



THE CITY OF SANIBEL, FL

CITYVIEW PROPOSAL

January 12, 2023

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ORIGINAL



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1. TRANSMITTAL LETTER

CityView, an unincorporated division of N. Harris Computer Corporation
4464 Markham Street, Suite 1202
Victoria, BC., V8Z 7X8 Canada
Toll-Free: 1.800.664.5647

January 12, 2023

City of Sanibel
Attn: Julian Halitaj
800 Dunlop Rd.
Sanibel, FL 33957

RE: CityView Software Solution

Dear Julian,

Thank you for the opportunity to provide this CityView proposal for the City of Sanibel.

CityView has been providing land management/permitting solutions for forty years. Our proven approach will provide the City with a clear project plan and a well-developed methodology for a successful implementation that leads to long-term success. The CityView solution is a fully integrated solution with technologies such as Esri ArcGIS, Hyland OnBase, Bluebeam Revu (for electronic document markup), and Microsoft Office applications to streamline your daily activities. Your CityView solution will provide valuable time-savings and efficiencies for staff and constituents!

Selecting CityView as your new land management solution will enable the City to:

- Eliminate manual processes and redundant data systems. Within an application, CityView's fully integrated solution will enable City staff to utilize your GIS data, view any related permits or cases, track every step in real-time, and issue a permit all in one location. Permitting and planning applications will be submitted online and feedback provided via email and the portal in real-time. Digital permits will be issued and inspections will be requested, scheduled and the results all provided on-line.
- Omit missed steps or deadlines by providing insight into every aspect of your land management processes by using CityView's powerful Graphical Workflow Designer. Our workflows eliminate the over-reliance upon reports and provide real-time insight into the status of every application, or case, to management and staff.
- Improve the efficiency of field staff and improve customer service through CityView Mobile. Your field staff will have access to all of the data they need from your CityView system. This will help them provide superior service to your community while optimizing their time in the field. CityView Mobile provides the detail needed to complete their inspections and to quickly input the results. There is no need to return to the office to enter data, or to call office staff for an important detail.

Once again, thank you for the opportunity to respond! Lewis Gouge will be your main point of contact regarding this response and if you have any questions please do not hesitate to call:



CityView, a division of N. Harris Computer Corporation
Steve Favalaro
Regional Sales Manager
Telephone: 778.717.0571
Cellular: 904.630.2492
Email: sfavalaro@harriscomputer.com

Sincerely,

A handwritten signature in black ink, appearing to read "Sean Higgins", with a stylized flourish at the end.

Sean Higgins
Executive Vice President, CityView
Harris Computer Systems
Telephone: 1.800.664.5647
Email: shiggins@harriscomputer.com



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2. CITYVIEW PROFILE



- ❖ Since its inception 40 years ago, the makers of CityView have focused **solely and completely** on creating comprehensive permitting and land management solutions for municipalities across North America.
- ❖ CityView, an unincorporated division, of N. Harris Computer Corporation (proud, successful, and profitable) is owned by the Constellation Software Inc. group of companies.
- ❖ The CityView workforce is distributed throughout North America, in order to best serve our customers. Our primary location is Victoria, BC, with other locations in Oregon, Missouri, North Carolina, Vancouver, Alberta, and Ontario.
- ❖ Harris employs 6,000+ staff with 3,550 directly serving government disciplines. In the CityView business, this comprises 59% employed in serving our customers, 9% in Sales, 24% in Research and Development, and 8% in Administration (includes senior executive management, corporate – IT, HR, finance, and legal).
- ❖ Over 100,000 Harris customers. CityView's customers span 35 U.S. states and 7 Canadian provinces and are all local governments.
- ❖ 5000+ CityView users logged in at any one time. 13 million people live in communities where CityView is being used.
- ❖ Constellation is a publicly traded company on the Toronto Stock Exchange under (TSX: CSU). Constellation's revenues in 2021 were \$4.11 billion. For more information on our financial status, please visit Constellation's website: <http://www.cssoftware.com>.
- ❖ CityView provides a comprehensive solution including software and licensing, implementation, conversion, training, and support and maintenance. The City can be confident knowing they are in the right hands. CityView staff are experienced and *knowledgeable in your business*, and *committed to success in our business*.
- ❖ CityView will be the prime and only contractor. No subcontractors or third party implementors will be used. The City can feel secure in knowing they will be trained and supported by CityView staff and not a third party company.
- ❖ It is the combination of **flexibility, integration expertise**, and **reduced risk** that **sets CityView apart in the marketplace**.

CityView Differentiators

We provide easily installed, flexible, easy to use software solutions that are engineered for the long-term.

1. **Flexibility** – CityView offers seamless access to municipal staff, citizens and contractors via hosted or on-premise deployment, a self-service portal, an intelligent chatbot, video inspections and mobile solutions. These options, made possible by CityView's adaptive and modern technology, provide our customers with flexibility, convenience and efficiency.
2. **Integration expertise** – CityView's integration expertise lowers the total cost of ownership by providing tight integrations with other CityView applications, a seamless end-user experience when integrating with third-party products and flexibility for customers to maintain their systems of choice. Some integrations to note include our Microsoft Outlook and Word Add-Ins, Esri GIS, Bluebeam for paperless plan reviews, OnBase document management and more.
3. **Reduced risk** - Due to CityView's flexible and scalable solutions, tight integrations, seamless access and vast experience working with regional community development and land management requirements across North America, customers reduce their investment risk and staff resistance to change, all while lowering the total cost of ownership.










CityView	CityView Products		Winning Partner
<ul style="list-style-type: none"> ✓ Serving local governments since 1982 ✓ Over 350 successful implementations ✓ Covering 35 states and 7 provinces across North America 	<ul style="list-style-type: none"> • Property Information • Permits and Inspections • Code Enforcement • Planning • Electronic Plans Review • Business Licensing • Animal Licensing • Service Request • Cashiering 	<ul style="list-style-type: none"> • Rental Housing • Marriage and Death Registration • Parking Management • Cemetery Management • CityView Portal • CityView Mobile • CityView GIS • CityView PlansDrop • CityView Virtual Inspections • CityView Assistant 	<ul style="list-style-type: none"> ✓ Experienced ✓ Innovative ✓ Flexible Software ✓ Committed Staff ✓ Great References ✓ Stable

Our Mandate

It is our goal to provide easily installed, powerful and long-term software solutions that manage the everyday business processes of municipalities. Throughout our 40-year history CityView has focused on the needs of Community Development departments for local governments. These solutions are based on our combined years of experience in municipalities and on a product that easily adapts to changing practices. We are committed to providing a variety of comprehensive services for this software, from installation and training to ongoing technical support. We want to be a trusted advisor, coach and supporter. More than just a vendor, we want to be the company to partner with.

Partners

The following details partnerships we have formed to ensure that our customers receive the benefits from the latest technologies and additional functionality to meet your wide range of needs.

 <p>As an Esri partner for more than 15 years, CityView is able to provide the innovation of industry-leading mapping to staff and citizens in cities and counties throughout North America.</p>	 <p>Microsoft Certified Gold Partner, CityView is able to use the latest in technological advances, including Microsoft's .NET platform to continuously develop and enhance the CityView product line.</p>	 <p>CityView is an authorized registered reseller of Bluebeam, third party software, products and an Alliance Partner. CityView leverages the PDF markup technology inside of CityView's workflow and plan review processes.</p>
 <p>CityView's Professional Development Partnership with Laserfiche stems from the natural symbiosis between the roles they fulfill for Municipalities.</p>	 <p>CityView is part of the OnBase Developers Network (ODN) for Hyland software. OnBase is a single enterprise information platform for managing content, processes and cases.</p>	 <p>CityView customers benefit by having access to the latest communication technologies without having to deal with multiple vendors.</p>
 <p>CityView partners with Invoice Cloud to provide customers with secure, simple, reliable, and mobile payments online.</p>	 <p>Together Paymentus and CityView have created a fully real-time, integrated solution for online payment processing.</p>	 <p>CityView partners with Worldline, formerly known as Bambora, to provide digital payments for a trusted world. Process payments with peace of mind knowing you have a dedicated team at your service.</p>

CityView record of local government experience

ESTABLISHED

- Launched Property Information, GIS and Permitting solution in 1986;
- First field inspection solution by 1996;
- Customers date back over 20 years;

INNOVATIVE

Innovation is the cornerstone of CityView products and moves us ahead of the crowd to deliver new functionality consistently. 1st land management software vendor to provide a totally integrated mapping and database solution, innovative integration with MS Outlook and MS Word, first to provide completely integrated Electronic Plans Review with Bluebeam Revu.

ACROSS NORTH AMERICA

- Serve both USA and Canadian markets;
- CityView is in 35 U.S. states and 7 Canadian provinces.

SUCCESSFUL

- Consistently ranked as a leading vendor in this space for the past 40 years;
- Customer base grows year-over-year;
- State of the art technology, great references, consistent growth, profitability.

FOCUSED

- Founded by Local Government, for Local Government, 1982;
- All CityView software applications are built for Municipalities.

PARTNERSHIPS

We partner with industry leaders that serve local government: Microsoft, Esri, OnBase, Laserfiche, Selectron and TeleWorks IVR, Bluebeam, Invoice Cloud, Worldline (formerly Bambora), and Paymentus.

DEEP EXPERTISE

- Over 350 implementations across the USA and Canada;
- A number of our employees come from a local government background, selected for the value their domain experience brings.

INDUSTRY

Memberships include, Esri, International Code Council (ICC), American Planners Association (APA), MISA California, California Building Officials (CALBO) and more.

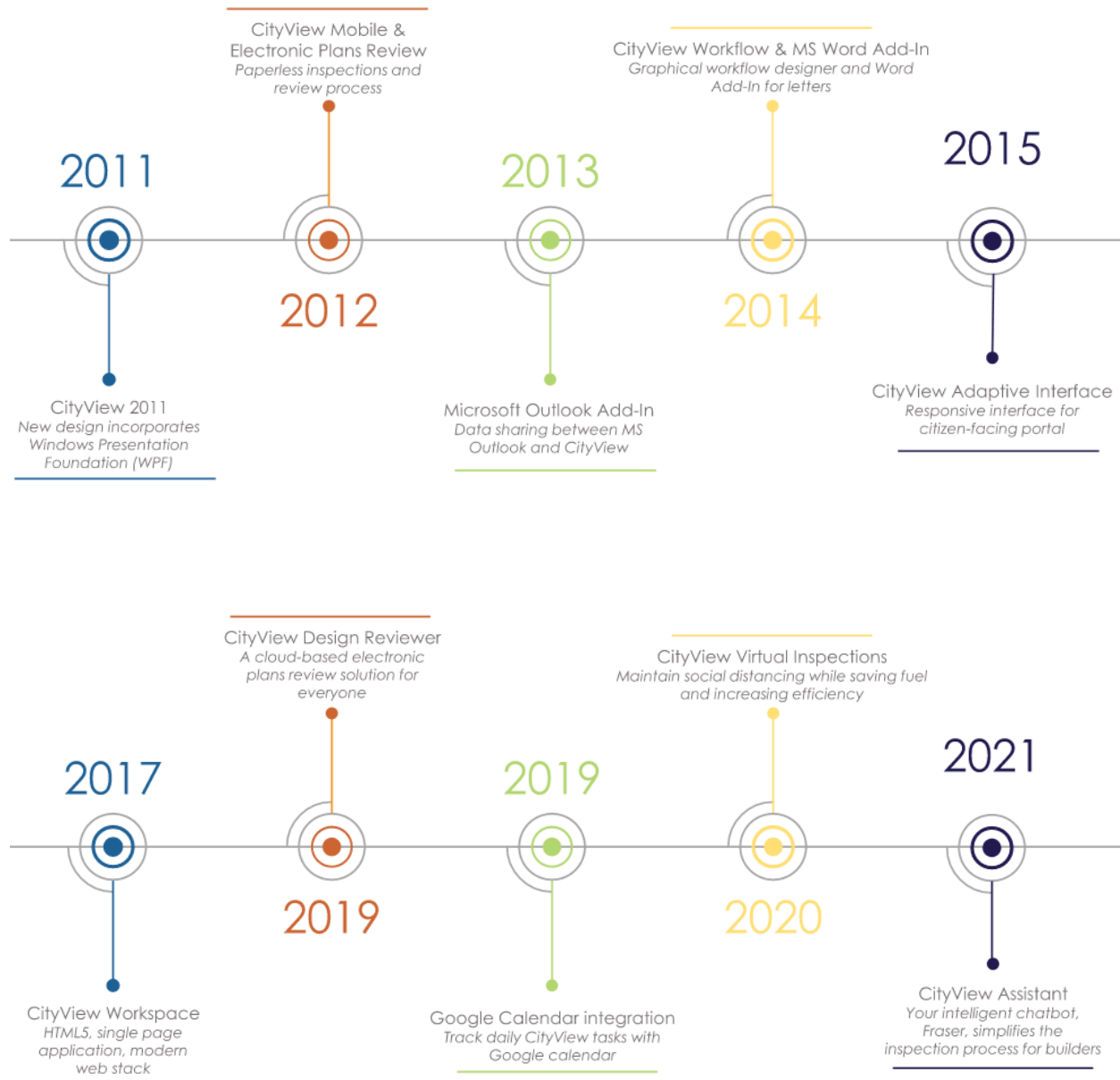
COMMITTED TO COMMUNITY

Attend, sponsor, and exhibit at leading and local industry events including California Building Officials (CALBO), American Planning Assoc. (APA), Alberta Building Officials Assoc., Ontario Building Officials Assoc., and others.

STABLE

- Parent company, Harris Computers serves 100,000+ Government customers in the areas of Land Management, Utilities, Tax and CAMA, ERP, Public Safety, School Districts, since 1977;
- Publicly traded;
- \$4.106B revenues in 2021; \$3.969B revenues in 2020; \$3.490B revenues in 2019
- Profitable.

LEADERS IN INNOVATION



Proposed project team

CityView is proposing our Select delivery model and we confirm, based on our understanding of the RFP, that the services CityView will provide to meet the City's requirements include software and licensing, implementation, conversion, comprehensive training, and support and maintenance. No subcontracting will be used.

CityView management profiles

Name	Title	Industry experience
Jean Soucy	President – Harris Public Sector Group (PSG)	20+ years
Dennis Asbury	Senior Executive Vice President PSG	20+ years
Sean Higgins	Executive Vice President - CityView	20 years
Susan McCormick	Senior Vice President - Customer Success	20+ years
Angus Simpson	Vice President – Sales & Marketing	20+ years
Mike Tardif	Vice President – Professional Services	20+ years
Mark Atkinson	Director - Research & Development	20 years
Ryan Monk	Manager of Customer Success	13 years
Steve Graham	Technical Architect	25+ years

CityView project team profiles*

Name	Title	Industry experience
Teri Wright	Senior Project Manager	20+ years
John Edwards	Support Team Lead	20 years
Deborah Verhille	Implementation Services Team Lead	20 years
Adam Wicks	Data Conversion – Interface Specialist	9 years
Yuliya Melnyk	Quality Assurance Team Lead	16 years

* Should a staff member become unavailable prior to the start of, or during the project, an alternate employee with corresponding capabilities and qualities, will be assigned to the project. One project manager will be assigned to the project.

3. APPLICATION SOFTWARE

3.1 CITYVIEW SOFTWARE SOLUTION OVERVIEW – PROUD REPUTATION

CityView is recommending our *Select* delivery model with the most recent version, CityView 2022.12 released December 12, 2022.

The CityView product was initiated by two local government employees with the vision of helping to automate municipal processes. Since its initial release, CityView has been continuously refined and updated to incorporate new technologies and to meet the diverse needs of our customers.

We have a reputation amongst our customers, competitors and the industry for software excellence. Our Chief Architect, a visionary who has been with the company more than 25 years, has consistently positioned us at the forefront of providers in this industry insofar as the technology is concerned. We were the first vendor in this space to offer a totally integrated mapping and permitting database solution (1986); first to .NET in 2001/2; first with a Web Services API; early adopter of the Windows platform; first to offer database replication for field inspections; early adopter of ArcGIS Server integration; first to integrate with Active Directory; amongst the first to deploy a device-agnostic HTML 5; JQuery-based field solution and, first to release the specific stack of web technologies designed for optimum usability in a browser-agnostic business applications. It truly addresses all users' needs with the best of mobile, desktop, and browser environments.

Why CityView – Exclusive Value-added Features

CityView Virtual Inspections (save fuel and increase efficiency during COVID-19) – CityView Virtual Inspections allow staff to social distance while saving fuel and increasing efficiency. CityView Virtual Inspections is completely integrated with your existing CityView Permits & Inspections module. This avoids any need for transferring files or video clips and managing them manually. All data, documents and notes that are pertinent to the inspection, are stored directly in the inspection task and against the relevant permit.

CityView Assistant, CityView's intelligent chatbot - "Fraser", (improve communication during COVID-19) – Fraser provides an intuitive and handy way for municipal builders to communicate with the CityView system and query permits while on the go, directly from their mobile device. CityView's intelligent Chatbot uses natural language that's easy to understand and is familiar with CityView terminology.

CityView Microsoft Word Add-in – The Word Add-in ships with a pre-defined list of letter tags that can be dragged-and-dropped into any letter template. You can also create your own tags and save them to the tag library.

CityView MS Outlook Add-in – Email attachments and Activities Added as Appointments and Tasks within Outlook.

CityView Gmail Add-in - Increase your Return on Investment and value of your GSuite products by using CityView Gmail Add-in. The CityView Gmail Add-in allows data from CityView and Gmail to be easily shared between the two applications with minimal user intervention.

CityView Graphical Workflow Designer - A Graphical Workflow Designer is included to quickly and easily maintain workflows and create new ones as your processes change.

CityView Workspace - CityView uses a single page application HTML5 architecture to create a fluid and responsive user experience. The highly visual task/activity bar, at the bottom of the screen, persists to give the user constant access to the workflow that allows them to navigate easily through the business process. CityView Workspace has a modern, streamlined look-and-feel that makes the data the focal point and draws the user's eyes to what is important to them.

CityView integrated Electronic Plans Review - CityView combines electronic submission, version control and workflow capabilities with the vast functionality of Bluebeam Revu, third party software, for electronic plans review and management of marked up documents.

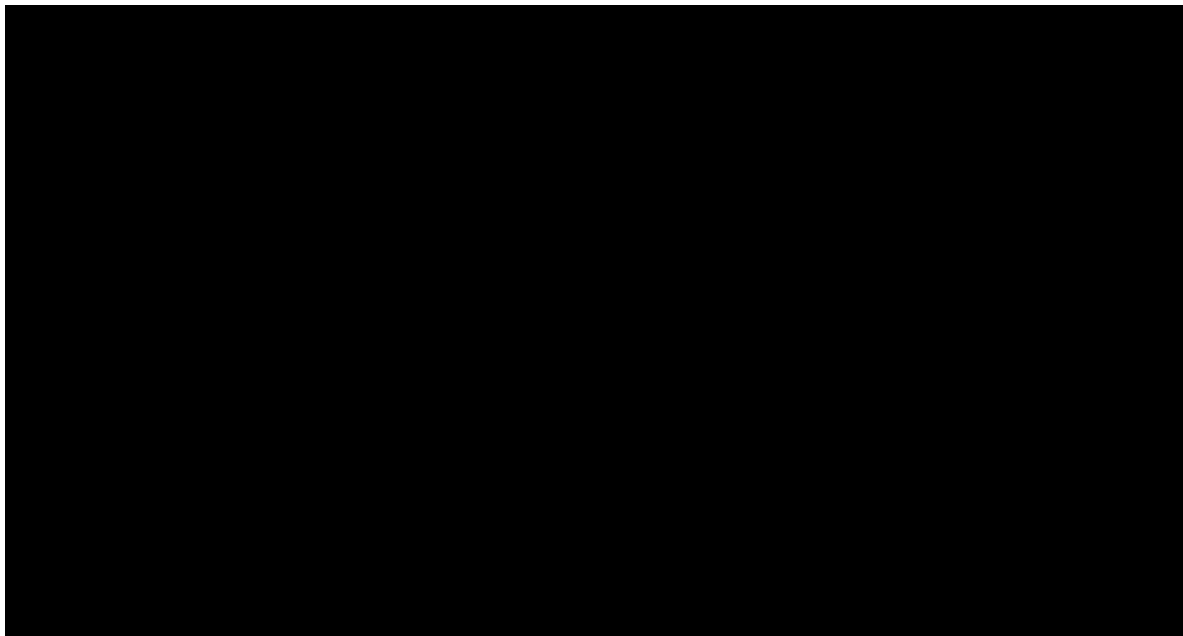
CityView Connect - CityView offers exciting, easy access to Help by the click of a button. CityView Connect, our online content management system is a major advancement in streamlining all of your online help, support, and documentation needs. Customers can access service requests, software updates, report issues and track the status of previously reported items 24 hours a day, 365 days a year.

CityView Feedback and Status Button – feedback is easy 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.

Why CityView – Ease of Use

Using the most industry-leading browser technologies available, CityView has created an interface that is easy to learn, free of unwanted screen clutter, and provides instant access to all of your business-critical data, using a Single Page Application design, users can view and maintain the information pertinent to their land management records all from one dynamic page per application or case. No more flipping around to various screens and tabs to find the information that is important to you at a point in time!

The user dashboard is the starting point where every CityView session begins. From here, you can access your To Do List, maps, inspection scheduling, history of previous work, and reports. The title bar also provides access to key functions like Searching and access to CityView Connect.

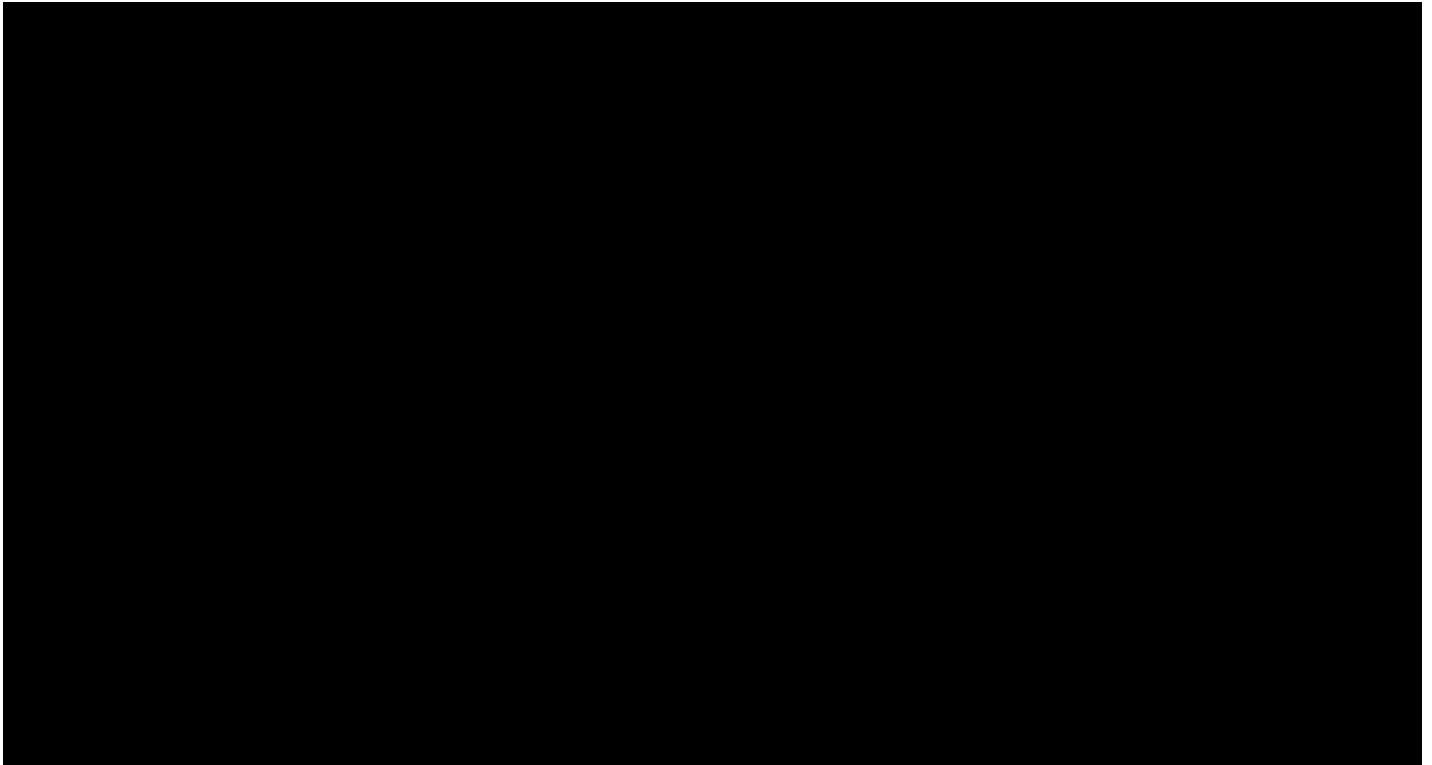


CityView User Assist

Another important feature of CityView Workspace is user assist. When you create a new case or application in the system, the user interface will guide you through all the important steps to ensure you get your data entry correct. User assist will ensure that even the most novice users can enter a permit successfully and navigate through the configured workflow with ease.

Deep integration with your Esri ArcGIS Server Maps

Mapping in CityView is better than ever, with inline maps throughout the application. Display your permit and property information on the map without leaving the current page.



Side menu and workflow

The persistent side menu provides immediate access to any data on the application. It also lets you know, at a glance, if any information exists in those sections and if there are any associated alerts. All the most commonly used features of CityView are available from the menu, including access to the Master Project, Permit Cloning, and custom buttons.

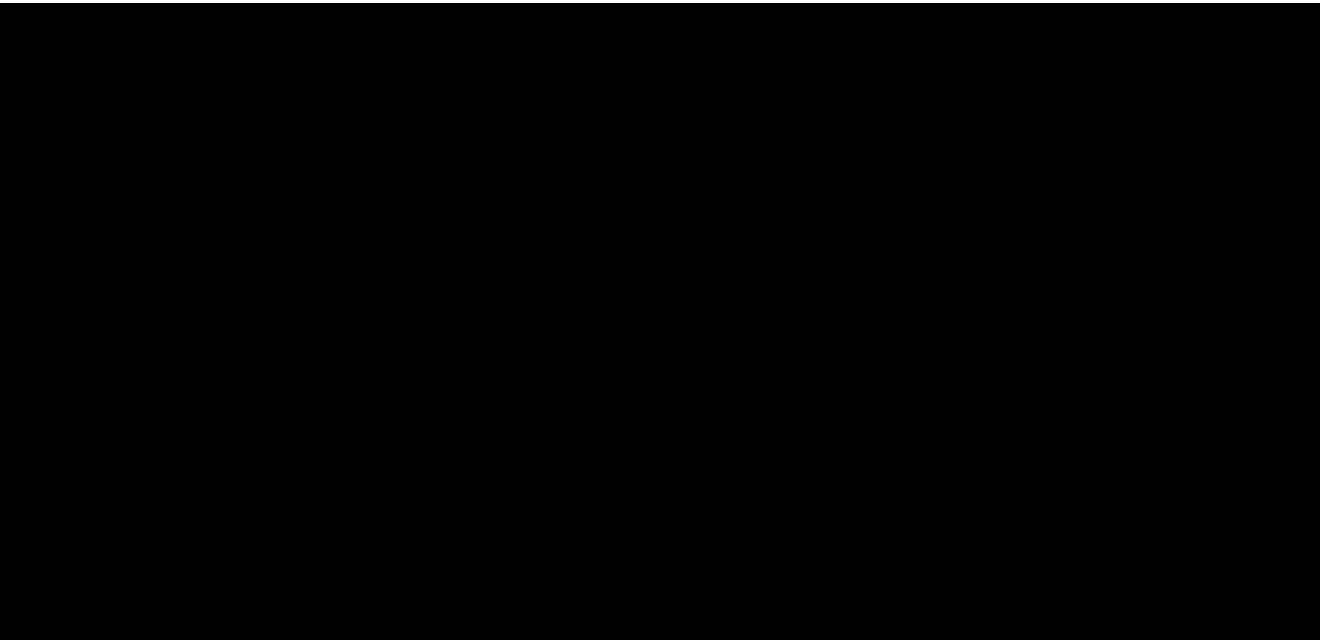
Security profiles will ensure that users only see what they need to see in the menu, so that screen clutter is minimized. We also secure at a much finer level of detail. For example, occupancy, can be secured independently of the Permits on the application.

Workflow is presented at the bottom of the screen so that the steps can be used for quick navigation without having to go to a separate screen. As each step is completed, the next steps automatically appear across the bottom of the browser window, as shown below. If you need to see workflow steps that were completed already, you can access them by clicking on the 'activities done' button or by opening the Activities panel from the side menu.

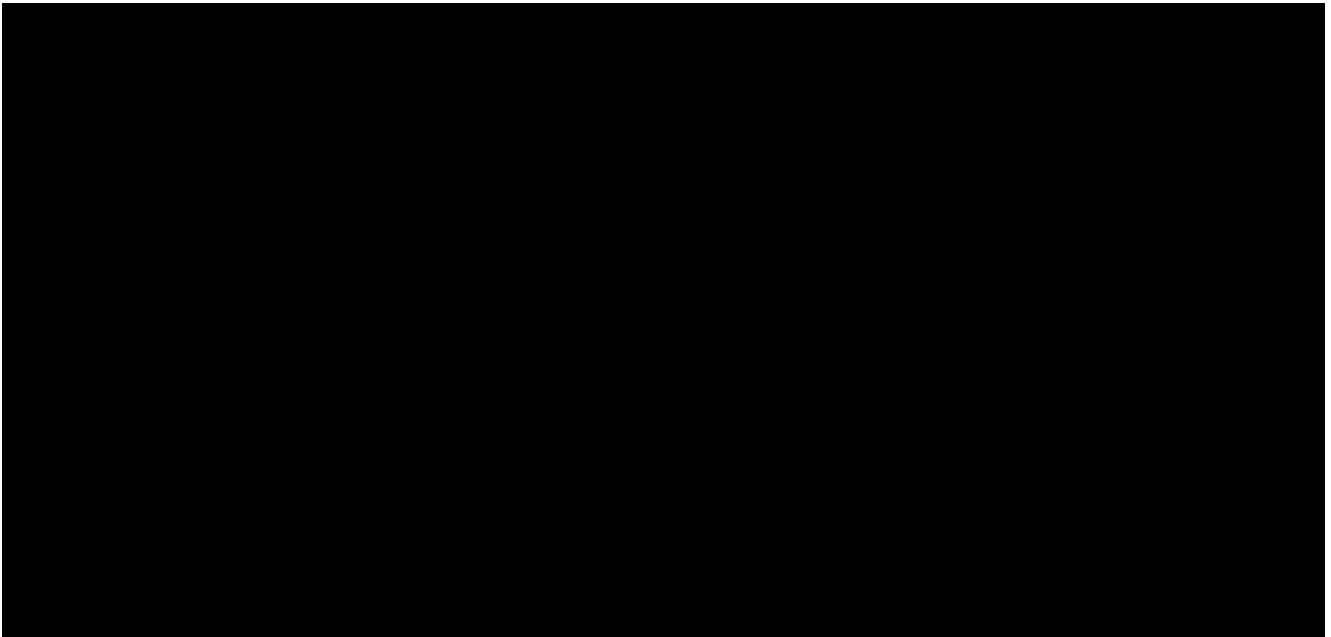
In a fully optimized CityView environment, the user will never need to know which panels to open. The workflow steps will be configured to pull in exactly the right panel(s) so that he/she can perform the next task and then move the workflow along. Once the user has completed all their steps in the process, they can close that tab in their browser and move on to the next item in their To Do List. In addition, It is also possible to leave applications, properties and cases open concurrently without affecting the context on your current page.

Inspections Scheduling

CityView Portal provides a user friendly means for customers to request inspections online in compliance with the City 's business practices. Additionally, customers can access inspection results immediately once completed 24/7. This will greatly reduce the number of phone calls front-line and inspection staff are having to field today.



For those requests that are received in the office, CityView Workspace provides an easy to use drag-and-drop calendar view allowing staff to efficiently manage their workload.



3.2 CITYVIEW PROPOSED SOFTWARE SOLUTION

The CityView 2022 technology can be summarized as follows:

- Microsoft .NET, Visual Studio.NET, HTML 5 and JQueryMobile, and now a Single Page Application (SPA) built on an HTML 5 framework,
- Multi-Tier, for development, deployment and upgrade ease, as well as scalability,
- Leading edge and cutting edge User Interfaces providing maximum functionality and usability,
- Browser-agnostic and device-agnostic interfaces for maximum reach and accessibility,
- Streamlined deployment for ease of administration and upgradeability,
- Microsoft SQL Server database technology,
- SQL Server Reporting Services (SSRS) reporting technology,
- Enterprise ArcGIS Server integration, employing Java-based and Esri Leaflet viewers,
- Web Services and ODBC connectivity,
- Configurable, fully integrated, workflow-based business applications leveraging core technologies and employing multiple frameworks for interfacing with third party applications.

3.2.1 PRODUCT OVERVIEW

We provide easily installed, flexible, easy to use software solutions that are engineered for the long-term. The information in Section 3.3 through 3.7.19 is considered proprietary and confidential, because it contains specific product architectural and functional descriptions. The following product overview is considered a trade secret for CityView.

3.3 THE CITYVIEW PLATFORM

The CityView solution is an upgradeable platform, built on state of the art technology, making it more efficient and cost effective to develop, deploy, and manage solutions that scale with your evolving needs. CityView is a set of integrated and configurable applications designed to address the unique requirements of local government.

The CityView platform is continually evolving to stay current with the latest technology; and, it is designed to improve the long term functionality of the product without increasing total cost of ownership. The product roadmap is driven by input from a variety of sources including customers, technology, and industry.

The rationale for incorporating features is based on an understanding of the local government industry and is coordinated and managed by our Research and Development team. Advances and improvements to CityView are funded through the Annual Software Maintenance Agreement that we have with each of our customers, and ongoing license sales.

3.4 CITYVIEW CONFIGURATION CONSOLE

A common frustration felt by local governments is when changes are required to installed software after the go-live date, there is a need to re-engage the vendor or allocate internal IT resources, which often has an impact on the product's upgradability. The time and expense associated with these efforts often leads local governments to maintain the status quo, resulting in outdated systems that no longer meet the needs of the business units or the IT department's strategic plan.

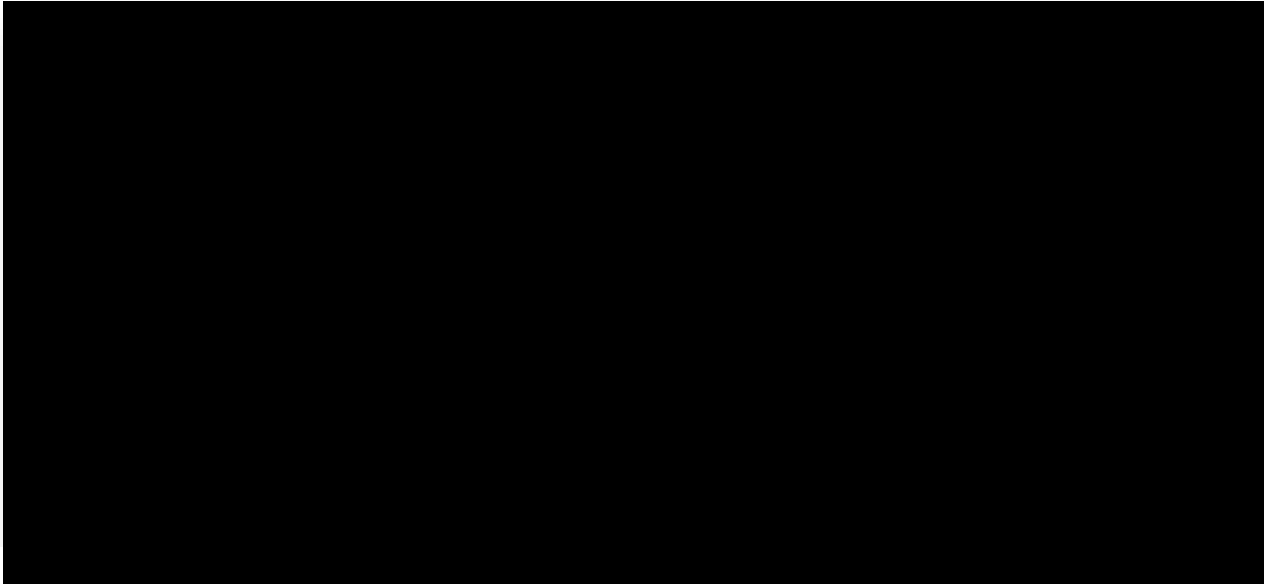
CityView addresses these concerns by providing a highly configurable environment and all of the configuration tools necessary to maintain and enhance the behavior of the system with minimal need for customization or programming knowledge. Using these tools, designated users can populate the contents of lookup tables, configure workflow, define "custom" database fields, produce letter templates, define business rules, provide scheduling options, and define the parameters for fee calculations.

These tools are designed to be used by reasonably capable users within the business domain, resulting in the following benefits:

- A reduced reliance on outside vendors and internal IT staff that lowers expenses and decreases the total cost of ownership.
- Streamlined processes based on tailored business workflows. This increases staff efficiency, reduces data entry errors, and ensures critical business decisions are based on accurate information.
- Configuration changes are carried forward through upgrades and enhancements to the system allowing the utilization of the latest technology without additional cost or effort.
- Configurations are based upon your defined business processes and staff input. This creates a familiarity that increases user buy-in and decreases training costs.
- Reduced errors and user frustration through the removal of outdated processes.

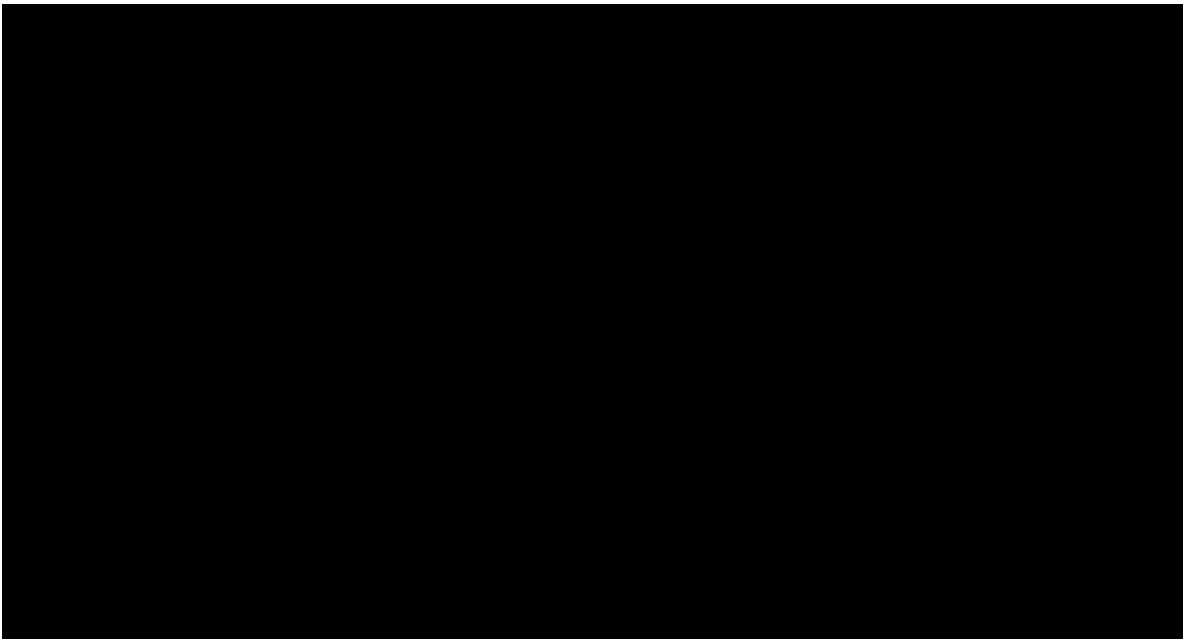
3.3.1 LOOKUP TABLE MAINTENANCE

The “Data Table Maintenance” feature ensures that all pick lists (lookup tables) are updated with relevant data, thereby reducing the occurrences of errors and streamlining data entry.



3.3.2 WORKFLOW CONFIGURATION

CityView is an [activities-based workflow system](#) providing users with a consistent path through the system, facilitating the training of new employees, and ensuring that employees and departments are aware when tasks have been assigned to them. Through CityView Graphical Workflow Designer, a suitable standard workflow of activities and outcomes is available, making it clear to users which steps are part of a particular process, when those tasks become due, and who is responsible for them.



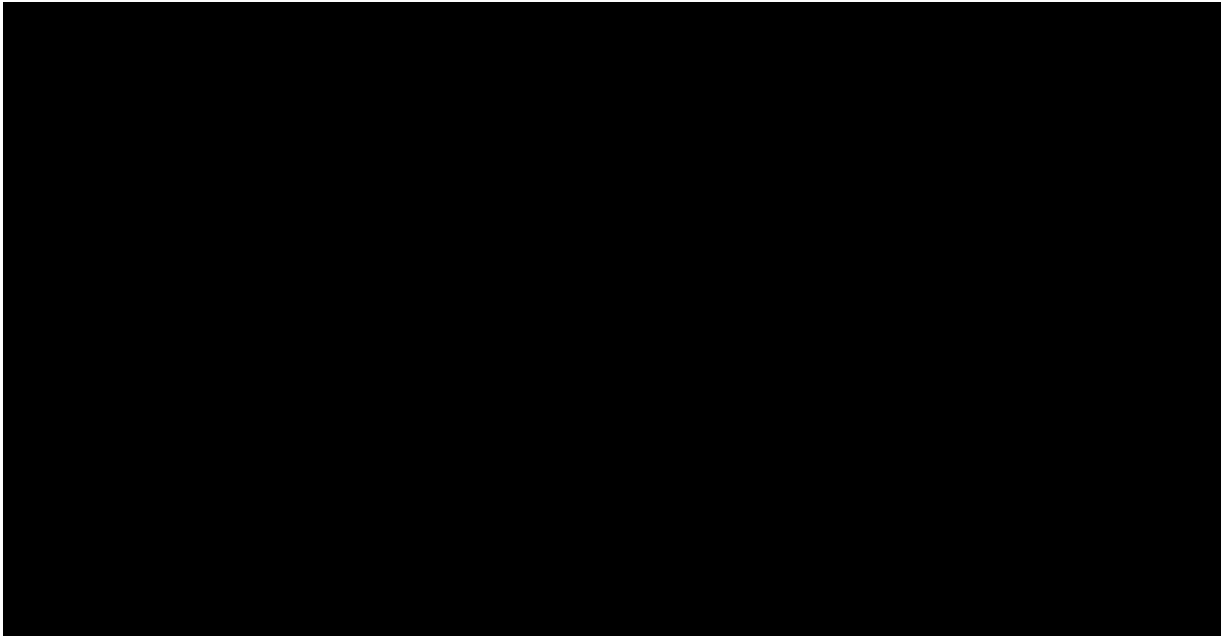
3.3.3 CUSTOM DATABASE FIELDS

Custom database fields allow for the capture of customer-specific data and dynamically appear on screens without the need for custom development. They allow the same data entry screens to be used to capture data appropriate for all your permit types, without resulting in overly complex entry forms. You can capture, maintain and report on the information that is specific to your business process and continue to add new data fields as your requirements change.

3.3.4 BATCH PROCESSES AND SCHEDULED EVENTS

The system can be configured to routinely (at predefined intervals) search the database and perform a set of pre-defined actions on any records that match the specified criteria. This is a very common approach for handling events like permit expirations and business license renewals.

Scheduled processes can be run in “test” mode without affecting the underlying data.

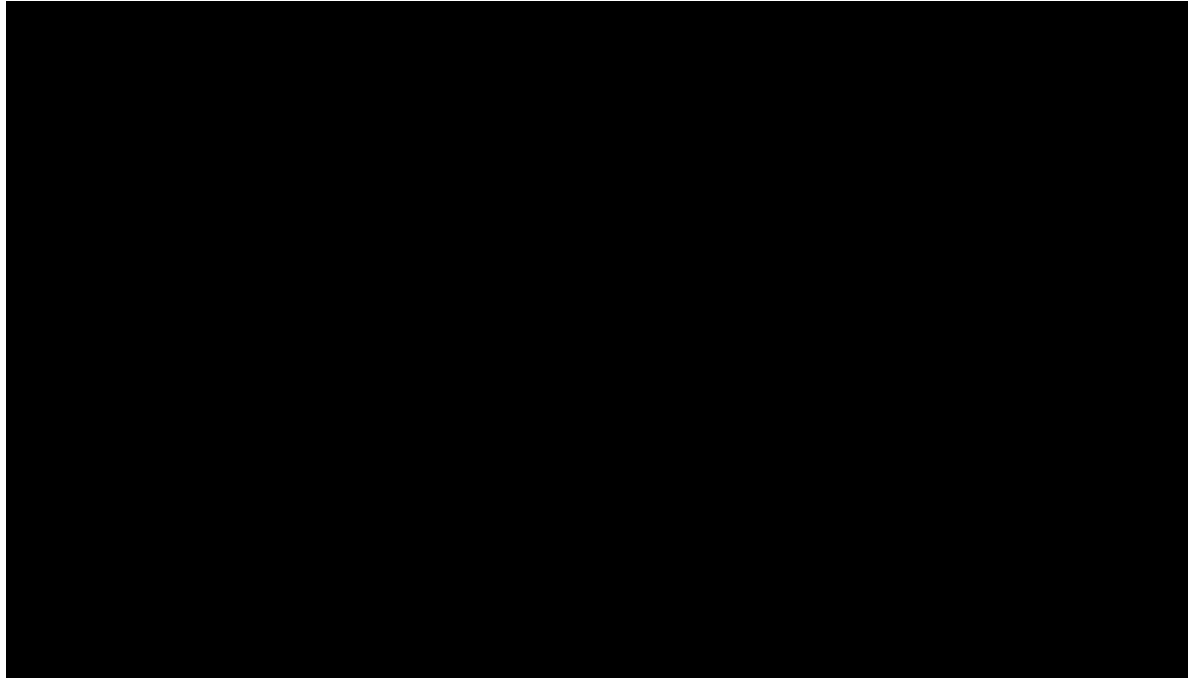


3.3.5 RESOURCE GROUP ADMINISTRATION

Facilitates appropriate assignment of tasks based on geographic location, business function, or skills/qualifications, e.g. a plumbing inspection at 123 Main Street requires an inspector from the “East Side Plumbing Inspector” resource group.

3.3.6 HOLIDAY CONFIGURATION

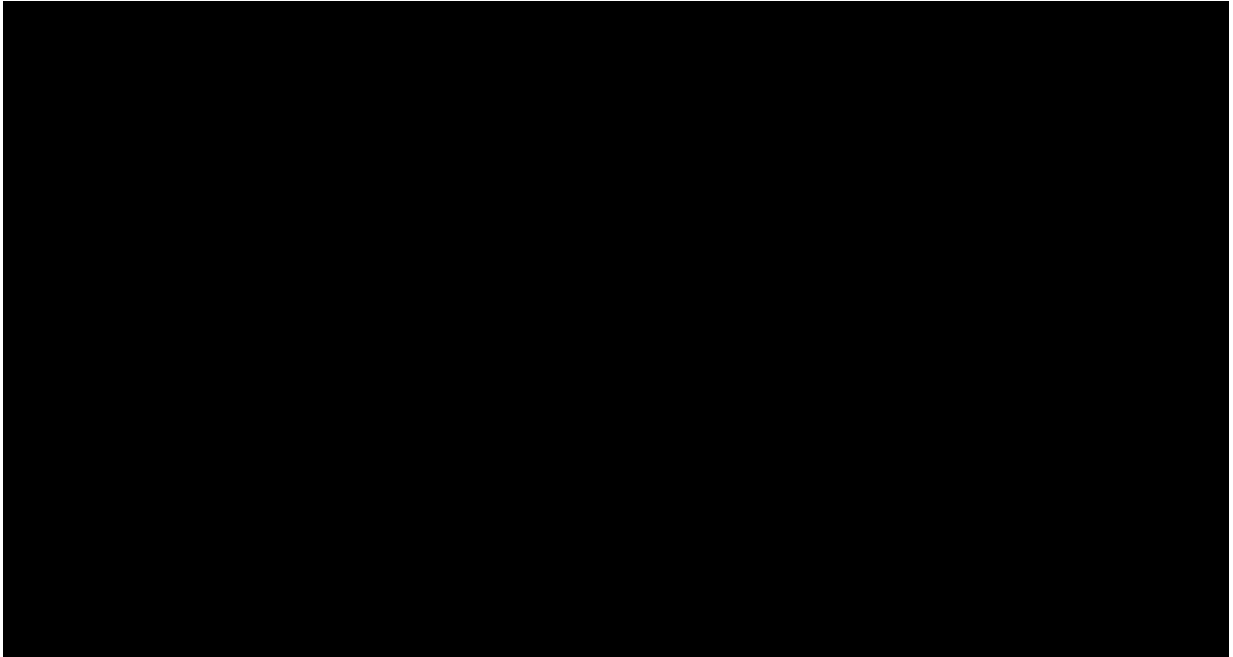
This tool provides the ability to continuously update the system’s calendar to reflect holidays and other non-working times, so that due dates and assignments can be accurately automated.



3.3.7 BUSINESS RULE CONFIGURATION

CityView's powerful Rules Engine comes with an intuitive user interface that enables trained users from either the IT department or the business domain to take ownership over the ongoing maintenance of much of the automated behavior of the system, as the needs of the business units evolve.

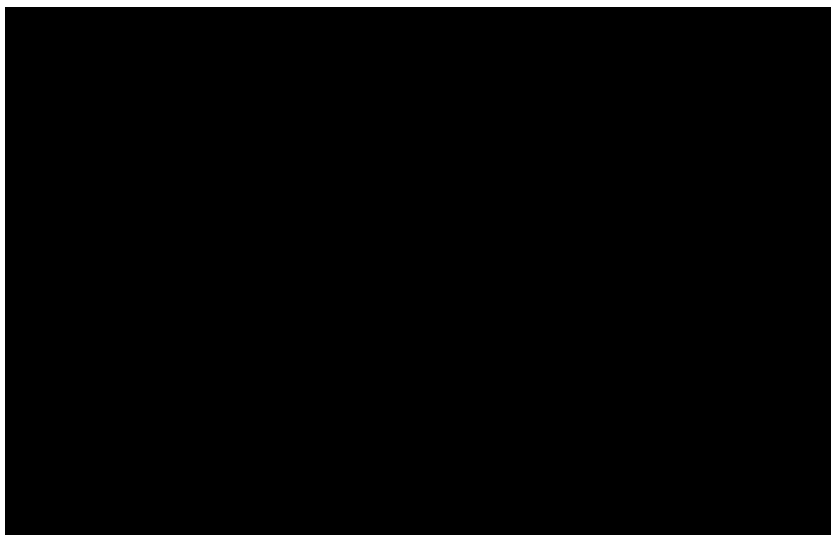
Rules can have various conditions under which they will perform a set of actions, e.g. to automatically populate a set of values based on the Permit Type. Outcomes (i.e. actions) can then be created that affect virtually any field in the database with a wide variety of options to fit any circumstance. Rule properties are selectable from defined pick lists to reduce error and enable even novice users to create rules successfully.



The steps to create new rules are very straightforward – users with no prior programming experience can become masters of this tool quite easily. Moreover, this tool maximizes efficiency by providing many other useful features, such as the ability to bulk-create conditions and outcomes, automatic detection of poorly constructed rules, ability to easily cleanup old and unwanted configuration, hyperlinks for easy navigation, and a runtime debugger for troubleshooting issues.

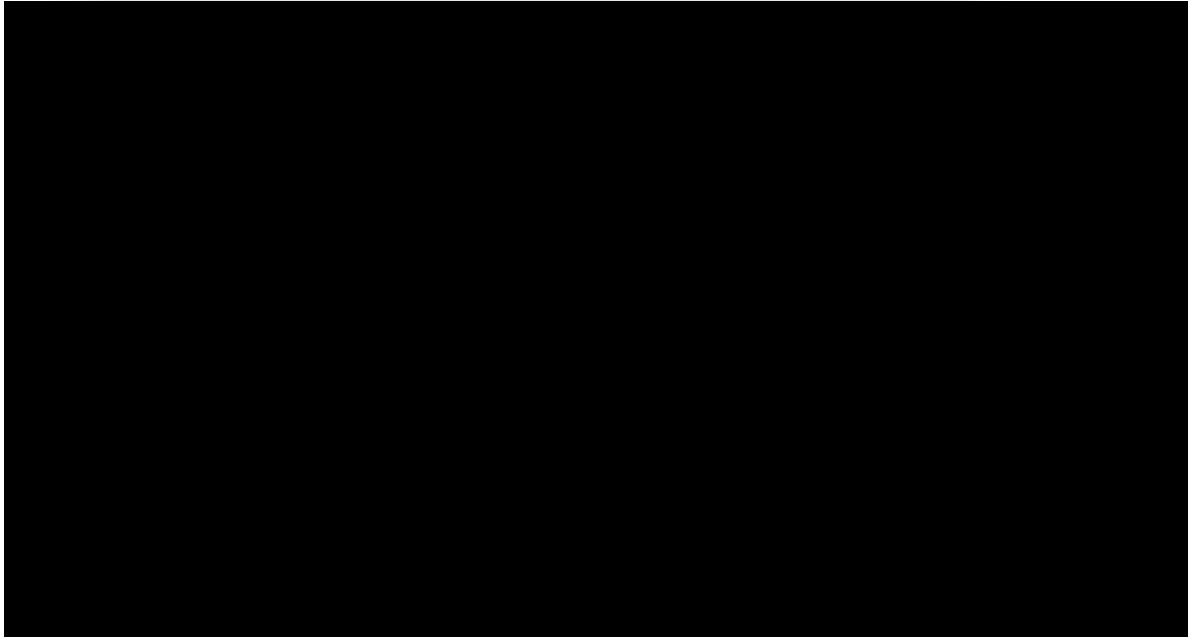
3.3.8 LETTER ADMINISTRATION

The 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, Office 2013, Office 2016, and Office 2019.



3.3.9 CITYVIEW FLEX FEE

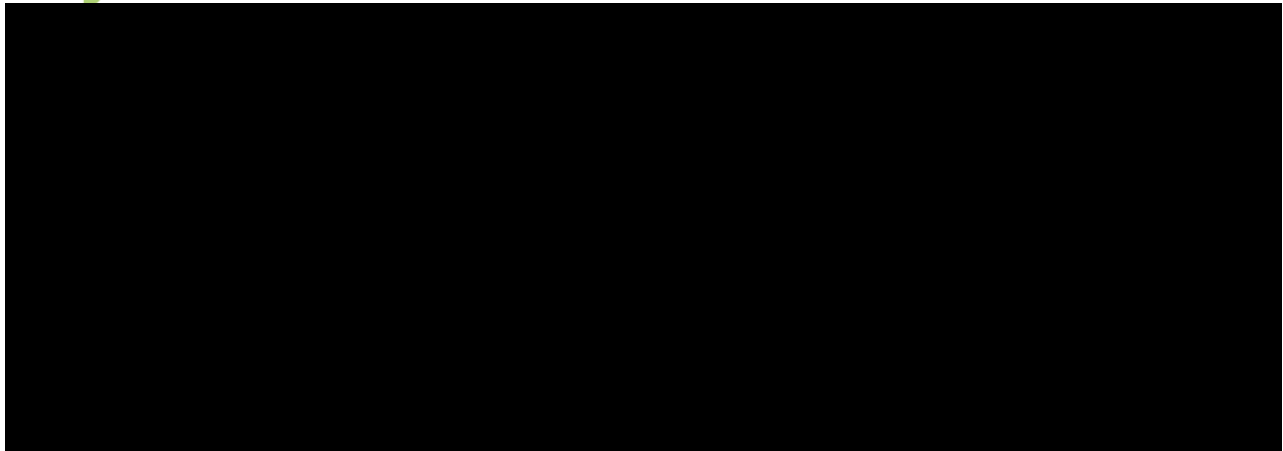
CityView's "Flex Fee" system ensures that appropriate fees are always charged by enabling the ongoing maintenance of fee schedules and valuation tables. CityView supports flat, incremental, percentage and range percentage based calculations. Fees will be automatically calculated and business rules will automate which fees get added to each application. If CityView Cashiering is being used, fees can be configured so that payment amounts will be distributed to appropriate general ledger accounts based on the fee definition.



3.5 REPORTING

We are proud to say that reporting is one of CityView's many strengths. Detailed out-of-the-box reports provide immediate visibility on daily business activities such as the status of all Building Permits, while statistical and summary reports allow you to track performance metrics such as the number of cases assigned to each inspector.

End-user ad hoc needs are met through CityView Reporter, which provides for pivot table reports, detail reports and charts and graphs. 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 very quickly and professionally. Reports are rendered in Microsoft SQL Server Reporting Services (SSRS), right within the CityView product. Reports can be saved for future repetitive use, exported 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. CityView reports can be pulled into the dashboard to run dynamically.



Simple reporting tools allow all your users to quickly create and generate the reports you need, and easily add them to their user CityView Dashboard!

Sample list of standard reports

The following out-of-the-box reports will be delivered with your solution. Each report is delivered with multiple filters to enable one report to fulfill several needs by virtue of the ability to change the filters on the report. This is therefore a high level list; an entire list would represent approximately 150 reports.

Please note: Your professional documents “letters” are not included in this list. CityView’s MS Word Add-In enables the creation of letter templates that merge permit/project/license data automatically into a Word document which enables letters to be generated quickly and professionally, edited on the fly and printed to PDF. The MS Word Add-In will be used for generating permits, notices of correction, agreements, license certificates etc. This is a far more flexible method of producing such documents than a report-writer.

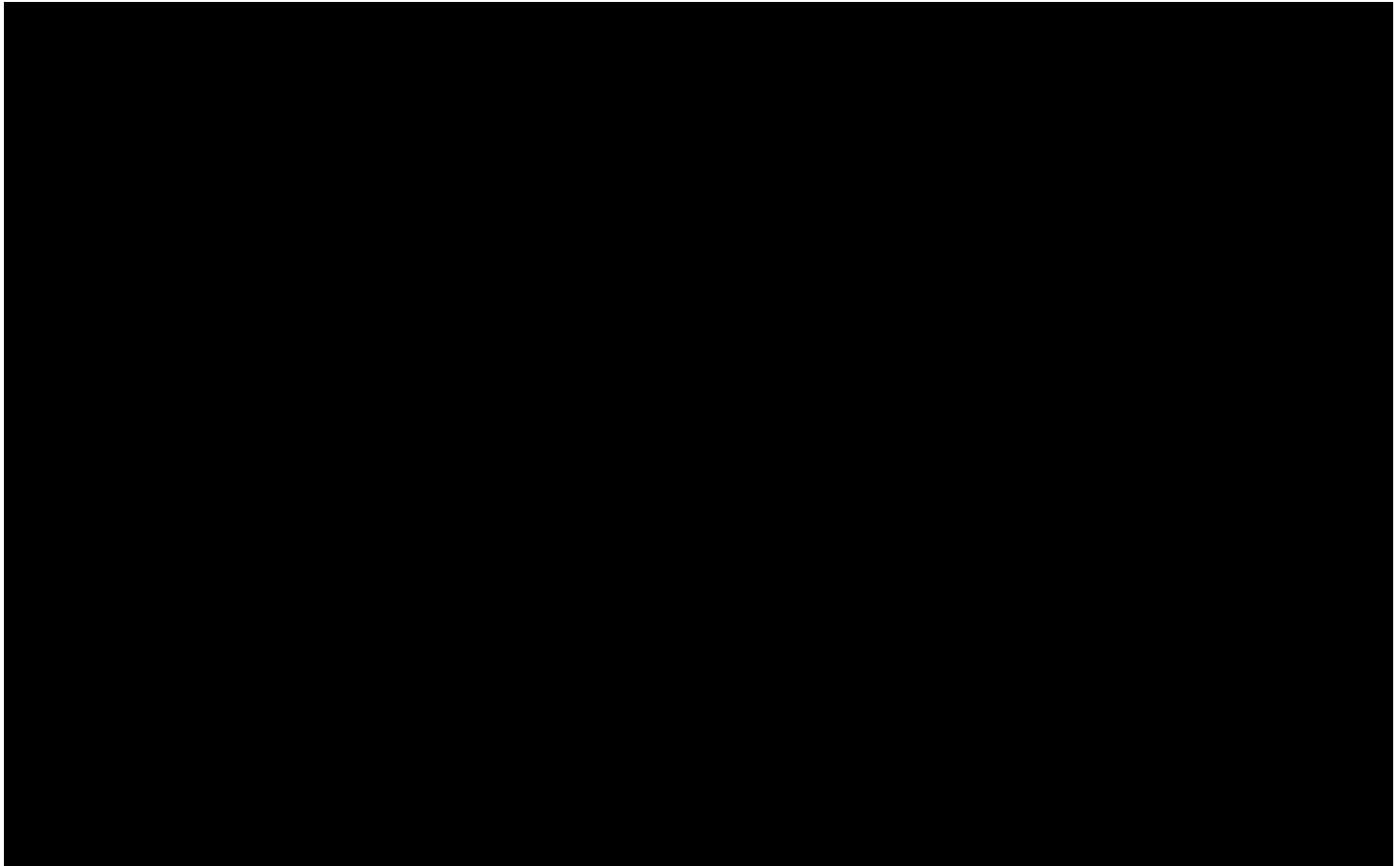
The out-of-the-box reports are significantly augmented by the CityView Reporter (ad hoc reporting) that allows end-users to extract precisely the information they require in charts, pivot reports and detailed reports, without the need for database knowledge or programming skills. Reports can be exported to common file formats like Excel, Word and PDF.

Permits & Inspections	Planning	Code Enforcement	Cashiering	Other
<ul style="list-style-type: none"> ✓ Application Review Tickler ✓ Average Daily Inspections ✓ Building & Safety Revenue Report ✓ Certificate of Occupancy Listing ✓ Deposits and Bonds Summary ✓ Escrow (By Revenue Account #) ✓ Fee Paid in Full ✓ Inspection Detail ✓ Inspection Outcome ✓ Inspection Schedule ✓ Inspections To Do ✓ Inspections by Inspector ✓ Outstanding Fees ✓ Permit Inspection Trend ✓ Permit Status Summary (By Contractor) ✓ Permit Status Summary (By Status) ✓ Permit Status Summary (By Type) ✓ Permit Time Spent ✓ Permit Turn-Around Detail Report ✓ Permit Value ✓ Permitting – Punch In-Out Report ✓ Public Works Permit Status Summary ✓ Review – Decision Date ✓ Review Turnaround Time ✓ Portal Permits Entered Today 	<ul style="list-style-type: none"> ✓ Deposits and Bonds Summary ✓ Escrow (By Revenue Account #) ✓ Expired Projects ✓ Monthly Project Status Report (sorted by Date Entered) ✓ Monthly Project Status Report (sorted by Project Number) ✓ Outstanding Plan Reviews ✓ Plan Review Time ✓ Planner Projects ✓ Planning Activities ✓ Planning Application Details ✓ Planning Punch In-Out Report ✓ Project Applications ✓ Project Expirations ✓ Project Fees ✓ Review Turnaround Time ✓ Scheduled Hearings ✓ Submittals Report (Sorted by Planner) ✓ Portal Projects Entered Today 	<ul style="list-style-type: none"> ✓ Cases Follow-up ✓ Case Status ✓ Case Summary ✓ Compliance Report ✓ Deposits and Bonds Summary ✓ Escrow (By revenue Account#) ✓ Incident History ✓ Inspection Schedule ✓ Inspection To Do ✓ Officer Activity by Case ✓ Officer Activity by Inspection ✓ Portal Cases Entered Today 	<ul style="list-style-type: none"> ✓ Daily Cash Out (By Fee Type) ✓ Daily Cash Out (By Payment Type) ✓ Daily Cash Out (By Payment Type) With Fee Types ✓ Daily Cash Out (By Receipt) ✓ Daily Cash Out (By Revenue Account Number) ✓ Daily Cash Out for Cashier (By Payment Type) ✓ General Cashiering Report ✓ Payment Detail ✓ Reversals ✓ Portal Payments Entered Today 	<ul style="list-style-type: none"> ✓ Audit Report ✓ Distribution List Report ✓ Fee Maintenance ✓ Portal Contact Email Lookup

3.6 CITYVIEW INTEGRATION CAPABILITIES

CityView makes use of Application Programming Interfaces (APIs), Web Services, and batch files to link to other systems. CityView is ODBC and OLE DB compliant allowing it to integrate with database both internal and external data sources. Details on common CityView integrations are described below and on the following pages.

3.5.1 GIS INTEGRATION



CityView's integration with [Esri's ArcGIS Server or ArcGIS Online](#) assimilates mapping and spatial analysis into the everyday business activities of CityView users in the office, in the field and publicly.

The deeply integrated GIS capabilities allow all staff to quickly locate a job location on a map; measure distance, boundaries and areas, create adjacent and buffered spatial queries for mailing lists, kick-off permit and other processes from the map and spatially analyze the surroundings of subject properties and project footprints.

While the integration requires an ArcGIS Server license or ArcGIS Online subscription account, CityView users do not consume additional individual Esri user licenses, though ArcGIS Online accounts do consume service credits.

The integrated mapping capability is available to all CityView users and can be controlled through the permissions and role capabilities of the CityView security model.

Maps can be utilized to:

- Embed into reports, letters and forms, e.g. so that inspectors can see where their inspections for the day are located throughout the City
- Allow users to select properties based on GIS information and then use the selection to send notices, updates or other letters to the contacts on the properties.
- View search results on a map or search spatial attributes from the map.
- Use Esri Feature Service layers to draw temporary locations which can then be used in CityView's integration with [Esri's ArcGIS Server or ArcGIS Online](#) to assimilate mapping and spatial analysis into the everyday business activities of CityView users in the office, in the field, and publicly.
- Flag activities of interest for other users to see e.g. planned route for overloaded vehicle, street closure for maintenance etc.
- Run spatial queries to automate the business process, e.g. inspector scheduling can use a spatial query to determine which inspector to assign based on the area the property is located in.
- View publicly accessible Web Map Services created by external agencies.
- Generate the most efficient routes for inspections including turn by turn directions and multiple options for route optimization.

3.5.2 INTEGRATED VOICE RESPONSE (IVR)

CityView has successfully integrated with a number of third-party Integrated Voice Response systems and forged a relationship with Selectron Technologies in order to ensure our customers receive the maximum benefit from the integration of their IVR selection and CityView.

3.5.3 FINANCIAL MANAGEMENT SYSTEMS (FMS)

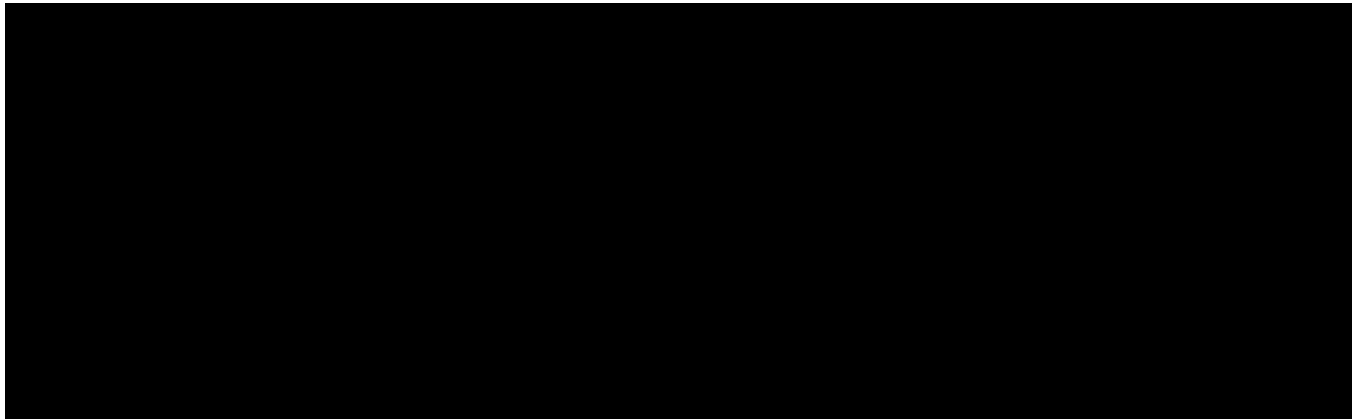
CityView has extensive experience interfacing with Financial Management Systems. In a typical implementation, fees paid within CityView are submitted to the FMS through a batch file export process or API (if available.) Examples of FMS integrations include Tyler Munis Financials, THE, SAP, MS Dynamics, J D Edwards, Oracle Financials, Sungard Pentamotion, Eden, and Active Networks.

3.5.4 311 SERVICES

CityView has implemented 311 interfaces with other customers via Web Services. Requests get entered into CityView via a Web Service call from the 311 system; and, updates to cases are made available to the 311 system and picked up by Web Service calls from the 311 service.

3.5.5 ELECTRONIC DOCUMENT MANAGEMENT SYSTEMS (EDMS)

CityView's distinctive framework for integrating with Document Management Systems has been used extensively with industry leading EDMS products such as [Laserfiche](#), [OnBase](#), [SharePoint](#), [PaperVision](#) and [eB](#). Documents are dynamically retrieved from the EDMS based on related metadata. This means that regardless of how (or when) a document gets added to the document management system, provided it is indexed with metadata like a permit/case number or address, CityView will be able to retrieve it later.



3.5.6 RELEVANT INTERFACES THAT MAYBE OF INTEREST

Financial Management Systems: Munis, Eden, HTE, SAP, MS Dynamics, J D Edwards, Oracle Financials, Sungard Pentamotion, Active Networks.

Payment Processors: Preferred Paymentus and Invoice Cloud, PayPal's PayFlow Pro, Heartland, Acculynk, iTransact, Moneris (Hosted Pay Page), PayGov, Bambora (formerly Beanstream), MSB Nexus, BIS Online, Authorize.Net, Active Class.

GIS: Esri, AutoDesk Mapguide, GeoPrise, InterGraph

Electronic Document Management: OnBase, Laserfiche, SharePoint, Eclipse (doc Star), PaperVision, ImageNow (Perceptive Content), Alfresco, FileHold, and eB

Electronic Plans Markup: Bluebeam Revu (Std, CAD & eXtreme)

Integrated Voice Response (IVR): Selectron Technologies

Signature Pad: ePad, ePad II, ePad USB Signature

Calendaring: MS Exchange

Asset Management: Diamond WorkTech, J D Edwards

CAMA: Manatron, ACS, CLT and others

Email Systems: MS Outlook and Groupwise

3.7 CITYVIEW BUSINESS SOLUTIONS

CityView parcels, addresses, roads, parks, assets, and trails locations provide the underlying land-based context and information for the business activities and processes that are managed and automated using the CityView modules, for land development, enforcement and administration. The CityView suite of modules enable our customers to administer the business processes surrounding Permits and Inspections, Planning, Code Enforcement, Business Licensing, Animal Licensing, Service Requests, Rental Housing, Marriage and Death Registration, Cemetery Management and Parking Management. The payment of fees generated by the system is managed with CityView Cashiering. The CityView extensions offer service, productivity and data integration value-adds such as *public access*, *field inspections solutions*, *electronic plans review*, *Microsoft office add-ins* and *third party integrations* to provide a one-stop land management enterprise solution.

CityView is an out-of-the-box software solution that includes the automation you need to manage Property Information, Permits and Inspections, Planning, Code Enforcement, Licensing, Animal Licensing, Service Requests, Rental Housing, Marriage and Death Registration, Cemetery Management, Parking Management, and Cashiering.

Based on [4 decades of experience](#) automating business processes of leading jurisdictions from across North America, CityView is designed to have your departments up and running in minimal time while making use of industry-wide best practices.

The CityView suite of modules is able to be implemented incrementally, providing the flexibility to apply resources and budget as they become available. They can also be integrated with third party solutions, adding value to the information collected across the organization and eliminating data silos.

The power of the CityView business solutions:

- **Automate business processes** – increase user productivity by streamlining workflow and business processes
- **Workflow** – automate common business processes related to land management activities with predefined workflows that save time by providing you with the tools to manage and track assignments; define deadlines; automatically generate subsequent activities and create a record of your business processes; and ensure accountability.
- **Accurate information capture** – intuitive, easy-to-use screens and panels that prompt the end-user for required data. Data validation tools, like drop down menus, business rules and spell check reduce errors and duplication of effort. This ensures decisions are based on correct, relevant information.
- **Increase revenue** – eliminate inaccurate fee collection with an integrated fees module that enables you to automatically configure, calculate and collect fees using even the most complex fee structure.
- **Centralize access** – allows all staff to view all information associated with an application, case or plan including documents and images instantly.
- **Easily navigate** – powerful search and sorting capabilities save users' time by quickly finding everything related to a case or permit. User-defined searches can be saved to ensure that users are able to repeat searches pertinent to their particular business activities again and again.
- **Access data wherever you are** – a number of remote and disconnected options allow users to access information from the office, home, or in the field, reducing commute times and data entry duplication. Allow your constituents to access community development services – inspection scheduling, permit applications and property information - on the web; reducing your frontline staff's workload and ensuring that your citizens' service demands are met.

3.7.1 CITYVIEW PROPERTY INFORMATION

PROPERTY INFORMATION



CityView Property Information is the backbone of the CityView solution, letting you see all activity, present and historical, on a given parcel of land. With CityView Property Information you can add or track unlimited addresses, ownership and structure information for each land parcel.

Combined with GIS data, CityView Property Information gives you a powerful inventory of your organization's property base.

Panels

- Properties, addresses and owners
- Instant access to key parcel details including zoning information, related structures (buildings), restrictions, and alerts.
- View all contacts and address information associated with a parcel
- Owners (or other contacts) can be maintained
- Customer-defined custom fields allow pertinent, business process data to be captured.

Access to information

- Easily view current and historical development permits, zoning applications, code enforcement cases, building and engineering permits associated with a parcel of land.
- Parcel information is immediately available
- Drop down menus expedite data entry and reduce errors
- Cohesively track and manage all your land use and community development activities in a central location
- Search for a property using multiple parameters.
- Select properties visually, using our embedded map viewer, reducing data entry errors and making it easy for everyday users to locate properties; measure distances, boundaries and areas, create buffer selections, etc.

Related data

- Provides details on all activity related to a parcel, e.g. open and historic permits, code cases, planning applications, etc.
- Enrich your parcel data to include the level of detail you need to complete your business processes with multiple address, ownership and structure information.

Automation

- Automate daily business processes like parcel selection and moving records between parcels and eliminate time-consuming manual activities, repetitive data entry and inaccurate information.

Property based alerts

- Inform users of potential issues with respect to a property
- Customers can be informed of potential delays and what is required to remove alert.

3.7.2 CITYVIEW PERMITS AND INSPECTIONS

PERMITS AND INSPECTIONS



CityView Permits and Inspections simplify the process of issuing and tracking permits, automating the entire process from initial application to the issuance of the Certificate of Occupancy. Everything you need to know about a building permit is instantly available, from owner and contractor information to sub-permits, utility releases and expiration dates. With CityView Permits and Inspections you can manage inspection scheduling and workflow, including your daily inspection roster, which aides in eliminating time-consuming manual scheduling which leads to increased productivity and efficiency in the workplace.

Access to information

- Track your permits in a central location
- Instant access to permit details, contact s, fees, deposits/bonds, and documents/images.
- Workflow specific data is available to users with drop-down menus to streamline data entry and reduce the chance of errors.
- Custom data fields, related parcel information and locations are easily added.
- Users are able to reference the entire status history of the application from the first page.
- Save time by automatically assigning and scheduling inspections based on geography, inspection type and inspector availability.
- Improve customer service with real-time, up-to-date inspection schedules accessible by staff or on-line via the CityView Portal to provide applicants with the most current information.
- Predefined workflows allow you to identify deadlines and automatically create next steps.

Automation

- Auto-generate permit numbers
- Determine plan checks and route workflow
- Add required inspections based on permit type
- Generate inspection assignments based on geography and/or inspection type or manually
- Integrated fees module allows you to configure fee calculations and assess fees at the appropriate point in the business process.
- Maximize efficiency by quickly creating multiple copies of an existing application

Reports and letters

- Standard document templates with letters configured to your specifications
- Ability to modify generated letters, on-the-fly, using a Microsoft Word Add-in
- Make informed decisions with intuitive reports that allow you to quickly and easily determine the status of all permits and inspections.
- Pre-configured reports including: Outstanding Fees, Fee Payment, 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 Detailed Report, and Permit Time Spent.

3.7.3 PLANNING

PLANNING



With CityView Planning you can easily track and manage all types of planning applications and processes from beginning to end, reviewing project milestones along the way. You can track meeting agendas, external reviews and land use restrictions for each application. CityView Planning provides you with the actual time spent on reviews, not just the start and finish dates.

Access to information

- Users are able to access all the information with respect to a project, including application details, contacts, hearings, fees, the documents and images associated with the planning application along with deposits and bonds
- Ability to apply unlimited free form comments to the application
- The current status and the complete status history is available so users can quickly update customers with current information
- Create a project record history by attaching site plans, digital photos, aerial photos and all other related documents to the application to create a permanent record of the project's activities.
- Manage the plan review process and coordinate meetings with a scheduling tool that constrains the number of applications to be reviewed on the agenda and generates related notices and attendance lists.
- Track submittal requirements and conditions of approval
- Make informed decisions by easily viewing spatial information, e.g. zoning and demographic data
- Track associated permits and code cases as part of the overall project footprint

Automation

- Auto-generate approval track, plan reviews, meeting reminders, process milestones, submittal requirements, and fees
- Email notifications for planning meetings, departmental reviews, and past due notices
- Auto generate attendance lists for hearings, and agenda
- Automate and monitor complex business processes to ensure that projects follow the guidelines set out for your jurisdiction
- Meet all your deadlines with a workflow-based system and a series of useful and relevant reports

Reports and letters

- Generate all your Planning correspondence quickly and easily, e.g. incomplete submittal letters,
- Preconfigured reports including: Project Applications, Planner Projects, Outstanding Plan Reviews, Project Fees, Expired Projects, Planning Activities, Plan Review Time, Scheduled Hearings, Project Locator
- Standard document templates with letters configured to your specification

3.7.4 CITYVIEW CODE ENFORCEMENT

CODE ENFORCEMENT



Based on the principles of priority-based inspector workflow management, CityView Code Enforcement provides a comprehensive system to track your cases from citizen request to resolution. You can organize inspector activities with automatic inspection deadlines, daily rosters and automatic case assignment based on geography. CityView Code Enforcement turns information into knowledge so your department is better equipped to provide outstanding service.

Access to information

- Track code enforcement activities in a central database accessible by all departments, including case information, contacts, images, workflow, and hearings.
- Ensure that you have an audit trail of your entire process from start to finish that includes an unlimited number of violations per case, dispositions and case-generated hearings and appeals.
- Relate code enforcement violations to parcels ensuring that all departments are aware of outstanding violations and can respond accordingly in fulfilling permitting related requests.
- Utilize intuitive mapping tools to create a spatial representation of case-related violations and easily assess trend data.

Automation

- Auto-generate inspection deadlines, daily rosters, assignments based on geography, fees, and correspondence.
- Organize inspection activities, generate daily inspections roster, including links to all case pertinent information that inspectors can access at their desk or in the field in disconnected mode.

Reports and letters

- Generate all your code enforcement correspondence quickly and easily, e.g. Notice of Violation, Citation Notice, Abatement Notice etc.,
- Preconfigured reports including: Case Status, Case Follow-up, Case Summary, Officer Activity by Case, Officer Activity By Inspection, Incident History, Case Locator, Inspection To Do, Inspection Schedule
- Standard document templates with letters configured to your specification

3.7.5 CITYVIEW CASHIERING

CASHIERING



CityView Cashiering integrates with all other CityView modules for a seamless cashiering process, giving you the power to manage the revenue from all your community development initiatives.

Access to information

- Manage your revenue in a central location for all your community development initiatives.
- Meet all standard cashiering expectations by splitting payments across multiple payment methods or joining them into a single transaction
- Void or refund transactions (in whole or in part), as required, and manage your daily batches.
- Correctly account for payments that need to be distributed to multiple GL accounts based on fixed amounts and percentages
- Update all permits, cases, and licenses with fees payment information, such as payee and receipt.
- Allow users to quickly search for outstanding fees by project reference number or contact information. System will find all related fees and mark them for payment at the click of a button.

Automation

- Generate transaction numbers, receipt numbers, payment date and payment receiver to create an audit trail of monies received.
- Automatically calculate correct penalty fees and interest
- Generate batch exports to your general ledger system
- Easily set up and change your fee structure to meet your exact requirements and set automatic fee activation and expiry dates.

Reports and letters

- Understand your revenue with reports that detail all payment transactions for a given time period by account, or by payment method.

3.7.6 CITYVIEW LICENSING

LICENSING



CityView Licensing opens the door to accurate and timely data, increasing your revenues and decreasing your stress. CityView Licensing allows you to track and manage licensing for any type of business. This solution manages workflow for you, from tracking and issuing business licenses that are going to expire to generating batch renewal notices, creating tax certificates and producing correspondence logs. With CityView Licensing you will increase revenue because you can track expired business licenses accurately and calculate correct penalty fees and interest.

Access to information

- Accurately track licenses over their lifetime, even when business locations and owners change.
- Correctly collect fees by easily identifying expired business/contractor licenses and accurately calculating penalty fees and interest charges.
- Collect gross receipts and other information where pertinent (e.g. changes in # of employees) for the system to calculate renewal fees.
- Create action items based on precise, timely data.
- Report on your businesses, business types, renewal status, and penalty fees etc. Flexible reports ensure that you know the status of all businesses in the system, whether their license fees have been paid by the expected date and what the value is of those unpaid fees is.
- Map the whereabouts of your businesses through GIS integration, dealing with such things as Business Improvement Districts.

Automation

- Automatically calculate correct renewal fees, penalty fees and interest.
- Create tax certificates.
- Generate batch renewal notices and process batch renewals.
- Automate business license expiries based on delinquency rules.

Reports and letters

- Generate all your Licensing correspondence quickly and easily, e.g. License Certificates, Renewal Notifications, Past Due Renewals,
- Preconfigured reports including: Business Status, Emergency Contacts, Inactive Licenses, Short Term Licenses, Business Not Reporting Gross Earnings, Past Due Licenses, Tax Exempt Businesses, Total Amount Billed, and more
- Standard document templates with letters configured to your specification

3.7.7 CITYVIEW RENTAL HOUSING

RENTAL HOUSING



CityView Rental Housing automates and manages your entire rental housing and compliance initiatives. Owners and property managers of rental premises have the responsibility to provide basic necessities, and are required to ensure that the premises are properly maintained. By using CityView Rental Housing, government agencies can manage every aspect of rental property tracking and compliance, from registration and compliance inspections to renewals and maintenance.

Access to information

- Track rental housing activities in a central database accessible by all departments, including rental information, contacts, images, workflow, and violations.
- Workflow specific data is available to users with drop-down menus to streamline data entry and reduce the chance of errors.
- Custom data fields, related parcel information and locations are easily added.
- Users are able to reference the entire status history of the rental property from the first page.
- Utilize intuitive mapping tools to create a spatial representation of rental-related properties and easily assess trend data.

Automation

- Auto-generate inspection deadlines, daily rosters, assignments based on geography, fees, and correspondence.
- Organize inspection activities, generate daily inspections roster, including links to all rental pertinent information that Inspectors can access at their desk or in the field in disconnected mode.

Reports and letters

- Generate all your rental housing correspondence quickly and easily, e.g. Rental Housing Certificate, Renewal Notice etc.,
- Preconfigured reports including: Rental Housing Permits Issued, Rental Housing Units Inspection, New Rental Housing Applications, Rental Application Locator, Deposits and Bonds Summary, Escrow
- Standard document templates with letters configured to your specification

3.7.8 CITYVIEW ANIMAL LICENSING

ANIMAL LICENSING



CityView Animal Licensing enables the accurate licensing and renewal of animals in the jurisdiction, keeping track of the movement of animals between properties and owners, and assisting with lost animal identification as well as records of dangerous animals. Integrated with other CityView modules, a complete picture of property activity is available.

Access to information

- Animal whereabouts can be viewed at a property or spatially on a map. Tracing animals between properties and owners as they move is simple.
- Integration with GIS provides tools for locating lost animals, mapping dangerous animals.
- Pertinent animal information is easily accessible for inspectors completing building or code enforcement inspections.
- Correctly collect license fees based on animal characteristics.
- Track distinguishing features for recognition of animals, including a record of pictures and documents associated with each animal.
- Multiple owners per animal and multiple animals per owner.
- Track immunization records.

Automation

- Support multi-tier fee structure, variable fees, discounts and adjustments
- Auto-generate animal tags and tag renewal notifications.
- Batch renewal processes takes the manual headache of renewals away.
- Automatically calculate correct renewal fees, penalty fees and interest.
- Automatically expire delinquent licenses and create follow-up prompts.

Reports and letters

- Generate all your licensing correspondence quickly and easily, e.g. License Tags, Renewal Notifications, Past Due Renewals,
- Preconfigured reports including: License Status, Expired Tags, Past Due Licenses, Lost Animals, Fees Collected, and more
- Standard document templates with letters configured to your specification.

3.7.9 CITYVIEW PARKING MANAGEMENT

PARKING MANAGEMENT



CityView Parking Management provides a comprehensive solution for parking tickets and permits, including on-street ticket entry, ticket processing, and permit tracking.

CityView Parking Management automates the ticketing process from start to finish. Your staff will appreciate the ease of data entry, advanced search capabilities, and automatic fine calculations. Timed parking, permit tracking and issuance, lot inventory, residential parking, and tow/boot management are all augmented by CityView's inherent benefits, such as attaching documents and images, and auto-generated correspondence.

Ease of data entry

- Whether you are entering tickets via handheld devices or manually entering them into the CityView software, CityView's data entry screens are built for speed and accuracy.

Location management

- CityView's distinct method of managing location-based data simplifies the entry and subsequent reporting of traditionally complex parking scenarios, e.g. on-street parking, lot and residential parking, metered parking, and timed parking.

Exception notifications

- When a plate number is entered into the system, it can be checked for repeat offences, stolen vehicles, immunity (for diplomatic, emergency and other plate types) and then the system will guide the user to undertake appropriate actions.

Determining fines

- Fine amounts can be selected from a filtered list; or, business rules can be configured to add the appropriate fines automatically.

Reporting capabilities

- Data can easily be retrieved based on plate or ticket numbers as well as any other piece of information in the system. CityView Reporter is a user-friendly report designer that allows anyone to create slick and useful reports with virtually no technical knowledge.

3.7.10 CITYVIEW CEMETERY MANAGEMENT

CEMETERY MANAGEMENT



CityView Cemetery Management allows you to track your entire cemetery inventory, including management of plot availability, processing reservations and plot sales, assisting with maintenance and repair, interments and disinterments, and burial services with sophisticated scheduling tools, and enabling easy retrieval of records. With CityView Cemetery Management, you can track plot transfers, returns of plots, as well as memorial and monument applications through the entire process. Customers can make an application or perform their own research online through the CityView Portal and staff can work efficiently from anywhere in the cemetery using CityView Mobile.

Access to information

- Track plot inventory for one or more cemeteries
- Easily scalable to include addition of new sections, mausoleums, columbaria, and other expansions
- Enables scheduling of burial ceremonies within defined parameters to avoid disturbances/overlap
- Easy access to plot reservations, sales, interments, contacts, fees, letters and documents/images.
- Tracks multiple positions within a plot, based on plot type and burial type, ensuring accurate placement
- Manage perpetual care maintenance and repairs
- Custom data fields allow virtually any type of related information to be tracked, searched and reported
- Comprehensive application tracking with workflow for plot returns, monuments/markers and memorials
- Research burials by name, relatives, location, etc.
- Record unlimited detail for each interred, including funeral information, birth date, cause of death, religious affiliation, inscription, next of kin, etc.
- Increase productivity with fully integrated mapping
- Public inquiries through online portal and kiosk
- Predefined workflows allow you to identify deadlines and automatically create next steps like plan checks and inspections.
- Handles all kinds of exception cases, e.g. incorrectly placed remains, mass graves of unidentified remains, single plots with multiple burials, etc.

Automation

- Auto-generate interment and application numbers
- Ability to bulk create sections, rows and plots
- Auto-create placements based on plot/burial types
- Calculate applicable fees for sales, applications, burials, disinterments, memorials, markers, etc.
- Maximize efficiency by quickly creating multiple copies of an existing application.
- Initiate specific processes from the map, e.g. reserve side-by-side plots for family members

Reports and letters

- Generate letters and other printed output from configurable templates, e.g. Sale Agreements, Deeds, Return of Plot, Transfer, Receipts, etc.
- Ability to modify generated letters, on-the-fly, using an intuitive rich-text format interface (MS Word-like formatting options.)
- Make informed decisions with intuitive reports that allow you to quickly and easily determine the status of all plots, scheduled interments, reservations, etc.

3.7.11 CITYVIEW SERVICE REQUESTS

SERVICE REQUESTS



CityView Service Requests automate and manage citizen submissions for service, complaints, or inquiries. By providing a centralized database to contain citizen requests for service (such as road or park maintenance), complaints, and general inquiries, CityView Service Requests ensures that your agency is able to access real-time information about the status of any request at any time.

Access to information

- Users are able to submit service requests 24 x 7 for activities such as road and park maintenance to garbage collection and general inquiries via the web including a mobile device enabled view.
- Ability to capture detailed service requests include location(s), requests types and comments so requests can be routed appropriately.
- Users can request feedback via multiple methods: email, phone, fax and mail.
- Users can attach digital photos, aerial photos and all other related documents to the service request to create a visual record.

Automation

- Managing information using this module is easy, saving staff time and reducing their overall response time to incoming requests.
- Manage your request data by providing a centralized data store for all requests, customer or interdepartmental checks on the status of any request become quick and easy. Requests can even be routed through CityView's workflow to multiple departments.
- Streamline and provide enhanced service. Providing excellent constituency services can be an overwhelming challenge for many agencies struggling with insufficient resources. CityView's Service Requests assist in this process by streamlining and automating many of the time consuming processes.

Reports and letters

- Standard document templates with letters configured to your specification.
- Generate all your Service Requests correspondence quickly and easily, e.g. Service Request Acknowledgment letters.

3.7.12 CITYVIEW MARRIAGE LICENSING & DEATH REGISTRATION



DEATH REGISTRATION

CityView Death Registration facilitates precise tracking of deaths and the creation of certificates, including time, date, location, cause, attending physician and more.

MARRIAGE LICENSING

CityView makes it easy to record all of the data required from marriage applicants, collect fees and process the post-ceremony certification.

Access to information – Death Registration

- Track place of death, date, time and cause.
- Recording the address of the deceased is simplified using our integrated property information.
- Record attending physician and who is reporting the death.
- Log certificate number, type, date and who it is issued by.
- Attach any supporting documents.
- Collect and record the appropriate fees.
- Add any contacts as need. Data integrity is enforced by fully integrating with the program's address book.

Marriage Licensing and Registration

- Track submittal requirements for licenses including identification, citizenship, Parental Consent or Judicial Permission if required.
- Record current and permanent address, lineage, marital status, divorce file number and date (if applicable) for each applicant.
- Gender neutral fields for applicants.
- Integration with the
- Track license waiting periods and expiration.
- Add ceremony information and Marriage Certificates.

Automation

- Support multi-tier fee structure, variable fees, and adjustments.
- Record judicial or parental consent based on the age of marriage applicants.
- Automatically expire delinquent Marriage Licenses.
- Automatically add marriage applicants to the CityView Address Book.

Reports and letters

- Fully integrated letter template system lets you create highly customized print outs to match your document needs.
- Use out-of-the-box detailed reports or create your own custom reports to facilitate state/province reports.

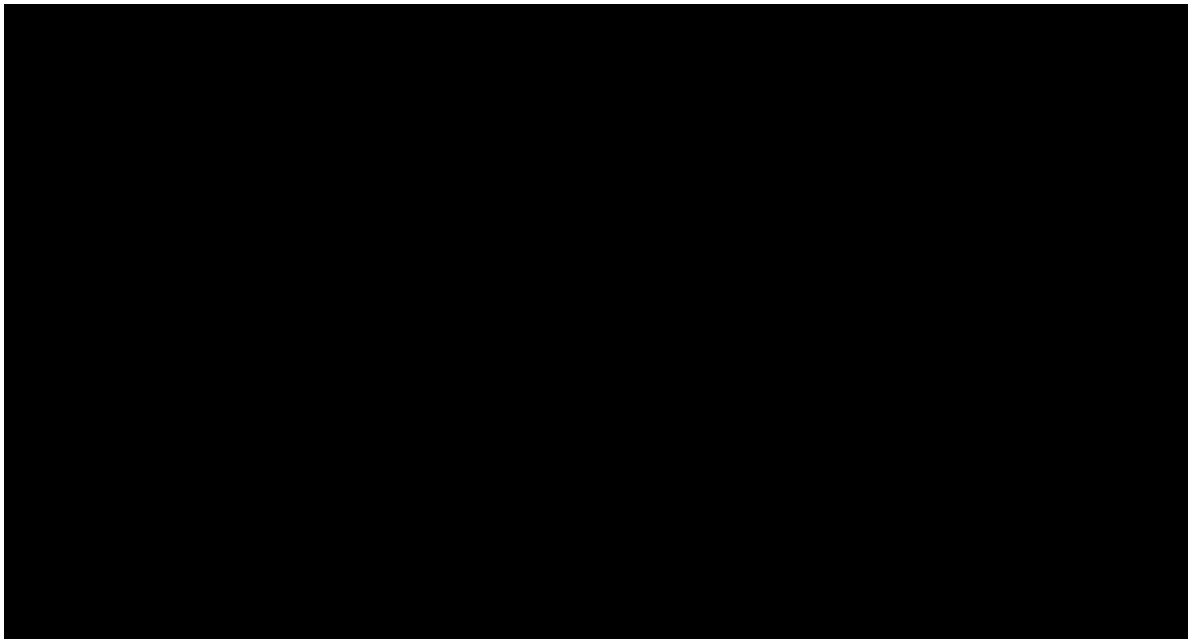
3.7.13 MICROSOFT OUTLOOK ADD-IN

The CityView MS Outlook Add-in allows data from CityView and Outlook to be easily shared between the two applications with minimal user intervention.



Emails can be attached to permits/cases/projects/contractors from Outlook. This ensures that all communications involving properties and cases, are recorded with their associated data in CityView, for future reference. All correspondence will be easily accessed, whenever needed. Further, emails that are associated with CityView records, will not be affected if the original email is deleted in Outlook. The CityView copy of the email remains intact.

User's CityView To-Do lists are displayed in Outlook and activities can be added as appointments to the Outlook Calendar as well as tasks within Outlook, for pop-up reminders. Linking from these activities will take the users directly to the specific record in CityView.



3.7.14 MICROSOFT WORD ADD-IN

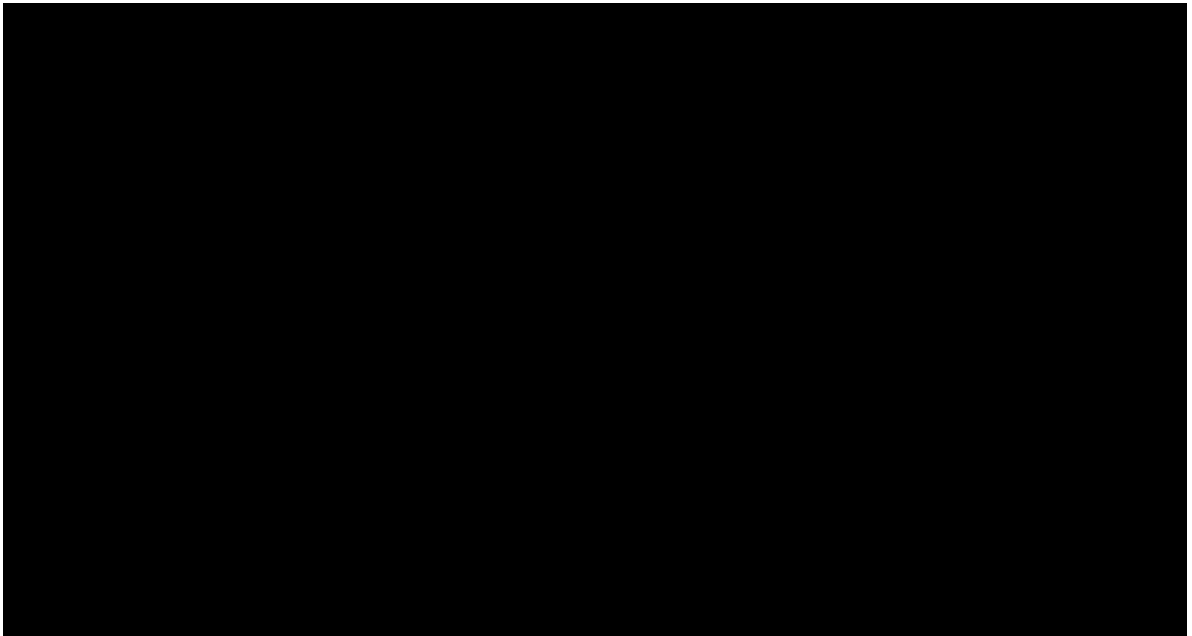
The CityView MS Word Add-in allows users with designated “configuration” rights to create and modify letter templates for use within the CityView business processes. This add-in is a rich editing environment that allows users to work in a product with which they are already familiar: Microsoft Word. The MS Word Add-In is compatible with Office 2010, Office 2013, Office 2016, and Office 2019.



CityView’s Select implementation includes the configuration of a number of standard letters for each business process. Once in use, these letters populate dynamically and typically include the following data:

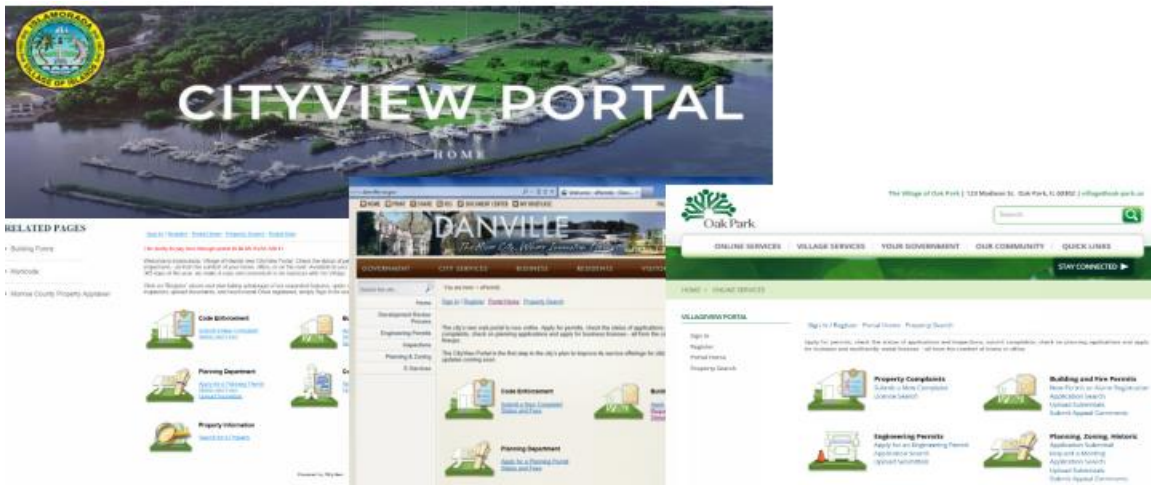
- Applicant’s name, address and property information
- Application/case number & related information
- All reviewers’ comments/corrections required, in the case of electronic plan reviews
- Standard approval wording, in the case of granting a permit or a certificate of occupancy
- Standard wording for conditional approvals
- Other required data that exists in the CityView database and that is relevant to such correspondence.

These letters may be considered complete in their initial auto generated format. However, by presenting these letters in Word files, users may review and edit prior to finalizing and sending them onto the recipients.



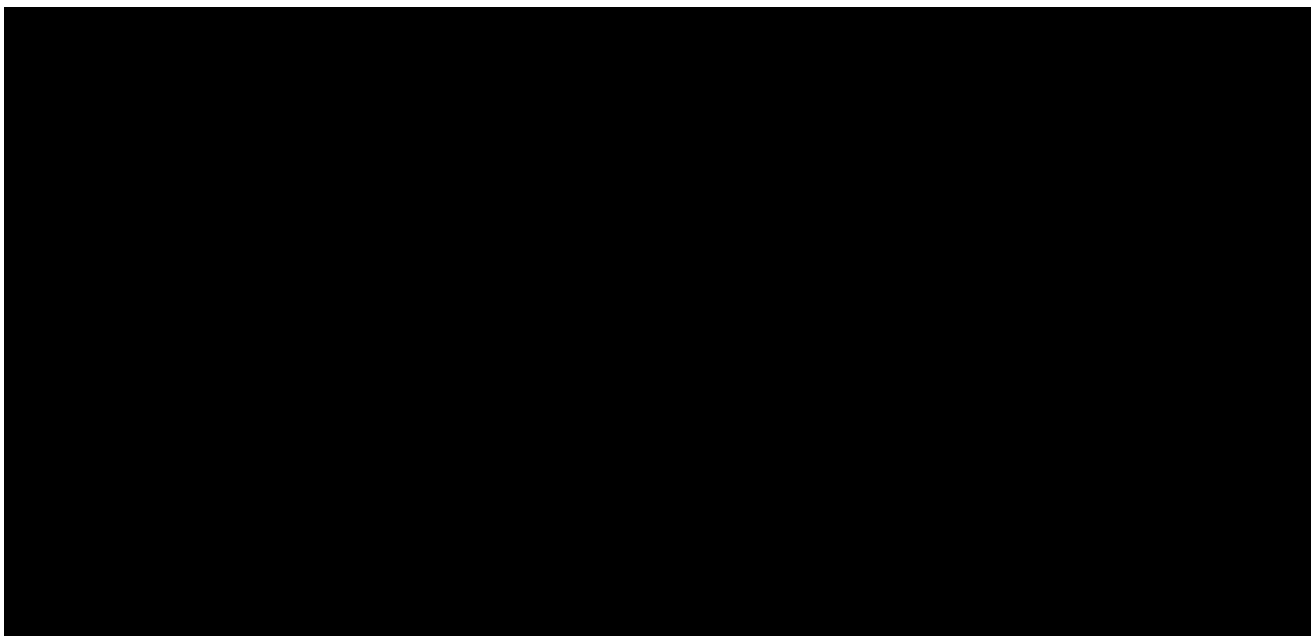
3.7.15 CITYVIEW PORTAL

The CityView Portal provides your constituents and contractors the convenience of working with the City 24/7 without having to leave their homes and offices. The portal offers access to public facing information and interactive services to registered and non-registered users. The CityView Portal is designed for public use in a variety of ways including: ease of use, security, and general functionality. Using the CityView Portal, citizens and contractors can initiate code cases, apply for and pay for permits, check permit status, requests inspections and meetings, view public information regarding specific properties, and much more. The design is consistent with typical, intuitive web browser use and is browser-agnostic.



In addition, the CityView Portal presents an adaptive interface that is usable on small-screen and touch-screen devices. The portal automatically detects whether the browser is running on a smartphone or tablet and uses a small-screen friendly interface.

Users have the option to switch to the traditional desktop browser interface by choosing the "Switch to Desktop Site" menu item (shown below). Portal Home Page icons and menu in the new tablet/smartphone mode:



3.7.16 CITYVIEW ASSISTANT – CITYVIEW’S INTELLIGENT CHATBOT (OPTIONAL, NOT INCLUDED)

CityView Assistant allows developers and the public to request or cancel inspections and obtain current information about their projects. This is done simply and quickly with text messaging on their mobile phones. The individual accesses the intelligent chat function by sending a brief message to a local phone number. The Assistant will respond in plain language. It recognizes permit numbers, addresses or other details from within the CityView system, so it can reply with a wealth of information and it can also schedule the requested inspection.



CityView Assistant offers the following:

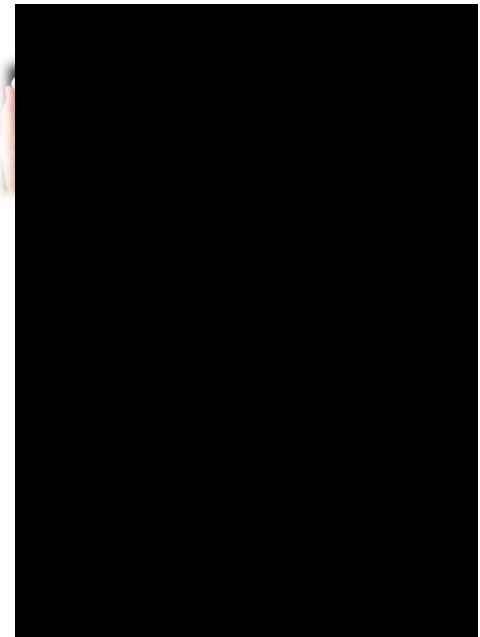
- Provides an opportunity for enhanced community engagement without requiring any additional staff
- Delivers accurate responses 24/7
- Offers total portability and access from anywhere that there is a cellular signal
- Accesses all CityView permits, code cases and planning applications on which the requestor is a contact.

3.7.17 CITYVIEW MOBILE (PERMIT INSPECTIONS)

CityView Mobile is a lightweight, handheld application served out for secure access by your inspectors and mobile staff.

CityView Mobile allows staff members to easily access key CityView functionality from the field using their light-weight handheld devices such as iPhones, iPads, Android devices, and tablets such as Microsoft Surface. Users can:

- Access their inspections to-do lists for the day and view them on a map.
- Set inspection order and notify contractors through portal of the inspectors' route
- Complete inspections in the field.
- Time inspections with a start/stop clock
- Automate SMS messages to contractors ahead of inspectors' arrival
- Route planning
- Integrate with the GPS of the mobile device
- Look up contractors to display the status of their licenses.
- Perform permit searches to check for status and outstanding fees.
- Perform property searches to check for valid permits, code cases etc.
- Navigate extensively through all of the above.
- Automate inspection result emails to contractors.
- Print inspection reports in the field,



- Upload pictures and videos.
- And more!

CityView uses advanced mobile device technology to run seamlessly even in situations with little or no connectivity (i.e. "disconnected mode") ensuring inspectors can continue working even when:

- Conducting inspections in areas with limited or intermittent cellular or WiFi coverage
- Losing connectivity moving between floors in a structure on a job site
- Any other situation in which transferring data between the mobile device and the CityView server will be difficult or impossible

If disconnected mode has been enabled, users logging in to the application will be prompted to download data that will enable them to auto-suggest contacts, contractors, locations and animal licenses even if they lose connectivity.

The next time the user logs into CityView Mobile with the same device, CityView will automatically detect if any updates to their downloaded data are required.

Once the user is in the field, the application will seamlessly move between connected and disconnected mode as the device loses and regains its connection.

3.7.18 CITYVIEW VIRTUAL INSPECTIONS (OPTIONAL, NOT INCLUDED)

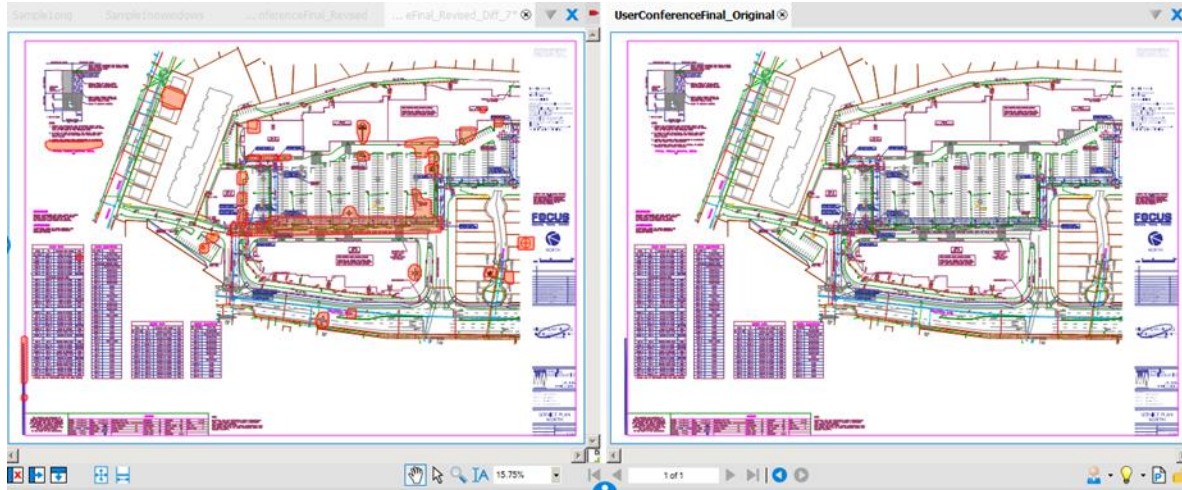
CityView Virtual Inspections allows any inspection to be completed remotely. It is fully integrated with all CityView business processes and the Workspace user interface. The Virtual Inspections product provides the following benefits:

- Increases efficiency and utilization by conducting inspections from the inspector's office
- Captures photographs, videos and conversations and the inspector can apply annotations, if needed
- Associates relevant media to the specific inspection within CityView
- Avoids the need to manually manipulate, transfer or store media files
- Maintains social distancing – when required
- Increases productivity by reducing or eliminating travel time
- Reduces fuel costs and traffic on the roads
- Avoids dependency on potentially insecure tertiary video conferencing tools
- Maintains PII data confidentiality and data residency requirements
- Allows your community to keep building and growing at all times



3.7.19 CITYVIEW ELECTRONIC PLANS REVIEW

CityView combines electronic submission, version control and workflow capabilities with the vast functionality of Bluebeam Revu, third party software, for document review and markup. CityView is registered reseller of Bluebeam products and a Bluebeam Alliance Partner.



Collier County, FL and Cherokee County, GA benefit from a paperless procedure that shortens the municipal review process

These counties experience significant cost savings in processing plan review documents electronically, and all data is automatically integrated with their other CityView modules, allowing for seamless workflows and one-point data entry.

Collier County, Florida and Cherokee County, Georgia, selected CityView's Electronic Plans Review solution to replace their existing systems. These counties benefit from a more integrated paperless procedure that shorten their municipal review process; offer exceptional and convenient service to their contractors, applicants and architects; and save time, money and the environment.



Collier County selected CityView's Electronic Plans Review to replace its legacy EPR solution which did not integrate with its permitting process in CityView. The County's legacy solution also lagged behind in functionality compared to the CityView solution. CityView combines the exceptional submittal, approval routing, version control and workflow capabilities of CityView with the vast capabilities of Bluebeam's flagship product, Bluebeam Revu, users circulate, mark up and review documents, plans and construction drawings and stimulate communication throughout the process.



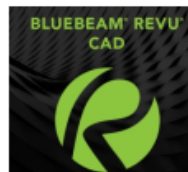
Cherokee County had also been using an alternative EPR solution; the challenge was there was no integration with CityView, causing County staff to have to enter data into two systems. With the move to CityView's Electronic Plans Review, all information seamlessly flow between modules; County staff increase productivity because duplicate data entry is eliminated. The County also benefits from the product's robust and intuitive workflows.

Bluebeam

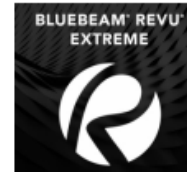
Digital markup solutions that push the limits of collaboration, mobility, cloud storage and plan review communication. Innovative PDF creation, editing and markup technology that will help take you paperless.















Revu Standard for powerful PDF creation, markup, editing, collaboration, and a paperless workflow.



Revu CAD has all that Revu Standard has, plus it adds plug-ins specifically for CAD users



Revu eXtreme for power users adds to Standard and CAD by adding Optical Character Recognition (OCR), Redaction, fillable forms and scripting.

CREATE	 PDF Creation Includes direct plug-ins for AutoCAD®, Revit®, Navisworks® Manage, SolidWorks®, and Microsoft® Office, for one button PDFs and batch creation.	 Batch Processing Convert an unlimited number of files to PDF. Add security, stamps, headers and footers or flatten an entire folder of PDFs at once.	 3D PDFs Create 3D PDFs from, Revit®, Navisworks® and add markups to 3D views	 OCR Transform scanned PDFs into text-searchable and selectable files.
COMMENT	 PDF Markup Customizable markup tools such as text, notes, highlighter, lines, clouds, callouts, stamps, and more to redline PDFs.	 Toolchest Save commonly used markups in the exclusive Tool Chest for easy reuse, and import or share tool sets with colleagues.	 Compare Plan Sets Automatically highlight the difference between two drawing revisions with clouds, or assign colors to layers with Overlay pages.	 Stamps Stamp PDF documents with date, time, signatures, and more. Use predefined stamps in Revu or create your own.
ORGANIZE	 Search Search for keywords or symbols within the PDF content, and in markups added to the PDF file.	 Tab Navigation Use tab navigation to easily switch between tabs, or view them in their own floating window. Split your screen up to sixteen times and sync tabs to pan and zoom in unison.	 File Access Display a list of recently opened PDF Files that can be previewed or reopened with a mouse click. Pin or save files in categories to keep documents organized and conveniently stored.	 Integration Seamless integration into ProjectWise® and SharePoint® document management systems streamlines workflows.

4. HARDWARE AND SOFTWARE SPECIFICATIONS

Hosted, subscription software model (named user subscriptions)

CityView hosted, subscription software solution is based on named user subscriptions.

Our cloud offering is ideal for municipalities with limited IT resources or those looking to reduce IT costs, as CityView takes care of the hosting and software management for you, freeing up staff for other critical duties.

CityView's hosted, subscription software solution provides you with a worry-free solution. No hardware to purchase or maintain; no license or maintenance fees (only a subscription); no client to install...plus:

- Lower up-front costs mean you receive a quicker return on investment.
- Easier administration for your IT staff.
- Your data stays secure in the data center in Pittsburgh, PA.
- Reliable infrastructure in a professionally managed data center.
- Reduced time-to-value for new features and functionalities as your product is kept up to date with the regular updates and enhancements provided by CityView

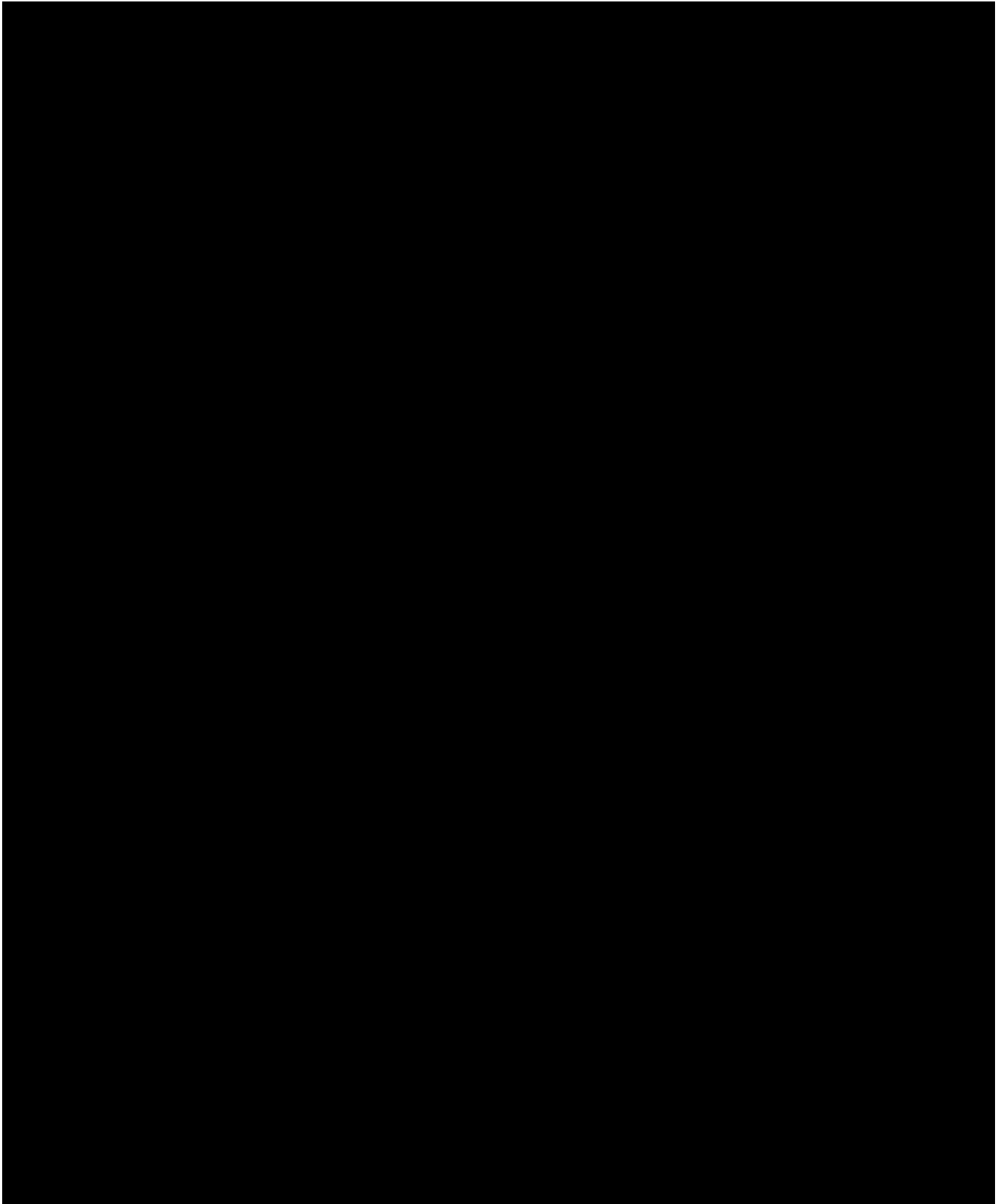
Required subscriptions include:

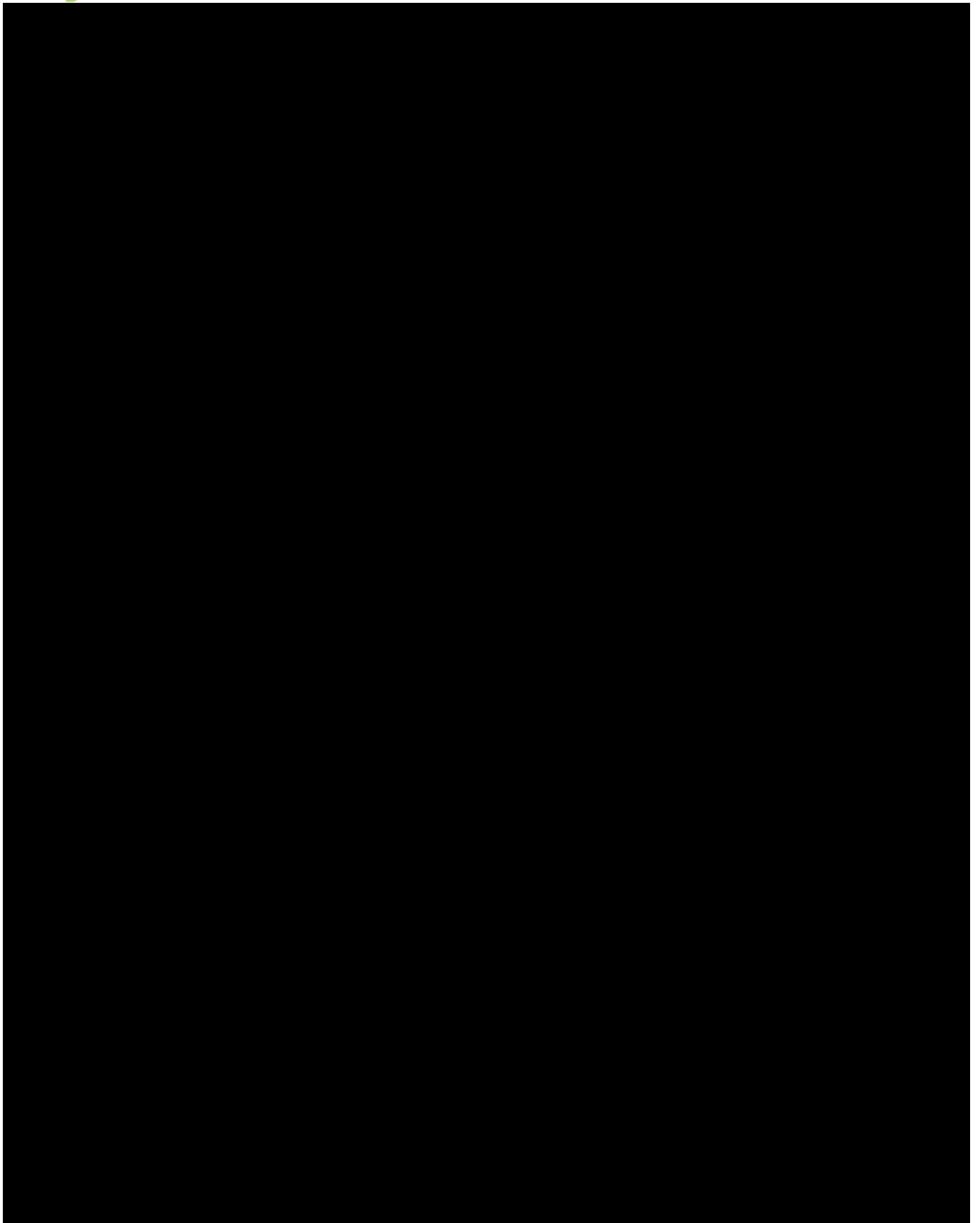
- A single site subscription for CityView Server software. This provides the CityView enterprise platform and system administration tools.
- A single software subscription for each of the CityView modules purchased (all modules are fully contained in the database, so integration is complete).
- Named users – For the hosted, subscription software model, CityView offers named user subscriptions.

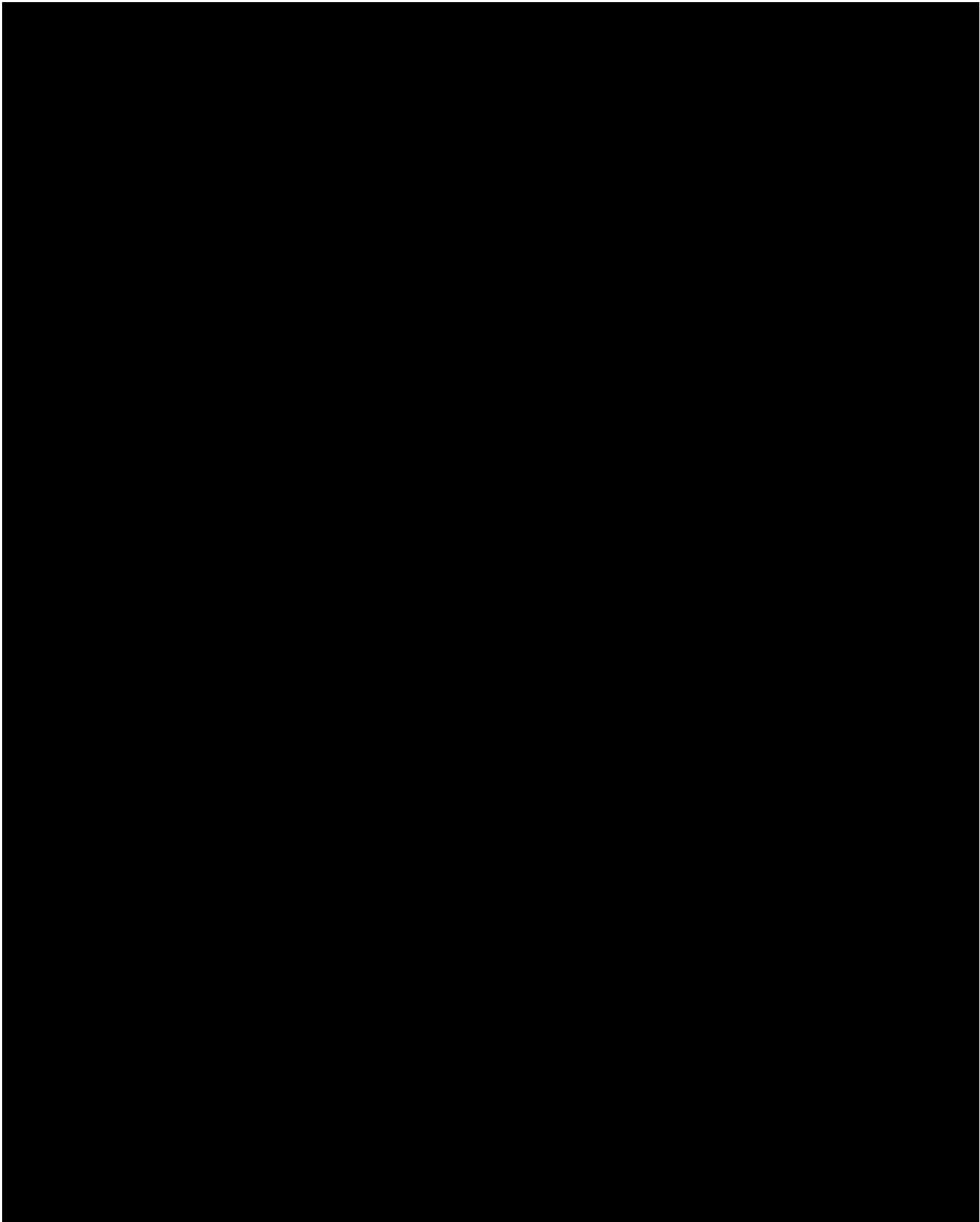
Furthermore, a hosted solution provides you with a plug and play solution: no server hardware or operating system licenses to purchase or maintain; a predictable monthly / yearly software fee, which is stable throughout the duration of the contract; and no fat or thick client to install on user workstation.

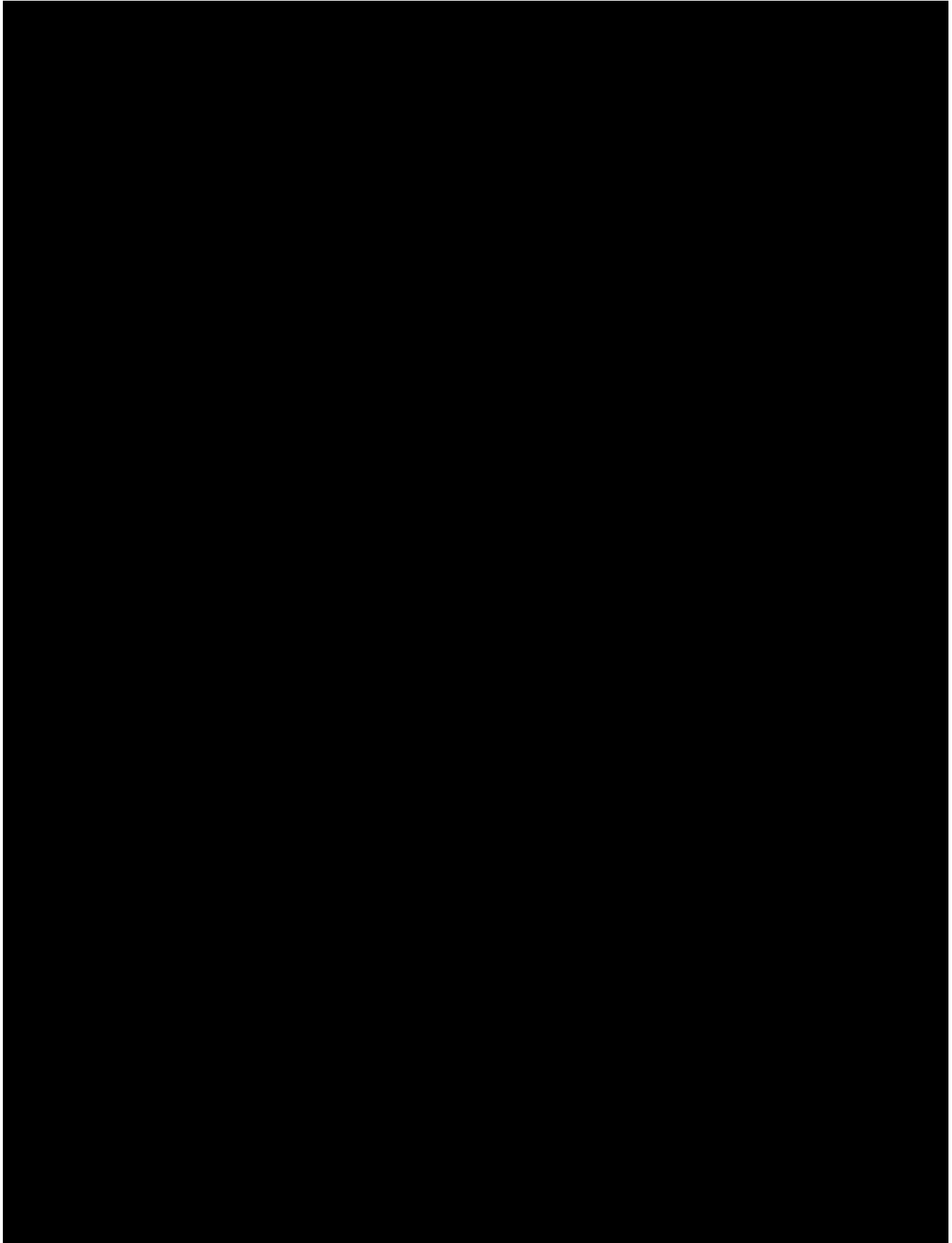
- CityView Mobile is subscribed by the number of users that have access to the mobile applications from the field (for use of the CityView Mobile application supported on handheld technologies such as iPhone, iPad, Windows mobile phone and others).
- CityView Integration Server Public API, a RESTful API for which a site subscription is offered. It is required for integrations with such things as Integrated Voice Response (IVR), Cashiering, and Electronic Plans Review.
- CityView Outlook Add-in allows data from CityView and Outlook to be easily shared between the two applications.
- CityView Word Add-in for creating and editing letter templates. Customers can now use Microsoft Word to create and edit letter templates using a new add-in.
- Bluebeam software (for Electronic Plans Review), subscribed on a per-user basis for Revu.

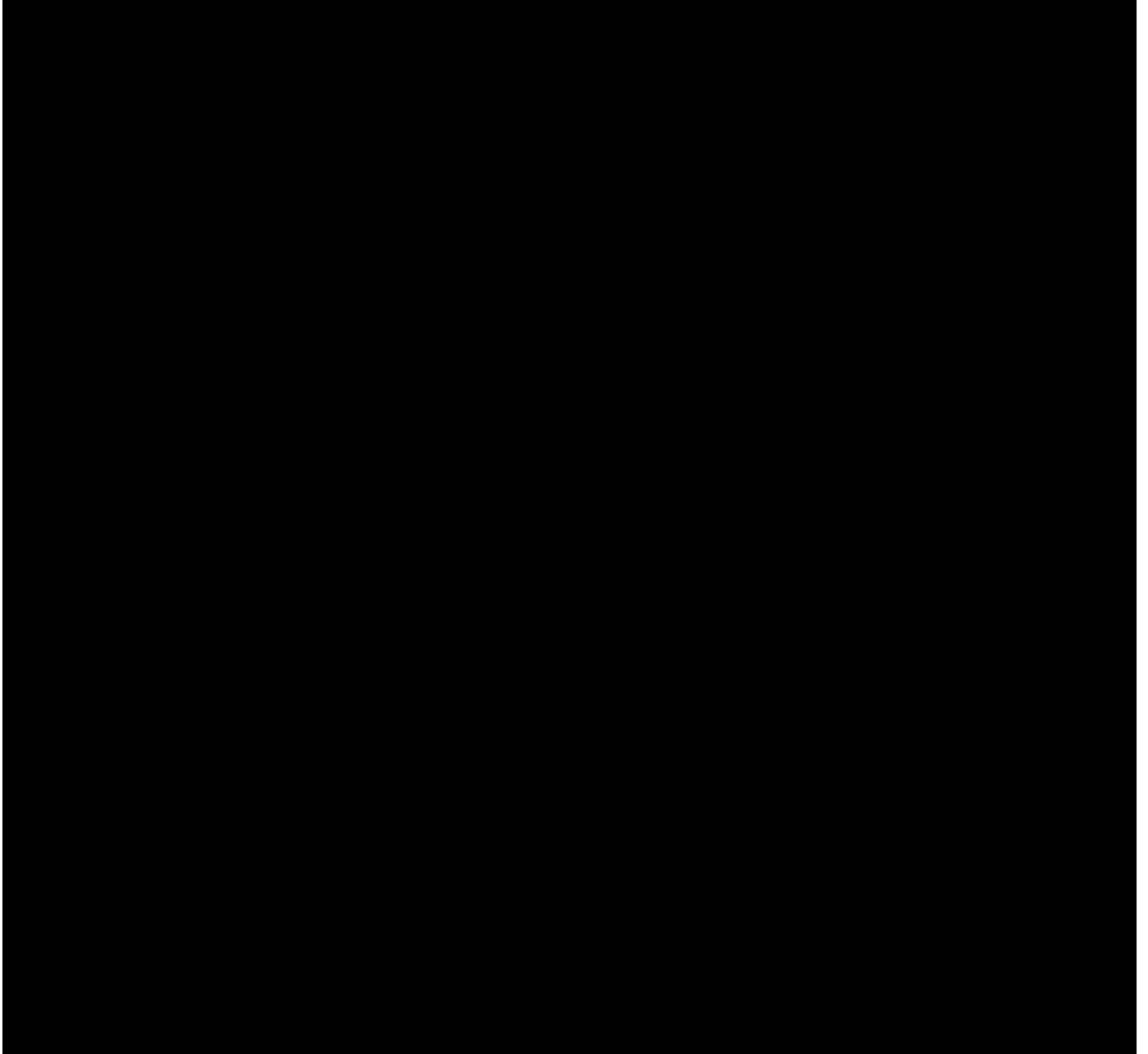
4.1 CITYVIEW HOSTED, SUBSCRIPTION SOLUTION



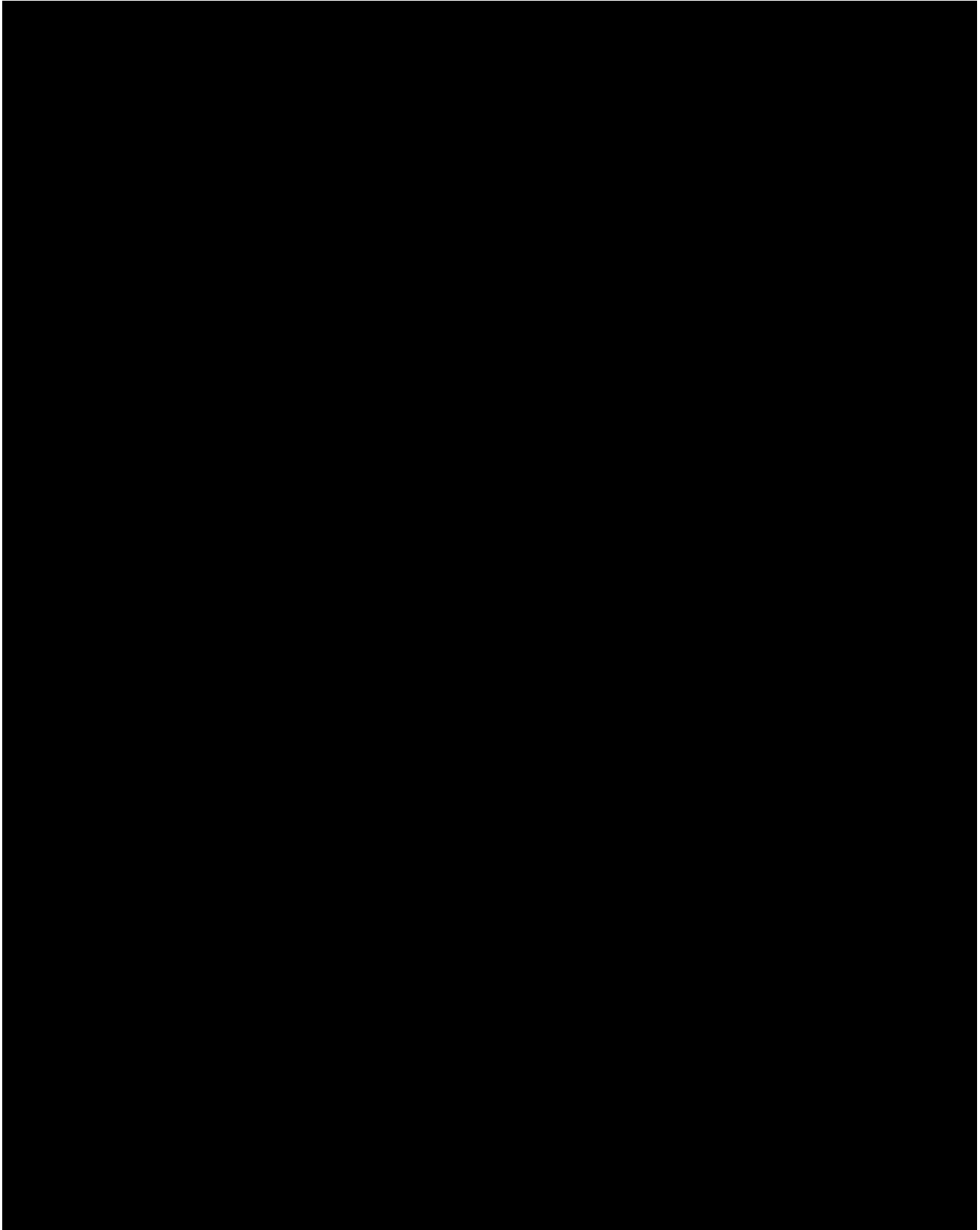


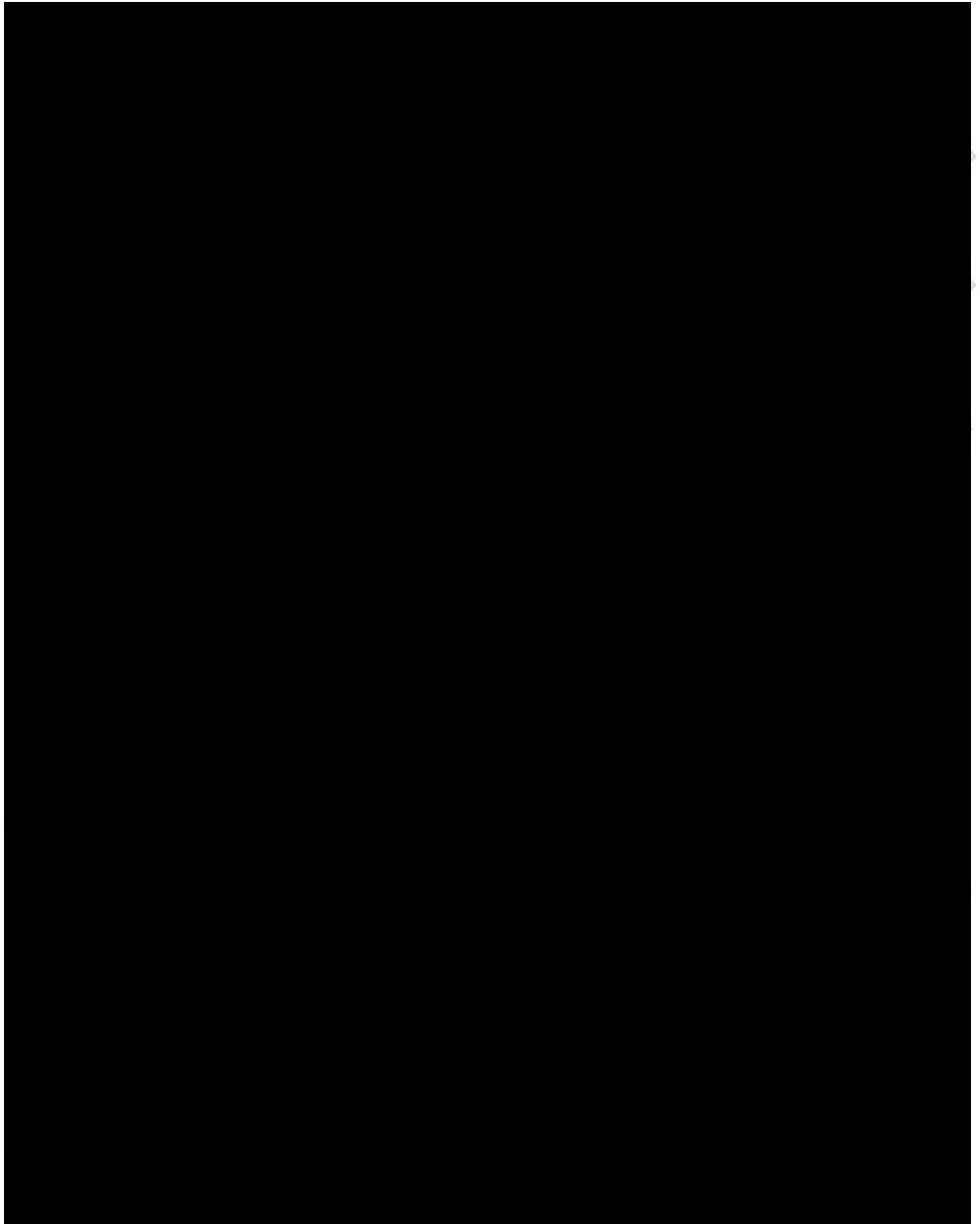


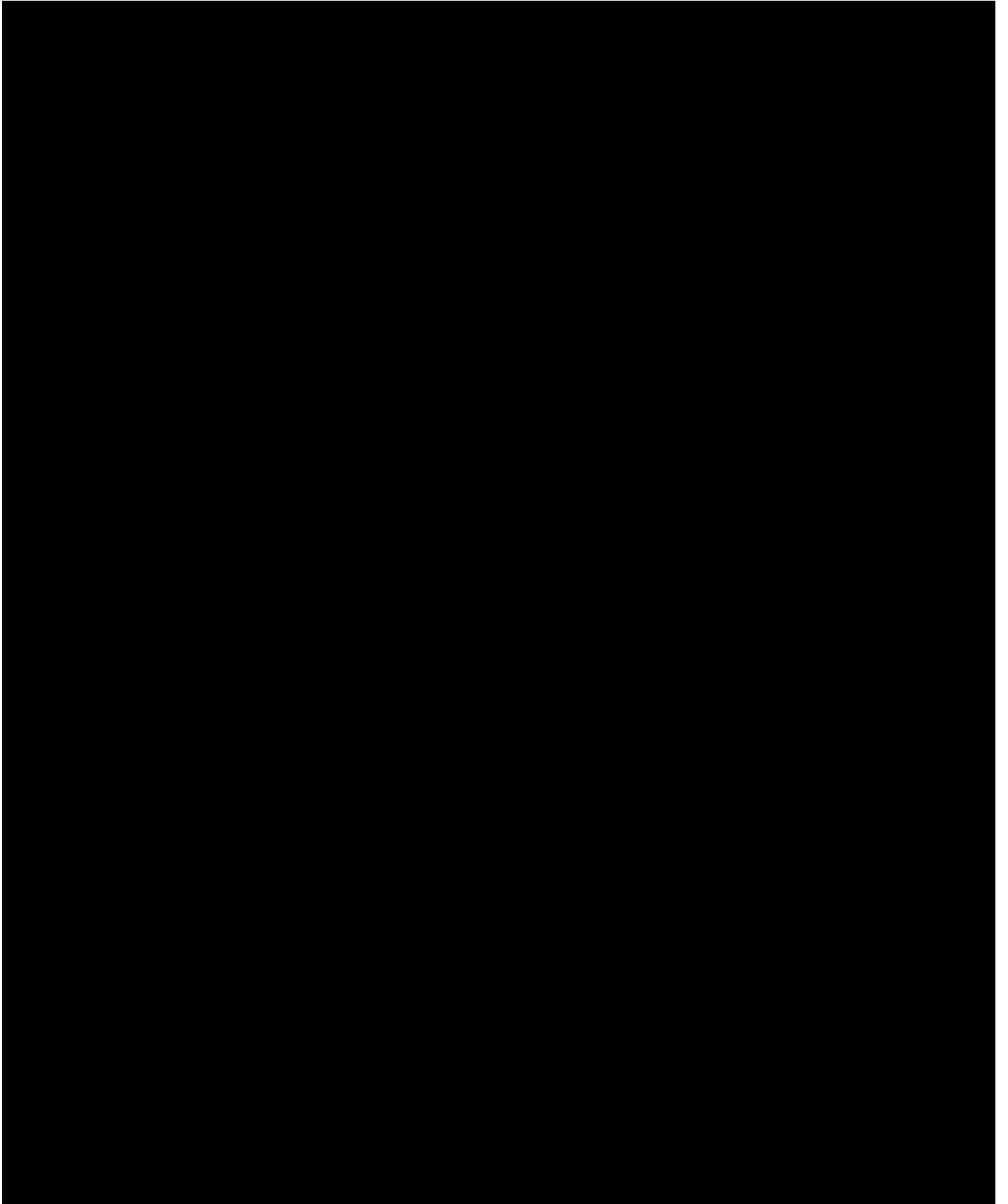


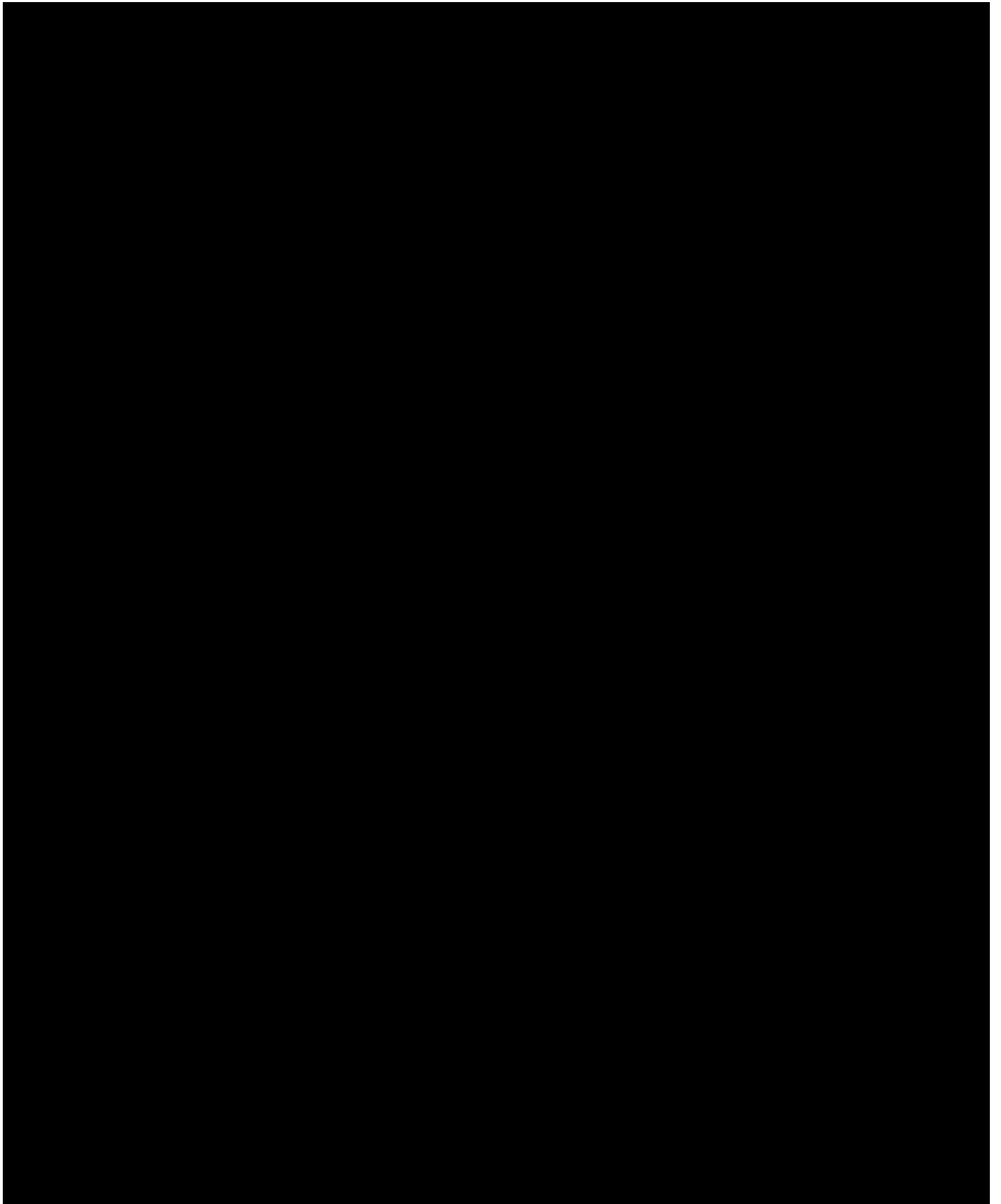


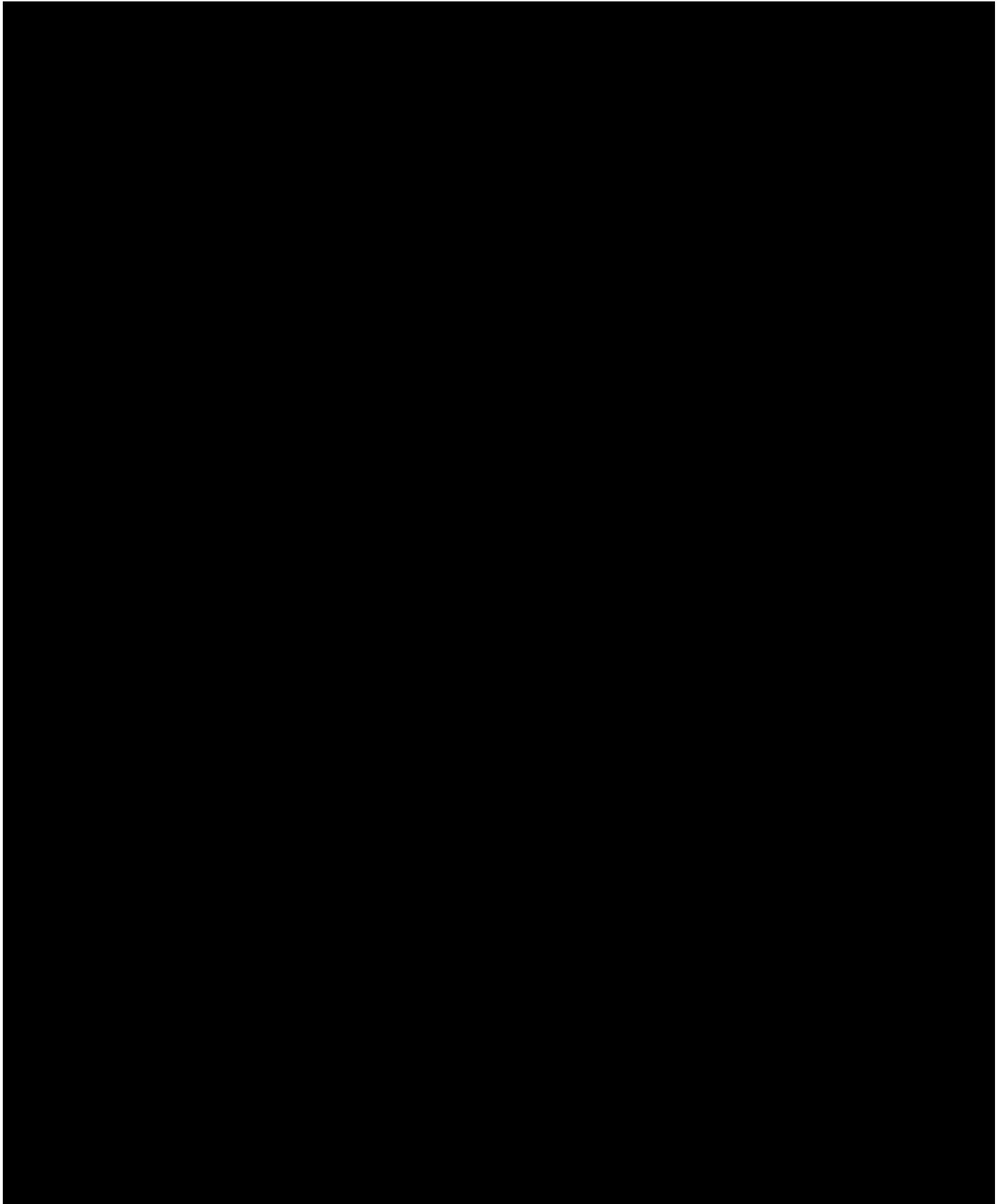
5. IMPLEMENTATION METHODOLOGY

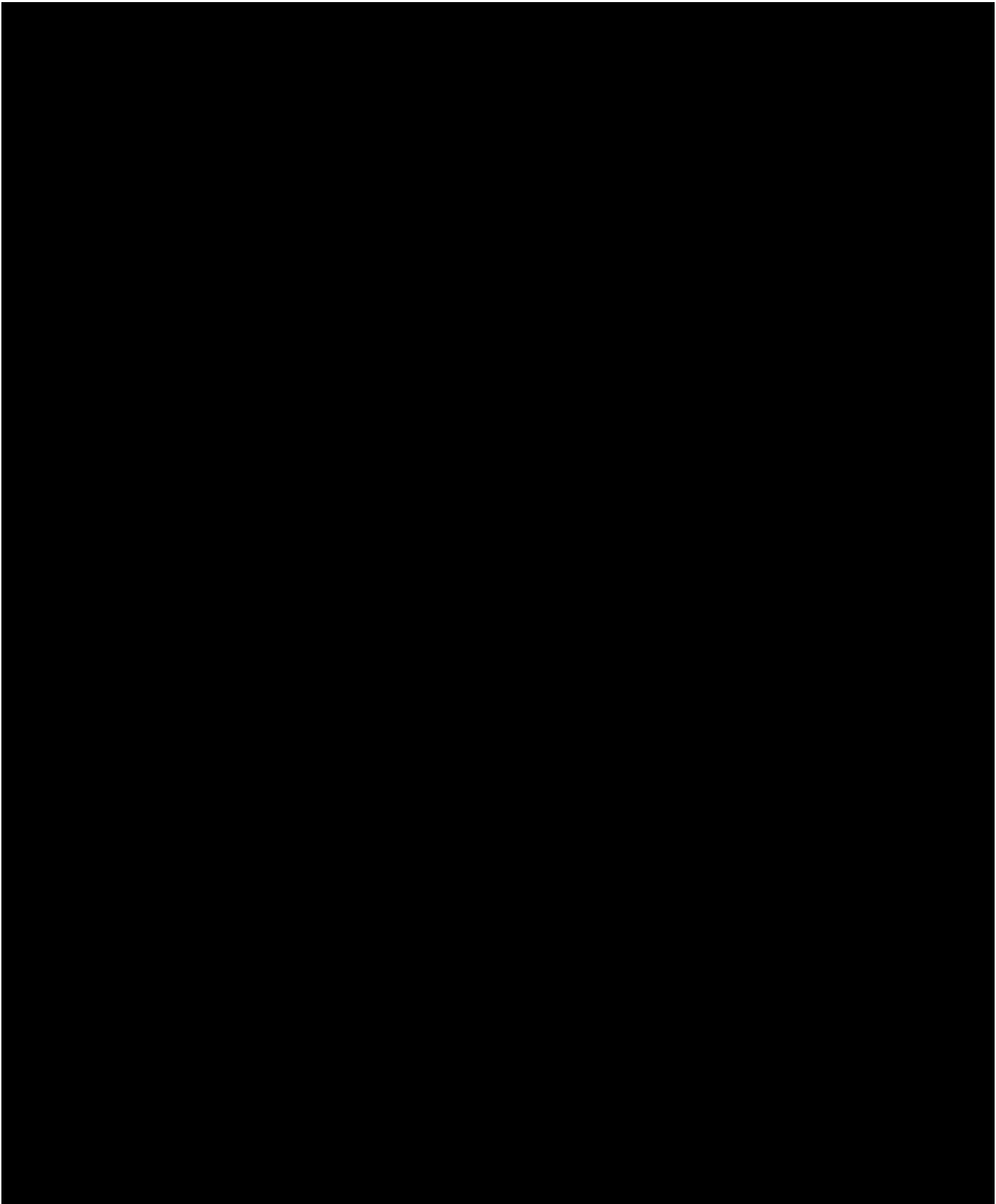


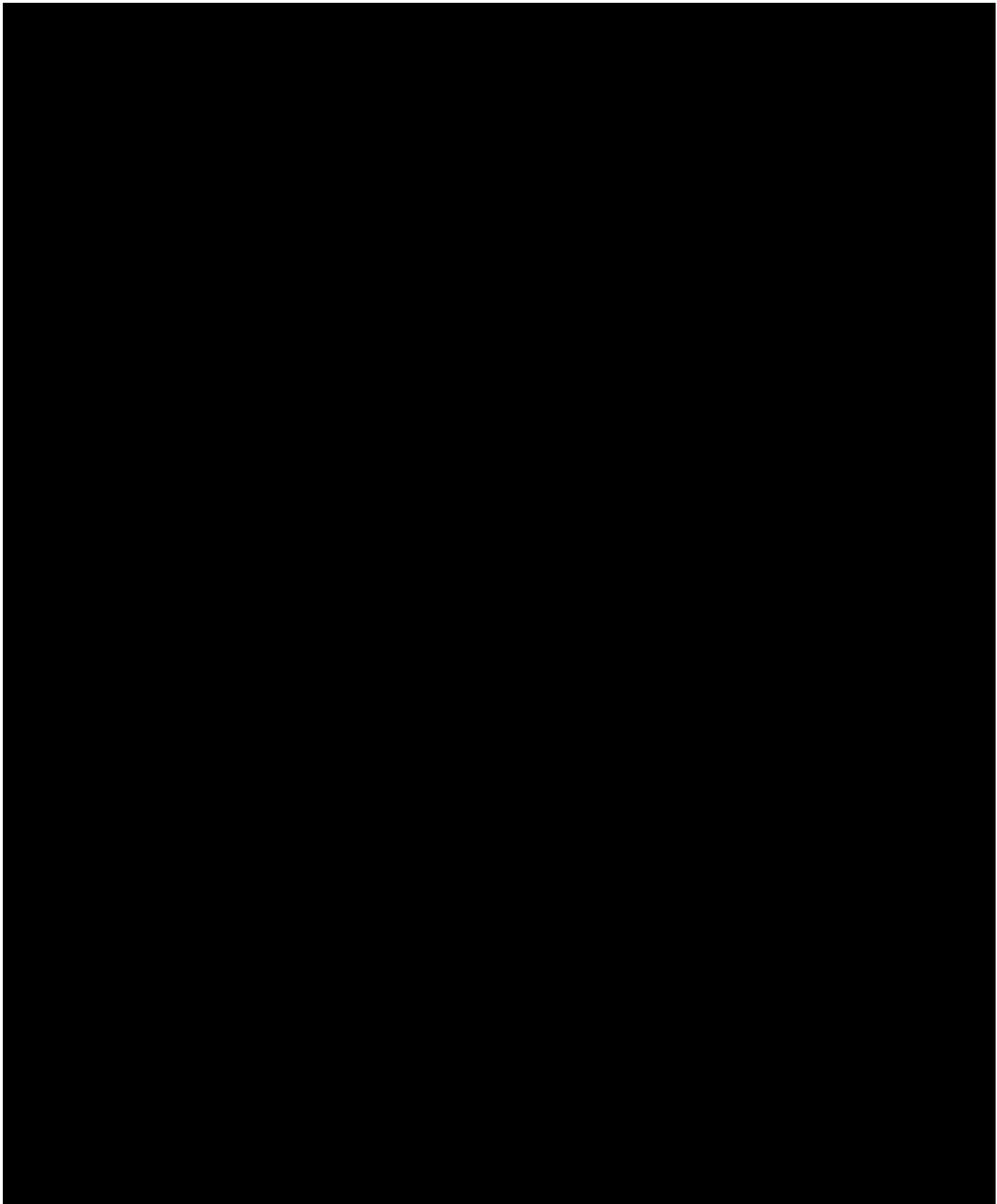












5.2 CITYVIEW PROJECT MANAGEMENT PROCESS

CityView will designate a project manager for the project, whose primary responsibilities are to undertake the administrative duties of developing and monitoring the project schedule, scheduling meetings, invoicing, maintaining regular correspondence and project status reports and being the first and primary contact with the City for all matters concerning the project. The CityView project manager will work hand-in-hand with the City's project manager to ensure a successful implementation that stays on schedule and within budgets.

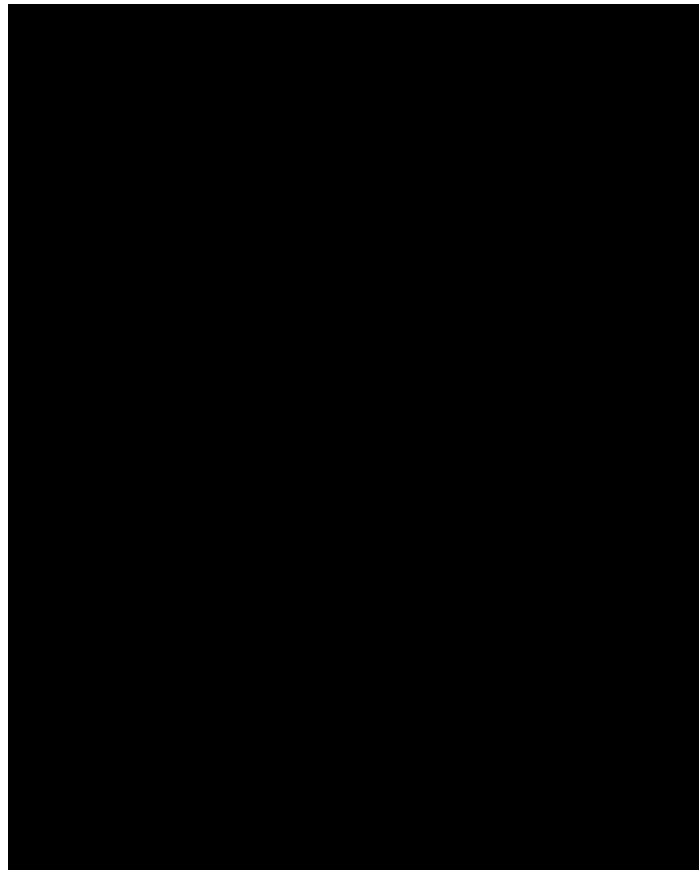
Key Tasks include the following:

- Attend project status meetings (via conference call, WebEx sessions, or on-site at additional costs),
- Review project status reports and facilitate resolution to identified issues on the customer side.
- Facilitate all aspects of project implementation from the customer side, including helping with data clarification, facilitating any on-site sessions, gathering required materials and information, managing customer deliverables to the agreed upon schedule, involvement in scope and budget validation, providing required sign offs during project implementation and managing issue resolution and escalation when required.
- Planning, progress monitoring (primary responsibility remains with vendor project manager).
- Issue escalation and risk management.
- Vendor and internal team management.
- Providing the City deliverables within agreed-on timelines.
- Providing sign-off at required junctures during the project implementation.

CityView generally adheres to the Project Management Body of Knowledge (PMBOK) methodology which is the core foundation for the Project Management Institute (PMI) and their Project Management Professional (PMP) certification. CityView does use many of the PMBOK principles and several of the PMBOK processes during our implementations.

Lifecycle:

The CityView implementation generally follows a waterfall lifecycle with each task flowing into the next until go-live.



Assignment of responsibilities and progress tracking:

CityView uses Microsoft Project as a scheduling and project management tool to identify all major tasks associated with an implementation and to schedule the task and assign the responsible resources. CityView schedules are duration based and not effort based. If a particular task is scheduled to begin on July 1st and end on September 1st, it does not imply that the task will require 2 months of effort but that the task must start by the July 1st date and must complete by the September 1st date regardless of the amount of effort needed to complete it.

Critical path:

All tasks on CityView schedules will also indicate whether the particular task is critical path or not. Critical path tasks are those that will cause a delay in the entire project if the individual task is delayed or any reason. CityView will work hard to avoid delay of critical path tasks because of the cascading effects to the other steps in the implementation.

The CityView Project Manager has primary responsibility for communication management during a CityView implementation. However, since each project has unique stakeholders and communications challenges the communication management approach is adjusted or tuned in each project to ensure the timely and complete transfer of information.

Steering committees:

We suggest the customer creates a project steering committee made up of senior managers or executive stakeholders to track and facilitate the progress of the project. CityView project managers have participated in many of these committees as technical resources, members and/or even as the chair of the committee.

Status calls with the project manager:

Each project manager is required to schedule and conduct status calls with their customers at least once every two weeks to discuss accomplishments, upcoming tasks and outstanding issues. These calls last anywhere from 30 minutes to an hour depending on the number of issues to discuss and the current stage of the project.

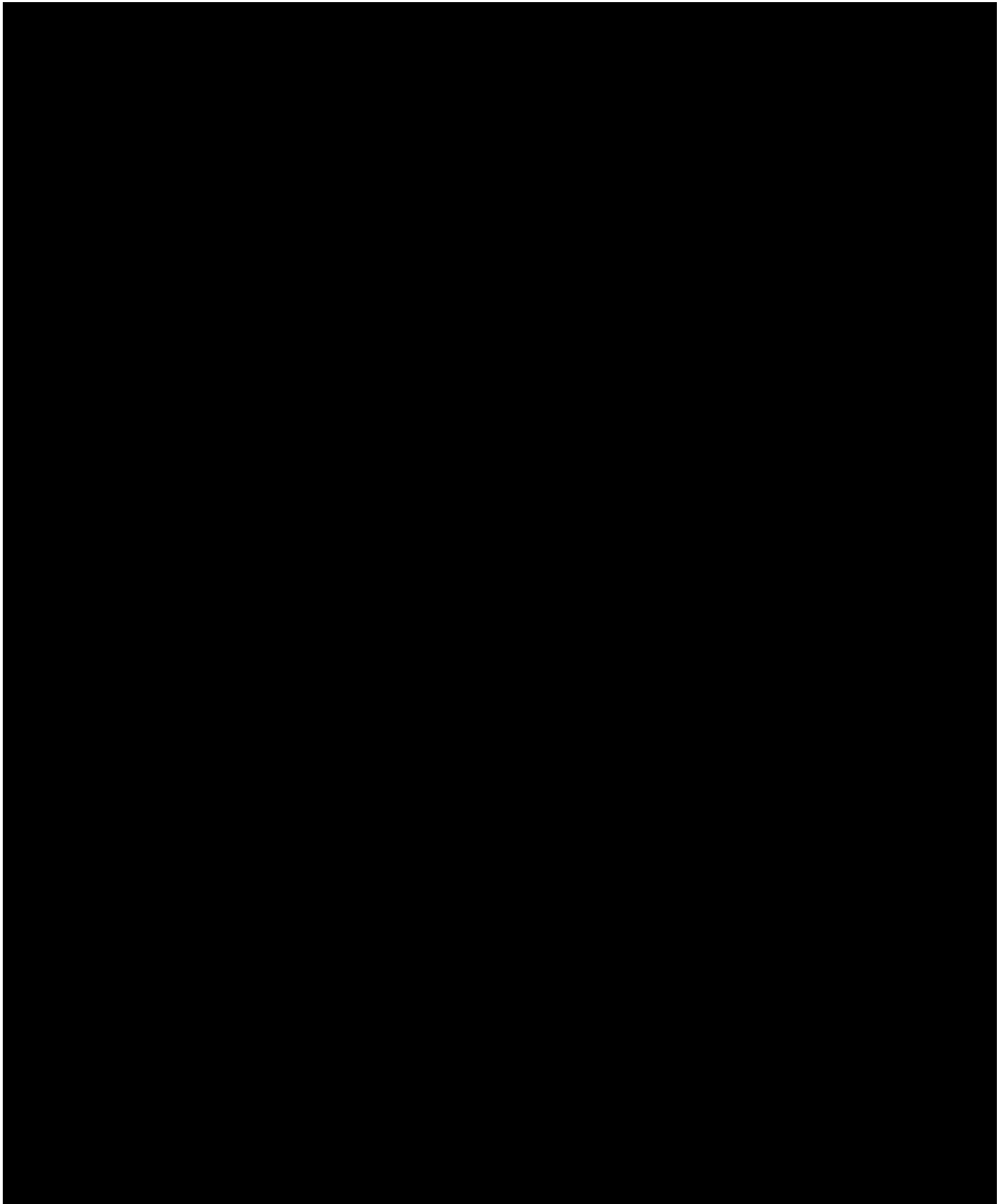
Status reports and schedule updates:

Each project manager is required to send a bi-weekly status report to their customers with accomplishments, upcoming tasks and outstanding issues identified.

Time management for a CityView implementation is primarily managed through the project schedule and work breakdown structure located in our OnTime task management application.

Work breakdown structure:

CityView uses a tool called OnTime to break projects down (decompose) into individual work modules that can be assigned to an individual developer, implementation specialist or other CityView staff member. The OnTime application provides a communication mechanism to the project team members, tracks progress, history and completion of each individual task. Tasks can be entered with dependencies on other tasks and attachments can be added in OnTime to fully describe the requirements for a particular work item.



5.2.1 CITYVIEW COMMUNICATION PLAN

CityView's team keeps your staff in constant communication during each step of the implementation in order to stay on track and hit milestones which are collaboratively agreed upon. An immediate mitigation step is that customer sign off is required at key stages to provide milestones to review progress, confirm objectives, define scope and detail the activities and timelines for the next phase. Sign off involves acceptance of all deliverables and confirmation of the budget and timeline for the next phase. This keeps all stakeholders informed throughout the project reducing the risk of delays or scope creep. It also ensures that acceptance testing is an ongoing process and project acceptance is milestone-based and therefore contained.

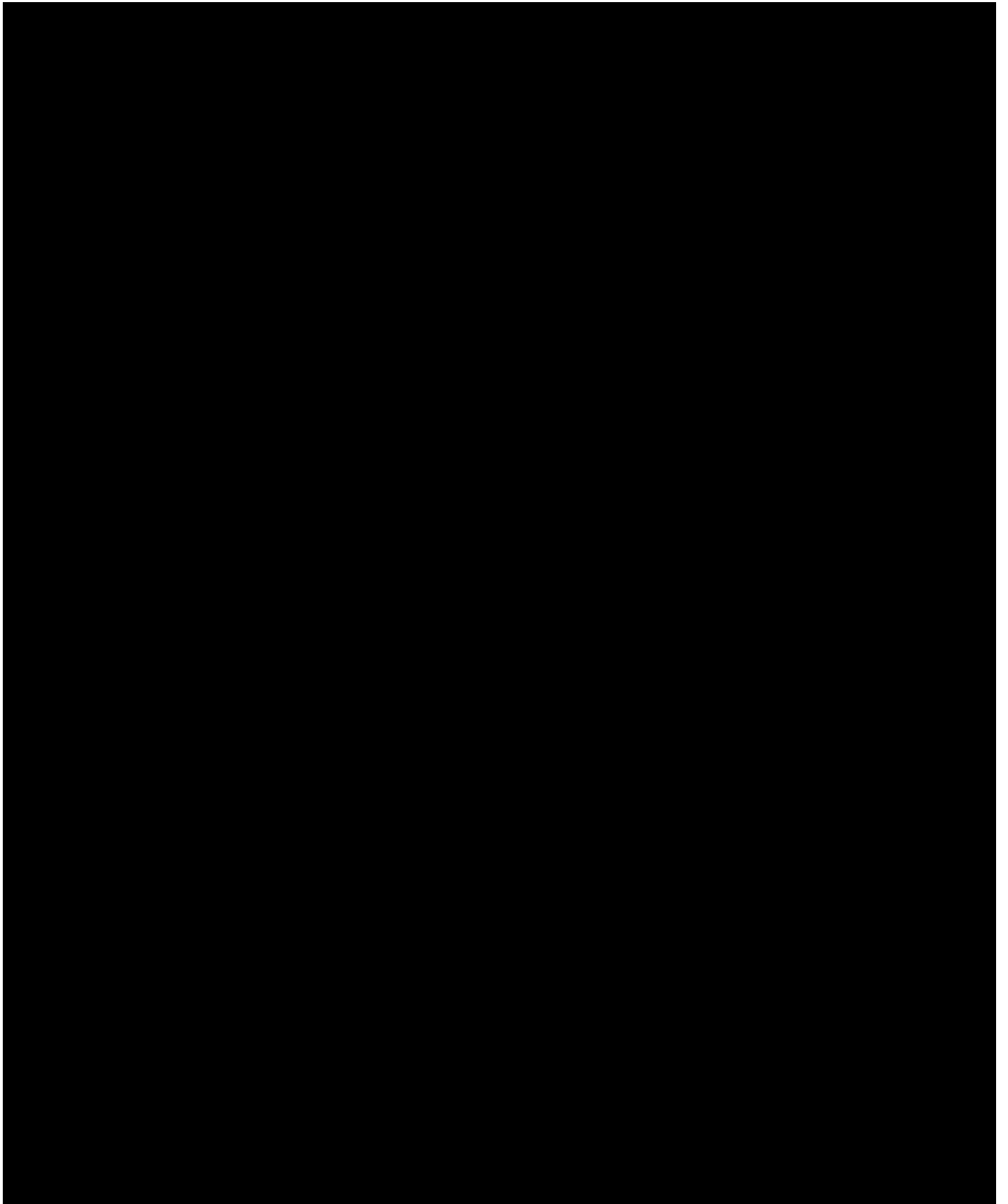
The CityView project manager has a primary role and responsibility for communication management during a CityView implementation. However, since each project has unique stakeholders and communication challenges the communication management approach is adjusted or tuned in each project to ensure the timely and complete transfer of information

Each project manager is required to send a bi-weekly status report to their customers with accomplishments, upcoming tasks and outstanding issues identified.

We propose that a Risk Register be developed and maintained as a separate document during the implementation and that this be reviewed on a monthly basis by both project teams to ensure that risks are being proactively managed.

In addition, CityView's unique Customer Feedback feature can be used to communicate immediate feedback and reporting of issues to our implementation specialists and developers while in any CityView module. We collect comments from all of our customers on the usability of the system and we use those to gather the Feedback, prioritize that feedback and use it to drive the ongoing development of the software, in particular in the area of "ease of use". This has been absolutely integral to the evolution of the software in order that it excels in this area.

Coordination of meetings is the responsibility of the CityView project manager in conjunction with the City project manager. Resource availability is a key component of a successful implementation, including both business and technical resources. Documenting and open communication with available resources will continuously build momentum toward a successful implementation. Resources must be readily available in order to meet the constantly changing demands of the rolling train of implementation, such as meeting configuration deadlines, conducting end-user analysis, transferring knowledge, issue resolution, identifying points of escalation, etc. There is a direct link between readily available resources and the progress of the implementation. Implementations flow smoothly and efficiently with engaged and equipped resources, while implementations with resource challenges often reflect these challenges with a lack of progression. Commitment from both CityView and the City will lend itself to a successful implementation.



5.2.2 CITYVIEW CHANGE MANAGEMENT APPROACH

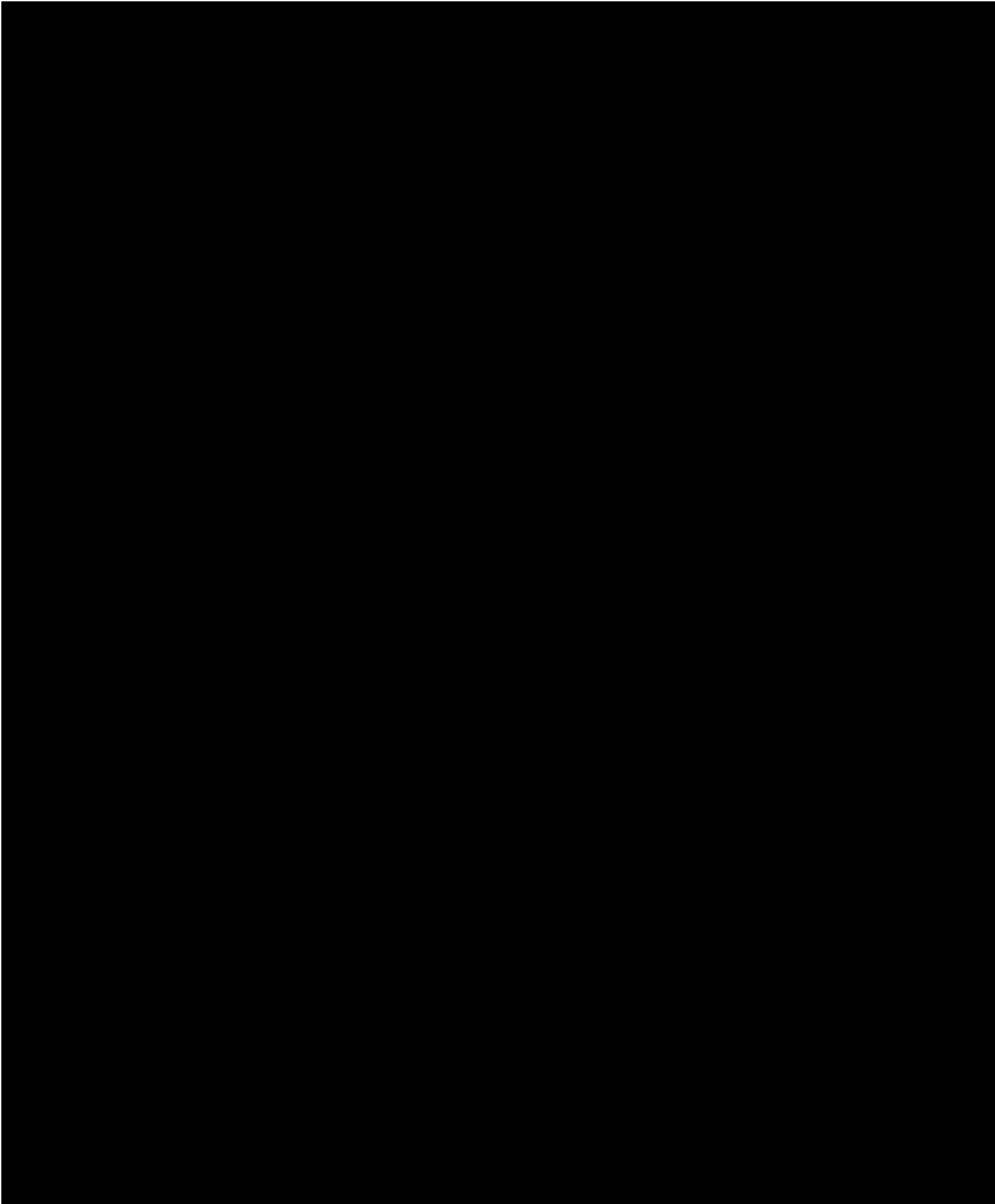
The scope of work defines key activities designed to involve the City as much as possible in helping contribute to the change and therefore owning it. This does not entirely replace the need for the City to have an internal change management plan and the City's active role in enforcing the change management initiative is critical; however, we do recognize that we implement systems every day so we are in a very good position to make recommendations and assist in this process.

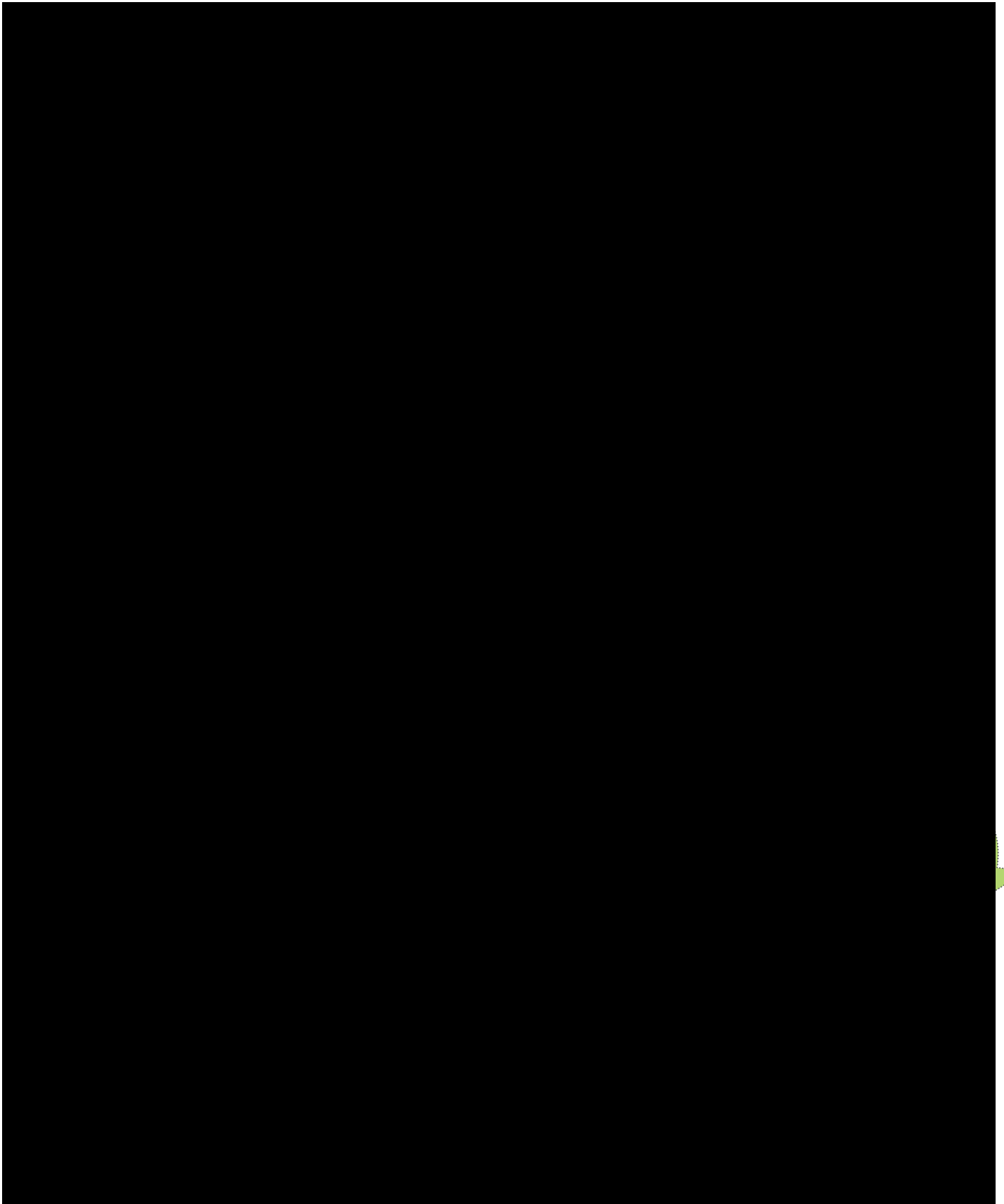
We do realize a new piece of software, even an upgrade, can be a disconcerting time for the front line users of any new software. CityView provides both on-site end-user training and on-site go-live assistance to aid with this process. During this time an Implementation Specialist is on-site to help users acclimate themselves with the new system, answer their questions as they arise, provide over-the-shoulder guidance on usability, and provide a direct line to Support. These sessions are probably the single biggest direct contribution to the change management process and are always received extremely well.

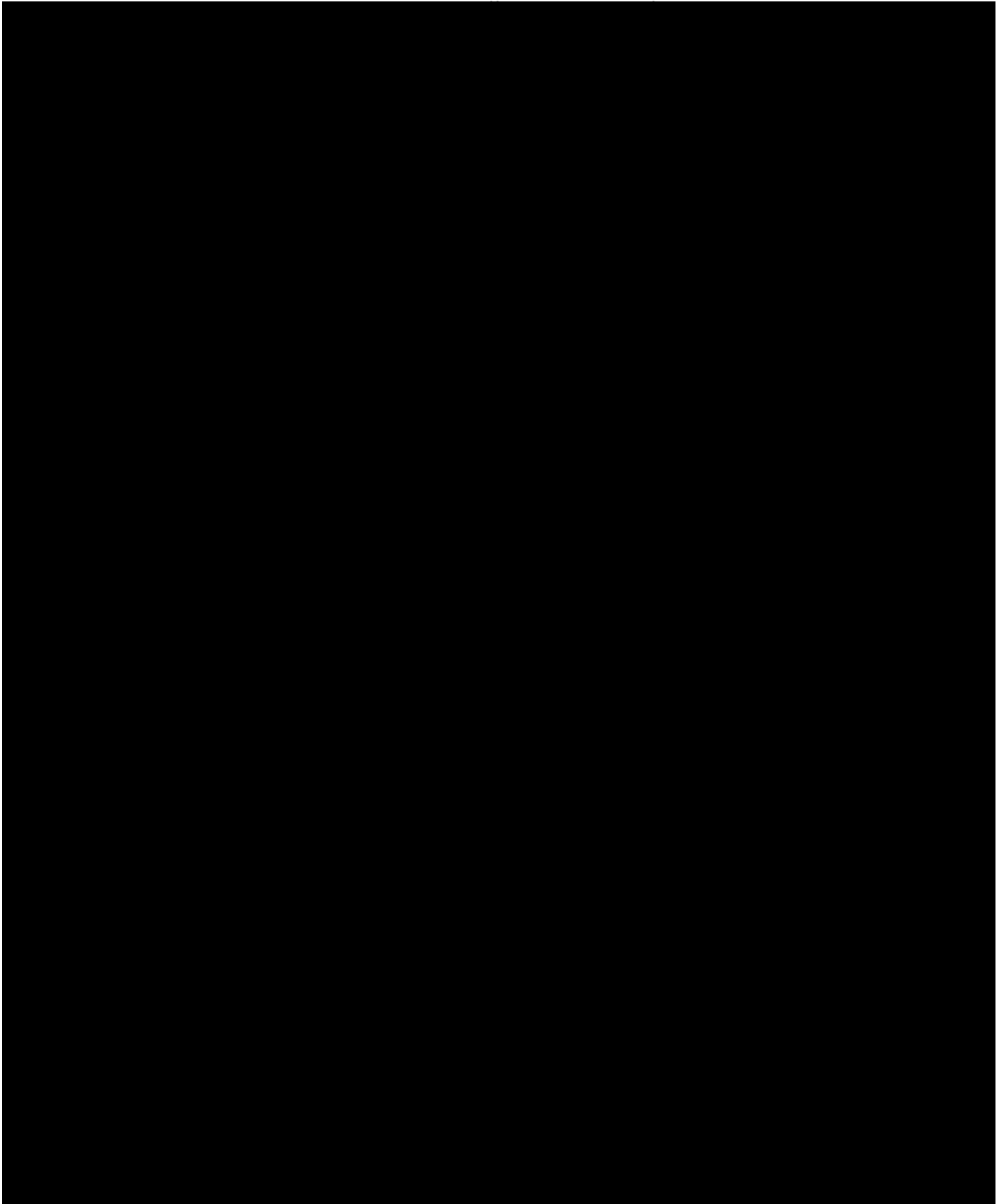
Process for change orders

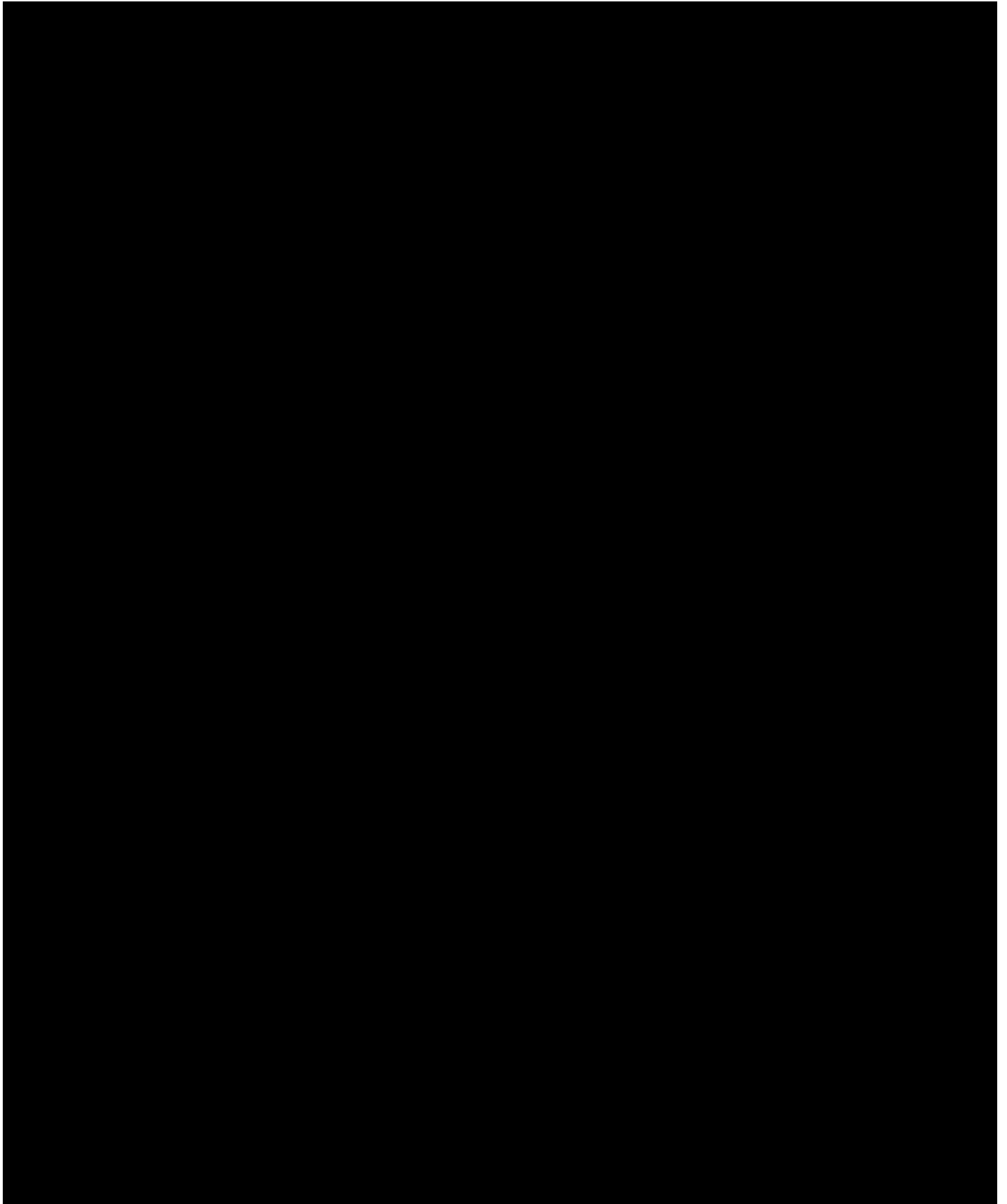
CityView will request a formal customer signoff for configuration and data collection/ process mapping and use this as a baseline for scope management throughout the project.

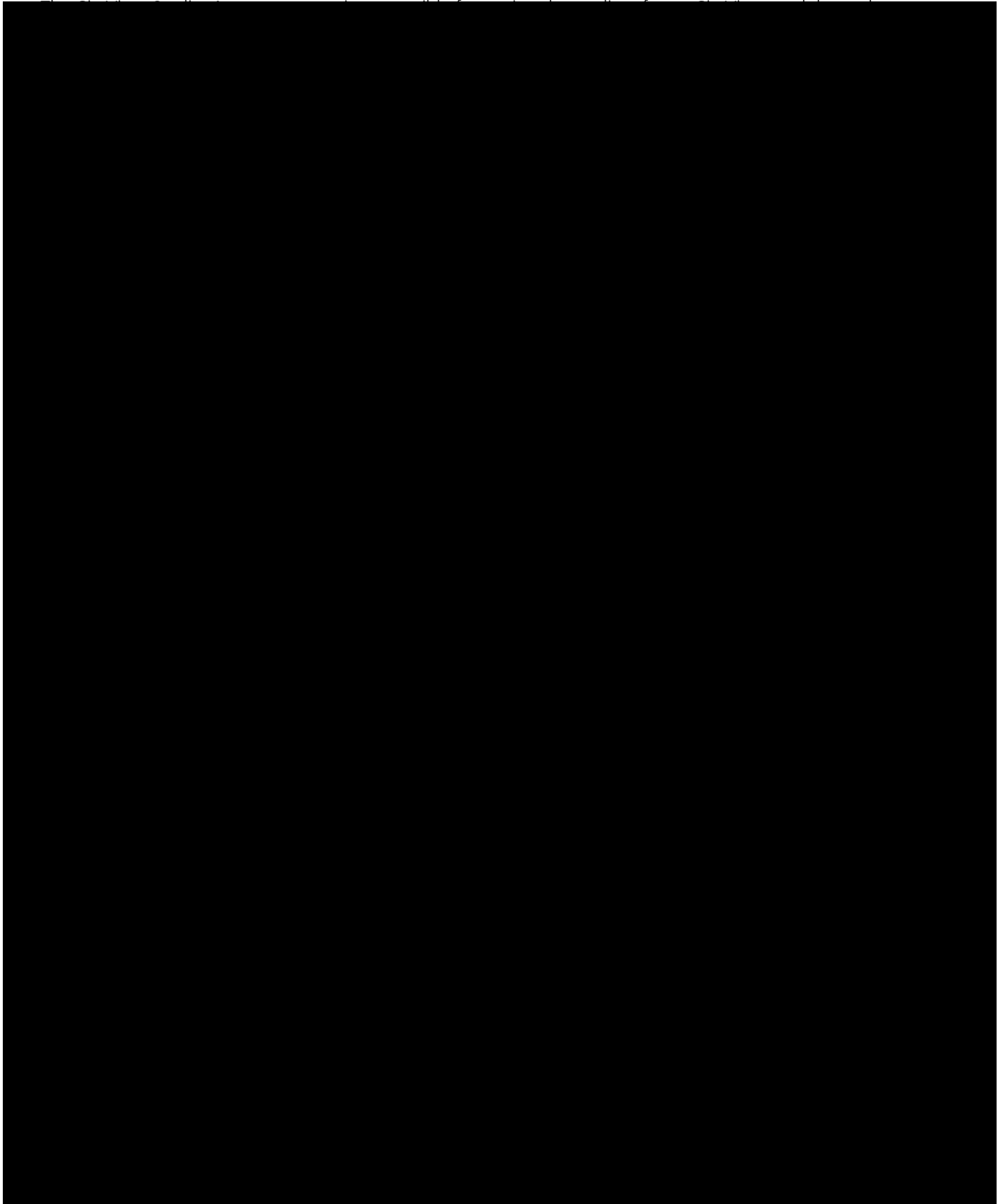
As situations and/or requirements change during a project, the customer will be provided with a standardized change control form which identifies the suggested change, the requesting party, a justification and an impact with respect to schedule and cost. If the change order is approved by the customer, the change is incorporated into the project. A sample follows on the next page.

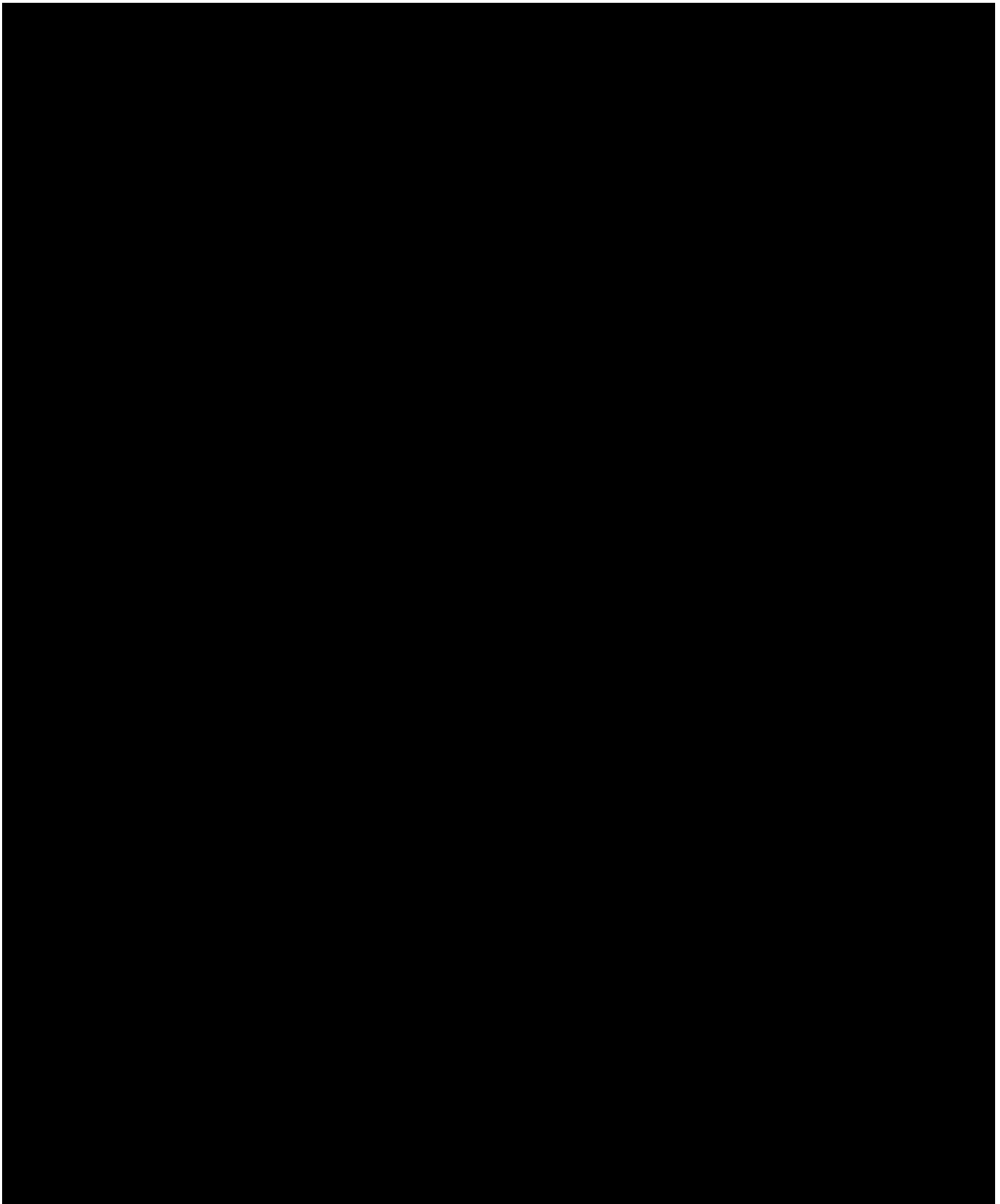


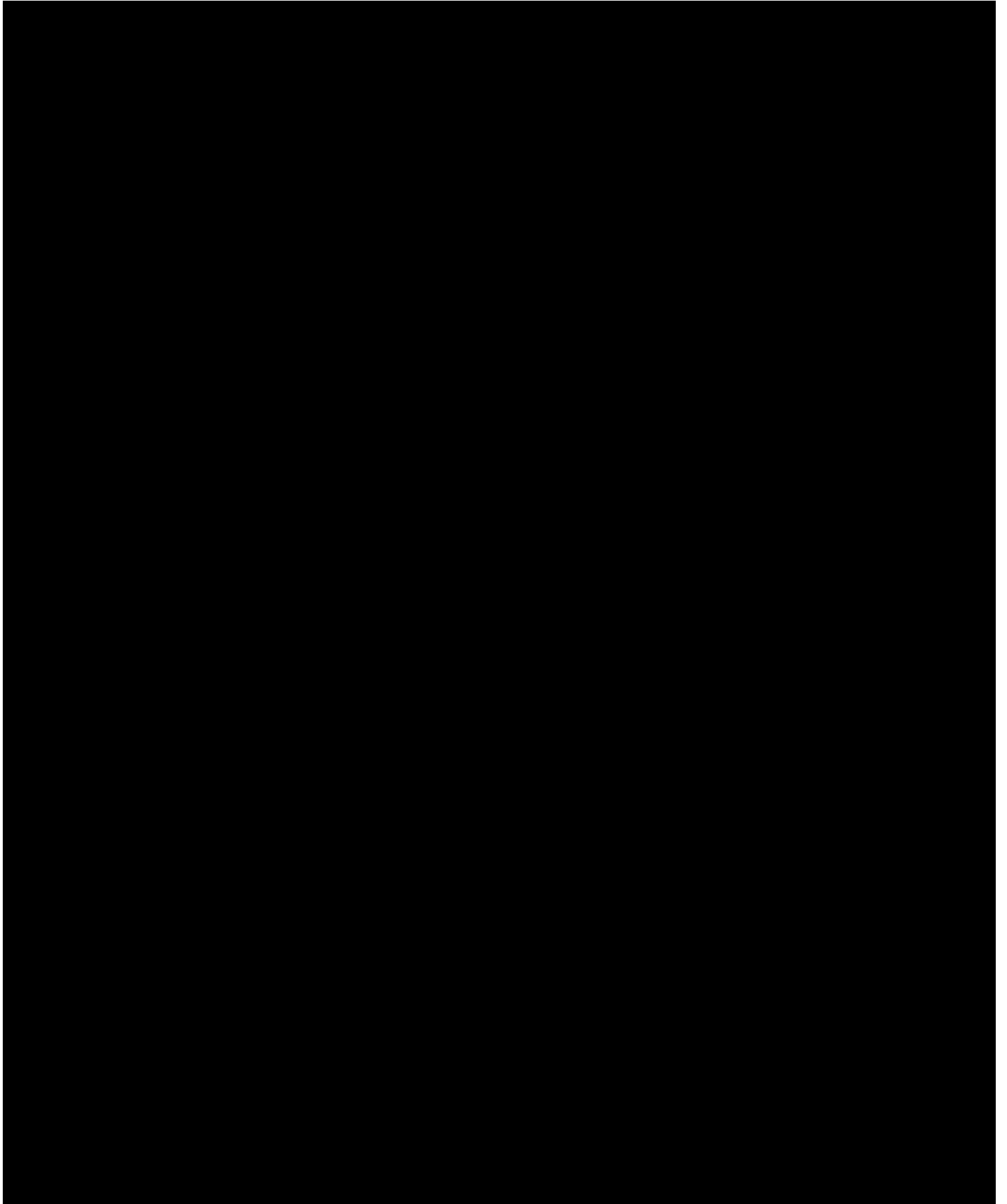


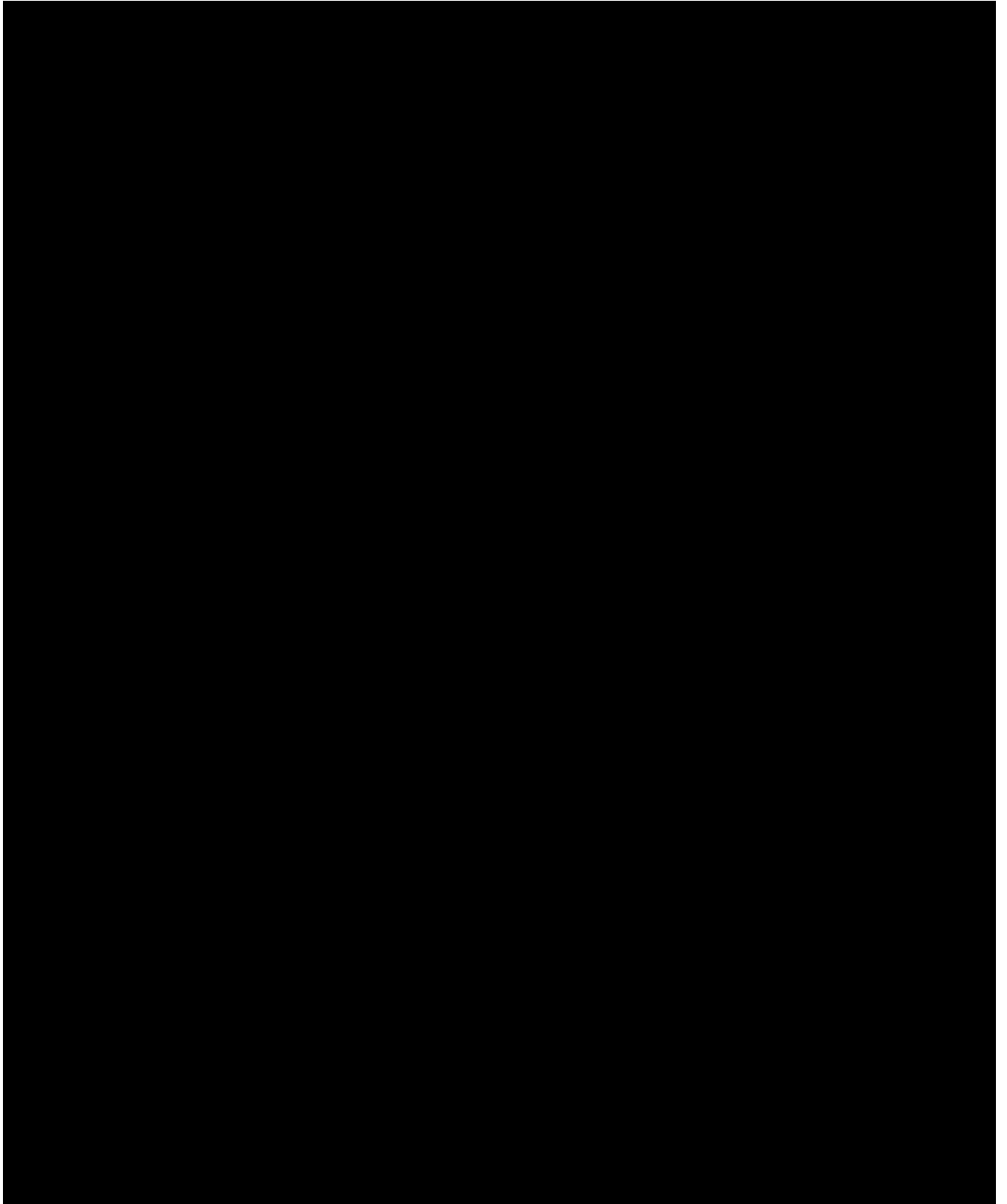


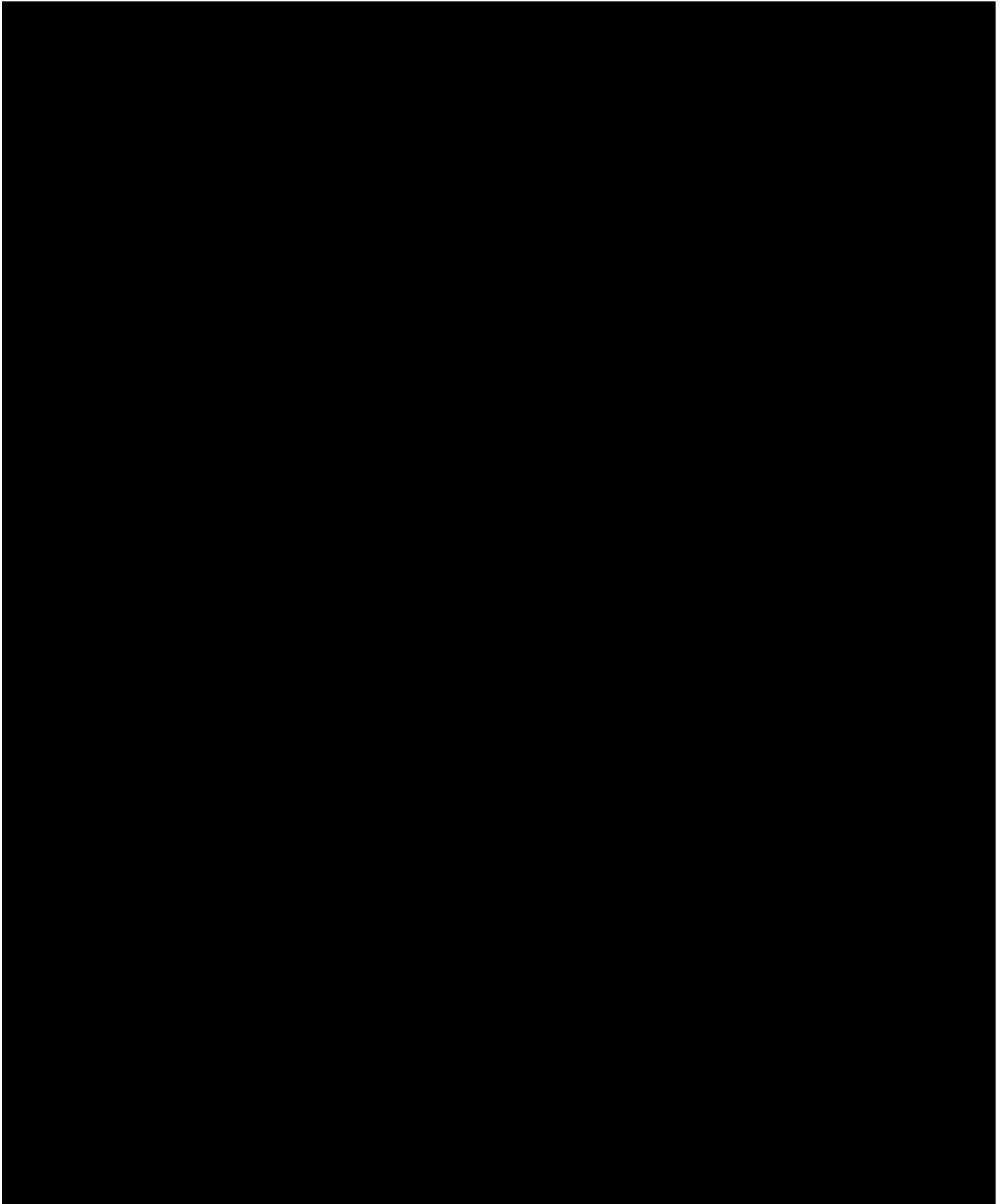


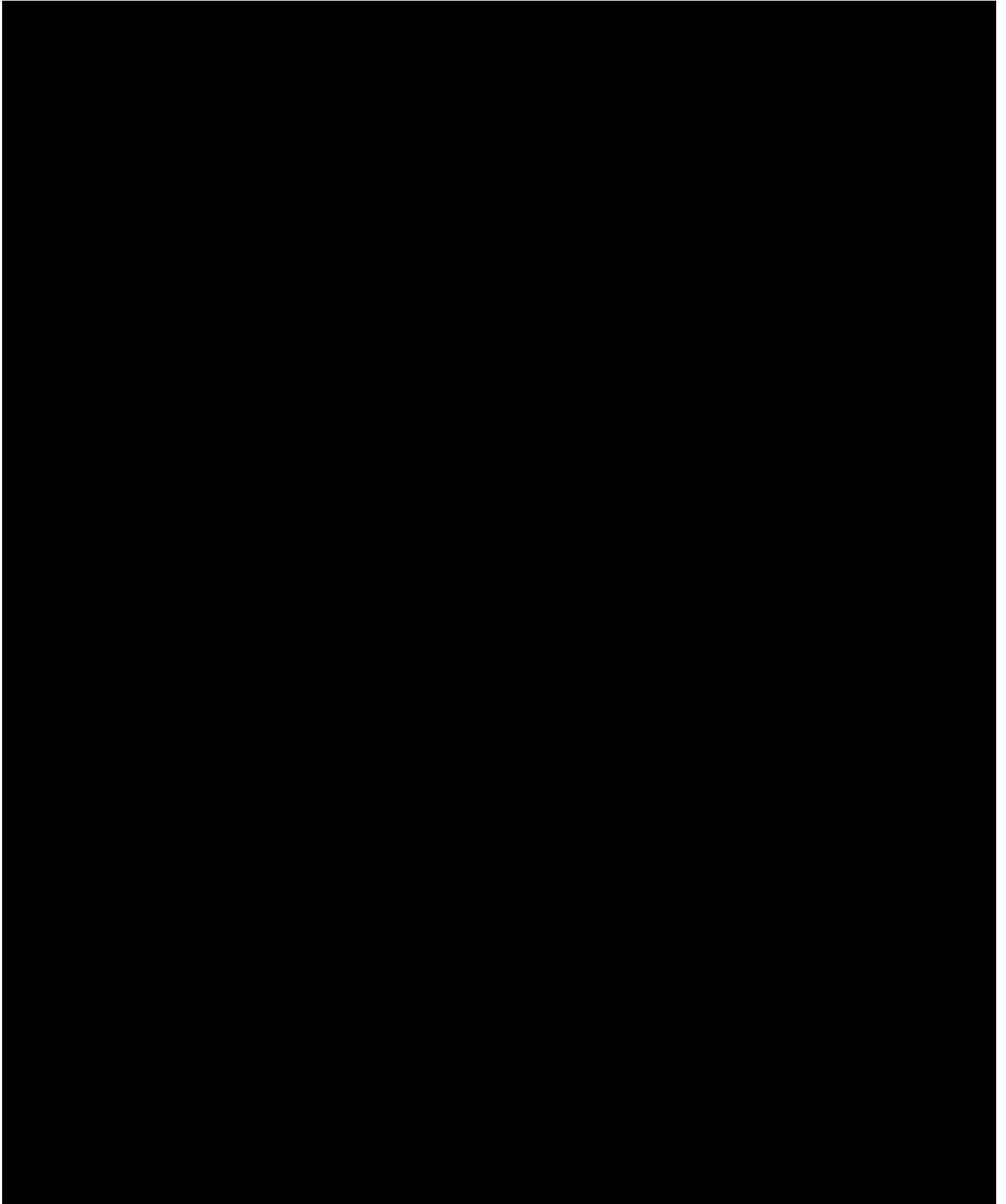


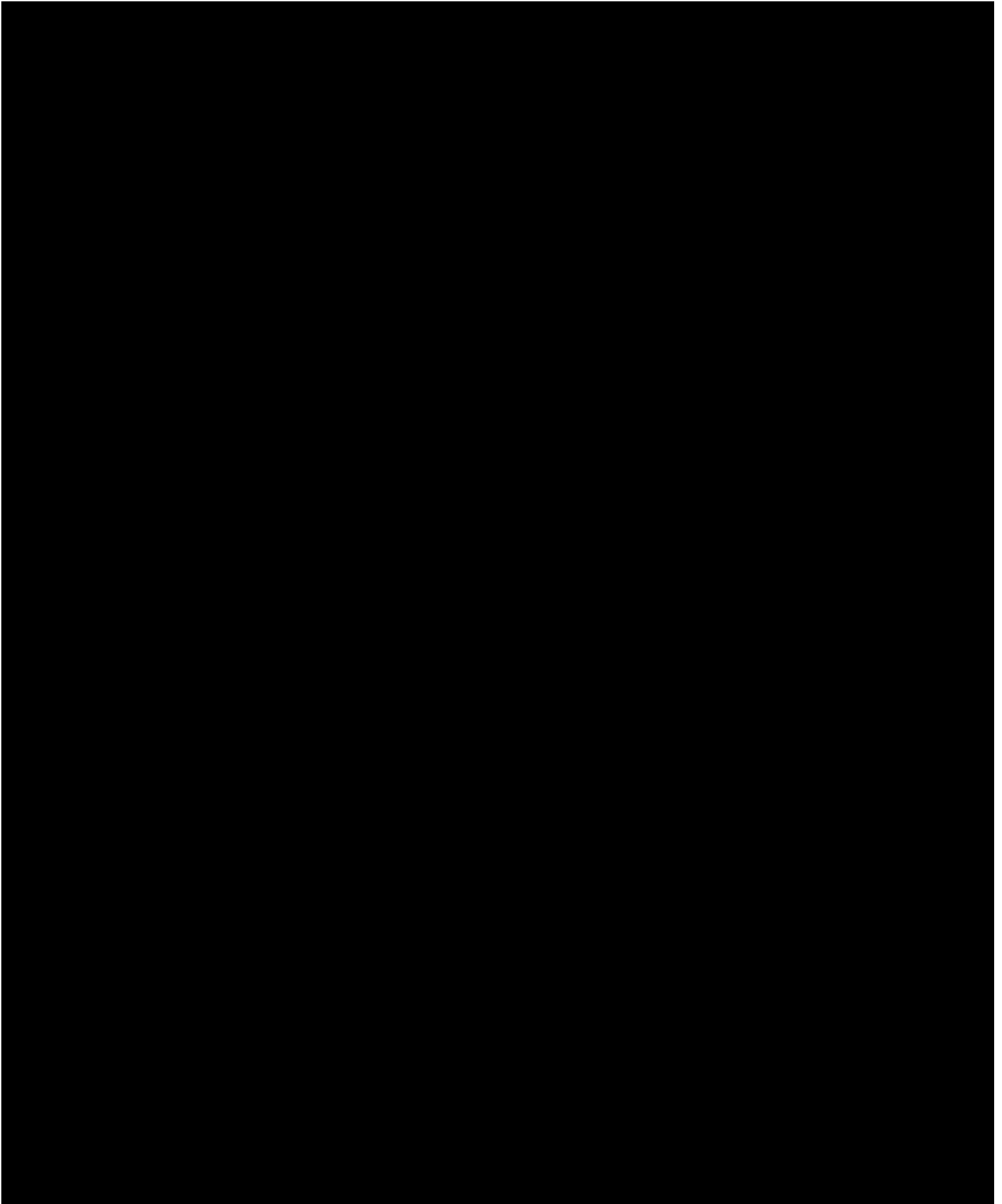


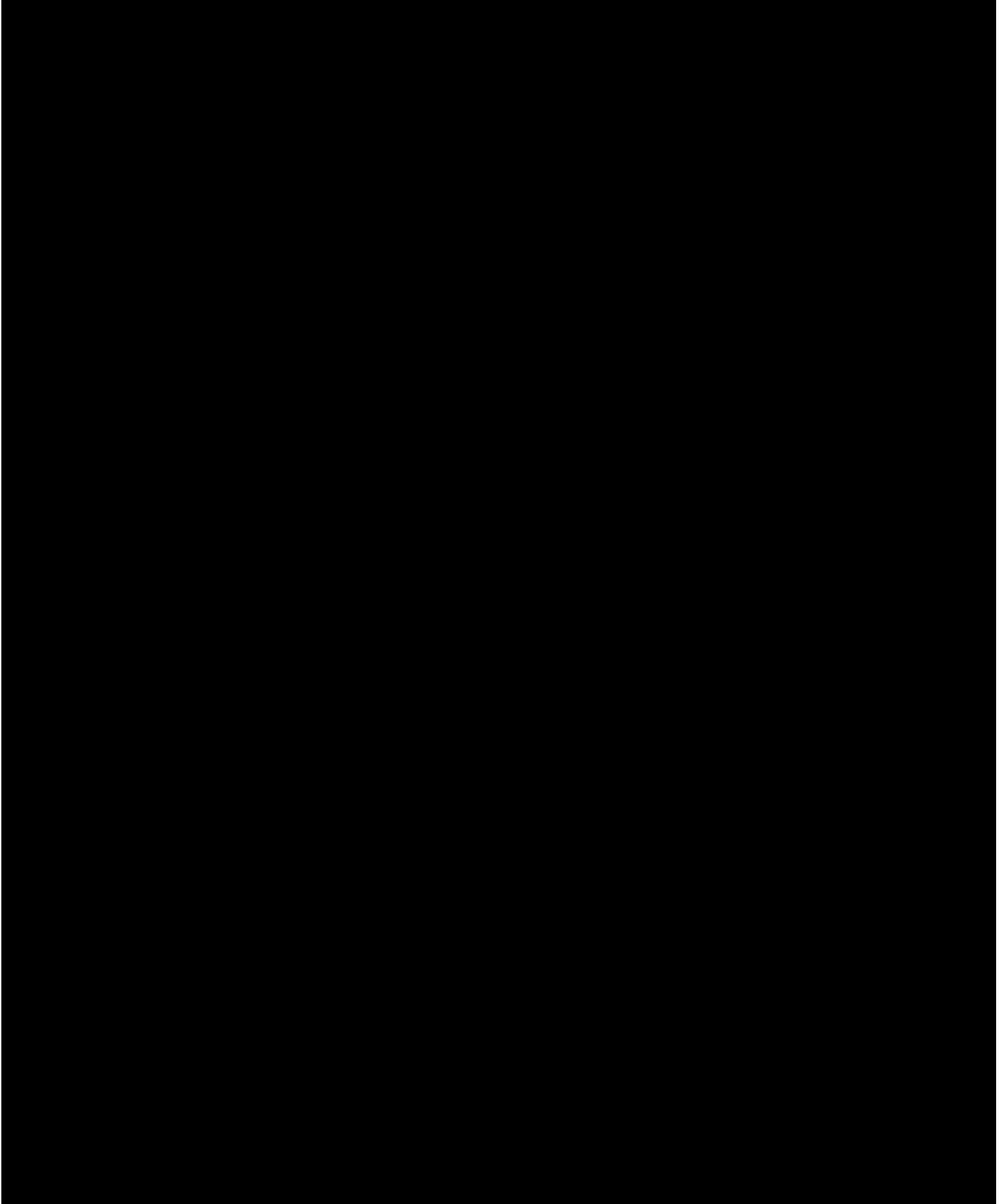


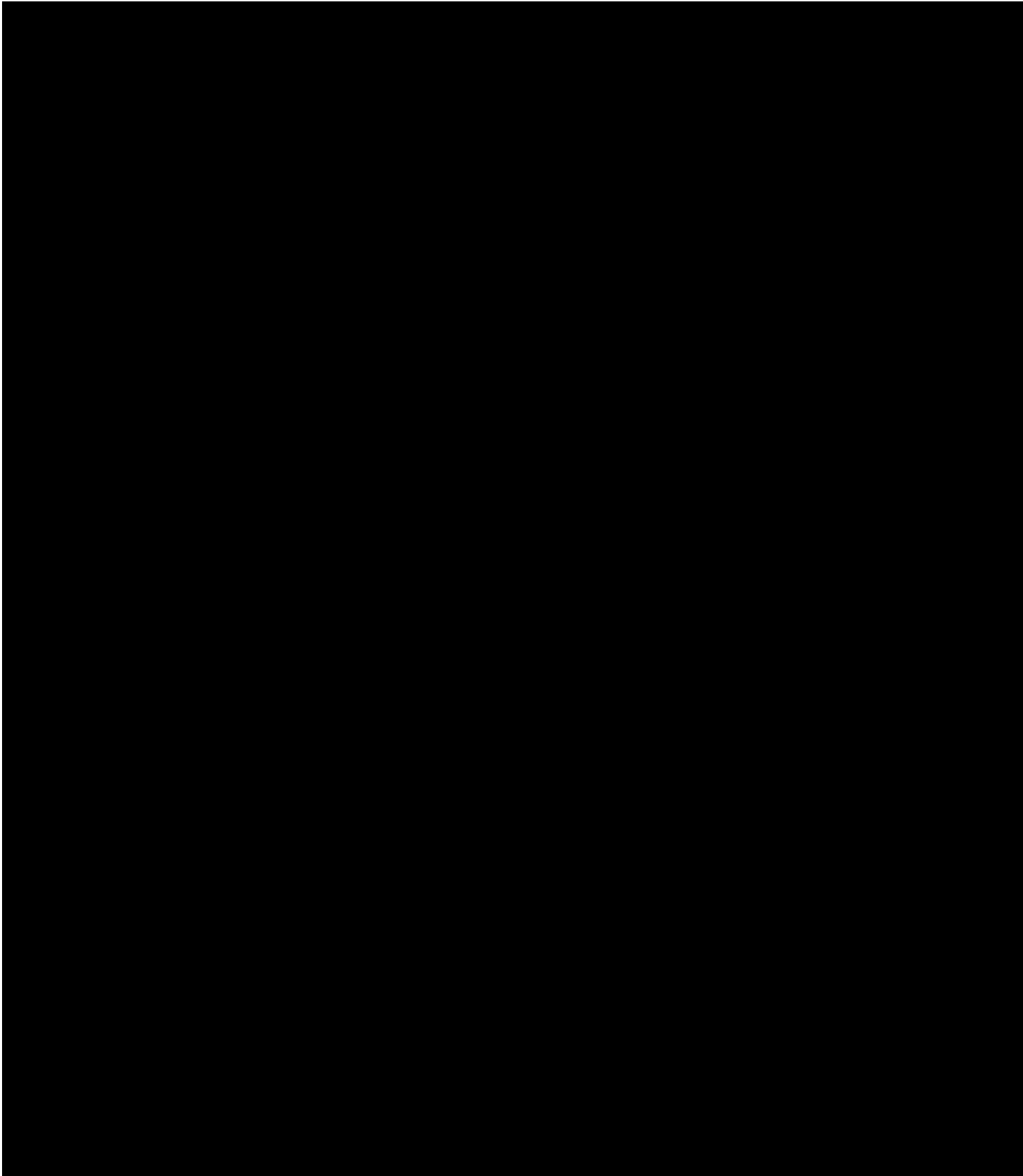




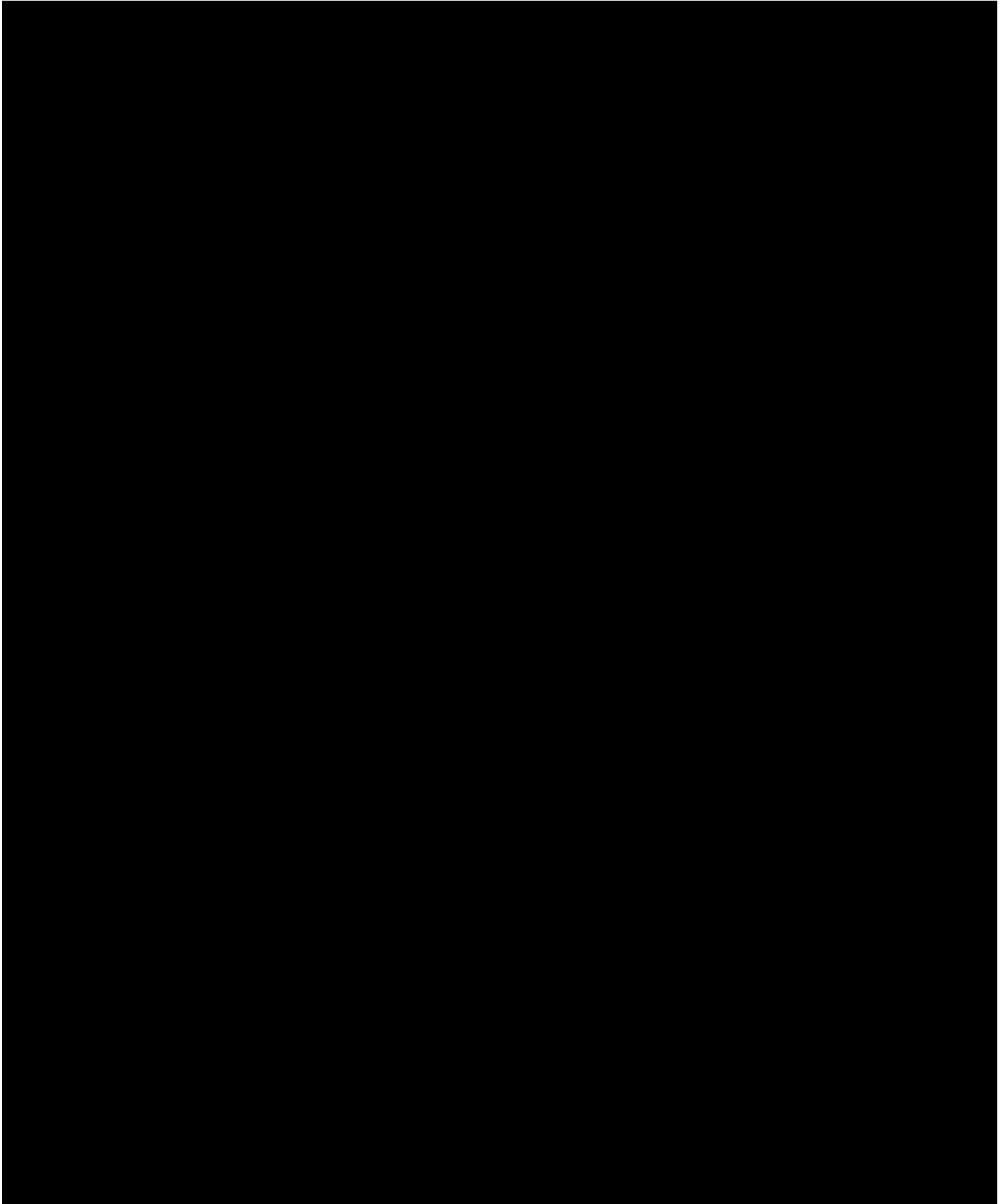


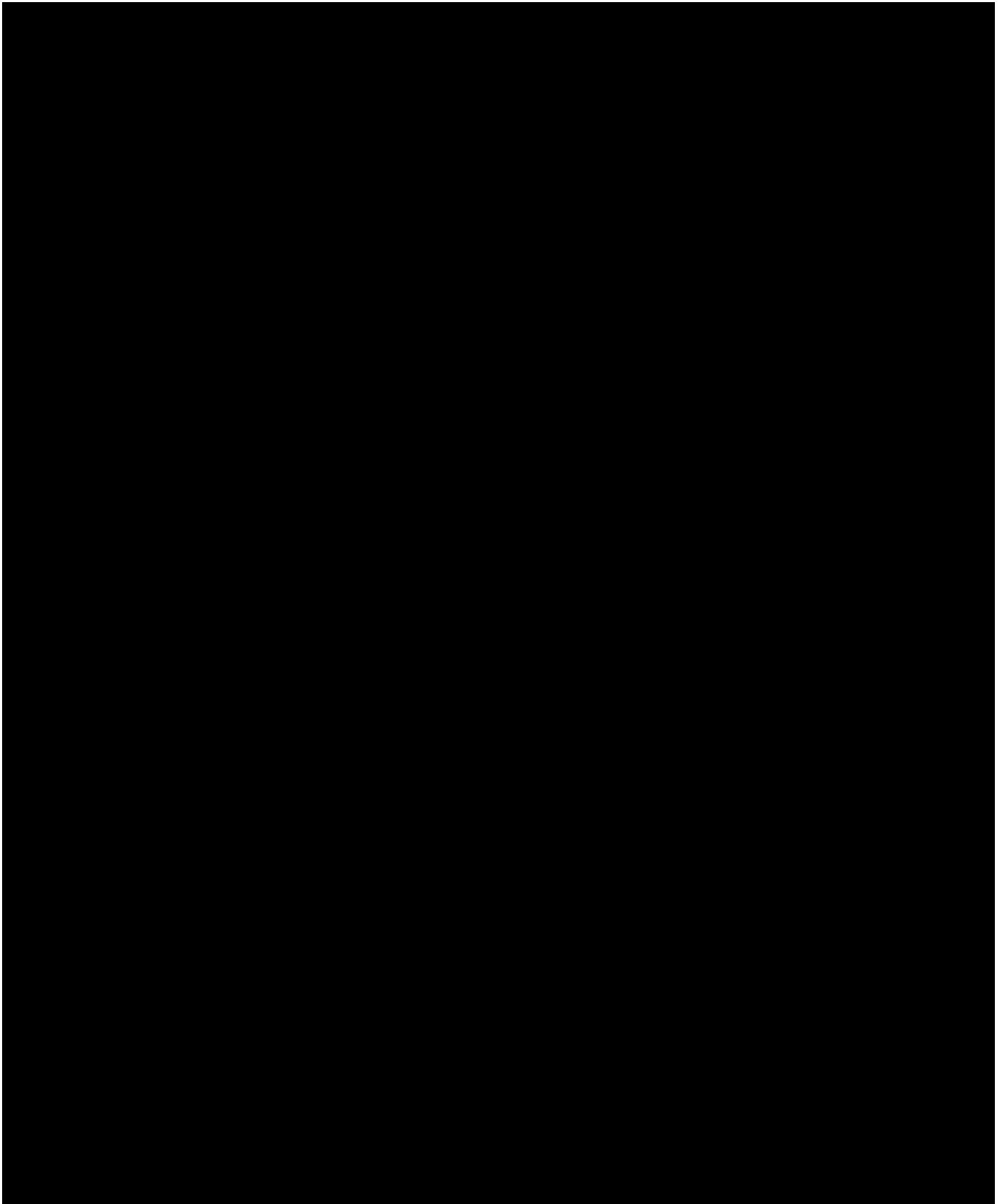


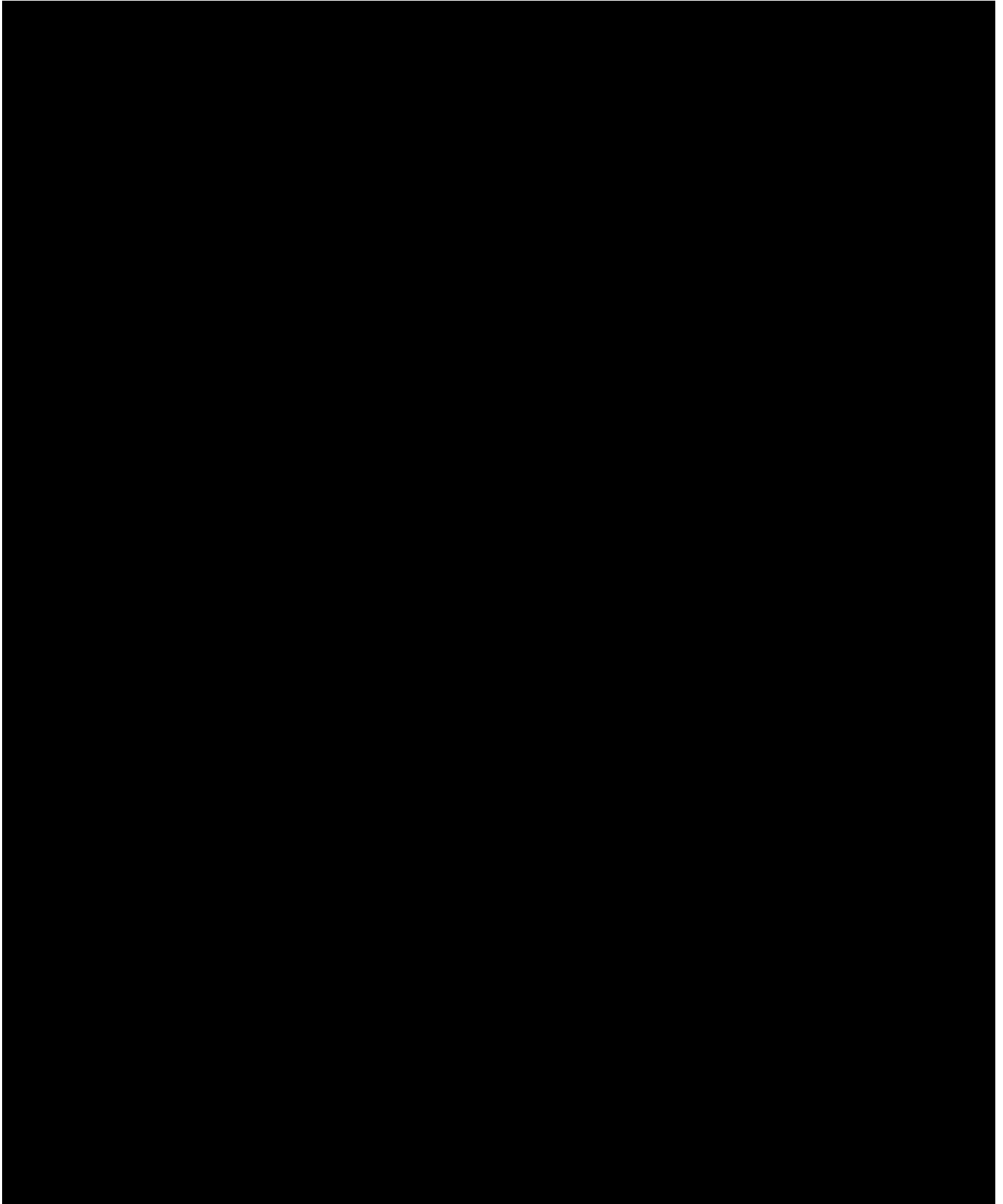


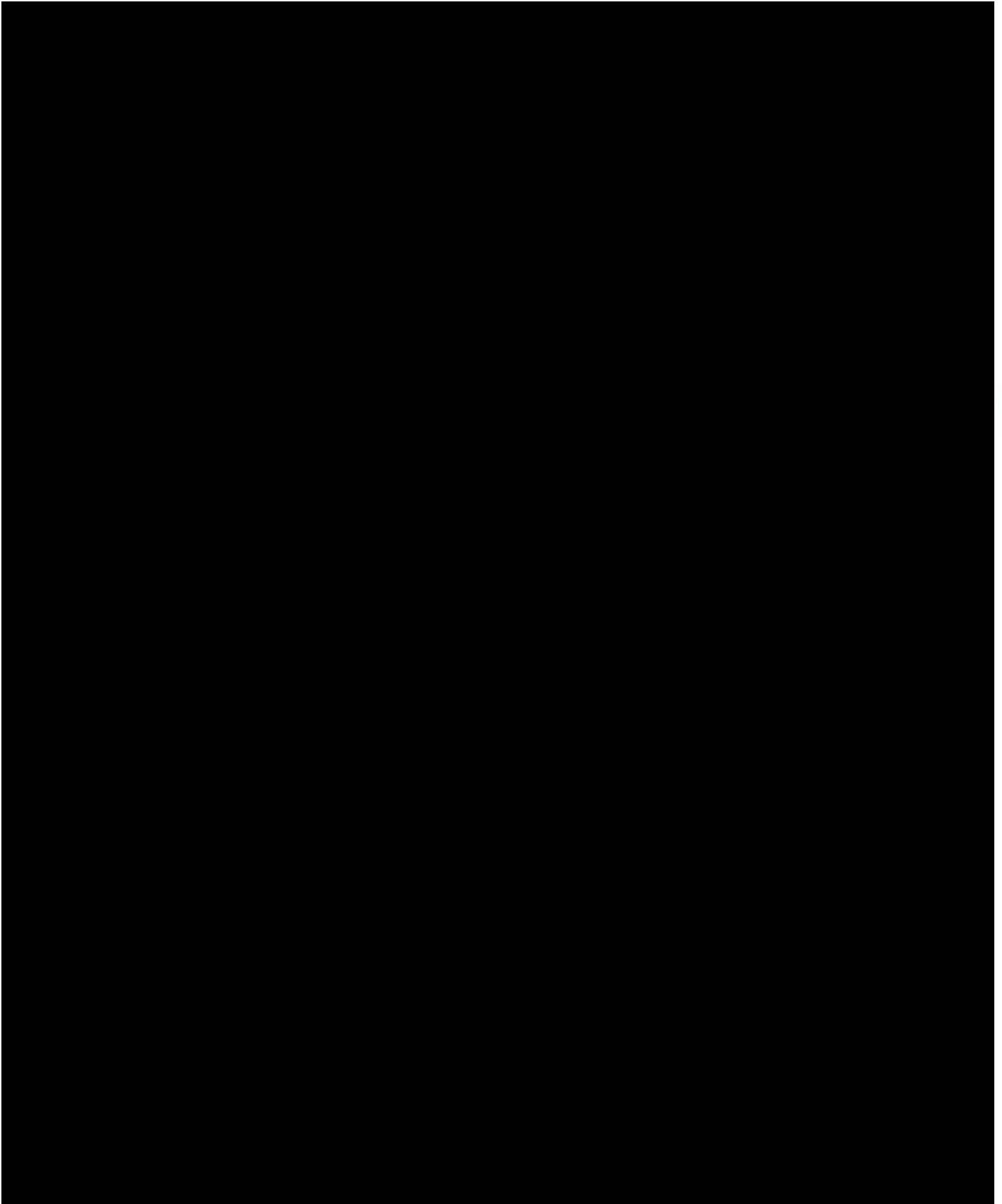


problem.









5.7 RETURN ON INVESTMENT THE CITY CAN EXPECT TO REALIZE

The City is making a significant investment in this project and we believe it is important to consider the total return on that investment. Many systems on the market are low-cost and therefore have a low 5-year total cost of ownership (TCO). However, price alone does not cause those systems to be selected as the systems of choice. CityView's customers have provided quantifiable metrics for returns on investment that the City may realize. The following are real and measurable benefits:

City staff save an average of 5-10 minutes per inspection as self-service functionality has already provided the information required.

Plan reviewers apply their mark-ups directly on a PDF drawing and these comments are automatically transcribed to the CityView database and also into a Word letter to the contractor. This will typically save 15-30 minutes per reviewer and even more time for complex projects.

Printing correspondence and mailing costs are totally eliminated by returning all details via email. A conservative estimate would be \$1/letter. You can estimate the saving by your anticipated Portal users and the average number of transactions they conduct with the City for your savings.

Your citizens can inquire on the status of each inspection via the CityView Portal or through a text message using CityView Assistant eliminating many of these inquiries by phone. A conservative estimate is that the City will on average reduce calls by 50% when citizens learn they can access information quickly and easily via CityView Portal or through a quick text message using CityView Assistant.

Similarly, all inspections can be requested and scheduled with little or no involvement from City staff.

CityView customer, Cherokee County, GA has approximately 12,000 registered users of their portal – demonstrating how important this is to the developers. The portal is by far, the preferred method of communication. The County front desk is seldom staffed as a result. Those that once tended to the front counter have been reassigned to more valuable positions.

Saves Money:

- Noticeable reduction in postage & mailing costs as many tasks that formerly involved letters, envelopes and postage are now automated via email and the CityView Portal.
- CityView Mobile has yielded tremendous savings in fuel alone by optimizing the inspector's route and allowing him to complete his inspection report in the field, without the need to return to the office to perform data entry.
- Cities can save \$15-\$25 per inspection by adopting CityView Virtual Inspections. This is very conservative and considers travel time and fuel savings only. The cost of maintaining a pool of vehicles along with the extended life by reducing miles can also be significant.
- **Collier County, FL**, another CityView valued customer, achieved ninety-six percent (96%) of building permits (58,028) electronically submitted through CityView Portal in 2021, an increase of 18% from the previous year. This saves time, money, and paper for the County and their constituents. Collier plans to increase the percentage again next year.

Collier County's initial implementation included a complete delivery module including: installation, conversion, implementation/configuration, training and ongoing support. CityView modules implemented included: Property Information, Permits and Inspections, Planning, Code Enforcement, Cashiering, CityView Mobile, CityView Portal, CityView Electronic Plans Review, and GIS extension.

6. COST PROPOSAL

6.1 CITYVIEW – DETAILED INVESTMENT FEES (HOSTED, SUBSCRIPTION)

The following table provides our price proposal for a **hosted, subscription software solution** comprising software subscription fees, implementation, data conversion, comprehensive training, and support and maintenance costs.

The following represents a summary of the prices for the implementation of CityView Property Information, Permits & Inspections, Planning, Licensing (Business) and Cashiering. CityView extensions include CityView Mobile (for permits inspections), CityView Portal, CityView MS Outlook Add-In, CityView MS Word Add-In, CityView GIS Extension (assumes ArcGIS Server or ArcGIS Online subscription is available), CityView Payment Processor Extension (Preferred Partner – InvoiceCloud or Paymentus) and CityView Configuration Console. Below is a more detailed breakdown.

Cost Summary (including Add-ons & Extensions)	
Total	\$ 208,282
Travel & expenses (billed on a cost recovery basis)	
Annual Fees	

*Subscription fees are based on initial 5-year term agreement and subject to annual revision.

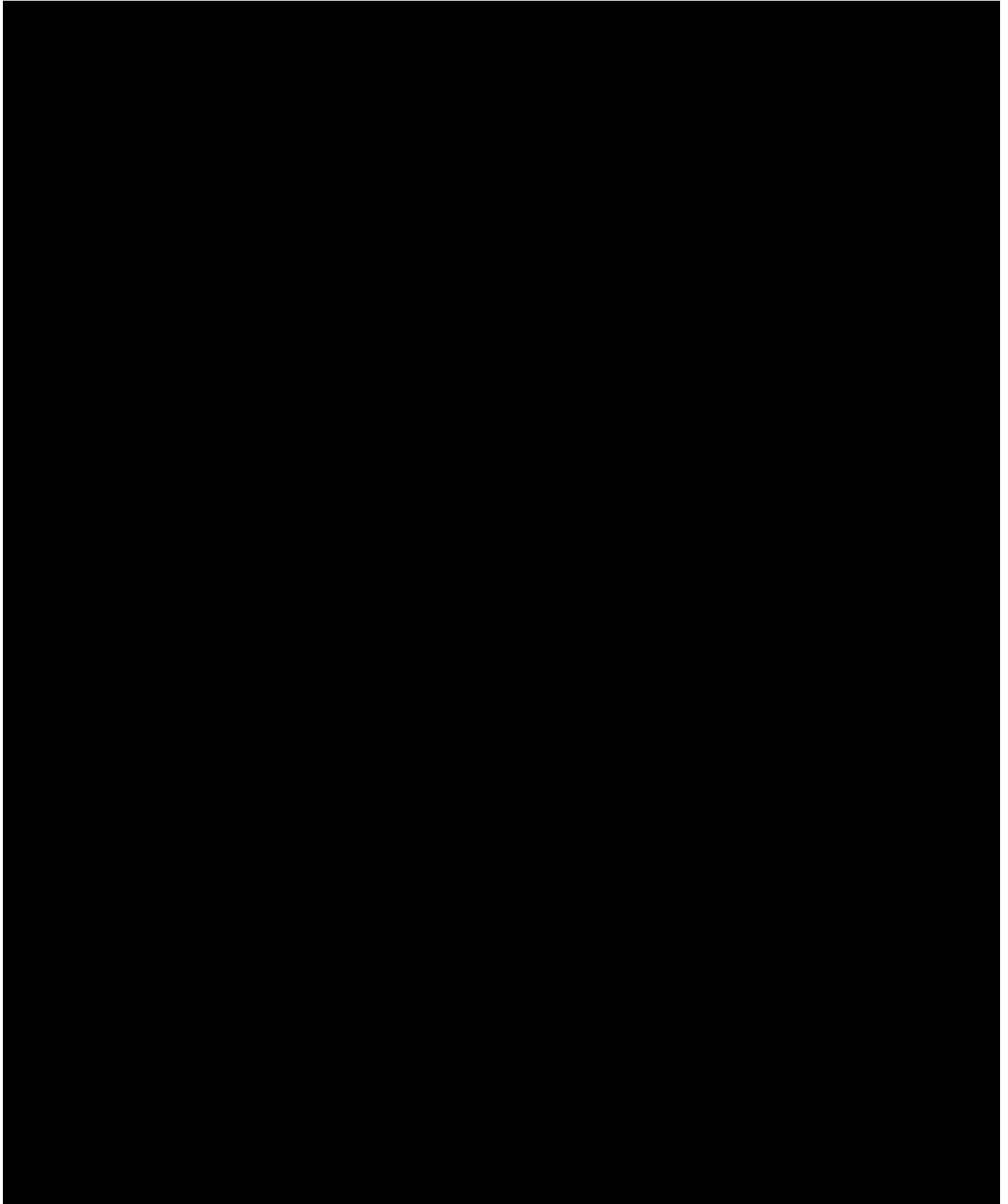
Detailed costs

The following details the elements of our proposal for CityView software and services following our **Select** delivery model including:

- A subscription for **twenty (20 full read/write named users)** for CityView **Property Information**, CityView **Permits and Inspections, Planning, Licensing (Business)**, and CityView **Cashiering**.
- A subscription for **five (5 named users)** for **CityView Mobile** (browser-based, device-agnostic application for handheld devices such as iPads, iPhones, Windows Mobile phones, Androids, etc.) for in-field building inspections resulting.
- A subscription for **five (5 named users)** for **Bluebeam Revu (Complete)**
- A subscription for **CityView Portal (for Permits and Inspections, Planning and Licensing (Business))** for online, 24/7 convenient access to service deployed to the Web, including registration, property and permit lookup, status checks, inspection requests, permit application, fee payment (requires a 3rd party payment processor - preferred InvoiceCloud), meeting requests and more.

Should the City decide to use a different payment processor other than the preferred ones mentioned, additional charges will apply.

- A subscription for **CityView GIS Extension**, comprising ArcGIS Server or ArcGIS Online-based integration with your GIS. Additional CityView extensions included are **CityView MS Outlook Add-in, CityView MS Word Add-in, CityView Electronic Plans Review, CityView Payment Processor Extension** (InvoiceCloud preferred), and **CityView Configuration Console**.
- CityView's **enterprise server software** for administration and management of your existing CityView system.
- An **implementation** based on our CityView Select delivery model as described earlier in this proposal which includes
 - Configuration changes to the out of the box workflows and the configuration of 1 custom distinct workflow for Permits and Inspections and 1 custom distinct workflow for Planning or equivalent effort to changes to the standard workflows.
 - Configuration of 53 letter templates
 - Integration/interface (further clarification and final pricing will be determined) support for CityView customizations and/or integrations with 3rd party applications (includes project management and quality assurance, as well as documentation on customizations, referencing where they fit into the product) (1) Batch export to the City's GL. Confirmation upon final definition of the integration requirements.
 - Data conversion estimate to be confirmed upon review of data.
- A **training program** that ensures your end-users are fully trained to maximize adoption and value from the software, your advanced users are equipped to contribute meaningfully to its evolution after go-live as changing requirements demand and your system administrators are empowered to support and manage the system.
- Ongoing **support and maintenance**, providing unlimited technical support, software upgrades and updates for subscribed software and much more, including the Harris Software for Life Program (if RFP is not issued).



Software Licensing & Annual Subscription Fees:	Quantity	
Application Software - CityView Solutions Accessed by Subscribers:		
CityView Property Information (required)	1	
CityView Permits & Inspections	1	
CityView Planning	1	
CityView Business Licensing	1	
CityView Cashiering	1	
User Licensing & Subscriptions:		
Named Users Read/Write	20	
Named Users CityView Mobile	5	
Bluebeam Revu (Complete) Subscriptions	5	
Software Add ons:		
CityView Esri ArcGIS Mapping Extension (unlimited users)	1	
CityView Portal (licensed for 3 business processes only i.e. Building Permits, Planning Permits, Business Licenses)	1	
CityView Electronic Plans Review	1	
CityView Configuration Console)	1	
CityView MS Outlook Add-in	1	
CityView MS Word Add-in	1	
CityView-Supported or non-supported Payment Processor	1	
Total: With itemized Add-ons		\$ 93,356

Implementation Services:	
Project Management	Ongoing project facilitation, billing, status reports, issues resolution, escalation, resource allocation, scheduling, budget management, change orders etc.
Infrastructure Review (remote service)	Remote review of customer infrastructure for purposes of accessing CityView Workspace and for interface purposes
Data Collection & Process Mapping (remote), customization/interface definition (onsite)	Remote reviews of CityView Select, completion of CityView Select, web based configuration workbook & other digital materials, collection of business data required to tweak & refine CityView Select pre-configuration. Includes 2 person days on-site plus

	appropriate offsite time for definition of customizations and custom workflows.	
Installation (remote) & Environment Management	Production and test environments set up and tested, includes up to 3 installs during the project	
Data Mapping	Data Mapping for historic data conversion and property interface. Mapping of Assess & Address Views to corporate property data source. Assumes one data source. Data mapping for historic data conversion. Data requirements for creation of interfaces.	
Configuration from Data Collection & Process Mapping	- Fees, custom data fields, business rules for all products licensed.	
	- Configuration of up to 53 tailor-configured letters (assumption is Customer creates the balance of letters required with knowledge from advanced configuration training).	
	- Metadata for scheduled processes	
	- Configuration of 1 distinct workflow for Permits & Inspections and 1 distinct workflow for Planning	
Customizations & Integrations + non-standard configuration	CityView Customizations and/or Integrations with 3rd party applications (includes project management and quality assurance, as well as documentation on customizations, referencing where they fit into the product). Currently this includes for a batch export to the City's GL.	
Data Conversion (estimate)	Initial data conversion.	
Reviews for Validation & Refinements (remote); Acceptance Testing	In-scope refinements to configuration, business rules etc. Conducted through a series of remote environment reviews, focusing on configuration and workflow, data conversion, customizations and interfaces (where applicable). Latter review/s client-led.	
Final Data Update/install (remote) & Go-live	Final data update/conversion to get current data into client database for go-live. Must be the same scripts used in initial data conversion. Data must be verified by both CityView and Client before go-live. Sign off required.	
Total Implementation Services		\$ 170,931

Travel & Expenses (for onsite services)	Person-Trips	Person-days Onsite	Cost
Travel Budget for Onsite Services (billed on a cost recovery basis)			

Standard travel policy - Travel and expenses are billed monthly, as incurred, on a cost recovery basis. The price proposal presents these estimated costs based on our experience and reasonable costs. They include economy flights, rental car, hotel, other direct expenses, a per diem meal rate of \$65/day week days and \$110/day for weekend days (no receipts provided), a travel time rate of \$95/hour and mileage charges consistent with the Internal Revenue Service published guidelines. (Further clarification and final pricing will be determined.)

All on-site time is subject to travel restrictions being lifted. Should COVID-19 limit our ability to travel, all on-site services will be conducted remotely at the same cost (less travel & expenses).

Mandatory Annual Recurring Fees	Cost
The ASM is due at Initial Installation of hosted environment and provides: Support for Bluebeam integration, Esri GIS integration and batch export to the City's GL. Support for in-scope, CityView-delivered customizations to product and Select configuration	
Third Party Subscriptions and Carrier fees	
Recurring third party fees (Bluebeam Revu)	
Year 1	\$ 5,528