

**Schedule “D”  
Statement of Work**

# I. Table of Contents

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I. Table of Contents ..... 1

II. Background & Objectives ..... 2

III. Scope..... 3

IV. Work Approach..... 8

V. Post Implementation Support ..... 18

VI. Technical Environment..... 19

VII. Roles & Responsibilities ..... 28

VIII. Schedule..... 37

IX. Project Acceptance ..... 38

X. Change Order Management..... 39

XI. Issues & Problem Resolution ..... 41

## II. Background & Objectives

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The City of Sanibel, FL was recently devastated by the impact of Hurricane Ian, and in anticipation of the recovery efforts the City has contracted CityView to implement CityView Permits & Inspections, Planning and Business Licensing to:

1. Provide a robust and flexible portal and mobile solution to improve the City's services through online services.
2. Provide easier access to accurate data and reporting for management.
3. Reduce the time it takes for the review and issuance of Building and Planning permits, and better manage business licenses and renewals.
4. Standardize business processes, rules, fees and document outputs to save time, improve service and facilitate easier training of new employees.
5. Lessen the burden on IT for system support.
6. Build the structure for future upgrades and improvements so that product enhancements can be enjoyed by end-users to improve productivity and service delivery.

The following statement of work describes the activities that will be undertaken in the implementation of CityView for the City.

### III. Scope

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The Project scope:

1. Setup the externally hosted solution for CityView Property Information, Permits and Inspections, Planning, Business Licensing and Cashiering as well as CityView Portal (licensed for Property Information, Permits & Inspections, Planning and Business Licensing), CityView Mobile (for Permits & Inspections) and CityView Electronic Plans Review (which includes a subscription of Bluebeam Revu).
2. Setup CityView integrated extensions including CityView Esri ArcGIS Server mapping extension, CityView MS Word Add-in, CityView MS Outlook Add-in, CityView Configuration Console and CityView Preferred Partner (Paymentus or InvoiceCloud) Payment Processor Extension. CityView's MS Outlook Add-in is supported with Outlook 2010 or later and Office 365 (installed version) and CityView's MS Word Add-in is supported with MS Word 2016 or later and Office 365 (installed and online editions).
3. Collect City-specific data through a series of remote data collection sessions for lookup table values, fees, letters, workflow-specific values (assigned to, required dates, responsible departments, resource groups, email triggers), reviews, inspections, submittal requirements, business types and classifications, renewal periods and processes, expiration dates and processes and other related values for Permits & Inspections, Planning, and Business Licensing. This data will be collected, providing the CityView Project Team relevant documentation, such as fee schedules and letter templates, and by the City's completion of the CityView workbook for each specific CityView solution.
4. Collect City-specific requirements through a series of onsite (3 days) data collection sessions for a total of up to two (2) custom workflows, or equivalently effort-intensive changes to the CityView Select workflows across the products licensed. The two (2) custom workflows include one (1) for Permits & Inspections and one (1) for Planning.
5. Provide a hardware and software infrastructure questionnaire for completion by the City. Review questionnaire response and provide Infrastructure Assessment Report on any possible deficiencies in hardware and/or software infrastructure as far as suitability for optimal running of CityView is concerned.
6. Configure CityView Property Information, Permits & Inspections, Planning, Business Licensing, Cashiering, Portal, Mobile, and Electronic Plans Review using the data collected in CityView's web-based configuration workbook as well as other digital materials provided by CityView. This will include the following:
  - a. Lookup table data.
  - b. Custom data fields for specific data capture requirements. The assumption is a maximum of 20 custom fields per area of functionality (i.e. Property Information, Permits and Inspections, Planning and Business Licensing). Additional fields can be added through budget validation, change order, or by the City once the configured system is delivered.
  - c. One-time configuration of fees specific to the permits, projects and license types being tracked through the system.
  - d. Refinements to the CityView Select workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of existing sub-workflows based on the City's requirements.

- e. Configuration of up to two (2) custom workflows for Permits & Inspections (1) and Planning (1) or equivalently effort-intensive changes to CityView Select workflows.
  - f. Adjustment of the existing CityView scheduled processes for license renewals and permit expirations. These include; LC Add Delinquency Fee, LC Business Late Fee (Interest), LC Business Late Fee (Penalty), LC Business License Renewal, LC Business License Renewal - Tax Exempt Businesses, LC Merge and generate renewal notices, Permit Expiration: Set Permit Status to Expired, Permit Application Check Invalid Licenses, Permit Expiration: Add Generate Expiration Warning Notice Activity, Permit Expiration: Add Generate Expiration Notice Activity, and Permit Expiration: Add Progress Inspection Activity
  - g. Configuration of up to fifteen (15) letter templates for Permits & Inspections, twenty-five (25) letter templates for Planning, ten (10) letter templates for Business Licensing, three (3) letter templates for Cashiering (53 total letters).
  - h. Additional configuration (workflows, letters, etc.) as required or desired by the City and mutually agreed to through written change order.
7. Capture City's relevant historical, electronic data as defined in the following table and convert this into CityView. **Costs are estimates to be confirmed upon review of the data.**

Type of Electronic Information	Requested Conversion Item	Source
Permitting data	All active building permits with associated information including general permit information, application names, miscellaneous information, structure setup, application tracking, permit setup, cash receipts and charges, application fees, application documents, inspections results	Munis

*No other data sources are assumed to be involved.*

CityView will convert the data as it is in the source database. However, if there is data that does not match the format of the field (e.g. alpha characters in a numeric field), or if there is inconsistent information, CityView either will not convert that data or the inconsistencies will be converted as is. CityView will report any data anomalies found during the conversion process.

- 8. Develop property integration with the City's central parcel data using CityView's property integration tool. CityView will load Parcel, Address, Owner, Structures (buildings), Parent Parcels, Roads and Road Segments, Parks and Park Elements, Trails and Trail Landmarks, and Zoning as part of the property integration, subject to the availability of the data in the City's data source.
- 9. Set up the export for exporting cash receipting information to City's General Ledger system (Tyler Munis) from CityView Cashiering. This is an estimate and will be finalized prior to Scope sign-off, once all the export requirements have been reviewed
- 10. Implement user security settings according to City completion of organizational role spreadsheets defining the out the box organizational roles inherent in the solutions.

11. Deliver pre-configured reports for Permits and Inspections, Planning, Business Licensing, and Cashiering including the following reports:

Permits & Inspections	Planning	Licensing
<ul style="list-style-type: none"> <li>✓ Application Review Tickler</li> <li>✓ Average Daily Inspections</li> <li>✓ Building &amp; Safety Revenue Report</li> <li>✓ Certificate of Occupancy Listing</li> <li>✓ Deposits and Bonds Summary</li> <li>✓ Escrow (By Revenue Account #)</li> <li>✓ Fee Paid in Full</li> <li>✓ Inspection Detail</li> <li>✓ Inspection Outcome</li> <li>✓ Inspection Schedule</li> <li>✓ Inspections To Do</li> <li>✓ Inspections by Inspector</li> <li>✓ Outstanding Fees</li> <li>✓ Permit Inspection Trend</li> <li>✓ Permit Status Summary (By Contractor)</li> <li>✓ Permit Status Summary (By Status)</li> <li>✓ Permit Status Summary (By Type)</li> <li>✓ Permit Time Spent</li> <li>✓ Permit Turn-Around Detail Report</li> <li>✓ Permit Value</li> <li>✓ Permitting – Punch In-Out Report</li> <li>✓ Public Works Permit Status Summary</li> <li>✓ Review – Decision Date</li> <li>✓ Review Turnaround Time</li> <li>✓ Portal Permits Entered Today</li> </ul>	<ul style="list-style-type: none"> <li>✓ Deposits and Bonds Summary</li> <li>✓ Escrow (By Revenue Account #)</li> <li>✓ Expired Projects</li> <li>✓ Monthly Project Status Report (sorted by Date Entered)</li> <li>✓ Monthly Project Status Report (sorted by Project Number)</li> <li>✓ Outstanding Plan Reviews</li> <li>✓ Plan Review Time</li> <li>✓ Planner Projects</li> <li>✓ Planning Activities</li> <li>✓ Planning Application Details</li> <li>✓ Planning Punch In-Out Report</li> <li>✓ Project Applications</li> <li>✓ Project Expirations</li> <li>✓ Project Fees</li> <li>✓ Review Turnaround Time</li> <li>✓ Scheduled Hearings</li> <li>✓ Submittals Report (Sorted by Planner)</li> <li>✓ Portal Projects Entered Today</li> </ul>	<ul style="list-style-type: none"> <li>✓ Business Status</li> <li>✓ Deposits and Bonds Summary</li> <li>✓ Did Not Report Gross Earnings</li> <li>✓ Emergency Contacts</li> <li>✓ Escrow (By Revenue Account #)</li> <li>✓ Excise Tax</li> <li>✓ Fees Paid in Full</li> <li>✓ Inactive Business Licenses</li> <li>✓ One Day Business Licenses</li> <li>✓ Outstanding Fees</li> <li>✓ Past Due Licenses</li> <li>✓ Tax Exempt Businesses</li> <li>✓ Total Amount Billed</li> <li>✓ Portal Licenses Entered Today</li> </ul> <ul style="list-style-type: none"> <li>✓ Reports created with CityView Application Builder (ActiveReports)</li> <li>✓ Reports created with CityView Reporter (based on Microsoft technology)</li> <li>✓ Requires MS SSRS (SQL Server Reporting Services)</li> </ul>
Cashiering	Other	
<ul style="list-style-type: none"> <li>✓ Daily Cash Out (By Fee Type)</li> <li>✓ Daily Cash Out (By Payment Type)</li> <li>✓ Daily Cash Out (By Payment Type) With Fee Types</li> <li>✓ Daily Cash Out (By Receipt)</li> <li>✓ Daily Cash Out (By Revenue Account Number)</li> <li>✓ Daily Cash Out for Cashier (By Payment Type)</li> <li>✓ General Cashiering Report</li> <li>✓ Payment Detail</li> <li>✓ Reversals</li> <li>✓ Portal Payments Entered Today</li> </ul>	<ul style="list-style-type: none"> <li>✓ Audit Report</li> <li>✓ Distribution List Report</li> <li>✓ Fee Maintenance</li> <li>✓ Portal Contact Email Lookup</li> </ul>	

12. Perform the installations and upgrades of the environment (production and test) through the life of the project. This includes the provision of 3 installs:

- Initial Installation
- User Acceptance testing
- Go-Live delivery

The assumption is the City has provisioned for any minor network changes detailed in the Infrastructure Assessment report. Should additional installs be required, these will be mutually agreed through the change order process.

CityView is not responsible for installing or configuring any other software or components on the City's network, e.g. Network Security, IIS configurations, SSL Certificates, Server communication including external traffic related to Portal. Infrastructure support requested to assist with or troubleshoot issues in these areas may attract additional costs.

13. Conduct up to three (3) remote validation and review sessions, for Permits and Inspections, Planning and Business Licensing, with the appropriate subject matter experts ("SMEs"). Each session is two to three (2-3) hours. Any additional sessions required will be mutually agreed to, and a change order will be raised. Additional corrections and modifications will be captured and corrected from each session..
14. Conduct seventeen and one-half (17.5) days of user training consisting of (16) days onsite and (1.5) days of remote training. This will include:
  - a. Eight and one-half (8.5) days of end user training.
  - b. Five (5) days of advanced user training (onsite and remote) to include configuration (3 days onsite), reporter (1 day onsite), and system administrator training (1 day remote).
  - c. Four (4) days of onsite Go-Live Facilitation to ensure comfort with the new system.
15. Ongoing support and maintenance of the software under the CityView Software License and Support Agreement.

Exclusions:

1. Provision of hardware, databases and third-party software.
2. Setup and support of network infrastructure supporting CityView.
3. Quantities, of the following items, that are in excess of those defined in "Scope (Inclusions)", are specifically excluded, unless addressed by a change order:
  - Letter configuration
  - Custom data fields
  - Spatial queries
  - Training
  - Customizations and interfaces
  - Custom workflows
  - Custom reports
  - Batch/scheduled processes
4. Non-standard configuration – standard configuration would be what is provided in the "Inclusions" above and what comes preconfigured in the system. Examples of non-standard configuration would include: modifying record-level security from what is pre-defined; defining organizational role

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

5. CityView provides the integration with third-party payment processing systems to accept online payments. CityView does not provide third-party payment processing systems but the integration of CityView with such processors, is included. The City is required to obtain their own payment processor license though agreement with the selected vendor. Invoice Cloud and Paymentus are preferred.
6. Customizations and interfaces other than those specified above or agreed to through change order. Should any 3<sup>rd</sup> party interfaces/integrations require licensing or services costs from the 3<sup>rd</sup> party, such costs are the responsibility of the City.
7. Spatial Queries - CityView accomplishes spatial queries using its business rules engine. Most spatial queries are simple to create and can even be added by your system administrator(s) post-go live! Until we know the particulars of your maps and your business requirements, we cannot know if there are any spatial queries that will require non-standard configuration or customizations; this agreement does not include for any spatial queries

#### Assumptions:

- Historical Data conversion and property integration assumes a single source of data. This estimate will be confirmed upon review of the data.
- Fee schedules were not provided prior to development of the price estimate for this project. Therefore, CityView's assumptions of the effort to configure fees are subject to review of the complete requirements. For example, if you have Impact Fee schedules or Development Charges, we will not have assumed that and those may result in additional costs. CityView is happy to review this with City prior to contract signing, to give a firm estimate of the effort to configure all fees.
- The software implementation is based on CityView's understanding of the number of "responsible departments" managing the processes within each product. Budgeted effort is allotted to various aspects of the implementation based on this number. For example, if the project to implement CityView Permits & Inspections includes scope for building permits, encroachment permits and fire permits, and each of these is managed separately by a different responsible department, then the budget estimate is based on 3 responsible departments needing independent sessions for data collection, validation & refinement and end user training. If, however, all of those permit types were managed by the same people under one City Service Centre, then this would be classed as 1 responsible department and the budgeted effort for data collection, validation and refinement and end user training is lower.

CityView's understanding of the City's responsible departments is as follows:

- Permits and Inspections (1 department), Planning (1 department) and Business Licensing (1 department).



## IV. Work Approach

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

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

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

#### **Project Kickoff**

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

CityView will prepare the Project Plan which will include a draft project schedule.

#### **Remote Infrastructure Review**

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CityView's Infrastructure Review Specialist will verify remote accessibility, available bandwidth and technology compatibility and advise the City's network specialists of the software prerequisites and security requirements to optimize the performance of the City's system. CityView will conduct this review remotely, off-site

#### **Setup of Hosted Development Environment**

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CityView Technical Support will setup a development environment hosted at the same data center where the eventual Production environment will be hosted. This will be the principal environment for data collection and process mapping, configuration, validation and refinement.

#### **Product Walkthroughs/Process Mapping**

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

The walkthroughs ensure the City's users:

1. Learn the basics of the activity-based workflows.
2. Learn how to complete the online workbooks and/or other digital materials provided by CityView.
3. Learn how to provide the data for City's fees, letters, lookup tables, and scheduled processes named above.
4. Understand the data mapping process.
5. Process Mapping sessions are also conducted and designed to impart the skills City's SMEs require to complete their homework assignments. Users are provided with an in depth knowledge of CityView table structures and the formats required to streamline the data collection process. Each session will be from two (2) to four (4) hours, depending on the product. Sessions will be held for CityView Permits and Inspections (two (2) sessions), Planning (two (2) sessions) and Business Licensing (two (2) sessions).

Data collection will involve remote and onsite services. Onsite time will be devoted to two (2) days for the collection of the specifics for up to two (2) custom workflows to be created as well as three (3) days for the definition of data conversion and interface requirements. A total of four (4) days of onsite time is accounted for.

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

The main deliverable at the end of the Data Collection phase is the "Scope Document." The Scope Document will reference, where applicable, documentation that needs to be included in the implementation, such as RFP functional requirements, the answer sheet from the online data collection workbooks, other digital materials that were provided by CityView and completed by the City, data mapping documents, and interface/customization design documents.

### **Budget Validation**

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

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

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

## **Phase 2: Configuration**

### **Data Conversion**

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Data conversion will commence once both parties are comfortable with the output of the data mapping exercise. CityView's specialist will create the scripts that parse, derive, and translate the source data into the ideal format for CityView. To reduce the time and effort associated with this phase CityView requires that the City provide data in one of the following formats: SQL Server, .mdb, .dbf, or .txt. Documentation must accompany any databases provided in .txt format so that our data conversion specialists do not have to infer the format of the file is (particularly in the case of non-delimited .txt files.) The initial data conversion will run the scripts to provide a means for verification of correctness during the validation stage of the Project. CityView will complete a final iteration (using the same scripts) immediately prior to go-live.

### **Data Conversion Assumptions**

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

1. Data has been cleaned according to the suggested guidelines.
2. Both parties have reviewed and signed off data mapping before proceeding to data conversion.
3. CityView will perform one complete data load prior to validation testing, one complete refresh prior to End User Training and Go-live Support, and one complete refresh at go-live. CityView will make all other fixes using targeted scripts. CityView can perform additional complete refreshes if the parties mutually agreed through a written change order.

4. The City provides data in one of the required formats: SQL Server, .mdb, .dbf or .txt. Documentation must accompany any databases provided in .txt format so that our data conversion specialists do not have to infer the format of the file is (particularly in the case of non-delimited .txt files.)
5. CityView will complete the final iteration using the same scripts. Should changes occur that affect the scripts, a change order will be required prior to any delivery.

### Configuration

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

1. **Letter Template Development** – CityView’s Word Add-in will be used to create up to 53 letter templates according to electronic samples provided by the City with data merge tags defined. Letter samples must be provided in MS Word format. The City is provided the letter generation tools for its SMEs to create additional letters to meet additional or future requirements.
2. **Fees, Valuation, Work Items, Classifications** - All the fees are configured in the City’s CityView environment. Fee configuration is a one-time load. Should the fee schedule provided to CityView be changed or updated prior to go live, and additional configuration is required, a change order will be required.
3. **Activities Workflow** – All the CityView Select workflows will be configured with the City specific requirements for assigned to, required dates, email notifications, responsible departments and resource groups. In addition, existing sub-workflows may be removed, or added to the main workflow, depending on the City’s specific processes. Should the required changes to the CityView Select workflows be significant and go beyond the refinement activities mentioned above, additional costs may apply through mutually agreed change order. CityView will configure up to two (2) custom workflow or equivalently effort-intensive changes to the CityView Select workflows.
4. **Custom data fields** - Custom data fields to meet the City’s specific data capture needs will be defined for each pertinent table where they are required and configured accordingly, along with the business rules to apply these data fields where appropriate.
5. **Lookups** – All lookup data defined during Phase 1 Data Collection, is entered into the system.
6. **Security** – Users are assigned to the roles and given permissions that are pre-defined in the products, based on information collected during data collection. Should additional user-level and record level security be required other than as defined in the solution’s organizational roles, additional costs may apply.
7. **Batch Rules and Scheduled Processes** – the named CityView Select batch rules and scheduled processes will be refined according to the requirements for permit expiry and license renewal.

### Customizations

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

### Interfaces

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

### **Quality Assurance (QA)**

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

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

The CityView PM will work with the City to establish the Review and Validation Plan, i.e. to determine when certain review and validation sessions will be given and who should attend. The development environment will be hosted at CityView's data center (OrionV in Pittsburgh).

### **Review and Validation**

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CityView will undertake a series of three (3) remote review and validation sessions with City's SMEs, for Permits and Inspections to work through the validation of the configuration based on the data collection materials and scope document.

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

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

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

### **In Scope Refinements**

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

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

### **User Acceptance Testing**

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On completion of the third Review and Validation session, the City will have a period of three (3) weeks for final User Acceptance Testing on its own completely installed test system. The CityView Implementation Specialist will monitor the City's feedback and continue to make any in scope corrections. Provided the acceptance criteria have been met, the City is asked to formally accept the delivered solution for go-live.

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

### **Final Environment**

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

### **User Training**

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

### **Final Conversion Run**

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

### **Go-live**

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During go-live, CityView will be onsite for four (4) days of onsite go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training. It is recommended that the City consider having an additional CityView resource onsite to support the staff on CityView software during the first weeks after go-live. Budget for this is not included here. The CityView and the City's project teams will discuss this to determine the City's needs prior to scope sign-off.

During go-live facilitation the CityView Project Team will work with the City to record any known issues. The CityView Project Team is responsible for the resolution of these known issues. See Project Acceptance section IX for more information about post go live process.

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

### **IV1 Communication plan**

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The CityView Communication Plan includes:

- A 1 hour bi-weekly, or 30 minute weekly, status meeting with the CityView Project Manager or designate as mutually agreed, through the life of the project.
- Communication with Implementation staff (IS) as provided for in the data collection and validation sessions, and reasonable engagement beyond these sessions to clarify information collected and answer questions. Requests for dedicated time, or recurring meetings involving IS staff, may incur extra costs.

### IV2 Training plan

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

#### Training Plan

Course	Objectives		
<b>CityView End User Training (onsite)</b>	<p>This course is designed to train the City's users on the business use in order to fulfill their daily work activities. The course provides specific instruction on how to navigate and complete tasks within CityView. It will cover tasks such as completing an application, adding contacts, attaching files, tracking activities and outcomes, applying and paying fees, producing correspondence, mapping basics, and running reports. Users are able to:</p> <ol style="list-style-type: none"> <li>1. Understand the key concepts that make up the business process.</li> <li>2. Be able to navigate and complete tasks relevant to day today activities.</li> <li>3. Be able to walk through a business activity based workflow.</li> </ol>		
	<b>Duration: 7 days*</b>	<b>Users: End Users as defined below</b>	<b>Maximum#: 10/session</b>
<b>Configuration &amp; Maintenance Training (onsite)</b>	<p>This course is focused on enabling users to configure, maintain and evolve their business process within the CityView solution. Concepts that will be covered include Letter Generation, maintaining your Activity Based Workflow, Fee Maintenance, Holiday Configuration and Maintaining Lookup values. Users will be able to:</p> <ol style="list-style-type: none"> <li>1. Create and modify Letters.</li> <li>2. Create and modify Fees.</li> <li>3. Improve and evolve the Activity Workflow.</li> <li>4. Keep your system current by updating Lookup tables.</li> </ol>		
	<b>Duration: 3 days</b>	<b>Users: Advanced</b>	<b>Maximum#: 6</b>
<b>CityView Reporter Training</b>	<p>CityView's fully integrated ad-hoc report designer provides a quick and intuitive way for non-technical subject matter experts to create their own reports. In this course, students will learn about creating detail reports and pivot reports, as well as how to get the most out of the out of the box reports that come with the CityView system. Additional topics may include: complex report writing, views, and on-form expressions</p>		
	<b>Duration: 1 day</b>	<b>Users: Advanced</b>	<b>Maximum#: 6</b>
	<p>This course is designed to provide administrators responsible for managing CityView with the general knowledge of how to install and upgrade versions of CityView, change user rights and manage security. The advanced course will go</p>		

<b>CityView System Administrator Training (remote)</b>	<p>into additional detail on the architecture of the CityView platform as well as how to maintain the CityView Portal.</p> <p>Course participants will walk through typical system maintenance and troubleshooting examples, which will teach them the tools, techniques and terminology applicable to CityView, enabling them to not only support the business users in their organization but also to communicate more effectively with CityView's Technical Support team. They will be exposed to our best practices approach for Security Maintenance; and, they will learn the processes for installing and upgrading the CityView environments.</p> <p>Students will be instructed in the use of the appropriate aspects of CityView CityView Configuration Console, and they will gain an understanding of the architecture behind CityView. Additional topics that may be covered include: configuration of Microsoft Exchange, Web Server settings, LDAP settings, Mapping, and Document Management settings.</p>		
	<b>Duration: 1 day</b>	<b>Users: Advanced</b>	<b>Maximum#: 4</b>
<b>CityView Mobile End User Training (onsite)</b>	This training will focus on the highly intuitive CityView Mobile.		
	<b>Duration: 0.25 days</b>	<b>Users: TBD</b>	<b>Maximum#: 10</b>
<b>CityView Portal Instructional Training (remote)</b>	This training will focus on the highly intuitive CityView citizen Portal, to provide a select group of City users with the knowledge of how to navigate Portal processes so that they can answer citizen questions on the use of Portal.		
	<b>Duration: 0.75 days</b>	<b>Users: TBD</b>	<b>Maximum#: 10</b>
<b>Bluebeam Markup Training (remote)</b>	This training will focus on basic use of Bluebeam markup tools.		
	<b>Duration: 0.5 days</b>	<b>Users: TBD</b>	<b>Maximum#: 10</b>
<b>Go-live Facilitation Assistance (onsite)</b>	Four days of go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training (as described in the Work Approach above).		
	<b>Duration: 4 days</b>	<b>Users: All</b>	<b>Maximum#: N/A</b>
<b>Premium Online Learning (optional)</b>	<p>CityView offers an online-only option for all advanced training. This allows up to 6 students to have access to online learning content instead of "live" sessions with a trainer. The advantages are: access to more content for a full year, which can also be renewed with annual maintenance to support your ongoing learning needs, staff turnover, etc. Speak to your "CityView PM" if you are interested in swapping the "live" training, included above, for Premium Online Learning.</p> <p>Note: live training does not include access to recorded sessions. CityView only provides recordings of training as part of Premium Online Learning.</p>		

Training is provided on City-provided hardware.

\*7 days End user training divided as follows:

CityView Basics Training 2 x ½ day sessions (1 day total)

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

Planning 1 x 1 ½ day sessions (1 ½ days total)

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

Cashiering 1 x ½ day session (½ day total)

Electronic Plans Review 1 x 1 day sessions (1 day total)



### IV3 Matrix of Responsibilities and Work Products

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

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

### ***IV4 Documentation***

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

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

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

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

CityView offers the following documentation:

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

## V. Post Implementation Support

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Detailed in Schedule C, CityView Service Level Agreement.

## VI. Technical Environment

Information is provided for reference in the following pages regarding recommended servers, database sizing considerations, third party software, and compliancy tables. This is followed by a diagram depicting a typical installation. For all the most recent specifications please refer to CityView Connect - <https://cityviewhelp.iharriscomputer.com/CityViewCMS/index.php/supported-technologies>

### Operating Systems\*

Interface	Supported OS Versions	Editions	Minimum Requirements
CityView Configuration Console	Windows 10	32 and 64 bit, Home, Pro and Enterprise Editions	.NET Framework 4.8 required - download link
	Windows 8, 8.1	32-bit and 64-bit editions	.NET Framework 4.8 required - download link
CityView Mobile*	iOS (iPhone, iPad, iPod)	4 or higher (tested to iOS 14.3)	<p>CityView Mobile is a browser-based interface, so devices will require an internet connection and a web browser. Local storage must be enabled.</p> <p><b>Important:</b> TLS certificate required.</p> <p>About Windows Surface devices: these devices will run CityView Mobile, but you will not be able to directly access the camera for photos or video. This is a Windows security issue and is not controlled by CityView.</p> <p><b>Optional Hardware:</b></p> <p>For areas with poor coverage, some customers have used <b>vehicle cellular signal boosters</b> to enhance connectivity.</p> <p>Though we (CityView) do not claim to support or endorse any one product, this unit has been recommended by our customers: <u>weboost</u> Drive 4G-M</p>
	Android	2.3 or higher	
	Windows Phone 7 or higher	7 or higher	

\*CityView Mobile is an optional add-on service to use CityView through a customized browser application. Each module is licensed for CityView Mobile separately. CityView Mobile is optimized for use in the field on a small screen; it is a supplement to, and not a substitute for a full version of CityView Workspace.

\*When communicating with external sites such as ArcGIS Online and payment vendors, CityView will use the default security protocol configured in the OS. This could be TLS 1.1, 1.2 or 1.3. The version of TLS supported by the CityView Web Servers depends on the OS and IIS configuration.

## Browsers\*

For CityView customers that purchase CityView Workspace. Note that servers for all CityView web-based interfaces require TLS certification and an HTTPS address.

Workspace		
Workspace has been designed to work with desktop browsers. Staff mobile users should be using the CityView Mobile interface, which also supports disconnected mode (security certificate required).		
Supported Browsers	Required Settings	Notes
Google Chrome*	Required for Workspace on all browsers: <ul style="list-style-type: none"> <li>JavaScript must be enabled</li> <li>Cookies must be enabled</li> <li>Ad Blockers must be disabled</li> <li>Pop-ups must be enabled (or not blocked)</li> </ul>	CityView Workspace (internal use) <b>does not</b> currently support browsers on mobile devices. Staff mobile users should be using the CityView Mobile interface, which also supports disconnected mode.  <b>Important - Internet Explorer No Longer Supported in Workspace</b> - Microsoft has discontinued development of Internet Explorer and recommends Edge. Microsoft Edge is not available for Windows 7 or Windows 8.1. Customers still on those operating systems should use either Firefox or Chrome for the full CityView Workspace interface experience.
Microsoft Edge* Windows 10 required		
Mozilla Firefox		

\*Recommended browsers

Portal		
Portal has been designed to work with desktop and mobile browsers		
Supported Browsers	Version	Notes
Internet Explorer (deprecated)	11	Portal servers require a TLS certificate (https) and a 64-bit IIS Application Pool
Microsoft Edge	40 and up Windows 10 Mobile	
Google Chrome	Desktop (tested version 73) and Mobile	
Mozilla Firefox	Desktop (tested version 66) and Mobile	
Opera	Tested version 58	
Safari	9, 13 and up* MacOS, iOS, iPad	*A bug in Safari and embedded browsers on MacOS 10.14 and all browsers on iOS 12 may cause issues with certain payment gateways. This has been fixed in current versions. Invoice Cloud, Paymentus, Heartland, MSB Nexus (with Hosted PayPage) are not affected.

Mobile		
Mobile has been designed to work with mobile browsers		
Supported Browsers	Version	Notes
Safari	10 or higher	CityView Mobile is highly compatible with many mobile browsers for phones or tablets  Firefox and Chrome update automatically. As of publication, the current version is supported.  As of Firefox version 62 and Chrome version 67, these browsers no longer allow insecure websites to access the browser Application Cache. This is where the pages for disconnected mode are stored. Mobile Disconnected Mode will no longer run when using HTTP. Your browser will give a No Internet connection error. To be able to use disconnected mode, you need to host CityView Mobile using HTTPS.
Firefox	57 or higher	
Chrome	63 or higher	
Opera		

Android	Note that these browsers update automatically, so trying to retain a previous version is not a practical solution.
<b>Virtual Inspections</b> Contractors using their mobile phones for inspections will need to have one of the Twillio supported browsers: <a href="https://www.twilio.com/docs/video/javascript#supported-browsers">https://www.twilio.com/docs/video/javascript#supported-browsers</a>	

## Bluebeam Revu

For customers that purchase Electronic Plans Review. Bluebeam Revu is needed for document markup. It is not required to view flattened documents with the mark-up in place.

Supported Versions	Editions	CityView Interface	Notes
Revu 2021  Revu 20.1 & 20.2  Revu 2019.1.16, 2019.1.20, & Revu 20  Revu 2019  Revu 2018*	<b>Core and Complete</b>  <b>Revu eXtreme</b> all document comments and markups are flattened before the document is returned to the customer for corrections  <ul style="list-style-type: none"> <li><b>CAD &amp; Standard</b> versions can be used by users who will be marking up documents, but not be initiating or finalizing the markup process, or for Workspace users</li> </ul>	Workspace	Bluebeam Revu is required for CityView Electronic Plans Review (EPR) functionality.  Bluebeam Revu can also be used to view, create or manipulate PDF documents, independently of CityView.  <ul style="list-style-type: none"> <li>Bluebeam Revu licenses are required</li> </ul> *For customers upgrading to version 2018: If you have a Bluebeam Open or Enterprise License, Bluebeam will validate your license every time you launch, prepare or flatten documents. It is normal to see a "License Seat Acquisition" message.

## Microsoft Outlook

For CityView customers that purchase the Microsoft Outlook integration Add-In

Supported Versions	Editions	Notes (VSTO deployment)
Office 365	Installed	Office 365 online (browser-based) versions are not supported.
Outlook 2019	32-bit and 64-bit	<b>IMPORTANT:</b> CityView Integration Server is now required.  Office 365 online (browser-based) versions are not supported.
Outlook 2016		"Click-to-Run" versions prior to version 2019 are not supported by CityView.

<b>Outlook 2013</b>		<b>Note:</b> Because CityView currently uses Visual Studio Tools for the Outlook (VSTO) add-in, Centralized Deployment of Office add-ins is not supported.  See <a href="https://docs.microsoft.com/en-us/microsoft-365/admin/manage/centralized-deployment-of-add-ins?view=o365-worldwide">https://docs.microsoft.com/en-us/microsoft-365/admin/manage/centralized-deployment-of-add-ins?view=o365-worldwide</a>
<b>Outlook 2010</b>		

## Microsoft Word

For CityView customers that purchase the Microsoft Word integration Add-In, the requirements differ for users who will generate the base letter templates and users that just need to make edits to letters before sending, after they have been generated by the template. Most users will just need the Letter Editing requirements.

Note that Office 2019 is supported on Windows 10 but isn't supported on Windows 7 or Windows 8.1.

## Letter Editing

Once a letter is generated from a template, the content of the letter can be edited via the Word Add-In. These are the supported versions for letter editing.

For Letter Editing (manifest deployment)		
Supported Versions	Editions	Notes
<b>Office 365</b>	Installed and online	See Word Add-in for Workspace for configuration information.
<b>Word 2019</b>	32-bit and 64-bit	"Click-To-Run" version is required for Word 2016 and supported for 2019
<b>Word 2016</b>		

## Template Editing

Users in the Letter Configuration organization role can customize letter templates used to generate letters/correspondence. These are the supported versions for template configuration.

For Template Letter Editing (VSTO deployment)		
Supported Versions	Editions	Notes
<b>Office 365</b>	Installed client only	Office 365 online (browser-based) versions are not supported.
<b>Word 2019</b>	32-bit and 64-bit	"Click-to-Run" versions prior to version 2019 are not supported by CityView.
<b>Word 2016</b>		



<b>Word 2013</b>		<b>IMPORTANT:</b> Because CityView uses Visual Studio Tools for Office (VSTO) add-ins, Centralized Deployment of Office add-ins is not supported.  See <a href="https://docs.microsoft.com/en-us/microsoft-365/admin/manage/centralized-deployment-of-add-ins?view=o365-">https://docs.microsoft.com/en-us/microsoft-365/admin/manage/centralized-deployment-of-add-ins?view=o365-</a>
<b>Word 2010</b>		

## Mapping/GIS Technologies\*

For CityView customers that purchase the GIS/mapping integration (Esri only)

Supported Versions	Editions	Notes
ArcGIS Online		<ul style="list-style-type: none"> <li>Supported</li> <li>Required for CityView Mobile Route Planning</li> <li>Esri requirement: TLS 1.2 certificate required</li> </ul>
ArcGIS Server v11	<ul style="list-style-type: none"> <li>32-bit and 64-bit editions, Express and higher.</li> <li>Workgroup or Enterprise Capacity Level servers (Standard, Advanced).</li> <li>Server Basic version <b>not</b> supported.</li> </ul>	<ul style="list-style-type: none"> <li>TLS certificate required.</li> <li>ArcGIS Engine v9.3 and v9.2 ArcGIS Reader v9.3 and v9.2 - legacy support; no significant enhancements will be implemented.</li> </ul> <p><b>* Feature Service Layers</b> required for editing maps through CityView.</p>
ArcGIS Server v10.9		
ArcGIS Server v10.8.1		
ArcGIS Server v10.7.1		
ArcGIS Enterprise v10.6		
ArcGIS Enterprise v10.5		
ArcGIS Server v10.4		
ArcGIS Server v10.3.1		
ArcGIS Server v10.2.2		

## Document Management Systems

Optional integration for CityView customers who are using one of the following document management systems. Additional license required to integrate with CityView. If no other integration is configured, CityView will use its native DMS.

System	Supported Versions	Notes
Laserfiche	<b>9, 10, and 11 (including all minor versions)</b>	<a href="https://www.microsoft.com/en-ca/download/details.aspx?id=48145">https://www.microsoft.com/en-ca/download/details.aspx?id=48145</a>  The Laserfiche libraries that CityView uses and ships with will work with an instance of Laserfiche 11 Server.
Microsoft SharePoint	<b>2016, 2013, 2010, SharePoint Online</b>	
OnBase	<b>OnBase Foundation Enhancement Pack 3 (EP3)</b>	Supports CityView/OnBase API
Eclipse (docStar)		
PaperVision	<b>78, 79</b>	
ImageNow (Perceptive Content)	<b>6.7</b>	
Alfresco	<b>5.2</b>	
FileHold	<b>15.2.0</b>	
eB		Contact CityView Support before installing

## Payment Processing

CityView Portal supports optional integration with numerous Payment Processing systems (Payment Gateways). You must be licensed to implement this integration. \* Preferred gateway in Canada. \*\*Preferred gateway in U.S.

**Security Note: The PCI Data Security Standard requires that merchants use TLS1.2.**

Supported Gateways	Notes
Paymentus*	Supports eCheck/ACH payment if customer account has set this option with their payment vendor. Shopping cart supported conditionally.
Invoice Cloud**	Supports eCheck/ACH payment if customer account has set this option with their payment vendor. Shopping cart supported.
Heartland	
Acculynk	
PayPal's PayFlow Pro	Payflow Pro v4.3
iTransact	
Moneris (Hosted Pay Page)	
PayGOV	
Bambora (formerly Beanstream)	Shopping cart supported.
MSB Nexus	Web API "May 2017" version, MSB Nexus "Hosted Payment" Gateway method
BIS Online	
Authorize.Net	Supports eCheck/ACH payment if customer account has set this option with their payment vendor.
Active Class	Contact CityView Support before installing.

## SMS/Text Messaging

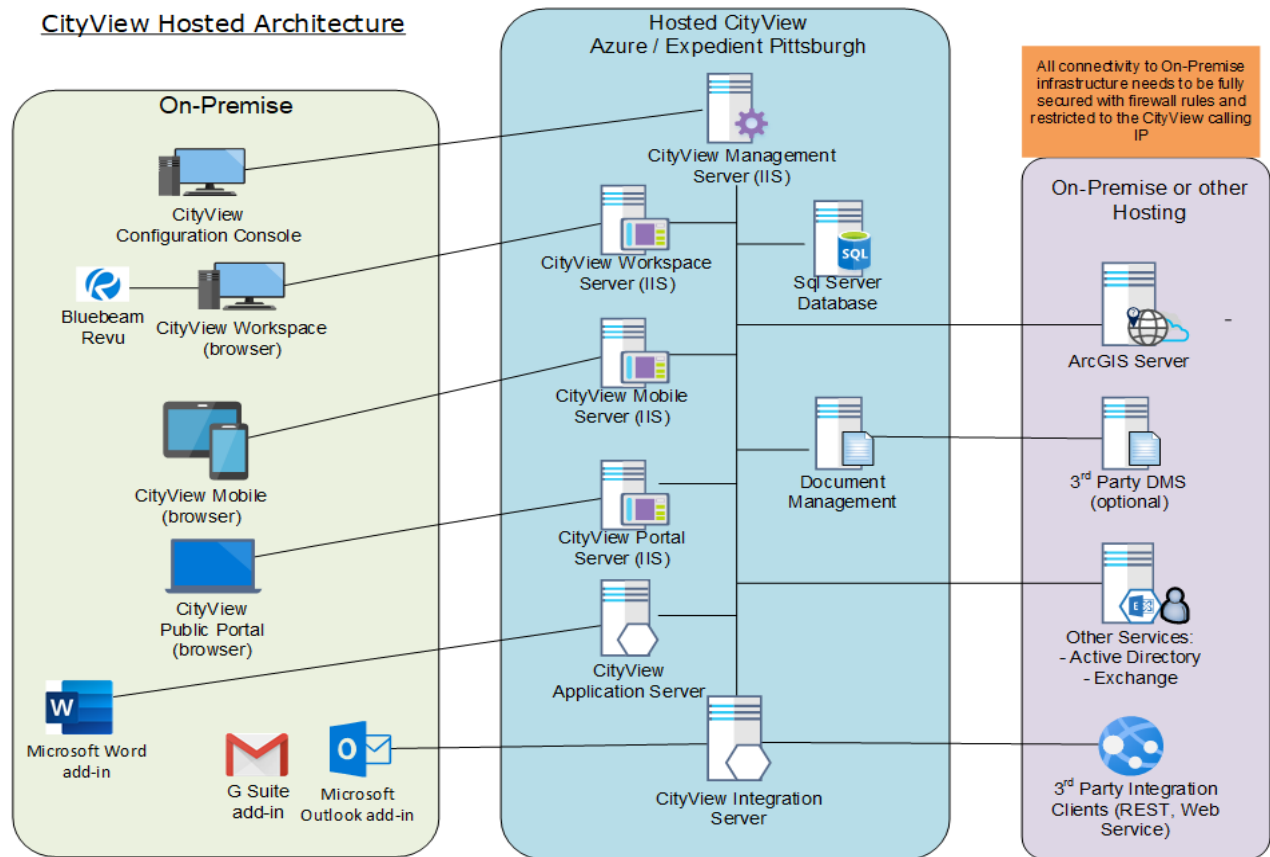
CityView customers with modules that are licensed for Mobile can use the following service to send text messages.

Supported Versions	Notes
Twilio	Configuration information.

The City would access the hosted CityView Workspace environment via a web browser coming from an approved IP address i.e. The City's public IP Address as access restrictions are in place, or any other IP Address the City has requested we allow. All management software is accessed via Remote Desktop Services website. The management software resides on the hosted environment and the software is ran inside the hosted environment and is displayed to the user via a remote desktop application window. Dual login is required for access to management software (Account in Hosted environment /Account in City's CityView Environment).

Subscription pricing includes a Data Storage limit of 250GB. In the event additional Data Storage is required, it may be purchased in 100GB amounts at the then current rates, currently \$75/100GB/month.

## Hosted Hardware and Software Specifications



## VII. Roles & Responsibilities

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

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

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

### **Executive Sponsor**

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

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

### **Project Manager**

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

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

14. Hold review & status meetings with City's resources
15. Facilitate and provide timely resolutions to issues and concerns as it relates to CityView resources, project issues, etc.

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

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

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

### **Implementation Specialist/Trainer**

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

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

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

1. Provide training to the different City groups as follows:

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

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

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

1. Evaluate interfaces functionality requirements
2. Provide recommendations on interfacing approaches
3. Identify Interfaces issues
4. Perform the analysis of the required interfaces
5. Evaluate a sample data structure provided by the City to which CityView must create an interface
6. Create the design documentation of the required interfaces
7. Manage interfaces' design documents and revise according to the City's review and comments
8. Forward the interfaces' design documents to the CityView Project Manager for review and approval
9. Unit test the interfaces to ensure they meet the specifications outlined in the design documentation
10. Work closely with the CityView Developers to answer any technical related question that might arise
11. Provide training support to the City's Technical Experts regarding the interfaces
12. Evaluate sample data structure from which CityView will be converting electronic data
13. Provide data conversion analysis with the City's Data Conversion Expert
14. Provide recommendations on data conversion approaches
15. Provide data conversion mapping review and assistance
16. Identify conversion issues
17. Develop data conversion scripts according to the final mapping documents
18. Perform the preliminary cut data conversion
19. Unit testing the preliminary cut data conversion
20. Modify data conversion scripts based on test results if necessary
21. Perform any other agreed on intermediary cuts of data conversion
22. Setup the production ready cut and briefly unit test the production ready cut data conversion
23. Provide assistance to the City's Data Conversion Expert in loading the preliminary cut of the converted data and test it
24. Communicate directly with the City's Data Conversion Expert on any data conversion related issue / question

**Application Development Team**

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

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

**Quality Assurance Team**

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

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

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

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



### City Executive Sponsor

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

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

### City Steering Committee

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

1. Attend Steering Committee meetings
2. Set priorities
3. Approve scope and scope changes
4. Resolve escalated issues
5. Provide strategic guidance to achieve the define project goals
6. Promote the project throughout the City
7. Commit the required resources to the project and approve new ones when required
8. Monitor the project progress
9. Monitor the overall City impact
10. Approve extensions to project timeline or addition of new City resources to resolve City -side delays
11. Empower the City Project Manager and the core project team to make decisions
12. Generate timely decisions
13. Conduct periodic review of project progress
14. Make strategic decisions to manage business and project risks
15. Support both Project Managers to accomplish project goals
16. Have an active relationship with CityView management

### City Project Manager

The City Project Manager is responsible for the overall City deliverables and the day-to-day management of the project. This resource is the primary liaison between the CityView Team, the City's project team and the Steering Committee. Both Project Managers will work together to meet the objectives, address issues,

facilitate resolution and participate in active management of the teams. Below is a list of responsibilities to be performed by the City's Project Manager:

1. Manage all City resources for project related activities
2. Manage the project (budget, timeline, quality, risks, scope, issues, deliverables, etc.) in cooperation with CityView's Project Manager
3. Communicate project status to the Steering Committee, the Executive Sponsor and the project team leveraging updates from CityView's status updates
4. Participate in the Steering Committee meetings
5. Create, maintain, manage and refine the project schedule with all its elements in cooperation with the CityView Project Manager
6. Maintain project standards especially Scope & Status reporting
7. Prepare, organize and co-conduct with the project kick-off meetings
8. Manage the delivery and coordination of City project tasks
9. Manage all project deliverables in coordination with CityView's Project Manager
10. Manage and streamline the issue management process in conjunction with CityView Project Manager
11. Manage project deviations and take necessary corrective actions
12. Participate in gathering of the City's business process requirements when required
13. Plan, manage and execute the Acceptance Test efforts
14. Plan, manage and execute the end user training efforts
15. Provide timely reviews and potential sign-offs on all project deliverables approval documents as presented by the CityView Project Manager
16. Review and accept project milestones
17. Manage the logistical activities of the end user training
  - a. Training facilities
  - b. Students booking
  - c. Scheduling of sessions
  - d. Monitoring and logging the end user attendance
18. Capture the end user feedback
19. Responsible for internal & project communication
20. Provide guidance to project team members
21. Lead the Go-Live preparation planning
22. Participate heavily in the Go-Live preparation tests
23. Must provide Go / No Go Decision throughout the project phases
24. Must be present for Go-Live

### City Subject Matter Experts

The Business Experts own the business process within their functional areas since they perform these day-to-day business processes. These people collectively form the knowledge base of the City's business process

requirements. Such resources will be involved in the Data Collection, as well as approval of the Scope Documentation and testing and acceptance of the configured system. They will further verify that the new configured system meets the City's business requirements as outlined in the Scope Documentation. They will participate in making decisions regarding the business processes and they will help both Project Managers manage the project scope and all the associated deliverables. Below is a list of responsibilities to be performed by the SMEs

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

#### **City Data Conversion Expert**

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

1. Act as the primary contact for CityView Data Conversion Specialist
2. Acquire knowledge from the CityView Data Conversion Specialist as analysis & mapping is performed
3. Understand the database structure through knowledge transfer and documentation provided by CityView
4. Provide file layouts, where available, for existing data sources
5. Provide data sources in an agreed to format
6. During the analysis, provide documentation pertaining to the current systems (existing user manuals, etc.) if available
7. Lead the analysis of the existing data sources as they relate to the database
8. Finalize and approve the data mapping documents once prepared and delivered by the CityView Data Conversion Specialist
9. Test and potentially accept the preliminary data conversion cut and any other subsequent data conversion cuts whether performed by CityView or the City's resources

10. In coordination with the Database Administrator, prepare any other database environments that might be required for data cuts
11. In coordination with the Database Administrator, prepare the production database for the final cut data load
12. Work in conjunction with CityView to identify and possibly resolve conversion issues by directly communicating them to the project team, CityView, users and management
13. Participate in the Go-Live preparation planning
14. Should be present for Go-Live

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

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

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

### **City Database Administrator**

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

1. Provide support to the project team during the project implementation as identified in the project schedule
2. Manage the performance of the database
3. Establish and maintain database security and coordinate with application administration the application security levels
4. Include the databases in the normal backup routines and add them to the recovery management plan
5. Coordinate activities with City network and workstation administrators
6. Manage and execute database installation and upgrade patches
7. Participate in user access rights and privileges planning, definition & testing

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

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

1. Setup required peripherals for the different environments
2. Provide setup of clients' workstations if required
3. Setup testing environments as requested by the City's Project Manager
4. Participate in Go-Live preparation tests
5. Should be present for Go-Live

**City End Users**

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

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

## VIII. Schedule

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The project plan will be defined by the Project Managers as an initial step in the project. Start date will take into account each party's current schedule of activities. Please note CityView's implementation resources are currently booked 120-150 days in advance. The City will be added to CityView's schedule after a signed agreement is received.

## IX. Project Acceptance

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

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

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

## X. Change Order Management

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

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

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

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

Any impact to the cost, schedule and/or resources will be elevated to City Project Sponsor and CityView Project Manager for their review and approval.



**Sample Change Order Document****Change Order / Quotation**

CHANGE ORDER DESCRIPTION			
Request Date		Quote Number	
Client/Project		Valid Until	
Requestor		Created By	
Description of the Requested Services			
Impact Assessment: Estimate impact to budget, work effort and schedule.			
Total Cost Estimated		Planned Delivery Date	
Payment Terms			
APPROVALS			
	PRINT NAME	SIGNATURE	DATE
For Customer			
For CityView			

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## XI. Issues & Problem Resolution

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

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

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

Escalation Process:

CityView escalation levels in the order listed below:

1. Project Manager
2. Manager, Implementation Services
3. VP, Professional Services
4. Executive Vice President

City escalation levels in the order listed below:

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