CityView

Change Order / Quotation

CHANGE ORDER DESCRIPTION			
Request Date	02-10-2023	**Quote Number**	CO20230009
Client/Project	Norman, City of, OK	**Valid Until**	03-31-2023
Requestor	Kari Madden	**Created By**	Teri Wright

Description of the Requested Services

The City of Norman, OK has completed the Data Collection (process mapping) phase of the CityView Implementation completion of the scope document. [DOC: 12359 Norman Scope Document v3.1 Oct 14 2022 FINAL.docx]

This change order represents the budget reconciliation listed in the scope document reviewed by the City's project Team. This includes descoped items from the project as noted

DOC: 12359 Norman Scope Budget Reconciliation - v2.4 CLIENT Oct 14 2022.xlsx

Impact Assessment: Estimate impact to budget, work effort and schedule.

CityView: additional requirements accounted for in the project schedule 12359 Norman Project Schedule updated v12.2 Feb 7 2023.pdf
Norman: additional budget associated with the current project implementation

Total Cost Estimated	$ 10,278.00	**Planned Delivery Date**	See Impact Assessment
Payment Terms	100% Services invoiced on execution of change order, due net 30 days. Applicable taxes not included.		

APPROVALS			
	PRINT NAME	**SIGNATURE**	**DATE**
For Customer	Kari Madden	*Kari Madden*	2/21/2023
For CityView			

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HARRIS

CityView®

CITY OF NORMAN, OK

SELECT IMPLEMENTATION

SCOPE DOCUMENT

VERSION CONTROL

Version #	Date of Issue	Author(s)	Description
1.0	May 25, 2021	David Hill	Initial Version [draft pending Data Collection completion]
1.1	September 28, 2021	Elton Silveira	Code Enforcement added
1.1	March 8, 2022	Chris Hahn	Update to current status
1.2	March 22, 2022	Teri Wright	PM transition – gap analysis
1.3	April 06 2022	Adam Wicks	Property integration
1.4	April 17 2022	Teri Wright	Updates added
1.5	April 21 2022	Jatinder Chadha	Updates added
1.6	April 26, 2022	Teri Wright	Review with Client to audit
1.7	April 27, 2022	Kari Madden	Begin Review with Planning staff
1.8	May 2, 2022	Kari Madden	Continued review with Planning & Public Works staff
1.9	May 3, 2022	Kari Madden	Continued review
1.10	May 4, 2022	Kari Madden	Continued review with Code Compliance completed
1.11	May 5, 2022	Kari Madden	Continued review with Business Licensing completed
1.12	May 6, 2022	Kari Madden	Continuation of review (PW, Planning, Permits)
1.13	May 9, 2022	Kari Madden	Continuation of review (PW, Planning, Permits)
1.14	May 10, 2022	Kari Madden	Continuation of review (Permits, etc.)
1,15	May 11, 2022	Kari Madden	Continuation of review with Departments
1.16	May 12, 2022	Kari Madden	Continuation of review with Departments

1.17	May 16, 2022	Kari Madden	Continuation of review (versions discussed)
2.0	August 2022	CityView Team	Updates from reviews, final Administrator pulls, minor edits
3.0	Sep-Oct 2022	CV team/ Norman team	Updates, reviews, and edits between both teams. Reviewed during status calls
3.1	Oct 14 2022	CV PM/ Kari Madden	Finalize comments, outstanding questions, and relation to budget reconciliation

TABLE OF CONTENTS

1 INTRODUCTION

The purpose of this document is to record the outcome of the Process Mapping sessions that took place with the Utilities, Development Services, Public Works (all Divisions) Special Events with City Manager Office, Code Enforcement, Planning, Licensing, Fire, Police Department, Finance and GIS, Subject Matter Experts (SMEs). The Process Mapping sessions were for process documentation, fees, letters, workflow-specific values, reviews, inspections, submittal requirements, expiration dates violations and corrections codes, GIS mapping & required data associated or found within that database, and other related values but not limited to for Permits & Inspections, Planning & Development Services, Public Works (all Divisions), & Licensing, Service Requests, Finance cashiering needs & GL reconciliation, electronic plans review, and Code Enforcement. This document will be used by the CityView Implementation Team as a guide to what deliverables are required for Norman's implementation.

For reference, this is the summary of the **original scope** of the project:

- CityView Solutions & Add-ins:
    - Property Information, Permits & Inspections, Planning, Code Enforcement, Business Licensing, Service Requests, Cashiering, and Electronic Plans Review
    - CityView Portal for Property Information, Permits & Inspections, Planning, Code Enforcement, Business Licensing, and Service Requests
    - CityView Mobile for Code Enforcement (6 licenses) and Permitting (11 licenses)
    - Bluebeam licensing: 20 Revu eXtreme
- Integrations & Customizations:
    - Property integration to GIS
    - Esri ArcGIS Server mapping extension,
    - EDMS extension (Laserfiche),
    - MS Exchange Integration,
    - MS Outlook Add-in,
    - MS Word Add-in,
    - CityView Integration Server
    - Integration with Tyler (batch),
    - Integration with Advanced Utilities
    - Selectron IVR
- Data Conversion – legacy data

2 SIGN OFF

By signing this document, the Subject Matter Experts of the City of Norman are agreeing that the scope of work described herein represents the scope of Property Information, Permits & Inspections, Planning, Code Enforcement, Business Licensing, and Cashiering configuration that CityView will undertake as the total amount of work as agreed to in the terms of the contract between the two parties

Qualification: It is unrealistic to expect the Subject Matter Experts to have identified every one of their business requirements during process mapping; therefore, it is expected that changes will be requested during the life of the project. However, we do expect both parties to apply an element of reasonableness to this process. As long as those changes do not require any customization of the software, and can be made without requiring unreasonable rework of completed configuration, they will be covered under the Validation and Fine Tuning phase of the project. Please note: if requests amass in excess of what is reasonable and the requirements become something of a moving target, then change orders will need to be considered. The determination of what is unreasonable rework of configuration need to be agreed upon by the City of Norman and Cityview.
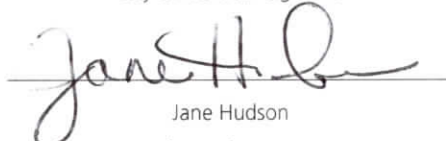
Data Security and Privacy: By signing this page you are also acknowledging that any concerns your organization has around data security and privacy have been discussed with your project team and appropriate documents (e.g. non-disclosures) have been signed.

Final Approved Document: 12359 Norman Scope Document v3.1 Oct 14 2022 FINAL.docx

                                              12359 Norman Scope Budget Reconciliation - v2.4 CLIENT Oct 14 2022.xlsx

CityView Project Managers	City of Norman Sign offs
Kari Madden	*Jane Hudson*
Kari Madden	Jane Hudson
City of Norman	
Date 2/21/2023	Date 2/21/2023
	Shawn O'Leary
Teri Wright	Shawn O'Leary
Sr. Project Manager, CityView	2/21/2023
(Digital Signature)	Date

3 PROPERTY INTEGRATION

Property Integration consists of two primary parts: data mapping and data integration/load. The property data mapping will be reviewed by the CityView Data Conversion Team and Norman Team prior to integration. The Property Data Mapping Document details the approved data field mapping and planned property integration for Norman property data.

Property Data Mapping Document: 12359 Norman Property Integration Mapping v1.0 April 6 2022.xlsx

The data source for the property integration will be the City of Norman's ArcGIS REST endpoint url defined in section 3.1 CityView will use the City of Norman's source data for the CityView property integration datasets: address data, parcel data and owner data, and road segment data, pa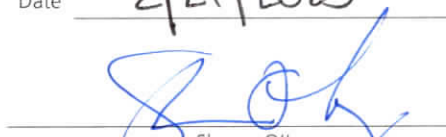rent parcel information, and parks. In addition, the City of Norman has decided they will not include the following additional data elements in their property integration: Park Elements, Structures, Structure Types, Trails, Trail Landmarks, and Zoning. Where applicable, these dataset field mappings appear in the data mapping document defined above.

3.1 Property Integration Datasets

City of Norman's ArcGIS REST endpoint MapService URL:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services

Feature Layers included:

Address data source:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services/Address_Points/FeatureServer/1

Parcel data source:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services/Parcels/FeatureServer/1

Owners data source:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/arcgis/rest/services/NormanOwnership/FeatureServer/0

Road segments data source:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services/Street_Centerlines/FeatureServer/1

Parks data source:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services/Park/FeatureServer/1

Parent Parcel data source:
To be created going forward.

Commented [TW1]: NORMAN: checking with Joyce to confirm [Aug 30/22]

3.2 Property Routine Load (Scheduled Process)

Subsequent to Go Live, property information will be updated within CityView through a scheduled process. As part of the CityView property data integration process, a scheduled process is created to update the CityView property data from the City of Norman source datasets.

CityView has set the scheduled process, "Property Updates", to run nightly at 1:00 am. The City of Norman will be able to alter this configuration after Go Live, if necessary. Scheduled processes must be run at times of the day or night that will not interfere with users who are in the system, backups that may be scheduled to run against the CityView database or on the same server, and other processor-intensive operations such as full virus scans running on the server.

4 DATA CONVERSION

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 step CityView requires that the City of Norman provide data in one of the following formats: SQL Server .bak, .mdb, .dbf, .csv, pipe-delimited, or .txt. Documentation must accompany any databases provided in .txt format so that our data conversion specialists do not have to infer the format of the file is (particularly in the case of non-delimited .txt files.) The initial data conversion will run the scripts to provide a means for verification of correctness during the validation stage of the Project. The City of Norman data is coming out of a DB2 database which a SQL Server .bak is not an option nor is .mdb, or .dbf.

CityView will complete a final iteration (using the same scripts) immediately prior to go-live.

- DOC: 12359 Norman Data Conversion Mapping v1.0 May 03 2022.docx

4.1 Data Conversion Assumptions

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

Data has been cleaned according the suggested guidelines.
1. Both Parties have reviewed and signed off data mapping before proceeding to data conversion.
2. CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training, 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.
   The City provides data in one of the required formats: SQL Server, .mdb, .dbf, .csv, pipe-delimited, or .txt. Documentation must accompany any databases provided in .txt format so that our data conversion specialists do not have to infer the format of the file is (particularly in the case of non-delimited .txt files.) . The City of Norman data is coming out of a DB2 database which a SQL Server .bak is not an option nor is .mdb, or .dbf.

3. CityView will complete the final iteration using the same scripts. Should changes to the delivery of the data occur [ie: not providing in the agreed to format the scripts were build with), that affect the scripts, a change order will be required prior to any delivery.

4.2 Legacy Data

CityView is not responsible for the viability of the legacy data that will be migrated into CityView. It is expected that the City of Norman shall clean the legacy data to resolve data inconsistencies, inaccuracies, and incompleteness prior to data conversion runs, so that these issues will not be migrated to CityView. This will help reduce data conversion issues that might arise, such as incompatible data formats between the legacy data and the mapped CityView tables and fields. When identified, the CityView Data Conversion team will provide guidance on legacy information that needs to be cleaned. The CityView Data Conversion team is not responsible for the legacy data accuracy and completeness.

It is also expected that during Project Validation and other testing opportunities, the City verifies that legacy records, which have been converted into CityView, can be advanced through the configured CityView process. It is essential that any issues related to this are discovered and addressed well before Go Live.

The process to be followed shall be:

- CityView will analyze the legacy data to identify legacy custom fields and to determine where data cleansing by Norman may be necessary.
- CityView and Norman will collaborate to append to the established data mapping document any custom fields created in legacy.
- Norman personnel will review and approve the Data Mapping documents.
- CityView will alter established data migration routines to include additional mapping for custom fields and to translate legacy lookup values to CityView lookup values.
- Norman will clean their data to address data viability issues identified during data mapping.
- During the project validation phase, Norman business users will continue to review the migrated data and provide feedback to the Data Conversion team.
- CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training, and one complete refresh at Go Live. CityView will make all other fixes using targeted scripts. CityView can perform up to 2 additional complete refreshes, beyond that they will do done if the parties mutually agree through a written change order.

Go Live is typically scheduled on the first business day of the week. In order to prepare the CityView system for Go Live and allow adequate time for database transfers and software installation, the data conversion is usually executed on the preceding Wednesday or Thursday. Any data entered into the legacy system after the final copy has been delivered to CityView for the final conversion will not be migrated into CityView. The City will need to manually enter this data into CityView or leave it in the legacy system, which will serve as a reference system for this data.

Each and every time a new cut of legacy data is provided to CityView, it must be provided in the exact same format that it was when it was initially mapped and scripted. Once the conversion routines are written, they are not adaptable to change, so the import will fail and re-work will be required. If this occurs, it will result in a change order to do the re-work unless the City of Norman can resolve the discrepancy (by providing the legacy data in the agreed to format the scripts were build from). Moreover, it will have schedule implications, the most serious of which would be if the final cut of data (received only a few days before Go Live) is delivered in a different format, there may not be enough time to correct this and load by the GoLive date.

The City team is responsible for validation of the converted data. If there is no evidence that this has been tested prior to the Go Live, then CityView reserves the right to postpone the Go Live and raise applicable change orders.

4.3 Out of Scope Data Conversion

No out of scope items identified at this time, however note that there could be the potential for the request to refresh the legacy data more than the contract inclusion allotment and will be determined at a future date as required.

5 SECURITY

5.1 Security Configuration

Implement user security settings according to customer completion of the roles and permissions workbooks. These Organizational Roles workbooks define the out-of-the-box roles and permissions inherent in the solutions. The permissions are defined in:

- DOC: 12359 Norman Employee Security and Department Details-v3 Mar 1 2022.xlsx

Additional information may be gathered in each solutions Administration Summary (see each section within)

More information about the out-of-the-box organization roles can be found on CityView Connect:

https://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/cityview-manuals/system-administration-with-cityview-manager/security/1233-organization-roles

> **Please note:** it is imperative that the Code column on the Employee Details tab matches the users' Active Directory login name (i.e. the username used to log onto their machine.) If the CityView Development Team configures the security settings per the information provided in the workbook, and it turns out that these are not the user's Active Directory login names, the rework is significant and will require a change order.

5.2 Infrastructure

CityView Workspace, CityView Portal and CityView Mobile are modern, browser-based applications. Please consult CityView Connect for latest supported browsers and devices.

https://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/supported-technologies

CityView will also require that these websites be run under SSL (https). IT departments should be prepared to apply a proper SSL certificate (not self-signed) to both of these websites. Documentation can be provided upon request if more information is required.

6   CONFIGURATION: PLANNING

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

6.1 General Configuration

Configuration of CityView Planning and Planning Portal using the information collected during process mapping. This will include the following:

- Lookup table data
- Custom data fields specific to the Planning types being tracked through the system
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out-of-the-box sub-workflows based on the City's requirements.
- Refinement of the CityView Select scheduled process for planning application expirations.

General configuration is defined in:

- DOC: 12359_Norman Planning Administrator 20220817.pdf
- DOC: 12359 Norman PL EE User Security and Submittals v2 Aug 23 2021.xlsx
- DOC: 12359 Norman Planning 20220817.xlsx
- DOC: 12359 Norman Planning MATRICES v4 Jun_1 2022.xlsx
- DOC: 12359 Norman Final Plat- Checklist 1_29_13.Doc
- DOC: 12359 Norman Preliminary Plat- Checklist-1-29-13 v2 Jun 22 2021.docx
- DOC: 12359 Norman WQPZ Checklist v1.0 Aug 30 2021.xls
- DOC: 12359 Norman 0 - Planning Commission Item Checklist Sep 13 2021.docx

6.2 Activity Workflow

The in scope CityView Select workflows and custom workflows [only if applicable] are listed below:

- DOC: 12359 Norman PL workflow 1 Mar 25 2022.jpg
- DOC: 12359 Norman PL workflow 2 Mar 25 2022.jpg
- DOC: 12359 Norman PL workflow 3 Mar 25 2022.jpg
- DOC: 12359 Norman PL workflow 4 Mar 25 2022.jpg
- DOC: 12359 Norman PL workflow 5 Mar 25 2022.jpg
- DOC: 12359 Norman PL workflow 6 Mar 25 2022.jpg

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Planning: Pre-consultation and Intake (main Planning workflow)	In Scope
Planning: Circulation and Review (re-circulation) (sub-workflow)	In Scope
Planning: Circulation and Review (no re-circulation) (sub-workflow)	[Not to be Used
Planning: Appeal Process (sub-workflow)	In Scope
Planning: Administrative/Staff Approval (sub-workflow)	In Scope
Planning: Commission Approval (sub-workflow)	In Scope
Planning: Council Approval (sub-workflow)	In Scope
Planning: Hearings/Agendas (sub-workflow)	In Scope
Planning: Heritage Board (sub-workflow)	In Scope
Planning: Pre-Application (sub-workflow)	In Scope
Planning: Revisions Process (sub-workflow)	In Scope
Planning: Agreement Process (sub-workflow)	[Not to be Used]
Planning: Service Agreement (sub-workflow)	[Not to be Used]
Planning: Upload Review (sub-workflow)	In Scope
Planning: Zoning Board of Appeals (sub-workflow)	In Scope
Planning: Add Default Inspections (sub-workflow)	[Not to be Used]
Planning: Inspection Template (template)	[Not to be Used]
Planning: Review Template (template)	In Scope
Planning: External Agency Review (template)	In Scope
Planning: Legacy Workflow	In Scope
Planning: Flood Plain	Out of Scope

6.3 Letters

Configuration of 10 letter templates for Planning included in the contract.

The following letters were identified during process mapping:

- DOC: 12359 Norman Letters v1.0 Apr 21 2022.xlsx

6.4 Fees

Fees for Planning are identified in the following documents provided:

- DOC: 12359 Norman List of Fee Types Apr 21 2022.xlsx
- Final Scope Doc\Fees\ - also references fees in file 12359 Norman PL List of Fee Types v2 Jun 1 2022.xlsx Since there are 2 files both with fees Cityview needs to make sure all are accounted for. CityView prefers one file.

The scope of the project includes a one-time load of the City's fee schedule. The fee schedule provided during process mapping is assumed to be the one that will be configured and implemented for go live. Once the project is live and transition to Support has occurred, the City of Norman will have the ability to maintain their fee schedule with the appropriate training.

Any changes that occur to the City's fee schedule during the project, need to be communicated immediately to the CityView Project Manager so that plans can be made to mitigate the risks.

6.5 Reports

CityView out-of-the-box reports are provided as is for Planning. Additional reports requested are listed in the Out of Scope section below.

Planner Projects	Deposits and Bonds Summary
Planning Activities	Escrow (By Revenue Account #)
Planning Application Details	Expired Projects
Project Applications	Outstanding Plan Reviews
Project Expirations	Monthly Project Status Report (sorted by Project Number)
Project Fees	Monthly Project Status Report (sorted by Date Entered)
Review Turnaround Time	Plan Review Time
Scheduled Hearings	Submittals Report (Sorted by Planner)
Portal Projects Entered Today	Planning Punch In-Out Report (requires SSRS)

6.6 Scheduled Processes

The following out-of-the-box scheduled processes will be configured (enabled and scheduled) as part of this project:

Expire Planning Applications	Criteria:	Disable
	Expiration date is:	Today plus 0 Calendar Days
	Status of the Project is in the following list:	Waiting for Conditions
	Process invoked by scheduled process:	Expire Planning Application
	Schedule frequency:	Weekly, Daily at 23:50
	Outcomes:	Set Planning Project status to Expired Set Planning Application status to Expired

6.7 Alerts & Holds

No specific alerts have been defined for Planning. The user always has the ability to manually add a property alert, or a contact alert that will be visible any time a location or contact is added to an application.

6.8 Misc Configuration

Out of box Community notification to be implemented.

6.9 Out of Scope Activities

- **WORKFLOW**: Flood plain sub workflow to be configured based on the document *Flood Plain Permit Application WorkFlow.pdf*

- **REPORTS**: Three (3) additional reports have been requested to be included in the scope of report hours in the contract:
    - DOC: 12359 Norman PL Custom Report - 220301_February 2022 Commercial Report (1).pdf
    - DOC: 12359 Norman PL Custom Report - 220301_February 2022 Residential Report.pdf
    - DOC: 12359 Norman PL Custom Report - 220301_February 2022 Monthly Report.pdf

7   CONFIGURATION: PERMITS & INSPECTIONS

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

7.1   General Configuration

Configuration of CityView Permits & Inspections and Permits & Inspections Portal using the information collected during process mapping. This will include the following:

- Lookup table data.

- Custom data fields specific to the permit being tracked through the system.
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out-of-the-box sub-workflows based on the City's requirements.

General configuration is defined in:

- DOC: 12359 Norman Permits and Inspection 20220817.pdf
- DOC: 12359 Norman PR Workbook v2.4 Mar 7 2022.xlsx

7.2   Activity Workflow

The in scope CityView Select workflows are listed below:

- DOC: 12359 Norman PR Workflow Permits GC Jun 14 2022.docx
- DOC: 12359 Norman PR Workflow Permits GC Jun 14 2022.docx

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Permits and Inspections Building: Main Process	In Scope
Permits and Inspections Building: Deposits and Bonds (sub-workflow)	In Scope
Permits and Inspections Building: Main Process Upload Review	In Scope
Permits and Inspections Building: Main Process Default Inspections Template	In Scope
Permits and Inspections Building: Main Process Default Reviews Template	In Scope
Permits and Inspections Building: Permit Expiration	In Scope
Permits and Inspections: Simple Inspections Template	[Not to be Used]
Permits and Inspections: Special Events (sub-workflow)	In Scope
Permits and Inspections: Waiting for Fee Payment (sub-workflow)	In Scope
Permits and Inspections: Condition Document Submitted	In Scope
Permits and Inspections: Legacy Workflow	In Scope

7.3   Letters

Configuration of 15 letter templates for Permits & Inspections included in the contract.

The following letters were identified during process mapping:

- DOC: 12359 Norman Letters v1.0 Apr 21 2022.xlsx
- FILE: Permits and Inspections/Letters/City of Norman EDITS folder
  (City of Norman has modified out-of-the-box letters and provided them to CityView found here:)

7.4   Fees

Fees for Permits & Inspections are identified in the following documents provided:

- DOC: 12359 Norman List of Fee Types June 01 2022.xlsx

The scope of the project includes a one-time load of the City's fee schedule. The fee schedule provided during process mapping is assumed to be the one that will be configured and implemented for go live. Once the project is live and transition to Support has occurred, the City of Norman will have the ability to maintain their fee schedule with the appropriate training.

Any changes that occur to the City's fee schedule during the project, need to be communicated immediately to the CityView Project Manager so that plans can be made to mitigate the risks.

7.5 Reports

CityView out-of-the-box reports are provided as is for Permits & Inspections. No additional reports are included. Additional reports will require a change order.

Application Review Tickler	Permit Turn-Around
Average Daily Inspections	Inspection Detail
Building and Safety Revenue Report	Inspection Outcome
Certificate of Occupancy Listing	Inspection Schedule
Deposits and Bonds Summary	Inspections To Do
Escrow (By Revenue Account #)	Inspections by Inspector
Fee Paid in Full	Outstanding Fees
Permit Status Summary (By Status)	Permit Inspection Trend (requires SSRS)
Permit Status Summary (By Type)	Permit Turn-Around Detail Report
Permit Status Summary (By Contractor)	Permit Value
Permit Time Spent	Permitting – Punch In-Out Report (requires SSRS)
Review Turnaround Time	Public Works Permit Status Summary
Portal Permits Entered Today	Review – Decision Date
Stats Canada Reports (requires SSRS)[8]	

[8] For Canadian customers only

7.6 Scheduled Processes

The following out-of-the-box scheduled processes will be configured (enabled and scheduled) as part of this project:

Check Invalid Licenses	**Criteria:**	**Enabled**
	Status of the Permit Application is in the following list:	Invalid License

	Check each of the Contractor contacts on the application:	All Contractor Contacts issuances are Issued and have correct issuances for the trade permits
	Schedule frequency:	Weekly, Monday – Friday at 22:00
	Outcomes:	Update Permit Application status to the status prior to set to Invalid License

Add Generate Expiration Warning Notice Activity	**Criteria:**	**Enabled**
	Expiration date is:	On or after First Day of Next Month Before or on Last Day of Next Month
	Status of the Permit is in the following list:	Pending, Submittals Incomplete, In Plan Check, Issued, On Hold, Stop Work, Ready for Issuance, Recalled, Ready to Process
	Schedule frequency:	Monthly, on the 5th day at 00:00
	Outcomes:	Add Generate Expiration Warning Notice Activity

Add Generate Expiration Notice Activity	**Criteria:**	**Enabled**
	Expiration date is:	Today plus 0 Calendar Days
	Status of the Permit is in the following list:	Pending, Submittals Incomplete, In Plan Check, Issued, On Hold, Stop Work, Ready for Issuance, Recalled, Ready to Process
	Process invoked by scheduled process:	Set Permit Status to Expired
	Schedule frequency:	Weekly, Daily at 23:50
	Outcomes:	Add Generate Expiration Notice Activity

Set Permit Status to Expired	**Criteria:**	**Enabled**
	Expiration date is:	Today plus 0 Calendar Days
	Status of the Permit is in the following list:	Issued
	Schedule frequency:	Weekly, Daily at 23:30
	Outcomes:	Set Permit Status to Expired

Add Progress Inspection Activity	**Criteria:**	**Disabled**
	Date of last Inspection:	Is before or on Today minus 60 Calendar Days
	Status of the Permit is in the following list:	Permit Issued
	Schedule frequency:	Weekly on Monday, Tuesday, Wednesday, Thursday, Friday at 00:00

	Outcomes:	Add Progress Inspection Activity

7.7 Alerts & Holds

There is one out-of-the-box Permits & Inspections alert that is configured for this system. When a Stop Work Order has been issued, an alert is automatically placed on the property. Once the Stop Work Order is resolved, the property alert will automatically be removed from the property.

7.8 Out of Scope Activities

No out of scope activities have been requested for CityView Permits & Inspections.
We do believe there needs to be more time allocated for Special Events review and associated permits, work items, etc. This may require some additional hours to account for in the budget reconciliation.

Court Bonds also will best fit under Code Enforcement using Cashiering it has been determined. It is possible scope needs to be accounted for this as well.

8 CONFIGURATION: CODE ENFORCEMENT

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

8.1 General Configuration

Configuration of CityView Code Enforcement and Code Enforcement Portal using the information collected during process mapping. This will include the following:

- Lookup table data.
- Custom data fields specific to the Code Enforcement case types being tracked through the system.
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out-of-the-box sub-workflows based on the City of Norman's requirements.

General configuration is defined in:

- DOC: 12359 Norman Code Enforcement Administrator 20220817.pdf

8.2 Activity Workflow

The in scope CityView Select workflows and custom workflows [only if applicable] are listed below.

- DOC: 12359 Norman Code Enforcement Workflow 20220227 final.pdf

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Code Enforcement – Attach Pictures (sub-workflow)	In Scope
Code Enforcement – Abatement (sub-workflow)	In Scope
Code Enforcement – Citation (sub-workflow)	In Scope
Code Enforcement – New Case Workflow	In Scope
Code Enforcement – Portal Complaint (sub-workflow)	In Scope
Code Enforcement – Summons (sub-workflow)	[Not to be Used]
Code Enforcement – Appeal Process	In Scope
Code Enforcement – Legacy Workflow	In Scope
Code Enforcement – Abatement & Condemnation End Process (subworkflow)	[Not to be Used]
Code Enforcement – Condemnation (Previously Uninhabitable Process)	In Scope
Code Enforcement – Commercial Fire Inspection	[Not to be Used]
Code Enforcement – ADJ (sub-workflow)	In Scope
Code Enforcement – Agency Reviews (inspection template)	[Not to be Used]
Code Enforcement – Animal Complaint	[Not to be Used]
Code Enforcement – Animal Picked-Up (sub-workflow)	[Not to be Used]
Code Enforcement – Animal Quarantine (sub-workflow)	[Not to be Used]
Code Enforcement – Dangerous Dog (sub-workflow)	[Not to be Used]
Code Enforcement – Dog Bite	[Not to be Used]
Code Enforcement – Fire-Safety Inspections	[Not to be Used]

8.3 Letters

Configuration of 15 letter templates for Code Enforcement included in the contract.

The following letters were identified during process mapping:

- DOC: 12359 Norman Letters v1.0 Apr 21 2022.xlsx

8.4 Fees

Fees for Code Enforcement are identified in the following documents provided:

- DOC 12359 Norman Abatement&Filing_Fees-Code-March 29 2022.xlsx
- DOC: 12359 Norman AttachmentA-mowing Mar 29 2022.xlsx
- DOC: 12359 Norman AttachmentA-other Mar 29 2022.xlsx

8.5   Reports

CityView out-of-the-box reports are provided as is for Code Enforcement. The City of Norman has three (3) possible custom reports noted below. These are a monthly stat report, monthly stat report per inspector, and an annual combined report that identifies details (per inspector, per violation type, and detailed report). Additional reports will require a change order.

Annual_Report_Combined_Yrs.xlsx
CC_Monthly_Stats_FYE-(year).xlsx
Inspector_Stats-(Month)-(Year).xlsx

Case Status	Inspection Schedule
Case Follow-up	Deposits and Bonds Summary
Case Summary	Escrow (By revenue Account #)
Incident History	Officer Activity by Case
Inspection To Do	Compliance Report
Officer Activity by Inspection	Portal Cases Entered Today

8.6   Alerts & Holds

There is one out-of-the-box Code Enforcement alert that is configured for this system. The alert behaves as follows: when a Code case is opened on a property, a moderate level alert will automatically be placed on the property. If a violation is flagged as dangerous and added to the case, the level of the property alert will automatically be increased to high. Once the case is closed, the alert will automatically be resolved and closed.

8.7   Out of Scope Activities

The following Reports are required will be accounted for under the contracted Report hours:
- Annual_Report_Combined_Yrs.xlsx
- CC_Monthly_Stats_FYE-(year).xlsx
- Inspector_Stats-(Month)-(Year).xlsx

9   CONFIGURATION: BUSINESS LICENSING

Configuration (workflows, letters, fees, etc.), whether required or desired, is considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

9.1   General Configuration

Configuration of CityView Business Licensing (including Portal) using the information collected during process mapping. This will include the following:

- Lookup table data
- Custom data fields specific to the Licensee and Issuance types being tracked through the system
- Adjustments to the solution workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of out-of-the-box sub-workflows based on the City's requirements.
- Refinement of the CityView Select scheduled process for licensing renewals.

General configuration is defined in:

- DOC: 12359 Norman Licensing Administrator 20220817.pdf
- DOC: 12359 Norman BL Workbook v1.0 Mar 02 2022.xlsm

9.2   Activity Workflow

The in scope CityView Select workflows are listed below.

- DOC: 12359 Norman BL StormWater Workflow v1.0 Mar 11 2022.pdf

Workflow Name (if out-of-the-box) or Description (if custom)	In Scope / Not to be Used
Licensing: New Business	In Scope
Licensing Inspection Template (template)	In Scope
Licensing Review Template (template)	In Scope
Licensing: OTC/Portal Business License	[Not to be Used]
Licensing: Notice & Order Process	[Not to be Used]
Licensing: Taxi Inspections (sub-workflow)	[Not to be Used]
Licensing: Demolition (sub-workflow)	[Not to be Used]
Licensing: Vehicle for Hire Owner (sub-workflow)	[Not to be Used]
Licensing: Legacy Workflow	In Scope
Licensing: Marriage	In Scope
Licensing: Rental Housing	[Not to be Used]
Licensing: Stormwater	Custom: Out of Scope

9.3   Letters

Configuration of 7 letter templates for Business Licensing included in the contract.

The following letters were identified during process mapping:

- DOC: 12359 Norman Letters v1.0 Apr 21 2022.xlsx

9.4 Fees

Fees for Business Licensing are identified in the following documents provided:

- DOC: <u>12359 Norman List of Fee Types Apr 21 2022.xlsx</u>

The scope of the project includes a one-time load of the City's fee schedule. The fee schedule provided during process mapping is assumed to be the one that will be configured and implemented for go live. Once the project is live and transition to Support has occurred, the City of Norman will have the ability to maintain their fee schedule with the appropriate training.

Any changes that occur to the City's fee schedule during the project, need to be communicated immediately to the CityView Project Manager so that plans can be made to mitigate the risks.

9.5 Reports

CityView out-of-the-box reports are provided as is for Business Licensing. No additional reports are included. Additional reports identified will be accounted for from the Reports budget in the contract

Business Status	Total Amount Billed
Emergency Contacts	Past Due Licenses
Deposits and Bonds Summary	Tax Exempt Businesses
Did Not Report Gross Earnings	Total Amount Billed
Escrow (By Revenue Account #)	Inactive Business Licenses
Excise Tax	One Day Business Licenses
Fees Paid In Full	Outstanding Fees
Portal Licenses Entered Today	

9.6 Scheduled Processes

The following out-of-the-box scheduled processes will be configured (enabled and scheduled) as part of this project:

Expire License Issuances	Criteria:	Enabled
	Expiration date is:	Before or on Today plus 0 calendar days
	Status of the Licensee is exactly:	Active
	Status of the Issuance is exactly:	Issued
	Schedule frequency:	Weekly on Monday, Tuesday, Wednesday, Thursday, Friday at 23:00
	Outcomes:	Set Issuance status to Expired

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LC Add Delinquency Fee	**Criteria:**	**Disabled**
	Expiration date is exactly:	Today minus 2 Calendar Days
	Status of the Licensee none of:	Cancelled, Closed, Moved
	Licensee Category any of:	Business
	Schedule frequency:	Weekly on Monday, Tuesday, Wednesday, Thursday, Friday at 01:00
	Outcomes:	n/a

LC Batch Print Renewal Notices	**Criteria:**	**Enabled**
	Letter Type any of:	Renewal Notice
	Concatenated PDF?	Yes
	Save to Single File?	Yes/No
	Separate Printed and Emailed Letters?	Yes
	Sorting:	Address
	Schedule frequency:	Mar 1st, every year

LC Business Late Fee (Interest)	**Criteria:**	**Disable**
	Fee Type any of:	n/a
	Fee Paid field is exactly:	False
	Fee Payable field is exactly:	True
	Schedule frequency:	Monthly on the 1st day at 00:00
	Outcomes:	Add Interest Adjustment to fee and apply adjustment

LC Business Late Fee (Penalty)	**Criteria:**	**Enabled**
	Fee Due date is before or on:	Today minus 1 calendar day
	Fee Type any of:	License Fee
	Schedule frequency:	April 1st – 14th $2 / Day
	Outcomes:	Fee Adjustment

LC Business License Renewal	**Criteria:**	**Enabled**
	Issuance Expiration date is:	On or after First Day of Next Month Before or on Last Day of Next Month
	Status of the Licensee is exactly:	Active
	Status of Issuance is exactly:	Issued

	Licensee Type is exactly:	Business
	Issuance Type is not exactly:	Temporary License
	Schedule frequency:	Monthly on the 1st day at 22:00
	Outcomes:	Add Renewal Issuance Add License Submittals Add Renewal fee Add Renewal Letter

	Criteria:	**Disabled**
LC Business License Renewal Tax Exempt Business	Issuance Expiration date is:	On or after First Day of Next Month Before or on Last Day of Next Month
	Status of the Licensee is exactly:	Active
	Status of Issuance is exactly:	Issued
	Licensee type any of:	Business, Event, Exempt, Specialized, Manufacturing/Wholesale, Regulatory Permit
	Issuance Type is not exactly:	Temporary License
	Schedule frequency:	Monthly on the 1st day at 23:00
	Outcomes:	Add Renewal Issuance Add License Submittals Add Renewal Letter

	Criteria:	**Enabled**
LC Merge and Generate Renewal Notices	Letter Type is:	[to be configured for customer]
	Recipient Type any of:	[to be configured for customer]
	Issuance Type is exactly:	Business License
	Issuance Status is exactly:	Issued
	Schedule frequency:	Weekly on Friday at 00:12
	Outcomes:	Generates a combined renewal notice for each individual contact

9.7   Alerts & Holds

No specific alerts have been defined for Licensing. The user always has the ability to manually add a property alert, or a contact alert that will be visible any time a location or contact is added to an application.

9.8   Out of Scope Activities

Custom workflows as identified and noted in the budget reconciliation

10 CONFIGURATION: CASHIERING

Configuration (workflows, letters, fees, etc.), whether required or desired, are considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

10.1 General Configuration

Configuration of CityView Cashiering using the information collected during process mapping. This will include the following:

- • DOC: 12359 Norman Cashiering Administrator 20220817.pdf

10.2 Letters

Configuration of 3letter templates for Cashiering included in the contract.

The following letters were identified during process mapping:

- • DOC: 12359 Norman Letters v1.0 Apr 21 2022.xlsx

10.3 Reports

CityView out-of-the-box reports are provided as is for Cashiering. No additional reports are included. Additional reports will require a change order.

Daily Cash Out (By Fee Type)	Payment Detail
Daily Cash Out for Cashier (By Payment Type)	Payment Detail (By Cashier)
Daily Cash Out (By Revenue Account #)	Reversals
Daily Cash Out (By Payment Type)	General Cashiering Report
Daily Cash Out (By Payment Type) With Fee Types	Portal Payments Entered Today
Daily Cash Out (By Receipt)	Fee Maintenance

10.4 Out of Scope

No out of scope activities have been requested for CityView Cashiering.

11 CONFIGURATION: PROPERTY INFORMATION

Configuration, whether required or desired, is considered out of scope unless specified in this document and must be mutually agreed to through a written change order.

11.1 General Configuration

Configuration of CityView Property Information using the information collected during process mapping. This will include the following:

- DOC: 12384 Norman CityView Administrator Property v1.0 April 26 2022.pdf

12 MOBILE

12.1 General Configuration

Configuration of CityView Mobile using the information collected during process mapping. This will include the following:

- DOC: 12359 Norman Mobile Administrator v1.0 Apr 22 20222.pdf

13 PORTAL

13.1 General Configuration

Configuration of CityView Portal using the information collected during process mapping. This will include the following:

- DOC: 12359 Norman Portal Administrator v1.0 Apr 22 20222.pdf

14 INTEGRATIONS AND CUSTOMIZATIONS

14.1 GIS/Mapping Integration

The publicly exposed map service (server) is found here:
https://services.arcgis.com/rt1leD4Hj3sLGHNL/ArcGIS/rest/services

The publicly exposed geometry service is found here:
https://utility.arcgisonline.com/arcgis/rest/services/Geometry/GeometryServer

Suggested map services

CityView will create three maps: one for use inside CityView Workspace (for staff use), one for use by citizens via CityView Portal, and one for use in CityView Mobile (for inspector/field use). The Mobile/Portal maps will be used over slower connections, older browsers, and lighter weight equipment; therefore, it needs to have fewer, less complex layers and it must not require the user to do any manual manipulation of those layers to do their work.

14.2 Financial Export to GL

The City uses Tyler Munis as their Financial system. The following file was provided by the City on December 14, 2021 and will comprise the requirements for the daily export file.

- DOC: 12359 Norman FinExport v1.0 Dec 14 2021.csv

CityView will create an expression that will be executed by a scheduled process once per day (weekday) after close of business. The users who take payments will be trained to Close their batches for the day, reconcile their cash drawers, and set their batches to "Ready for Export". Any Cashiering batches that are in a status of "Ready for Export" will be exported by this expression.

14.3 Laserfiche (EDMS) Integration

CityView's electronic document management framework allows all documents generated by, or attached to, CityView records to be pushed through to Laserfiche using the document management system's API. This is done in real-time, so the user does not need to do anything deliberate in order to ensure that your records are moved into Laserfiche. CityView is able to push meta data information into the document management system using upload document business rules. The only meta data field that must be set is the primary reference number for the parent table to which the document is attached (i.e. Permits & Inspections, Planning, Code Enforcement, etc.) This becomes the relational "key" so that CityView can retrieve all applicable documents out of Laserfiche the next time a user positions on the permit/application/case in CityView.

> **Please note:** CityView **strongly recommends** that the City NOT point their onsite TEST environments at their Production EDMS. For brief periods of testing, this may be acceptable; or, if there is a designated path or "area" within the EDMS where TEST documents can be stored, then it may be OK, but generally it is very risky because test documents will be getting pushed into the Production EDMS and that is typically undesirable. Any cleanup of test documents will be the City's responsibility.

- DOC: 12359 Norman Laserfiche Integration Questionnaire v1.0 Nov 17 2021.docx

14.4 Payment Processor – Invoice Cloud

The City uses Invoice Cloud as their payment processor for online portal payments.

- DOC: 12359 Norman Invoice Cloud requirements v1.0 April 5 2022.docx

CityView will create an expression that will be executed by a scheduled process once per day (weekday) after close of business. The users who take payments will be trained to Close their batches for the day, reconcile their cash drawers, and set their batches to "Ready for Export". Any Cashiering batches that are in a status of "Ready for Export" will be exported by this expression.

14.5 IVR

Selectron IVR (Interactive Voice Response) integration allows the contact on the application to easily schedule inspections, retrieve inspection results, status etc., in real time mode, which is done through various searches, business rules using SOAP or Webservice calls.

The details of this integration / setup can be found in the document:

- DOC: 12359 Norman Selectron Integration v1 Apr 20 2022.docx
- DOC: 12359 Norman 3078 - VP Call Flow v1c Feb 18 2022.pdf

14.6 MS Exchange Integration

CityView MS Exchange integration allows the system to query inspector calendars to find available time slots so that inspections can be automatically scheduled based on a range of criteria. Typical criteria would include geographic areas and specific trade qualifications. More information about the Exchange Integration can be found on CityView Connect:

https://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/desktop/prebuilt-essentials/inspection-scheduling/2088-inspection-scheduling-with-exchange-integration

CityView's MS Exchange integration is a licensable component, but it is otherwise out-of-the-box functionality. The only aspects of this integration that are "in scope" for the project are to configure the pointers and security settings so that CityView can find the Exchange server and connect to it, configuration of the resource groups (and alternate resource groups, if desired) that will allow CityView to query relevant inspectors' calendars to see if they are available to perform requested inspections, and security settings to enable the Exchange "Add Appointment" buttons in the CityView user interface.

14.7 Spatial Queries

CityView clients utilize spatial queries to retrieve information from mapping layers and store with the application/case. the City's contract includes one spatial query with configuration to create attribute field(s) for storing the resulting value from the spatial query.

- Synching to the map is based on a static value on the Map which relates to a piece of information for the Parcel.
- Spatial queries use the above synching between CityView and the map and either pulling attribute values from the map layer or identifying that the parcel polygon is within or partially within.

- Fields are created on the applications/cases to store the spatial information as at the time of the application/case.
- The values from the spatial queries can be used to affect automation in the product. For Example: if the property lies within a Flood zone add a Zoning Review along with the required reviews for the application.

The desired Spatial Queries are defined in:

- DOC: <u>12359 Norman Spatial Queries Template v1.2 May 12 2022.xlsx</u>

14.8 Other Integrations

Advanced Utilities (CIS) – CityView solution to connect to the CIS application via a Stored Procedure to retrieve the account information through either a SOAP or Webservice Call. If the account has an outstanding balance, a notification to the clerk that there is an amount overdue or outstanding. Final outcome to be confirmed

TYLER NEW WORLD: Descoped

14.9 Customizations
No additional customizations noted that is not already in the Budget Reconciliation document.

15 SYSTEM MAINTENANCE SCHEDULED PROCESSES

The following out-of-the-box scheduled processes for system maintenance will be configured (enabled and scheduled) as part of this project:

- Clear Letter Body for Printed
- Remove Letters from Print Queue
- Open/Close CityView Portal Cashiering Batches
- Complete Waiting Activities
- Address Book - Alternate Addresses
- Address Book - Alternate Addresses Yearly Maintenance
- Address Book - Alternate Phone Numbers
- Address Book - Alternate Phone Yearly Maintenance
- Overdue Activity Reminder

16 CITYVIEW MICROSOFT ADD-INS

The Microsoft Outlook Add-in and Word Add-in are both in scope for this project. **CityView supports Office 365 for the Word and Outlook Add-ins with some limitations**, mainly around configuring letter templates with the MS Word Add-in. Consult CityView Connect for exact system requirements:

Commented [TW20]: TERI: FINAL DETAIL TO BE CONFIRME FOR IN/OUT SCOPE/DESCOPED
Mar 4/22 noted discussion with R&D. details captured - -needs to be updated with discussion/outcomes.
[outstanding payment due prior to Lic. Approvals]

DISCUSSION required as this is a very large quote based on the info Norman has. Provided to Norman Nov 1 in email. CONFIRMED Norman GIS has the LocationID field.

Not currently quoted in the budget reconciliation (see notes an quote in the document) – if this is to be added, a decision need to be made for the hours. Last discussion has determined to leave it out

https://cityviewhelp.iharriscomputer.com/cityviewcms/index.php/supported-technologies/789-microsoft-office-integration

17 MISCELLANEOUS

Signature bitmaps have been collected from the City for Employees who will need to "sign" letters. Any letters that have a place for an employee signature will use these image files.

Lookup Codes, Statuses, and reference number formatting will be used as they come out-of-the-box.

Background photos (between 500KB and 1,800 KB) have been collected for use in CityView Workspace.

Logos and/or Seals have been collected for letterhead.

17.1 General

General settings have been collected as part of the CityView Administrator interviews and are included in the following:

- DOC: 12359 Norman General Administrator v1.0 Apr 22 20222.pdf