full training session for a particular topic.
3	Ability to provide an on-line tutorials.	M	Y		CityView	
4	Ability to provide all vendor supplied software that is accompanied by sufficient documentation to enable comprehensive understanding of its internal structure and operating procedures.	H	Y		CityView	

5	Ability to provide Release Notes that document changes between version releases. These documents must be written in a fashion that is easily understandable by the end user. The format of the Release Notes must be conducive to analyzing which changes effect the organization.	H	Y		CityView	CityView Connect includes details on new releases and the added functionality they contain. With each CityView release, detailed Release Notes documents the changes to the release both for new features, feature changes, and bug fixes. Any exceptions or changes for installation and upgrade are also noted.
6	<b>Help System</b>					
7	Ability to provide a menu-driven system with comprehensive utility and "help" screen capabilities.	H	Y		CityView	CityView provides data tips on all features and fields, and additional help is provided through CityView Connect, which is accessible directly from within Workspace
8	Ability to provide field-level and screen level help throughout the application that can be customized by trained users.	L	N		Not available	
9	<b>Online Vendor Customer Support Portal</b>					
10	Ability to provide a portal solution to the access various on-line information regarding the vendor's solution including: * Knowledge base of user documentation * Release notes * Other documentation	H	Y		CityView	

<p>11</p>	<p>Ability to provide a portal solution that allows users to submit enhancement requests and system bugs on-line that allows for tracking of progress on individual items.</p>	<p>H</p>	<p>Y</p>		<p>CityView</p>	<p>Within all CityView modules you can submit Feedback, which gets routed directly into our CRM software and automatically is assigned to an appropriate Support agent. That is then visible to you through CityView Connect by clicking on a button within the CityView module. From CityView Desktop, you simply click the Feedback Status button to access the current status of your feedback items at any time in the future. This unique feature is <i>very handy, highly visible and interactive.</i></p>
<p>12</p>	<p>Ability to provide a portal solution that allows users to query on specific items that they have submitted.</p>	<p>H</p>	<p>Y</p>		<p>CityView</p>	<p>Within all CityView modules you can submit Feedback, which gets routed directly into our CRM software and automatically is assigned to an appropriate Support agent. That is then visible to you through CityView Connect by clicking on a button within the CityView module. From CityView Workspace, you simply click the Feedback Status button to access the current status of your feedback items at any time in the future. This unique feature is</p>

						<i>very handy, highly visible and interactive.</i>
13	<b>Error Processing</b>					
14	Ability to log error messages and store for future review and reporting. Error messages should be meaningful to the user versus being of a technical nature.	H	Y		CityView	Validation rules can be configured that provide users with meaningful error messages - system provided messages are not configurable but are logged for future review and reporting
15	Ability to allow the system administrator or designated end-users to view the error log in the user interface to provide support for the users.	H	Y		CityView	
16	Ability to perform error checking to verify the quality of the information being entered and that system balances are maintained.	H	Y		CityView	Validation rules can be configured that ensure data integrity, and the use of picklists ensure the quality of the data being entered

17	<b>Forms Processing</b>					
18	Ability to provide an integrated Forms Solution that allows for custom develop various forms within the system that can be integrated with all modules (e.g. utility bills, letters, etc.)	H	Y		CityView	For Letter/Forms Administration and creation CityView has included CityView MS Word Add-in allows users with designated “configuration” rights to modify and create letter templates for use within the CityView business processes. This Add-in is a rich editing environment allowing users to work in a product that they are already very familiar with: Microsoft Word. The MS Word Add-In is compatible with Office 2010 and Office 2013.
19	Ability for trained users to customize forms without the need for Vendor assistance. Customized forms will be able to be incorporated into future vendor releases.	M	Y		CityView	For Letter/Forms Administration and creation CityView has included CityView MS Word Add-in allows users with designated “configuration” rights to modify and create letter templates for use within the CityView business processes. This Add-in is a rich editing environment allowing users to work in a product that they are already very familiar with: Microsoft Word. The MS Word Add-In is compatible with Office 2010 and Office 2013.
20	<b>Security and Auditing</b>					

21	Ability to use Active Directory (AD) as the source for security credentials. AD shall be used as the primary authentication level for user sign-on into the system.	H	Y		CityView	
22	Ability to limit access to, or updating of, the information stored on the computer through use of a password security system at the terminal, operator, and menu application levels. Security should additionally revolve around add/update/view/delete access at the transaction level.	H	Y		CityView	CityView software does not control access to the terminal. If you want the terminal to lock in certain situations, like if a user leaves their desktop machine idle or if an inspector leaves their iPad idle, then those devices and O/S have features to lock the devices. The software controls access to the software itself (initial login) as well as every feature within the software based on organization roles (and user overrides, where necessary).
23	Ability to deliver security in a layered format (i.e. data, database, application, network physical).	H	Y		CityView	
24	Ability to log all file changes in a detailed permanent audit trail, by user ID.	H	Y		CityView	
25	Ability to provide role based and class based system security; must be configurable and must establish rules for editing.	H	Y		CityView	Through organizational role security settings.
26	Ability for an administrator to change	H	Y		CityView	

	a user's status to inactive.					
27	Ability to support electronic/digital signatures.	H	T		CityView	Digital signatures are applied using Bluebeam Revu, in the plans review process. A certain number of licenses have been included with this proposal as it is an integral part of our Electronic Plans Review solution. For everyday signatures e.g. signing a permit, most customers use either a signature pad (CityView Supports 3 models of signature pad), or automatically place an image of the employees signature on the letter.
28	Ability to support the encryption of data communications between the client and the server.	H	Y		CityView	
29	Ability to define specific user access to processes, icons, screens, reports, records and code tables based on individual and group profiles.	H	Y		CityView	A users ability to access processes, screens, reports, records and tables is controlled through their security organizational role
30	Ability to apply security restrictions to report writer utilities.	H	Y		CityView	
31	Ability to apply security restrictions to global update functions.	H	Y		CityView	
32	Ability to apply security restrictions to all ODBC and OLE activities.	H	Y		CityView	

33	Ability to differentiate access between ability to view versus update for specific data elements.	H	Y		CityView	
34	Ability to restrict the accessing of security configuration and audit logs.	H	Y		CityView	
35	Standard system functionality restricts System Administrator account from performing transactions on the system.	H	Y		CityView	
36	Ability to provide single sign on with any third-party products proposed.	M	F		CityView	Only certain Single sign-on technologies are currently supported by CityView. To be determined because we are currently implementing this for another customer.
37	Ability to require both user ID and password to access system functionality.	H	Y		CityView	
38	Ability to provide password security which will automatically restrict access after a specified number of erroneous attempts to access.	H	Y		CityView	CityView integrates with Active Directory so users don't typically have to log in. If they are logged into their machine and they start CityView Desktop, they will be logged in automatically with their Windows credentials.
39	Ability to ensure that system password settings are "customizable" (based upon the nature of threats to the data residing in the system. Management should be able to set the complexity levels for	H	Y		CityView	Active Directory.



	passwords as appropriate.)					
40	Ability to ensure that system password expiration settings are "flexible" (higher privileged accounts should have passwords which expire every 30-60 days while lesser privileged accounts expire every 60-90 days).	H	Y		CityView	Active Directory.
41	Ability to reject a password if it does not meet established password editing & checking criteria that help ensure that the password will not be one that is easily guessed.	M	Y		CityView	Active Directory.
42	Ability to monitor concurrent users to the database.	H	Y		CityView	
43	Ability to automatically log off an inactive user.	H	Y		CityView	
44	Ability to track the relevant audit trails and allow "drill down to the source" functionality to review the history of all changes to the data.	H	Y		CityView	Audit tracks inserts, updates and deletes and records previous value of the field
45	Ability to allow management to review the system administrator's activities.	H	Y		CityView	

46	Ability to trace transactions through the system using audit reports.	H	Y		CityView	
47	<b>Archiving</b>					
48	Ability to provide an archiving solution for all data elements which provide configuration options for archiving schedules.	M	T		CityView	Archiving not managed directly by CityView. This would be managed by the City at the database level using SQL server tools or using Laserfiche archival tools for documentation.
49	System design provides an “archive” environment for historical data.	M	Y		CityView	As with # 48
50	Ability to use the system live while a backup/archive process is running (i.e. the system must be available 24/7 for read/write)	H	Y		CityView	As with # 48
51	<b>Performance</b>					
52	System actions (i.e. screen changes) must be completed within 3 seconds within initiation (i.e. clicking)	M	Y		CityView	On average, yes.
53	<b>Integration and Interfacing</b>					
54	Ability to import / export non-configuration data (e.g. transaction data) to/from a common data interchange format (e.g. ASCII, XML, etc.)	H	Y		CityView	
55	Ability to import / export configuration data to/from a common data interchange format (e.g. ASCII, XML, etc.)	H	Y		CityView	

56	Ability for all data import functions in the system to observe all pre-set data validation rules to enforce data / database integrity	H	Y		CityView	
57	Ability to support web services as a means of real-time data exchange with other applications.	H	Y		CityView	
58	Ability to import data.	H	Y		CityView	
59	Ability to apply security restrictions to all imports performed by a user.	H	Y		CityView	
60	Ability to attach multiple documents / images to a single ERP transaction and have that attachment flow with the transaction throughout it's life in the ERP (i.e. requisition to purchase order).	H	Y		CityView	Where applicable in the CityView modules.
61	System provides a standard interface to:	-			CityView	
62	Tyler Incode (court receivables)	M	M	\$9,636.00	CityView	Optional. City will issue a change order if required.
63	Tyler Brazos (citations)	M	Y	\$9,636.00	CityView	Optional. City will issue a change order if required.
64	Tyler/New World Public Safety (Fire Inspections)	M	Y	\$9,636.00	CityView	Cost estimate included in proposal.
65	Badger (water meters)	M	N		Master Address	Not Applicable.
66	Faster (fleet management)	M	N		Master Address	Not Applicable.
67	Fuel Master (fleet fluid management)	M	N		Master Address	Not Applicable.
68	CityWorks	M	M	\$9,636.00	CityView	Optional. City will issue a change order if required.

69	Granicus Legistar	M	M	\$9,636.00	CityView	No longer required.
70	Esri ArcGIS	M	Y		CityView	
71	Cisco VOIP	M	N		Not available	Typically would interact with Selectron IVR.
72	Selectron IVR	M	Y		CityView	
73	Selectron Mobile Field Inspection	L	N		Master Address	CityView Mobile applications.
74	Laserfiche (electronic content management)	M	T		CityView	
75	InfoWorks ICM Sewer Distribution Model	M			Master Address	Not Applicable.
76	Innoprise Water Distribution Model	M			Master Address	Not Applicable.
77	Parks and Recreation	M			Master Address	Not Applicable.
78	The Golf System (pro shop POS)	M			Master Address	Not Applicable.
79	GovQA / WebQA	L	M	\$9,636.00	CityView	No longer required.
80	Reverse 911	L			Master Address	Not Applicable.
81	<b>System Installation</b>					
82	Ability to provide capabilities for system to be deployed with an agentless client (e.g. web-based user interface)	L	Y		CityView	
83	Ability to push software installation and updates via Active Directory if software uses a "thick" client	M	N		CityView	Not Applicable - web based client
84	Ability to push and install software updates to workstations without requiring elevated permissions (workstation administrator)	M	Y		CityView	

85	Ability to retain user preferences when installing new releases of the vendor's software.	H	Y		CityView	
86	Ability to support the following environments during system implementation (e.g. DEV, TEST, TRAIN, LIVE)	H	Y		CityView	Short of using SQL tools to manage this, our process of creating a DEV, TEST, TRAIN environment is to take a copy of LIVE, so the amount of data would be identical. CityView Support is provided for a Live and Test environments. City will have to support additional environments independently
87	Ability to provide a configuration management solution to allow for easy management of moving data and programs between the various environments.	M	Y		CityView	Tools are present to facilitate moving "programs" between the various environments. Data is explained above.
88	<b>System Operations and Administration</b>					
89	Ability for application to be operated in a hosted environment (ASP option).	L	F		CityView	
90	Ability to supply various utilities to facilitate file maintenance, data manipulation, and backup/recovery. These may include, but are not limited to, sorts, file generators, and file-to-file copying utilities.	M	N		CityView	All such utilities would be third-party, e.g. part of the SQL Management Studio tool set, or RedGate, or equivalent.

91	Ability for system to include the appropriate administrative and programming toolsets to configure, modify and customize the software applications.	H	Y		CityView	
92	Ability for the software vendor(s) to have the facilities to diagnose and maintain the application software and database remotely.	H	Y		CityView	
93	Ability for the vendor to provide ongoing software maintenance and new software releases periodically to meet all State and Federal requirements at no additional charge.	H	M		CityView	CityView provides ongoing software maintenance and new software releases as part of the annual software maintenance and support agreement - it is impossible to say what future State or Federal requirements may need to be met, so additional costs for this may apply.
94	Ability to remain on-line and inquire into multiple applications for extended periods of time.	L	Y		CityView	
95	Ability to scroll forward and back during inquiry.	H	Y		CityView	
96	<b>Technical Standards &amp; Preferences - Applies to ALL products being proposed by the vendor.</b>					
97	Ability to provide system components that operate under .NET solution environment.	M	Y		CityView	The CityView Architecture is based on a Multi-Tiered, Service Oriented Architecture using Microsoft and HTML5 Technologies. CityView

						is designed with industry-leading technologies, using HTML5, Microsoft's .NET 4.6, JQueryMobile and Visual Studio.NET and embedding multiple frameworks for streamlined integrations with third party applications.
98	Web based components are written in HTML5.	M	Y		CityView	CityView Workspace and CityView Mobile are HTML5. CityView Portal is Visual Studio.NET
99	Ability to provide a system that operates under a Service Oriented Architecture (SOA) environment.	L	Y		CityView	
100	Ability to apply effort to use existing computers and printers.	M	Y		CityView	As long as systems meet minimum requirements.
101	Ability to support virtualization via VMWare.	M	Y		CityView	
102	<b>Data Management</b>					
103	Ability for all informational data elements tracked to be maintained in a (SQL Server) ODBC-compliant integrated database to allow efficient data sharing, customized report writing, and automated posting.	H	Y		CityView	

104	Ability for system to interact with the relational database and offer robust querying and online analysis tools that do not require programming knowledge, allowing users to pick and choose fields, link tables, and establish criteria.	H	Y		CityView	
105	Ability to log all on-line input and provide the ability to recover the data files to the point of the last transaction in the event of a programming or system failure. This process should minimize user involvement.	H	T		CityView	Our proposal is for an on-premises solution. Expectation is City adopts best practices standard for database backups and security standards. CityView does commit data to database without the need for users to click a "save" button
106	Ability to access tables from other systems using both SQL and non-SQL data sources.	H	Y		CityView	
107	Ability to support referential integrity through the use of data definitions.	H	Y		CityView	
108	Ability to create database integrity constraints that match the business rules enforced by the system through the modules code.	H	Y		CityView	
109	Ability for the database to allow for data access in a seamless manner even though the data may physically reside on another server.	H	Y		CityView	
110	<b>User Interface</b>					



111	Ability for system to ensure that all features and functions within the application will be available and operate identically regardless of the user interface that is used (i.e., web-based or client-based).	H	Y		CityView	Bearing in mind that each of our interfaces are tailored to the needs of their target audience, the user interfaces are designed specifically for the public, the inspector in the field, and the staff person back at the office. That said, if you are running one of those products on any particular compatible device, you will be able to use all of the features and functions. E.g. if you run CityView Workspace on a Surface Pro, you will have the same set of features and functions as you have running it on a full desktop PC.
112	Ability to ensure that the software applications provide functionality for or are compatible with third party industry standard (Lunar, Supernova, Zoom Text, Magic) screen magnification products to enlarge the print on the computer screen and configure print size, contrast and color selection for blind users. Please note third party product compatibility in Comment field.	L	Y		CityView	Window (and the browsers for newer UIs) provides the level of support for these technologies and we do adhere to their UI standards.

113	Ability for the software applications to provide functionality for or are compatible with third party industry standard (Hal, JAWS for Windows, Windows Eyes, etc.) screen reading software (used to operate a speech synthesizer, which voices the contents of a computer screen) for blind users. Please note third party product compatibility in Comment field.	L	Y		CityView	Window (and the browsers for newer UIs) provides the level of support for these technologies and we do adhere to their UI standards.
114	Ability for system to provide a Web-based interface that uses "point and click" device functionality to choose between pull down menus and options.	H	Y		CityView	
115	Ability for system to ensure a consistent use of command keys and screen layouts across the application.	H	Y		CityView	

116	Ability to allow any screen to be modified to use the customized terminology.	L	Y		CityView	Through CityView's extensive configuration tools modifications can be made to suite client's business needs. We do not recommend that you use the tools to make superficial (e.g. color, fonts, etc.) changes, as that will make your applications more difficult to support. The types of changes that are expected are additions of extra data fields, business rules to perform automation, required field indicators, etc. These are all modifiable through configuration tools that do not cause any implications to your future upgrades.
117	Ability to modify pull down menus and pick lists.	H	Y		CityView	
118	Ability for system to display all dollar amounts formatted with dollar signs and commas.	H	Y		CityView	
119	Public facing user interfaces (web portals, etc.) must be ADA-compliant.	H	Y		CityView	
120	Ability to configure data entry screens with custom fields.	M	Y		CityView	

121	Ability to simply create custom data entry forms.	M	Y		CityView	Assumption is not that these are additional net new forms but that they are existing forms, customized with the City's specific data entry fields laid out in City-specified order.
122	<b>Data Entry &amp; Transaction Processing</b>					
123	Ability to control entry of data to ensure user enters data into all required fields on the screen.	H	Y		CityView	
124	Ability to have data entry fields automatically default to a specific value (e.g., date fields should default to current date).	M	Y		CityView	
125	Ability to perform batch data entry of transactions with batch totals.	H	Y		CityView	Specific to business needs these exist, e.g. batch entry of certain inspection results. Not common to all areas of the application. If this is referring to management of batches in Cash reconciliation, this is supported
126	Ability for system to provide data entry transaction templates (i.e. journal entries, requisitions, etc.), with custom defined fields as a default.	H	Y		CityView	

127	Ability for system architecture to support distributed data entry by authorized users.	H	Y		CityView	Assuming this means certain users accessing the system from a remote office, then yes. Most likely the main system (excluding Portal and Mobile) will be installed inside the firewall, so the remote office will require secure access (e.g. VPN).
128	Ability to configure tabbing order on all data entry screens.	H	Y		CityView	Tabbing order is set by CityView to follow best practices for data entry. Workspace user panels that are pulled in automatically according to the workflow step the user is performing. This is configurable.
129	Ability to “auto fill” fills in field level information (e.g. – vendor name, vendor address, customer address, account name).	H	Y		CityView	Based on business rules and use of auto suggestors.
130	Ability for back-ups or other transactions in one module to not block, delay, or otherwise interfere with transactions in other modules.	H	Y		CityView	Backups of the SQL database are performed through the backup utilities that the City uses in accordance with the utilities functionality
131	Ability for the system, including complete system backup activities, to be available 24 hours a day.	H	Y		CityView	
132	System provides record locking functionality which only allow viewing, and query access to system records by users, while a user is making edits to the record.	H	Y		CityView	

133	Ability for system to provide free form comments fields for all transactions – prior to posting, after the fact (multiple un-editable comments with user stamping and date stamping)	H	Y		CityView	Where applicable in CityView. No posting per se.
134	<b>Central Document / Transaction Workflow Engine</b>					
135	Ability to provide workflow functionality, automating business processes within the system that can be controlled and managed by a trained end-user. This workflow includes routing based on roles defined in the system and assigned to each user and rules determining how a process is handled and works consistently across all module areas and user interfaces within the application.	H	Y		CityView	
136	System provides audit trail history of approvals.	H	Y		CityView	
137	Ability to set ad-hoc approval rule for individual transactions.	L	Y		CityView	
138	Ability to provide workflow functionality that is role based such that departments can perform approvals in a “person independent” manner.	H	Y		CityView	

139	Ability to provide tickler / reminder functionality throughout the system that could be set to trigger based on certain events (e.g., more than 2 weeks have passed and you are responsible for completing this step, contract is going to expire soon, etc.). Optionally, be able to trigger a standard email to be sent through Outlook.	H	Y		CityView	
140	Ability to provide the same workflow rules and engine regardless of the user interface that is used (i.e., web-based, client-based, and mobile interface).	H	Y		CityView	
141	Ability to provide workflow functionality that allows a user to enter comments justifying their approval/denial.	H	Y		CityView	
142	Ability to provide workflow functionality that allows a user to forward workflow items for a user-designated period of time to another user who will act as a surrogate in being able to review, approve and reject all workflow items in the first user's absence.	H	Y		CityView	
143	Ability to provide workflow functionality that allows for items to be put into workflow with a combination of parallel or sequential approvals.	H	Y		CityView	

144	Ability to provide workflow functionality such that supports parallel approvals.	H	Y		CityView	
145	Ability to provide workflow functionality that allows for reporting on how long each step in a workflow is taking to perform.	H	Y		CityView	
146	Ability to provide workflow functionality with the following options when reviewing an item: * Approve * Forward * Hold * Reject	H	Y		CityView	
147	Ability to provide workflow functionality that allows for notification of the results of a workflow step to be sent to a user via email or be viewable internally within the application. The type of notification (email or internal to application) can be customizable for each individual user.	H	Y		CityView	Customized per user would be considered non-standard config and would raise additional charges. Not included in proposal.
148	Ability to provide workflow functionality that allows for users receiving workflow updates via email to click on a link provided within the email that takes the user to the appropriate area within the application to perform the next steps on that workflow.	H	Y		CityView	Workflow updates of this nature are not received via email but rather as Tasks in the email (MS Outlook) application with hyperlink access from there.
149	<b>Address Management</b>					



150	Ability to support a standard naming convention including segments for all addresses within the system.	H	Y		CityView	
151	Ability to store all components of an address record in separate fields.	H	Y		CityView	
152	Ability to support a single customer record that is not duplicated within the system.	H	Y		CityView	Within CityView
153	Ability to support international address formats.	H	Y		CityView	
154	<b>Reporting and Printing</b>					
155	Ability to provide a user-configurable 'management dashboard' which allows users to identify and view key summary performance statistics from various components of the ERP system and drill into them for further detail.	H	Y		CityView	

156	System has an ad-hoc report writer with the following features:	-	Y	CityView	<p>Yes, CityView's <b>powerful</b> ad-hoc <b>report designer</b> allows users to extract precisely the information required. <b>End-user</b> ad hoc <b>needs</b> are met through CityView's <b>Desktop Reporter</b>, which provides for <b>Pivot table</b> reports, <b>Detail</b> reports and <b>Charts and graphs</b>. This reporting tool is a drag and drop ad hoc reporter allowing end-users to drag and drop fields into Rows and Columns, add filter criteria, select the content (e.g. Counts, Averages, Variances, Sums, Max, Min, Standard Deviations, Running values etc.), select how to group the data and label the groups and render the reports in CityView Desktop very quickly and professionally. Reports are rendered in <b>Microsoft SQL Server Reporting Services (SSRS)</b>, right within the CityView product. Reports can be saved for future repetitive use, <b>exported</b> to Excel, PDF and Word and printed. Charts can also be quickly generated, using drag and drop tools to drop fields into X and Y axes, Series and categories to create line graphs, Pie charts, bar graphs, areas, doughnuts and column graphs. In addition, the <i>CityView MS Word Add-in</i> allows "configuration" users to modify and create letter templates for use within the CityView business processes. This provides a <i>rich editing</i> environment that is inherently <i>user friendly</i> because it allows users to work in a product that they are already very familiar with: Microsoft Word. Letters generated from the system can be edited on the fly, in Word, and all printed letters print to PDF and are automatically attached to the CityView record, ensuring a complete record in a universally accepted and adopted format. The Word Add-In ships with a pre-defined list of letter tags that can be <i>dragged-and-dropped</i> into any letter template. You can also create your own tags and save them to the <i>tag library</i>.</p>
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157	Report Writer capability with file organization structure consistent between all application modules	H	Y		CityView	
158	Integration with all other application modules on the same processor for custom report creation	H	Y		CityView	
159	Flexible report formatting capabilities	H	Y		CityView	
160	Mailing list and label generation capability	H	Y		CityView	
161	Ability to retrieve information from multiple tables / files	H	Y		CityView	
162	Ability to specify desired subtotal breaks and totaling fields	H	Y		CityView	
163	Ability to obtain reports in different sort sequences	H	Y		CityView	
164	Ability to calculate percentages	H	Y		CityView	
165	Ability to calculate averages	H	Y		CityView	
166	Ability to make minor alterations to previously defined reports.	H	Y		CityView	
167	Ability to prepare / print reports from any accounting period and across periods.	H	Y		CityView	
168	Ability to set up menus of created reports for easy access and printing	M	Y		CityView	
169	Option available to send report to the screen, a printer, or to a file.	H	Y		CityView	

170	"Wildcard" and/or "Keyword" capability to allow easy accessing of a range of values when creating reports	H	Y		CityView	
171	Sequentially numbered pages on reports	M	Y		CityView	
172	Shows current date and reports "as of" date	M	Y		CityView	
173	Data fields include commas, decimal points (up to 4 digits), dollar signs, +/- signs, etc. and are right or left justified as appropriate	M	Y		CityView	No formatting of reports to meet 4 digit decimal points included in CityView proposal.
174	Ability to select any department (or cost center) or range(s) of departments (or cost centers) for inclusion or exclusion in/from reports	M	Y		CityView	
175	Ability to "drill down" allowing a user to begin with a summary level screen / online report and inquire on progressively more detailed (i.e., source) transactions.	H	Y		CityView	Screen only capability to access detail from summary information.
176	Ability to provide a simple, easy drill down / drill around – with minimal keystrokes.	H	Y		CityView	
177	Ability to output electronic files to all governmental entities as required by law.	H	Y		CityView	Further qualification of this requirement may be necessary
178	Ability for reports to be scheduled to run.	H	Y		CityView	
179	Ability to execute reports with an "as of" date.	H	Y		CityView	

180	Ability to allow end users to directly print reports and inquiry screens to printer, without cumbersome use of a "print queue".	H	Y		CityView	
181	Ability to allow search criteria on reports to be not-exact matches, partials, or similar (e.g., Soundex).	H	Y		CityView	
182	Ability to automatically route reports via a workflow.	L	N		Not available	
183	Ability for system to allow users to perform inquiries and searches by any field available for data entry.	H	Y		CityView	
184	Ability to reprint reports, checks, or bills with restart capability when reports, checks, or bills being printed are interrupted.	H	R		CityView	Our assumption is this applies to printing permits, licenses etc.
185	Ability to print or electronically produce check advice and deposit exports without running a check print job.	M	N		Not applicable	Not Applicable to CityView proposed functionality.
186	Ability to optionally print Accounts Payable and Payroll checks to laser printers with signatures and MICR coding (with appropriate security measures in place).	H	N		Master Address	Not Applicable to CityView proposed functionality.
187	Ability to allow formatted output to be matched to printer device characteristics without intervention by the user.	M	Y		CityView	Generally speaking, yes, but depending on the printer device some intervention may be required especially given the different printer hardware options available today

4.16 - Inspections and Code Enforcement			Code Enforcement and Inspections			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	<b>Request Management</b>					
2	System provides Web based functionality to allow inspection requests, and provides functionality to confirm with permit applicant, upon scheduling of inspection	H	Y		CityView Permits & Inspections and Code Enforcement	Through CityView Portal
3	System provides web based functionality to allow constituents to schedule inspections online.	H	Y		CityView Permits & Inspections and Code Enforcement	Through CityView Portal
4	System provides web-based constituent complaint reporting with the option of providing anonymous requests.	H	Y		CityView Permits & Inspections and Code Enforcement	Through CityView Portal
5	System provides the ability for constituents to submit inspection requests via an automated phone system that supports Cisco VOIP.	M	Y		CityView Permits & Inspections and Code Enforcement	Assume this is the Selectron IVR system.
6	System provides functionality to easily verify the appropriateness of an inspection request in terms of the sequence of inspections for a given project type.	H	Y		CityView Permits & Inspections and Code Enforcement	

7	System provides means for logging and time stamping inspection requests.	H	Y		CityView Permits & Inspections and Code Enforcement	
8	System provides means for logging and time stamping code enforcement complaint requests and assigns unique case numbers.	H	Y		CityView Permits & Inspections and Code Enforcement	
9	Service Request Management function can be linked to the master parcel (as identified by the county) so that all inspections, permits, and other activities are tied to the parcel in a single location.	H	Y		CityView Service Requests	Updated CityView proposal including Service Requests module. Updated proposal includes setup of module and two (2) custom workflows.
10	Ability for the City to define and configure a multitude of violation types (100+)	H	Y		CityView Permits & Inspections and Code Enforcement	
11	System provides the ability to change a violation type on an existing violation without having to close and reopen the case.	H	Y		CityView Permits & Inspections and Code Enforcement	
12	<b>Inspections and Investigations</b>					
13	System provides the ability to email inspection results.	H	Y		CityView Permits & Inspections and Code Enforcement	

14	System provides the ability to call constituents with an automated recording of inspection results.	H	Y		CityView Permits & Inspections and Code Enforcement	Assumption is this functionality is already supported by the City's Selectron system
15	System automatically prepares standard inspection checklist based on type of project and type of inspection.	H	Y		CityView Permits & Inspections and Code Enforcement	
16	System provides a means to establish an inspection schedule based on both recurring and non-recurring dates.	M	Y		CityView Permits & Inspections and Code Enforcement	
17	System can schedule inspections	H	Y		CityView Permits & Inspections and Code Enforcement	
18	System provides functionality for managing inspection scheduling.	H	Y		CityView Permits & Inspections and Code Enforcement	
19	System allows the generation of standard reports for a specific inspection or property or specific owners with multiple properties.	H	R		CityView Permits & Inspections and Code Enforcement	Letter templates for inspection reports are created using CityView's MS Word Add-in. In case of specific owners with multiple properties the assumption is the permit has multiple properties associated with it and the report is sent to the Property Owner of those properties.
20	System allows multiple cases to be associated with a single property.	H	Y		CityView Permits & Inspections and Code Enforcement	



21	System allows multiple violations to be associated with a single case.	H	Y		CityView Permits & Inspections and Code Enforcement	
22	System provides for the interface of remote inspection devices, allowing inspectors to enter findings and inquire on project / case information while at the site.	H	Y		CityView Permits & Inspections and Code Enforcement	
23	System provides a method of preparing agendas and backup documentation for cases reaching Court, Code Enforcement Board or similar authority	L	Y		CityView Permits & Inspections and Code Enforcement	
24	System accepts results and narrative information for daily inspections.	H	Y		CityView Permits & Inspections and Code Enforcement	
25	System maintains historical information about each case and inspection.	H	Y		CityView Permits & Inspections and Code Enforcement	
26	System provides an inspection request management functionality that is integrated to the ESRI GIS system, providing automated routing and location information	L	Y		CityView Permits & Inspections and Code Enforcement	
27	System provides ability to report on all inspection reports for a project	H	R		CityView Permits & Code Enforcement	

28	System provides tools for users to create custom reports through a report writer using key fields.	H	Y		CityView	CityView Reporter (ad hoc reporter writer)
29	System can report on inspection revenues by type.	H	R		CityView Code Enforcement	
30	System can accommodate restaurant inspections	H	Y		CityView Code Enforcement	Recurring restaurant inspections are handled through CityView Code Enforcement.
31	System can accommodate health inspections	L	Y		CityView Code Enforcement	
32	System can notify external utilities (i.e. Oklahoma Natural Gas, Oklahoma Gas and Electric, Oklahoma Electric Cooperative) of approved inspections	M	Y		CityView Permits	
33	System provides functionality for mobile field inspections, including mobile applications, that can be supported on a 3G cellular network.	H	Y		CityView Permits & Inspections and Code Enforcement	
34	System provides functionality for communication of inspection results (configurable for owner, renter, complainant, contractor, etc.) via email communication.	H	Y		CityView Permits & Inspections and Code Enforcement	
35	System provides a method of assigning a case to an inspector for follow-up. Where appropriate, allow demand reports to be run, sorted by inspector.	H	Y		CityView Permits & Inspections and Code Enforcement	

36	Code/Ordinance Enforcement					
37	System automatically prompts action on re-inspections/re-calls.	H	Y		CityView Code Enforcement	
38	System can provide notifications to responsible parties and establish user-defined follow-up inspection program to ensure corrections are made.	H	Y		CityView Code Enforcement	
39	System provides a quick review of an inspection status of any violation.	H	Y		CityView Code Enforcement	
40	System is capable of tracking and managing inspection results from external organizations (e.g. consultant) thru web based functionality	L	Y		CityView Code Enforcement	Assumption is external organizations have network access to limited parts of the City's system
41	System provides functionality for communication of code violations (configurable for owner, renter, complainant, contractor, etc.) via email communication.	H	Y		CityView Code Enforcement	
42	System provides the ability to record charges on properties generated by code enforcement actions.	M	Y		CityView Code Enforcement	
43	Ability to record payments for City work done on properties that are in code violation (e.g. the City mows an overgrown lawn and then invoices the property owner)	M	Y		CityView Code Enforcement	

44	Ability to record a lien against a property after a defined period of time has elapsed the property owner has been notified of a violation and not complied.	L	Y		CityView Property Information and Code Enforcement	
45	System provides a method of assigning a case to a code enforcement officer for follow-up. Where appropriate, allow demand reports to be run, sorted by the code enforcement officer.	H	Y		CityView Code Enforcement	
46	System provides a method of establishing fine calculations and identifying a project which has failed multiple inspections	H	Y		CityView Code Enforcement	
47	System provides functionality to capture and track billing information associated with inspections and code enforcement.	H	Y		CityView Permits & Inspections and Code Enforcement	
48	System can track multiple code enforcement types.	H	Y		CityView Code Enforcement	
49	System provides "tickler" file notification to ensure timely, efficient follow-up by appropriate staff for user-defined tasks.	H	Y		CityView Code Enforcement	
50	System provides functionality to allow for generation of customized correspondence concerning inspections, violations notices, etc.	H	Y		CityView Code Enforcement	

51	System can maintain, sort, search, retrieve, and report on key information about property (e.g. owner information, builder information, property address, parcel number, permits, inspections, etc.).	H	Y		CityView Property Information and Code Enforcement	
52	System can automatically determine fees and expiration dates	H	Y		CityView Permits & Inspections and Code Enforcement	
53	System can track inspection and violation data	H	Y		CityView Code Enforcement	
54	System able to be configured to charge / not charge fees for re-inspection, based on inspection type - with override capabilities	H	Y		CityView Permits & Inspections and Code Enforcement	
55	System provides functionality to proactively notify the applicant of inspection results, once complete.	H	Y		CityView Permits & Inspections and Code Enforcement	
56	System provides functionality to allow authorized staff to configure, specify and limit which data fields are available for public inquiry on the Web inspections portal.	H	Y		CityView Permits & Inspections and Code Enforcement	
57	<b>Code Compliance</b>					

58	Violation Types can be created with no limit	H	Y		CityView Code Enforcement	
59	Custom Tasks available to be created for Code Violations; Ability to change the order of available tasks	H	Y		CityView Code Enforcement	
60	Due dates for tasks must be able to be modified by inspector	H	Y		CityView Code Enforcement	
61	Letter templates to be used with customizable and indefinite merge tags for auto violation letter generation, and for generating liens, work orders, invoices, etc.	H	Y		CityView Code Enforcement	
62	Dashboard for inspectors with customizable view for inspections due for any specific day (today, tomorrow) and can be separated by inspector for easy reference.	H	Y		CityView Code Enforcement	
63	Ability to choose multiple cases and change due dates of tasks in one action; such as selecting all tasks due today and change them to be due tomorrow.	H	Y		CityView Permits & Inspections and Code Enforcement	Bulk scheduling of tasks is supported.
64	Ability to choose multiple cases and change due dates of tasks in one action; such as selecting all tasks due today and change them to be due tomorrow.	H	Y		CityView Permits & Inspections and Code Enforcement	
65	Ability to attach any file type to the case file (photos, voicemails,	H	Y		CityView Code Enforcement	

	scanned copies of citations/charges, etc.)					
66	Ability to create reports using any combination of cases, violation types, tasks, inspectors, wards, etc. & sort them by any criteria with totals and include pie charts. Should be used for totals only, or containing all information (or be able to select what is contained in the report). Dashboard to use repeat reports, to copy, etc.	H	R		CityView Permits & Inspections and Code Enforcement	Assumption is City is able to create SQL Views or add to those provided with the product to ensure the fields required for these reports are available for selection from these views.
67	Ability to change information previously entered (Ownership info, legal description, address, inspector assigned, etc.).	H	Y		CityView Permits & Inspections and Code Enforcement	
68	Web portal for online complaints entry by customers. Auto notification for case status to customer when email address is given, but allow anonymous complaints also.	H	Y		CityView Code Enforcement	Through CityView Portal
69	Complete individual case/violation/tasks history to maintain integrity of information for court purposes. Cases cannot be deleted, but only closed for whatever cause. All violations/cases must be assigned individual case numbers that cannot be duplicitous.	H	Y		CityView Code Enforcement	

70	Ability to integrate mapping/GIS for each address within a case file (violation) and also available for mapping for tasks due for each inspector's inspections/re-inspections any given day (or the day due).	H	Y		CityView Permits & Inspections and Code Enforcement	The City need to purchase and have an account with ArcGIS Online for route mapping.
71	Ability to use current web-based SaaS (GovQA/WebQA) & provide an interface with the new software.	H	M	\$9,636.00	CityView Permits & Inspections and Code Enforcement	No longer required.
72	<b>Violations</b>					
73	System maintains historical records of findings and actions associated with a given property.	H	Y		CityView Property Information and Code Enforcement	
74	System provides functionality to allow for review that all established requirements have been met.	M	Y		CityView Code Enforcement	
75	System provides functionality for project notes and comments.	H	Y		CityView Code Enforcement	
76	System provides the ability to generate a violation notice to be sent to the property owner, tenant, mortgage company, and any combination of the alternate addresses.	H	Y		CityView Code Enforcement	
77	System provides the ability to track notices and the complaint status	H	Y		CityView Code Enforcement	



78	<b>Module Interface Requirements</b>					
79	System provides the ability to interface the Inspections module to the Permits and Zoning modules	H	Y		CityView Permits & Inspections Code Enforcement, Planning	
80	System is capable of being deployed remotely on smart phones with synchronization features built in for maintaining database consistency.	H	Y		CityView Mobile	
81	System is capable of being deployed remotely on laptops or other remote clients with synchronization features built in for maintaining database consistency.	H	Y		CityView Mobile	CityView Mobile is designed for disconnected use.
82	System integrates with an Misc. Billing / Accounts Receivable module for account management purposes.	H	Y	\$9,636.00	CityView Permits & Inspections and Code Enforcement	No longer required.
83	System is integrated to the Master Address module and has capability to flag a property as suspicious to warn staff before approaching.	H	Y		CityView Property Information	

84	Service Request Management function is integrated with Master Address module to populate property Identification Number (PIN), address, owner information, alerts and judgments on the service request, as it is being entered	H	Y		CityView Service Requests	CityView Service Requests module added as part of updated proposal. And accompanying implementation services.
85	System can interface with Laserfiche for electronic content management	M	Y		CityView Permits & Inspections and Code Enforcement	System integration to multiple modules.
86	System can interface with Public Safety system (Tyler/New World) for citations	M	M	\$9,636.00	CityView Code Enforcement	An integration to Tyler New World is included in our proposal.
87	System can interface with Business License module to maintain a central customer record	M	Y		CityView Permits & Inspections and Code Enforcement	
88	System can integrate with Esri ArcGIS to map routes based on daily tasks	M	Y		CityView Permits & Inspections and Code Enforcement	The City need to purchase and have an account with ArcGIS Online for route mapping.
89	Ability to interface with Tyler Incode to provide information to issue warrants for non-traffic incidents and to record property liens.	M	M	\$9,636.00	CityView Permits & Inspections and Code Enforcement	Optional. City will issue a change order if required.
90	Ability to interface with the City's Cisco VOIP phone system.	M	T		CityView Permits & Inspections and Code Enforcement	Typically, CityView is interfacing via the Selectron IVR rather than directly with the phone system.
91	<b>Workflow Functionality</b>					

92	System provides for Workflow and application routing for staff scheduling and assignments	H	Y		CityView Permits & Inspections and Code Enforcement	
93	System provides for Workflow and application routing for various approvals, signatures, notifications and email integration.	H	Y		CityView Permits & Inspections and Code Enforcement	CityView is an activities-based workflow system.
94	Workflow functionality can accommodate intradepartmental processes.	H	Y		CityView Permits & Inspections and Code Enforcement	CityView is an activities-based workflow system.

4.22 - Permitting			Permitting			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	General Requirements					

2	System provides a true mobile application that has the ability to take payments and print inspection/permit forms/documents in the field (mobile field inspections and permit issuance)	H	Y	CityView Permits & Inspections	<p>CityView Mobile is a true mobile application and is very feature-rich. It is designed to the needs of the inspector; it doesn't allow you to issue a permit from the field, or take payments in the field. Inspectors can print inspection/issued permits/documents in the field though. We are happy to discuss a possible enhancement for the payments part, but we have not done this to date due to PCI compliance and customer privacy issues. Our CityView Portal is a better option for the customer to make payments through. That way it is the customer who is the user and they are the ones entering their credit card information, and no swiping device comes into play so it alleviates the PCI compliance issues. CityView Portal does work from mobile devices, so either the inspector or the contractor could pull it up while in the field, to allow the contractor to make payment, assuming that the security allowed that user to make a payment against that permit.</p>
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3	System provides capabilities to issue permits, violations, and inspections to any of the following level of data; parcel, address, structure, floor, unit, or occupant.	H	Y		CityView Permits & Inspections	
4	System provides the ability to distribute portions of permit fees to multiple GL accounts based on system-recognized attributes such as parcel location. Sample use case: 50% of all permit fees in new construction neighborhoods must be allocated to that neighborhood's park fund. The correct park is identified by the geographic location of the parcel.	H	Y		CityView Permits & Inspections	Subject to a review of the complete business requirements. Included in our quote.
5	Ability to support the City's ordinance that requires that the plan review fee is collected up front when a building permit application is submitted.	H	Y		CityView Permits & Inspections	
6	System includes barcoding or QR coding capabilities for permitting	M	Y		CityView Permits & Inspections	
7	System provides the ability to associate documents and letters to a specific parcel address and store in a	H	Y		CityView Permits & Inspections	

	document management system					
8	System provides tracking of all interim and final approvals, including dates and review comments on each level of approval for the permanent record.	H	Y		CityView Permits & Inspections	
9	System provides functionality to schedule hearings and indicate case results and approval / disapproval status	H	Y		CityView Permits & Inspections	
10	System provides the capability to restrict issuance of a permit subject to the prior issuance of other permit/licenses.	H	Y		CityView Permits & Inspections	Provided these permits are placed on the same Master Project and therefore are related this way
11	System provides the ability to view permits by site, by type, by geography, by address, by department, permit number by project subset (discipline), or any attribute of the permit.	H	Y		CityView Permits & Inspections	
12	System provides notifications “ticklers” and notify other departments of status changes and activity requests.	H	Y		CityView Permits & Inspections	

13	System provides permit compliance tracking and reporting, including scheduling reminders several years into the future.	H	Y		CityView Permits & Inspections	
14	System provides ability to easily search on and browse list of activities related to a project.	H	Y		CityView Permits & Inspections	
15	System displays all development and projects applied for and permits issued against any site during project creation and at other times upon demand.	H	Y		CityView Permits & Inspections	
16	System provides ability to update site information attributes easily	H	Y		CityView Permits & Inspections	
17	System provides ability to perform bulk refreshes of parcel and parcel owner information	H	Y		CityView Permits & Inspections	
18	System provides ability to maintain detail site information for multiple structures on a parcel.	H	Y		CityView Permits & Inspections	
19	System provides inquiry into the detail site data by parcel, address, owner, structure, floor, unit, etc.	H	Y		CityView Permits & Inspections	
20	<b>Permitting Process</b>					

21	Allow entry of applicant information. If the applicant is also the owner, provide an easy way to indicate this.	M	Y		CityView Permits & Inspections	
22	Allow easy verification of contractor licenses, license registration, and insurance and provide an easy method to add or update licensing the insurance information.	H	Y		CityView Permits & Inspections	
23	System provides the ability to verify various contractor business licenses (contractor, electrician, etc.) to ensure that the license is active.	H	Y		CityView Permits & Inspections	
24	System provides ability to enter or update information, which is specific to each permit type, including information required for fee calculation.	H	Y		CityView Permits & Inspections	
25	System provides easy verification that all routing has been completed for each permit type.	H	Y		CityView Permits & Inspections	
26	System provides easy verification that all required documentation has been submitted for each permit type.	H	Y		CityView Permits & Inspections	



27	System generates printable permit documentation and applications.	H	Y		CityView Permits & Inspections	Throughout the permit review and approval process, permit-related correspondence is generated through workflow.
28	System generates printable inspection results and applications	H	Y		CityView Permits & Inspections	
29	System generates customized correspondence concerning applications for permits, inspections, plan reviews, violations notices, etc.	H	Y		CityView Permits & Inspections	
30	System provides the capability to restrict issuance of licenses/permits subject to the prior issuance of other permit/licenses.	H	Y		CityView Permits & Inspections	Provided these permits are placed on the same Master Project and therefore are related this way
31	System provides functionality to prevent issuance of a permit until routing is complete, all holds are released, and all required documentation has been submitted (e.g. holds placed on plan reviews)	H	Y		CityView Permits & Inspections	
32	System provides functionality to generate email notifications to the applicant when Plans are approved or when permits are issued	H	Y		CityView Permits & Inspections	

33	System allows authorized users to issue permits by overriding holds and checks. When modifications are made to records a non-editable timestamp-containing user ID, Date and Time need to be saved.	H	Y		CityView Permits & Inspections	
34	System provides the ability to sequence permits and inspections into a logical workflow or checklist, based on dependencies, with notifications to inspectors and citizens	M	Y		CityView Permits & Inspections	
35	System provides the ability to provide constituent and builder notifications based on user preferences (e.g. a constituent wants all notifications and a builder only wants specific notifications)	M	Y		CityView Permits & Inspections	Letter templates can be designed to assign specific "Contact Types" as the letter recipient along with Primary Contacts who get all notifications and then user preference defines who the primary contact is
36	<b>Permitting: Fees &amp; Receipts</b>					
37	System provides configurable fee calculation capabilities based on permit type.	H	Y		CityView Permits & Inspections	
38	System capable of establishing fee groups	H	Y		CityView Permits & Inspections	

39	System capable of assigning multiple individual fees or fee groups to a permit application	H	Y		CityView Permits & Inspections	
40	System capable of allowing for adjustment of fees	H	Y		CityView Permits & Inspections	
41	System includes a fee calculator for “what-ifs” scenarios (e.g. if a customer wants to know how much the fees would be for a project, without entering an application).	H	Y		CityView Permits & Inspections	
42	System allows for additional charges or fee amendments throughout project and permit life.	H	Y		CityView Permits & Inspections	
43	System provide individual project or permit summary of all charges and credits made against it.	H	Y		CityView Permits & Inspections	
44	System provides an easy method to generate application, permit and inspection invoices, using pre-determined invoice numbers.	H	Y		CityView Permits & Inspections	
45	System provides a way to register refunds against projects, applications, and permits.	H	Y		CityView Permits & Inspections	

46	System accepts payments, provides receipts to customers, and displays relevant information about the transaction and customer through the Cash Receipt module.	H	Y		CityView Permits & Inspections	
47	System maintains accurate records of all license holders and applicants for above.	M	Y		CityView Permits & Inspections	
48	System provides the ability to inquire on all permit jobs/permits pulled for each license/permit holder and applicant over a user-defined time period.	H	Y		CityView Permits & Inspections	
49	System maintains complete audit trails of receipts, payments, late fees, approvals, denials and who performed the transaction.	H	Y		CityView Permits & Inspections	
50	System can automatically determine permit fees and expiration dates from type codes, based on user-defined tables.	H	Y		CityView Permits & Inspections	
51	System allows authorized users to override fees.	H	Y		CityView Permits & Inspections	
52	System provides the ability to report on customer payment status related to charges in the	H	Y		CityView Permits & Inspections	

	permitting and inspection processes.					
53	System accepts online payments for permits/inspections	H	Y		CityView Permits & Inspections	
54	System accepts online permit applications and can provide applicant with inspection results	H	Y		CityView Permits & Inspections	
55	System provides the ability to limit online permit applications to specific permit types.	H	Y		CityView Permits & Inspections	
56	System provides mobile field inspection voice-to-text for inspectors to voice-record inspection comments that will be translated to text into the inspection results.	L	Y		CityView Permits & Inspections	Voice to text function is a device-related feature.
57	System provides the ability to report on the breakdown of fees charges on permits to comply with the State of Oklahoma Uniform Building Code (needs to be paid and reported on monthly)	H	R		CityView Permits & Inspections	
58	System provides the ability to have escrow deposit accounts.	M	Y		CityView Permits & Inspections	

59	<b>Module Interface Requirements</b>					
60	System integrates to Exchange email system for configurable notifications to staff (e.g. Ordinance Enforcement, Public Works, etc.) during change of project case status (e.g. approval in order to record ordinance)	M	Y		CityView Permits & Inspections	
61	System integrates with central Master Address / Parcel Management function and provides updates, based on approved permits	M	Y		CityView Permits & Inspections	
62	System is capable of checking for holds, conditions, alerts, and open violations and complaints applicable to this address and permit type, through integration to the Master Address / Parcel function	H	Y		CityView Permits & Inspections	
63	System includes standard functionality to attach electronic documents, either natively, or through integration to Laserfiche, the external document management system.	M	Y		CityView Permits & Inspections	

64	System provides a web-based constituent interface allowing for secured appropriate access to information such as applications for sidewalk closures, status of permit, notifications of activities, etc.	H	Y		CityView Permits & Inspections	Through CityView Portal.
65	System provides functionality, which is able to be configured by authorized staff, to make any scanned attachments, associated with a project permit application (either natively, or through integration to Laserfiche) available to the public via the Web portal	M	Y		CityView Permits & Inspections	
66	System is integrated to the Cash Receipting modules of the system providing the ability to accept customer payments for various permit types, and other charges	H	Y		CityView Permits & Inspections	
67	System provides the ability to perform transactions tendering both with a cash register and with an integrated cash register drawer.	H	M	\$3,850.00	CityView Permits & Inspections	
68	System's Permitting module integrates with the Business Licensing module, to enable business license process to	H	Y		CityView Permits & Inspections	

	confirm permit approval.					
69	System provides integration with an IVR system (City currently uses Selectron IVR) for phone payments and other constituent inquiries	H	Y		CityView Permits & Inspections	Assumption is this functionality is already supported by the City's Selectron system
70	System provides integration with the Public Safety system (Tyler/New World) for fire inspection results, building plans, and comments about the property from Police and Fire.	H	M	\$9,636.00	CityView Permits & Inspections	Subject to a review of the complete business requirements. Included in our quote.
71	Ability to interface to GovQA/WebQA for code compliance.	H	M	\$9,636.00	CityView Permits & Inspections	No longer required.
72	Ability to integrate with Esri ArcGIS	H	Y		CityView Permits & Inspections	

4.23 - Planning and Zoning			Planning			
Number	Application Requirements	Priority	Availability	Cost	Required Product	Comments
1	<b>General Zoning Functionality</b>					
2	Ability to enter and track Planning & Zoning (P&Z) project case information.	H	Y		CityView Planning	
3	Ability to attach documents to P&Z	M	Y		CityView Planning	



	project cases through native functionality.					
4	System provides a highly configurable workflow engine that allows for multiple-step routing of P&Z project review, resubmittal functionality and reporting of activities	H	Y		CityView Planning	
5	System provides the ability to view permits by site, by type, by geography, by address, by department, permit number by project subset (discipline), date range, or any attribute of the permit.	H	Y		CityView Planning	
6	System provides notifications “ticklers” and notify other departments of status changes and activity requests.	H	Y		CityView Planning	
7	System provides ability to easily search on and browse list of activities related to a project.	H	Y		CityView Planning	
8	System provides ability to add new, validated addresses that may be created during the plan review process with approval routing capability	M	Y		CityView Planning	
9	System provides ability to maintain detailed site information for multiple structures on a parcel with the ability to create notes for each structure, individually.	H	Y		CityView Planning	

10	System provides inquiry into the detail site data by parcel, address, owner, structure, floor, unit, etc.	H	Y		CityView Planning	
11	<b>Contractor License Management</b>					
12	Accommodates the tracking of contractor licenses, for various contractor license types.	H	Y		CityView Planning	
13	System functionality allows users to update contractor information, directly from a permit, with which that contractor is associated	M	Y		CityView Planning	
14	<b>Pre-project Review / Counseling / Pre-planning Process</b>					
15	System provides ability to define and configure various permit application types.	H	Y		CityView Planning	
16	System provides the ability to define a checklist of materials and procedures for each type of application for use in screening applications, enforcing procedural discipline, and recording completed steps.	H	Y		CityView Planning	
17	System provides ability to define and configure field level information required for various application types.	M	Y		CityView Planning	
18	System provides ability to define and configure which fields are required for various application types.	M	Y		CityView Planning	

19	System provides ability to note all discussions.	H	Y		CityView Planning	
20	<b>Project Application Intake</b>					
21	System provides functionality when entering a new case to mitigate improper data entry by validating the address against the Master Address list and/or GIS.	H	Y		CityView Planning	
22	System allows one or more parcels to be assigned to a given project.	H	Y		CityView Planning	
23	Upon entry of parcel or site address, system should automatically fill in property-based information common to all applications such as the owner name and address, and land area as pulled from the Master Address database.	H	Y		CityView Planning	
24	System allows projects to be assigned to a spatial entity other than a parcel.	L	Y		CityView Planning	
25	System is capable of associating a project to point and line GIS feature class in the GIS application.	M	Y		CityView Planning	Assume those features are also represented in a tabular fashion in the system so that they can sync.

26	System provides ability to automatically generate - and also allow manual updates to - application specific information such as the filing date, the next available hearing dates for various organizations, and other information required for fee calculations.	M	Y		CityView Planning	
27	System provides the ability to associate documents and letters to a specific parcel address and store in a document management system (Laserfiche)	M	Y		CityView Planning	
28	<b>Project Application Review, Approval &amp; Inquiry</b>					
29	System provides functionality whereby departmental reviewers can provide plan review comments, markup, exhibits and indicate approval / disapproval status, prior to formal case hearings	H	Y		CityView Planning	
30	System provides functionality to allow for viewing review comments from other departmental areas, or other relevant parties or organizations	H	Y		CityView Planning	
31	System provides tracking of all interim and final approvals, including dates	H	Y		CityView Planning	

32	System allows assignment of unlimited number of agents, contractor, architect, lawyer, etc. to each project, including detail information concerning the agent type, name, address, and phone number.	M	Y		CityView Planning	
33	System is capable of tracking and managing unlimited separate internal technical reviews of a project & unlimited potential external reviews.	M	Y		CityView Planning	
34	System provides project multiple level application review routing.	M	Y		CityView Planning	
35	System provides functionality for versioning accommodating plan re-submissions, re-routing and re-review.	H	Y		CityView Planning	
36	System provides ability to change project case status to "application withdrawn"	M	Y		CityView Planning	
37	System provides for project review deadline dates based on user defined schedules, per permit type	M	Y		CityView Planning	
38	System provides review response tracking.	M	Y		CityView Planning	
39	System provides ability to provide review comments.	M	Y		CityView Planning	

40	System allow the creation and updating of a hearing calendar on the system for all types of hearings held by reviewing organizations with integration to Microsoft Exchange	M	Y		CityView Planning	Yes, CityView does allow all types of hearings used within the system and the hearings feature can be integrated with Microsoft Exchange.
41	System provides functionality to establish standard application review schedules and procedures, including a list of reviewing organizations, for each type of application.	M	Y		CityView Planning	
42	System provides functionality to allow flexible assignment of project to reviewers based on permit application type.	M	Y		CityView Planning	
43	System provide email notification of review assignments and details the review schedule	M	Y		CityView Planning	
44	System is capable of providing management reporting of assignments that are taking longer than assigned time standards.	M	Y		CityView Planning	
45	System provides notifications or dashboard on reviews beyond established review deadlines	M	Y		CityView Planning	
46	System provides ability to track grandfathered zoning requirements and associate them to a specific address(es)	H	Y		CityView Planning	

47	System provides ability to modify application review schedules at any time, including allowing for easy addition and removal of various hearings and reviewing organizations required for each application.	M	Y		CityView Planning	
48	System provides permit routing and tracking through multiple stages of actions, hearings, and reviews of each application.	M	Y		CityView Planning	
49	System enables application reviewers to record parcel holds or flags against a project, address, contractor, owner, or permit of specific type.	M	Y		CityView Planning	Alerts can be added to parcels or contacts. Holds can be enforced with appropriate business rules
50	System provide easy determination of application status in terms of progress through the process; show existing flags, holds, and other factors affecting status.	M	Y		CityView Planning	
51	System does not enable work on a step until all reviews are completed and all required approvals are complete prior to next step, as defined by user.	H	Y		CityView Planning	
52	System tracks all actions performed on a project into an activity list, showing the user performing the actions, date, time, and type of activity.	M	Y		CityView Planning	

53	System provides easy access to application status and pending conditions and requirements to owners, owners' agent, etc.	M	Y		CityView Planning	
54	System provides an easy method for authorized users to over-ride holds and conditions placed on this project during development review project.	M	Y		CityView Planning	
55	System automatically provides an un-editable timestamp for changes to override holds and conditions placed on a project.	M	Y		CityView Planning	
56	System confirms that all routing has been completed for each application before approval is granted.	M	Y		CityView Planning	
57	System confirms that all required documentation has been submitted for each application before approval is granted.	M	Y		CityView Planning	
58	System provides functionality to generate email notifications to the applicant when Plans are approved	M	Y		CityView Planning	
59	System provide functionality for Web access by authorized external stakeholders to project status, project conditions, requirements and comments	H	Y		CityView Planning	



60	<b>Escrow Management</b>					
61	System tracks escrow information and transactions for various projects requiring permits	H	Y		CityView Planning	
62	System maintains an audit trail of historical changes to developer escrow accounts	H	Y		CityView Planning	
63	System allows for establishing alerts on escrow	H	Y		CityView Planning	
64	System allows for the notification if an escrow is overspent	H	Y		CityView Planning	
65	System provides the ability to send out an email to a developer/constituent requesting additional funds if the escrow amount is depleted	H	Y		CityView Planning	
66	System provides the ability to add additional funds to an existing escrow account	H	Y		CityView Planning	
67	<b>Module Interface Requirements</b>					
68	System has the ability to interface with standard ERP functions (e.g. general ledger, receivables, payables, human resources, workflow, etc.)	H	M		CityView	We have included integrations to multiple systems per the Community Development requirements in our proposal.
69	System has the ability to interface with Incode to identify liens or infractions on properties	M	Y	\$9,636.00	CityView Planning	Optional. City will issue a change order if required.

70	System has the ability to interface to the Tyler/New World Fire Inspection module to populate the fire inspection work order details and to update the P&Z system with fire inspection results.	M	M	\$9,636.00	CityView Planning	Subject to a review of the complete business requirements. Included in our proposal.
71	Contractor licensing function integrates with other aspects of the Community Development Permit and Inspections module, to enable permit process to confirm valid contractor license prior to permit approval	H	Y		CityView Planning	
72	System integrates with ESRI GIS system to associate a P&Z case with a GIS feature class allows for viewing of other GIS layers in context of P&Z case location for spatial validation	H	Y		CityView Planning	
73	System integrates to email system for configurable notifications to staff (e.g. Ordinance Enforcement, Public Works, etc.) during change of project case status (e.g. approval in order to record ordinance)	H	Y		CityView Planning	
74	System integrates with central Master Address / Parcel Management function and provides updates, based on approved P&Z project cases	H	Y		CityView Planning	

75	System integrates with central Master Address / Parcel Management function for property and address information, and displays any properly alerts	H	Y		CityView Planning	
76	System integrates with central Cash Receipting function, and allows for collection of zoning fees	H	M	\$9,636.00	CityView Planning	City is moving to a CityView based cashingier so no longer required.
77	System includes standard functionality to attach electronic documents, including large blueprint size documents, to P&Z project cases through integration to the external document management system (Laserfiche) or to a GIS feature	H	Y		CityView Planning	Through EDMS (Electronic Document Management System Extension).
78	System provides a Web based portal which includes standard functionality to accept ePlan electronic attachments and associate multiple documents (including large blueprint size) to the project permit application. This functionality is provided natively.	H	Y		CityView Planning	Through CityView Portal.

79	System provides a secure online web based interface for constituent entry and tracking of private P&Z project information	M	Y		CityView Planning	Through CityView Portal.
80	System provides a public online web based interface for constituent tracking of P&Z project information	M	Y		CityView Planning	Through CityView Portal.
81	System integrates with the AP for refunds	H	M	\$9,636.00	CityView Planning	Subject to a review of the complete business requirements. Included in our quote.
82	System contains standard interface with Business License module	L	Y		CityView Planning	Assumes CityView Licensing included.
83	System can interface to Permitting module to enables application reviewers to record parcel holds or flags against a project, address, contractor, owner, or permit of specific type.	M	Y		CityView Planning	Assumes the associated permits are placed on the same Master Project

### XIII. Interfaces

CityView's updated RFP response to RFP 1617-24 ERP Software Suite – Pricing Forms, updated in October 2017, are provided hereto and attached herein by reference. The following table presents modified responses to those requirements and supersedes the responses of February 13, 2017 for the purposes of the Statement of Work.

Data Flow Item #	Data Flow Description	Source Application	Target Application	Estimated Hours	Hourly Rate	One-Time Cost	On-Going Annual Cost	Comments
4	Online Payments	Authorize.net	Cash Receipts	30	\$165	\$5,000	\$753	
36	Integrate with an integrated voice response system to allow customers to be able to inquire on account and bill information via phone.	Selectron IVR software (or other recommended IVR)	Permitting, Inspections		\$165	\$0		CityView is a Selectron Technologies partner. The City of Norman, OK will need to have the current interface from Selectron re-done to accommodate CityView integration. Only applies to inspection requests for permitting.
59	Fire Permits/Alarm permits	Tyler / New World Public Safety	ERP	58	\$165	\$9,636	\$1,452	Included in pricing – will require additional services from CityView to setup Alarm permits

68	CityView to validate that no overdue payments exist in Utility Billing for the account prior to issuance of business license.	Advanced CIS	Utility Billing	58	\$165	\$9,636	\$1,452	
	Tyler Munis Batch Update from CityView Cashiering	Tyler Munis		58	\$165	\$9,636	\$1,452	
	System provides the ability to perform transactions tendering both with a cash register and with an integrated cash register drawer.	CityView Cashiering			\$165	\$3,850	\$981	
	System can interface with the City's enterprise asset management system (Cityworks) to record notifications on address or asset. (such as a broken water main)	Cityworks		58	\$165	\$9,636	\$1,452	Subject to discussion of requirements. Optional. City will issue a change order if required. Interface costs and ASM costs are not included in our proposal but are listed here should the City desire to include in the project.

	Ability to interface with Tyler Incode to provide information to issue warrants for non-traffic incidents and to record property liens.			58	\$165	\$9,636	\$1,452	Subject to discussion of requirements. Optional. City will issue a change order if required. Interface costs and ASM costs are not included in our proposal but are listed here should the City desire to include in the project. Subject to discussion of requirements. Optional. City will issue a change order if required. Interface costs and ASM costs are not included in our proposal but are listed here should the City desire to include in the project.
	Electronic Citation Software (Brazos) ensure that there are no outstanding citations prior to issuing a business license	Business Licensing		58	\$165	\$9,636	\$1,452	Subject to discussion of requirements. Optional. City will issue a change order if required. Interface costs and ASM costs are not included in our proposal but are listed here should the City desire to include in the project.