

**Schedule “D”
Statement of Work**

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II. Background & Objectives

Routt County desires to replace their current Land Use Management Software that is based on legacy technologies and is unable to adapt to changing business requirements with a new Land Management Software that is robust, efficient, transparent, and perpetual or adaptable to future changes in technology through updates within an annual maintenance agreement to avoid purchasing new software in the future.

Current challenges include:

- Separate Electronic Plan Review software not connecting to permitting software.
- Lacking communication and project management capabilities for the public
- Process inefficiencies and data quality issues
- Technological limitations
- Reporting deficiencies

With the CityView replacement project, the County will provide greater customer service, increase operational efficiency, maintain the system and data security and enable greater transparency into operations. Specifically, the project's business goals are to:

- Provide secure web-based, self-service capabilities to customers
- Allow electronic plan review capabilities to enhance the plan review, and plat review, and zoning review processes
- Ensure scalability and flexibility to accommodate future business needs and reduce maintenance effort and dependence on Information Technology (IT) to make configuration changes
- Introduce modern technologies to improve workforce planning, accountability, and efficiency
- Ensure accurate and complete customer, and location information is available to the workforce, including GIS capabilities
- Automate workflow to support key business processes
- Provide a robust user defined reporting system
- Increase communication and notifications for all application processes (i.e., correspondences, emails, etc.)
- Historical Data conversion

Project Vision/Mission

The vision for this project is:

- To use technology to enhance the customer experience with land development and code enforcement as well as other permitting functions throughout the County.

The mission of this project is to:

- Improve online services and increase information transparency
- Streamline business processes to improve consistency and reduce cycle times
- Provide a single point of information for all land management, land development, permitting, inspections, reviews (adjustments, exceptions, variances), and violation enforcement information related to a project/property location
- Adopt a modular, scalable, and configurable solution that can easily adapt to changing business needs
- Improve operating efficiencies by consolidating or integrating multiple systems to support land development, permitting, inspections, and code enforcement processes and create a parent-child relationship between all permits and applications.
- Provide a solution that can be leveraged across the County to realize potential collaboration across County and City business services with similar functions.

III. Scope

The Project scope:

1. Install in the CityView data center CityView Property Information, Permits & Inspections, Planning, Code Enforcement, and Cashiering as well as CityView Portal (licensed for Property Information, Permits & Inspections, Planning, and Code Enforcement), CityView Mobile (for Permits & Inspections and Code Enforcement) and CityView Electronic Plans Review (assumes the County has sufficient licenses of Bluebeam Revu).
2. Install CityView integrated extensions including CityView Esri ArcGIS Server mapping extension, CityView Payment Processor Extension (Paymentus or Invoice Cloud), CityView Configuration Console, CityView MS Word Add-in, CityView MS Outlook Add-In, and CityView MS Exchange Extension.
3. Collect County-specific data through a series of remote and onsite (4 days) data collection for lookup table values, fees, letters, workflow-specific values (assigned to, required dates, responsible departments, resource groups, email triggers), reviews, inspections, submittal requirements, renewal periods and processes, expiration dates and processes, violations and corrections codes, and other related values for Permits & Inspections, Planning, and Code Enforcement. This data will provide the CityView Project Team relevant documentation, such as fee schedules and letter templates for each specific CityView solution.
4. Collect County-specific requirements for a total of up to four (4) custom workflows across the products licensed, or equivalently effort-intensive changes to the CityView Select workflows. The four (4) custom workflows or equivalent effort to modify the standard workflows includes two (2) for Permits & Inspections, one (1) for Planning and one (1) for Code Enforcement.
5. Complete a remote review of the County's infrastructure for purposes of accessing CityView Workspace and for interface purposes.
6. Configure CityView Property Information, Permits & Inspections, Planning, Code Enforcement, 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.
 - c. One-time configuration of fees specific to the permit, project, and case types being tracked through the system.
 - d. Refinements to the CityView Select workflows, including the assigned to, required dates, email notifications, responsible departments and resource groups. This task also includes connection or disconnection of sub-workflows based on County's requirements.
 - e. Configuration of up to four (4) custom workflows two (2) for Permits & Inspections, one (1) for Planning), one (1) for Code Enforcement or equivalently effort-intensive changes to CityView Select workflows. Assumption is (1) custom workflow in Permits & Inspections for County's CO extended CO process. The workflows per department are for minor enhancements to the Select workflows.

- f. Adjustment of the existing CityView scheduled processes for permit expirations. These include: 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 sixteen (16) letter templates for Permits & Inspections, twenty-five (25) letter templates for Planning, fifteen (15) letter templates for Code Enforcement and (3) letter templates for Cashiering (59 total letters). The Select workflows for the modules (Permits & Inspections, Planning and Code Enforcement) commonly include the letter template counts as listed above. Assumes one additional letter in Permits & Inspections for Generate Invoice Requirements.
 - h. Additional configuration (workflows, letters, etc.) as required or desired by County and mutually agreed to through written change order.
7. Capture County’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.** (Please note, CityView has provided a Not-to-Exceed Amount for data conversion for View Permits data to the County and City of \$65,000 (US Dollars)).

Type of Electronic Information	Requested Conversion Item	Source
Code Enforcement and Inspections	All active cases, case actions, case violation information, generic inspection information, case cash receipts information, user setup and code files	ViewPermit
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	ViewPermit
Planning and Zoning	Project information, project/location cross reference; planning action information, ley date, project letter, and meeting document information; zoning, allowable use, and project receipt information and code information	ViewPermit

No other data sources are assumed to be involved.

- 8. Develop property integration with the County’s central parcel data using CityView’s property integration tool. The assumption is that property data such as parcels, addresses and owner data will be coming from GIS.

9. Set up the export for exporting cash receipting information to County's General Ledger system (Tyler Munis) from CityView Cashiering.
10. Create a product enhancement to CityView MS Exchange Extension so that County staff can see the City of Steamboat Springs' inspections in their CityView Mobile To-Do List. *This product enhancement requires that both the County and City of Steamboat Springs utilize the CityView MS Exchange Extension.
11. Create a data export to facilitate Contractor Synching between the County (master contractor list) and City contractor list – The County contractor data will serve as the Master list for the both the County and the City – the costs are listed on the City's project.
12. Configure the following non-standard configurations:
 - a. Auto Generate Setbacks – Spatial query included in the bucket of hours for spatial queries listed below – includes custom data fields and business rules if required.
 - b. Additional Scheduled processes – Expiring and Expiration of Insurance and expiration notices
 - c. Base Fee Exhausted Notification – includes Generate Invoice Requirements letter
 - d. Spatial queries – Skyline, Fire Districts etc. - CityView creates spatial queries using its business rules engine. Until the particulars of the County's maps and your business requirements, CityView cannot know if there are spatial queries that will require non-standard configuration or customizations; therefore, this proposal accounts for \$2,065 to provide up to 10 spatial queries and one non-standard spatial query configuration. That estimate will be confirmed during project scoping and can be increased through mutually agreed change order.
 - e. Control zoning district (Miscellaneous.2) – Included \$2,065 estimate subject to understanding full requirements.
 - f. Additional fee configuration for jurisdictions the County serves
 - g. Custom reports - 2 reports included \$6,190 estimated (1) Date of expiration for insurance required by land use permits; (2) Permits that are assessed annual fees.
 - h. Cashiering – additional configuration/setup \$1,030 – to accommodate multi-jurisdiction invoicing needs
13. Implement user security settings according to customer completion of organizational role spreadsheets defining the out the box organizational roles inherent in the solutions.

14. Deliver pre-configured reports for Permits and Inspections, Planning, Code Enforcement, and Cashiering including the following reports:

Code Enforcement	Planning	Permits & Inspections
Case Status Cases Follow-up Case Summary Incident History Case Locator Inspection To Do Inspection Schedule Deposits and Bonds Summary Escrow(By revenue Account#) Zoning Code Report Compliance Report Office Activity by Inspection Officer Activity by Case	Project Applications Planner Projects Outstanding Plan Reviews Project Fees Expired Projects Planning Activities Plan Review Time Scheduled Hearings Project Locator Deposits and Bonds Summary Escrow (By Revenue Account #) Project Locator Development Review Status (with maps) Land Developer Review Log Monthly Project Status Report (sorted by Project Number) Monthly Project Status Report (sorted by Date Entered) Project Expirations Submittals Report (Sorted by Planner)	Outstanding Fees Fee Paid in Full Inspection Outcome Inspection Schedule Inspections by Inspector Average Daily Inspections Inspections To Do Permit Status Summary (By Status) Permit Status Summary (By Type) Permit Status Summary (By Contractor) Permit Value Permit Turn-Around Deposits and Bonds Summary Escrow (By Revenue Account #) Permit Locator Permit Turn-Around Detail Report Permit Time Spent Application Review Tickler Building & Safety Revenue Report Certificate of Occupancy Listing Public Works Permit Status Summary Review – Decision Date
Cashiering	Other	
Payment Detail Payment Detail (By Cashier) Daily Cash Out (By Revenue Account Number) Daily Cash Out (By Payment Type) Daily Cash Out (By Payment Type) With Fee Types Daily Cash Out (By Fee Type) Daily Cash Out (By Receipt) Reversals Daily Cash Out for Cashier (By Payment Type) General Cashiering Report Payment Detail By Date Posted	Transactions Audit Report Distribution List Report Fee Maintenance	

15. Conduct three (3) remote validation and review sessions for each of the modules (Permits & Inspections, Code Enforcement, and Planning) including 2 departments in Building & Inspections, 1 department in Planning and 1 department in Code Enforcement with the appropriate subject matter experts (“SMEs”). Additional corrections and modifications will be captured and corrected from each session.

16. Conduct sixteen (16) days of user training consisting of (13.25) days onsite and (2.75) days remote user training.

*9 days End user training divided as follows:

- a. CityView Basics Training 2 x ½ day sessions (1 day total)
 - b. Permits and Inspections 2 x 1 ½ day sessions (3 days total)
 - c. Planning 1 x 1 ½ day session (1.5 days total)
 - d. Code Enforcement 1 x 1 ½ day session (1 ½ days total)
 - e. Cashiering 1 x ½ day session (½ Day total)
 - f. Electronic Plans Review 2 x ½ day sessions (1 day total)
17. Conduct five (5) days of advanced user training (onsite and remote) to include configuration (3 days onsite), reporter (1 days onsite), and system administrator training (1 day remote).
 18. Conduct five (5) days of onsite Go-Live Facilitation to ensure comfort with the new system.
 19. Ongoing support and maintenance of the software under the CityView Software Subscription Agreement.

Exclusions:

1. Provision of hardware, databases and third party software.
2. Setup and support of network infrastructure supporting CityView.
3. Letters over and above the fifty-nine (59) included in the budget, unless agreed to through change order.
4. Customizations and interfaces other than those specified above or agreed to through change order. Should any 3rd party interfaces/integrations require licensing or services costs from the 3rd party, such costs are the responsibility of the County.
5. Custom workflows other than those specified above, unless agreed to through change order. CityView workflows are delivered and tailored during the implementation, with sub-workflows connected or disconnected as described in the Inclusions.
6. Additional Batch/Scheduled processes other than those specified above or agreed to through change order.
7. Reports other than those delivered as part of the products (described above) or specified in the customizations section above, unless agreed to through change order.
8. Non-standard configuration – standard configuration would be what is provided in the “Inclusions” above and what comes preconfigured in the system. Examples of non-standard configuration would include: modifying record-level security from what is pre-defined; defining organizational role security criteria other than those defined in the out of the box organizational roles (e.g. read-only access to some sheets, read-write to others); creating batch processes other than those defined in the product for permit expirations and license renewals; creating business rules defining specific outcomes that are tied to specific users of the system only (e.g. message box reminding of a process that needs to be followed but where that message box is only invoked where a specific users is

logged into the system). While these are not included in the Project's scope, the configuration tools are provided for County to undergo such configuration itself.

IV. Work Approach

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

County 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 Process Mapping

Project Kickoff

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.

The CityView Project Manager will provide the County with a Pre-Work Document that will list out all of the activities the County should undertake and start preparing for in advance of the Process Mapping sessions.

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

Remote Infrastructure Review

CityView will complete a remote review of the County's infrastructure for purposes of accessing CityView Workspace and for interface purposes. CityView will conduct this review remotely, off-site.

Initial Installation

CityView will setup a **development environment** hosted by CityView at the Harris data center in Pittsburg, PA for configuration, review, validation and refinement, and prior to go-live a hosted production and test environment will be set up.

Product Walkthroughs/Process Mapping

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

The walkthroughs ensure County'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 County's fees, letters, lookup tables, and scheduled processes named above. Note, County letter templates must be provided in MS Word format.
4. Understand the data mapping process.
5. Process Mapping sessions are also conducted and designed to impart the skills County's SMEs require to complete their homework assignments. Each session will be from two (2) to four (4) hours, depending on the product. Sessions will be held for each of CityView Permits & Inspections (two (2) sessions), Planning (two (2) sessions), and Code Enforcement (one (1) session).

Process mapping will involve remote and onsite services. The project manager will be onsite for two days as part of this phase of the project. Additional onsite time will be devoted to four (4) days for the collection of

the specifics for up to four (4) County workflows to be created as well as five (5) days for the definition of data conversion and interface requirements. A total of eleven (11) 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 Process Mapping phase is the "Scope Document." The Scope Document will reference, where applicable, key action items required for project success as well as documentation that needs to be included in the implementation, such as RFP functional requirements, the answer sheet from the online process mapping workbooks, other digital materials that were provided by CityView and completed by the County, data mapping documents, and interface/customization design documents.

Budget Validation

Once all of the data is collected from County, 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. (Please note, CityView has provided a Not-to-Exceed Amount for data conversion for ViewPermits data to the County and City of \$65,000 (US Dollars)).
2. List of customizations and interfaces

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

Phase 2: Configuration

Data Conversion

Data conversion will commence once both parties are comfortable with the output of the data mapping exercise. CityView's specialist will create the scripts that parse, derive, and translate the source data into the ideal format for CityView. To reduce the time and effort associated with this phase CityView requires that the County 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

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

1. Data has been cleaned according to suggestions made by CityView's data conversion specialists.
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 one complete refresh at go-live. CityView will make all other fixes using targeted scripts. CityView may, at its discretion, perform additional data loads; however, this stipulation is put in place to ensure that the County understands that the data in the test environment may become stale over time and it is not the responsibility of the project team to keep that data current with whatever is going on in the current production system. CityView can perform

additional complete refreshes at the County's request, if mutually agreed through a written change order.

4. County 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 database load at go-live using the same scripts as were developed and tested during the life of the project. Should source database changes occur that affect the ability for the scripts to run successfully, a change order will be required prior to any delivery.

Configuration

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

1. **Letter Template Development** – CityView's letter generator will be used to create up to 59 letter templates according to electronic samples provided by County with data merge tags defined. Letter samples must be provided in MS Word format. County is provided the letter generation tools for its SMEs to can create additional letters to meet additional or future requirements.
2. **Fees, Valuation, Work Items, Classifications** - All the fees are configured in County'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, requiring additional configuration, a change order will be required. Effort to configure fees and calculations have been estimated based on project norms and information made available through the RFP and subsequent follow up Sales discussions. Should the required fee configuration go beyond those expectations, additional costs may apply through mutually agreed change order.
3. **Activities Workflow** – All the CityView Select workflows will be configured with County 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 County's specific processes. Should the required changes to the CityView Select workflows be significant and go beyond the refinement activities mentioned above, additional costs may apply through mutually agreed change order. CityView will configure up to four (4) custom workflows or equivalently effort-intensive changes to the CityView Select workflows.
4. **Custom data fields** - Custom data fields to meet County'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: Process Mapping, 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 process mapping. 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 expiration.

Customizations

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

Interfaces

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

Quality Assurance (QA)

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 County. 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 & Development staff and management.

Phase 3: Review and Validation

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

Review and Validation

CityView will undertake a series of three (3) remote review and validation sessions[†] with City's SMEs, for each of Permits & Inspections, Code Enforcement, and Planning, to work through the validation of the configuration based on the process mapping 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 County's SMEs will have reviewed and validated the bulk of the configured system and be able to:

- Navigate the system through County-specific processes and workflow.
- Generate and test fees.
- View and validate lookup tables.
- Generate and test letters and documents that have been configured.
- Use scenario-based examples to test and validate automation

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

[†]If the County prefers to have additional CityView-facilitated validation sessions, this can be arranged through mutually agreed change order.

In Scope Refinements

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

Phase 4: User Acceptance Testing

User Acceptance Testing

On completion of Phase 3: Review and Validation, County 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 County's feedback and continue to make any in scope corrections. Provided the acceptance criteria have been met, County is asked to formally accept the delivered solution for go-live.

Phase 5: End User Training and Go-live Support

Final Environment

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

User Training

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

Final Conversion Run

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

Go-live

During go-live, CityView will be onsite for five (5) days of onsite go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training. It is recommended that the County 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 County's project teams will discuss this to determine the County's needs prior to scope sign-off.

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

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

IV1 Training plan

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

Training Plan

Course	Objectives		
CityView End User Training (onsite)	This course is designed to train the County's users on the business use in order to fulfill their daily work activities. The course provides specific instruction on how to navigate and complete tasks within CityView. It will cover tasks such as completing an application, adding contacts, attaching files, tracking activities and outcomes, applying and paying fees, producing correspondence, mapping basics, and running reports. Users are able to: <ol style="list-style-type: none"> 1. Understand the key concepts that make up the business process. 2. Be able to navigate and complete tasks relevant to day today activities. 3. Be able to walk through a business activity based workflow. 		
	Duration: 9 days	Users: End Users as defined below	Maximum#: 10/session
Configuration & Maintenance Training (onsite)	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: <ol style="list-style-type: none"> 1. Create and modify Letters. 2. Create and modify Fees. 3. Improve and evolve the Activity Workflow. 4. Keep your system current by updating Lookup tables and creating and maintaining custom attribute fields. 		
	Duration: 3 days	Users: Advanced	Maximum#: 6
CityView Reporter Training	CityView's fully integrated Desktop Reporter and Designer and custom report designer provide all of the features that you would expect from other industry-standard reporting tools. In this course, students will learn about creating simple reports, including pivot reports, detailed reports, charts, graphs, filters, subsections, and aggregate fields. Additional topics may include: complex report writing, views, and on-form expressions		
	Duration: 1 day	Users: Advanced	Maximum#: 4
CityView System Administrator Training (remote)	This course is designed to provide administrators responsible for managing CityView with the general knowledge of how to install and upgrade versions of CityView, change user rights and manage security. The advanced course will go into additional detail on the architecture of the CityView platform as well as how to maintain the CityView Portal.		

	<p>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 Configuration Console, and they will gain an understanding of the architecture behind CityView. Additional topics that may be covered include: configuration of Microsoft Exchange, LDAP settings, Mapping, and Document Management settings.</p>			
	<table border="1"> <tr> <td>Duration: 1 day</td> <td>Users: Advanced</td> <td>Maximum#: 4</td> </tr> </table>	Duration: 1 day	Users: Advanced	Maximum#: 4
Duration: 1 day	Users: Advanced	Maximum#: 4		
CityView Mobile End User Training (onsite)	<p>This training will focus on the highly intuitive CityView Mobile.</p>			
	<table border="1"> <tr> <td>Duration: .5 day</td> <td>Users: TBD</td> <td>Maximum#: 10</td> </tr> </table>	Duration: .5 day	Users: TBD	Maximum#: 10
Duration: .5 day	Users: TBD	Maximum#: 10		
CityView Portal Instructional Training (remote)	<p>This training will focus on the highly intuitive CityView Portal, to provide a select group of County users with the knowledge of how to navigate Portal processes so that they can answer citizen questions on the use of Portal.</p>			
	<table border="1"> <tr> <td>Duration: 0.75 days</td> <td>Users: TBD</td> <td>Maximum#: 10</td> </tr> </table>	Duration: 0.75 days	Users: TBD	Maximum#: 10
Duration: 0.75 days	Users: TBD	Maximum#: 10		
Bluebeam Markup Training (remote)	<p>This training will focus on basic use of Bluebeam markup tools.</p>			
	<table border="1"> <tr> <td>Duration: 1 day</td> <td>Users: TBD</td> <td>Maximum#: 10</td> </tr> </table>	Duration: 1 day	Users: TBD	Maximum#: 10
Duration: 1 day	Users: TBD	Maximum#: 10		
Go-live Facilitation Assistance (onsite)	<p>Five days of go-live facilitation where an implementation specialist will be available to help the users with questions as they arise, easing their concerns and complementing their training (as described in the Work Approach above).</p>			
	<table border="1"> <tr> <td>Duration: 5 days</td> <td>Users: All</td> <td>Maximum#: N/A</td> </tr> </table>	Duration: 5 days	Users: All	Maximum#: N/A
Duration: 5 days	Users: All	Maximum#: N/A		

Training is provided on County-provided hardware.

*9 days End user training divided as follows:

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

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

Planning 1 x 1 ½ day session (1.5 days total)

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

Cashiering 1 x ½ day session (½ Day total)

Electronic Plans Review 2 x ½ day sessions (1 day total)

IV.2 Matrix of Responsibilities and Work Products

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

Step	Responsibility	Lead	Deliverables
Project Kickoff	CityView	CityView PM	Hosted Development Environment, Project Plan
Infrastructure Review	CityView	CityView Infrastructure Review Expert	Infrastructure Review Document
Initial Installation	Share	CityView PM	Hosted Environment installed
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	County	County PM	User acceptance of the fully delivered system based on test scripts
User Training (including advanced training)	Share	CityView Trainer	Completed training
Go-live	Share	CityView PM	Live production environment

IV.3 Documentation

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. County can search for a particular topic or browse through the menu items.

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

Documentation is targeted to three main groups: business users, system administrators and application developers. CityView Connect provides supporting documentation 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 County 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.

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

Detailed in Schedule C, CityView Service Level Agreement.

VI. Technical Environment

The table below outlines the hardware and software requirements to operate CityView.

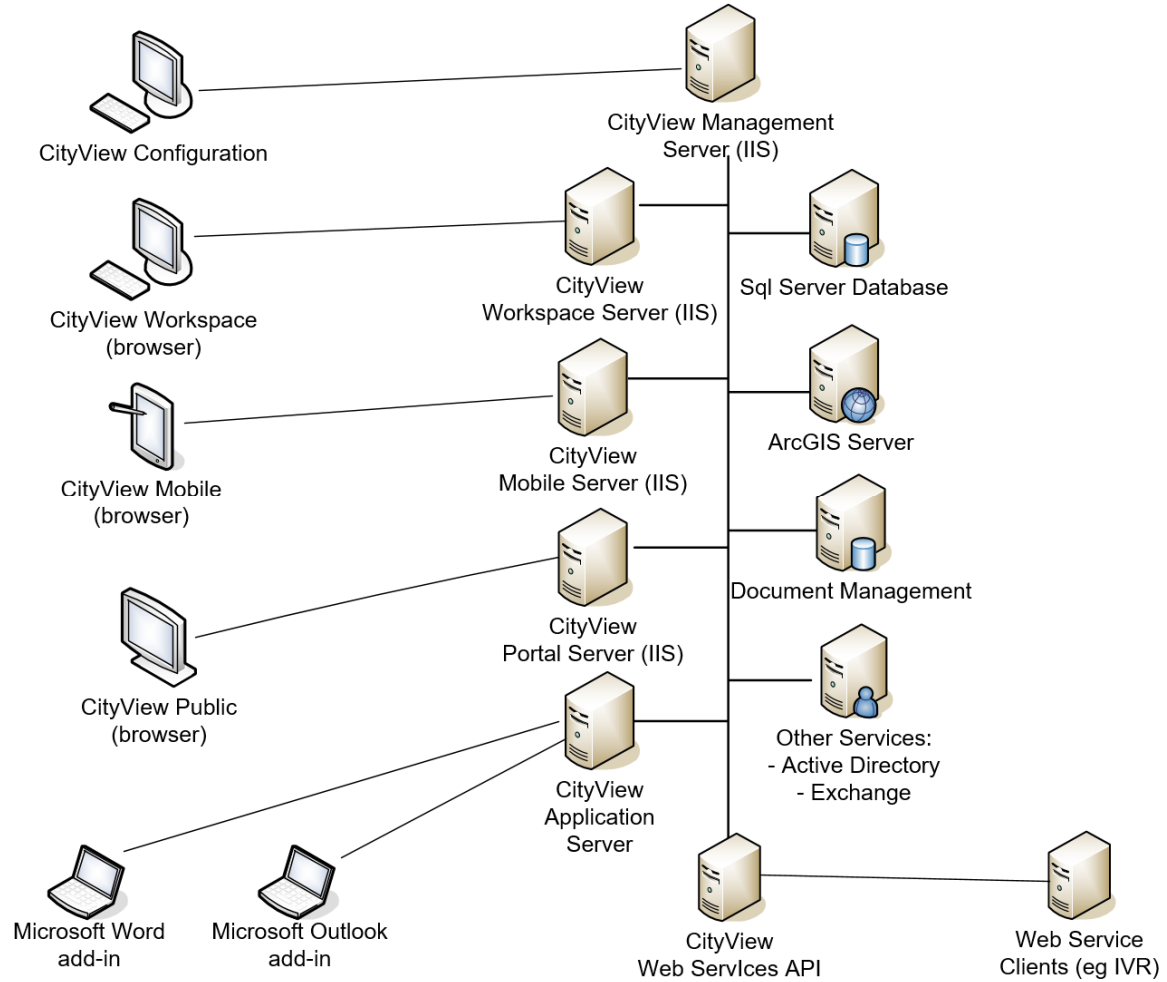
Browsers*

Supported Browsers	Required Settings	Notes
Google Chrome* Microsoft Edge* Windows 10 required	Required for Workspace on all browsers: <ul style="list-style-type: none"> JavaScript must be enabled Cookies must be enabled Ad Blockers must be disabled Pop-ups must be enabled (or not blocked) 	CityView Workspace (internal use) does not currently support browsers on mobile devices. Staff mobile users should be using the CityView Mobile interface, which also supports disconnected mode. Important - Internet Explorer No Longer Supported in Workspace - 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.
Mozilla Firefox		

*Recommended browsers

Configuration Console Client	
Hardware	Software
Windows PC with 2GHz clock speed recommended 2 gigabytes (GB) of RAM or higher recommended 400 megabytes (MB) of available hard disk space	Operating System: Microsoft Windows 10, 8.1 and 8 (32 bit and 64 bit), 7 (32 bit and 64 bit), and Vista Microsoft .Net 4.6.1 framework must be installed
CityView Mobile Configuration	
Mobile devices – this is a Web, browser-based interface that can be utilized by a very large array of devices. Please note that for tablets and smartphones, the browsers themselves can have different navigational methods of handling file attachments (Upload and download). Ideally, lower latency works best when handling upload/download of large file attachments with our product. 3G network connectivity is adequate however.	

CityView Component Architecture



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

Bluebeam Studio/Revu

For customers that purchase Electronic Plans Review

Supported Versions	Editions	CityView Interface	Notes
Revu 2018	<ul style="list-style-type: none"> Revu eXtreme all document comments and markups are flattened before the document is returned to the customer for corrections CAD & Standard 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. Studio Prime is required for customers doing EPR through CityView Workspace. Revu licenses are also required. 	Workspace	<p>Bluebeam Revu is required for CityView Electronic Plans Review (EPR) functionality.</p> <p>Bluebeam Revu can also be used with PDF documents, independently of CityView.</p> <p>If you are live (or going live) with CityView Workspace, you will need to use the new Bluebeam Studio Prime app to perform electronic plans review</p> <ul style="list-style-type: none"> A subscription to Bluebeam Studio Prime is required (+ Revu licenses) Bluebeam Revu licenses are required Bluebeam Studio hosts documents are on US-based cloud servers.

Microsoft Exchange

For CityView customers that purchase Microsoft Exchange integration

Supported Versions	Notes
Office 365 Exchange	Supported with Web Services API
Exchange 2016	
Exchange 2013	
Exchange 2010	

Microsoft Outlook

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

Supported Versions	Editions	Notes
Outlook 2016	32-bit and 64-bit	Required for CityView Outlook integration Add-In Click-to-Run: Please note that Microsoft Office installations that have been installed and that use " Click-To-Run " are not supported by CityView. Office 365 not supported.
Outlook 2013		
Outlook 2010		

Microsoft Word

For CityView customers that purchase the Microsoft Word integration Add-In. This Add-In allows users to create letter templates and edit generated letter in the following versions of Microsoft Word.

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

For Template Editing		
Supported Versions	Editions	Notes
Word 2016	32-bit and 64-bit	Required for CityView Word integration Add-In Click-to-Run: Please note that Microsoft Office installations that have been installed and that use " Click-To-Run " are not supported by CityView.
Word 2013		
Word 2010		

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 Generated Letter Editing		
Supported Versions	Editions	Notes
Office 365		
Word 2016	32-bit and 64-bit	Required for CityView Word integration Add-In
Word 2013		
Word 2010		

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"> Supported Required for CityView Mobile Route
ArcGIS Enterprise v10.6	<ul style="list-style-type: none"> 32-bit and 64-bit editions, Express and higher. Workgroup or Enterprise Capacity Level servers (Standard, Advanced). Server Basic version not supported. 	<ul style="list-style-type: none"> TLS certificate required. ArcGIS Engine v9.3 and v9.2 ArcGIS Reader v9.3 and v9.2 - legacy support; no significant enhancements will be implemented. <p>* Feature Service Layers required for editing maps through CityView.</p>
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	9 and 10 (including all minor versions)	<p>https://www.microsoft.com/en-ca/download/details.aspx?id=48145</p> <p>CityView Portal/Mobile: supports Laserfiche Web Access 9/10 and Web Link 9/10</p> <p>The Laserfiche libraries (version 10) that CityView uses and ships with will work with an instance of Laserfiche 10.X Server.</p>
Microsoft SharePoint	2016, 2013, 2010, SharePoint Online	
OnBase	16.0.0.17	Supports CityView/OnBase API
Eclipse (docStar)		
PaperVision	78, 79	

System	Supported Versions	Notes
ImageNow (Perceptive Content)	6.7	
Alfresco	5.2	
FileHold	15.2.0	
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.

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
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.

* Preferred gateway.

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.

Reporting Technologies

CityView supports optional integration with the following reporting systems.

Supported Versions	Editions	Notes
SSRS 2016	32 -bit and 64-bit editions, Express and higher	Valid TLS certificate required 1.2 or higher required on server for Workspace.
SSRS 2014	32 -bit and 64-bit editions, Express and higher	
SSRS 2012 R2	32 -bit and 64-bit editions, Express and higher	
SSRS 2012	32 -bit and 64-bit editions, Express and higher	

VII. Roles & Responsibilities

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 County.

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 County'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 County'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 County's Project Manager
8. In coordination with the County'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 County's Project Manager
11. In coordination with the County's Project Manager, manage scope change control
12. Assist the County's Project Manager in defining the training and Go-Live plans

13. Support County in the Go-Live preparation steps
14. Hold review & status meetings with County'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 complete a remote review of the City's infrastructure for purposes of accessing CityView Workspace and for interface purposes. Typically the IA is also our Manager of Support and as such carries responsibilities of managing the customer's hosted development environment, facilitating updates and installs and troubleshooting issues. Responsibilities include:

1. Prepare and distribute the Infrastructure Review Questionnaire to the City, for collection of appropriate information required to analyze hardware and software infrastructure as it relates to accessing CityView Workspace and interfaces.
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 third party software, and Esri map development and configuration,
5. Coordinate initiation of the City's hosted Development Environment and manage this throughout the project, including updates.

Implementation Specialist/Trainer

The Implementation Specialist/Trainer (IS) will work closely with the County 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 County'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 County'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 County's configured environment going into the training. Trainers have the following responsibilities:

1. Provide training to the different County 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 3rd 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 County 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 County'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 County'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 County'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 County's Data Conversion Expert in loading the preliminary cut of the converted data and test it
24. Communicate directly with the County'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:

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

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

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

County Executive Sponsor

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

- Participate on the project Steering Committee
- Promote the project throughout the County
- Monitor the progress of the project
- Monitor the overall County impact
- Empower the County Project Manager and the core project team to make decisions
- Make timely decisions
- Maintain the authority to set priorities, approve overall scope and settle issues / priorities that significantly affect the project and the County
- Support the Project Managers in accomplishing the project goals
- Provide a vision of the County's goals
- Maintain an active relationship with CityView Management

County Steering Committee

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

- Attend Steering Committee meetings
- Set priorities
- Approve scope and scope changes
- Resolve escalated issues
- Provide strategic guidance to achieve the define project goals
- Promote the project throughout the County
- Commit the required resources to the project and approve new ones when required
- Monitor the project progress
- Monitor the overall County impact
- Approve extensions to project timeline or addition of new County resources to resolve County -side delays
- Empower the County Project Manager and the core project team to make decisions
- Generate timely decisions
- Conduct periodic review of project progress
- Make strategic decisions to manage business and project risks
- Support both Project Managers to accomplish project goals
- Have an active relationship with CityView management

County Project Manager

The County Project Manager is responsible for the overall County deliverables and the day-to-day management of the project. This resource is the primary liaison between the CityView Team, the County'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 County's Project Manager:

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

County 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 County'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 County'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

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

County 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 County's Data Conversion Expert:

- Act as the primary contact for CityView Data Conversion Specialist
- Acquire knowledge from the CityView Data Conversion Specialist as analysis & mapping is performed
- Understand the database structure through knowledge transfer and documentation provided by CityView
- Provide file layouts, where available, for existing data sources
- Provide data sources in an agreed to format
- During the analysis, provide documentation pertaining to the current systems (existing user manuals, etc.) if available
- Lead the analysis of the existing data sources as they relate to the database
- Finalize and approve the data mapping documents once prepared and delivered by the CityView Data Conversion Specialist
- Test and potentially accept the preliminary data conversion cut and any other subsequent data conversion cuts whether performed by CityView or the County's resources
- In coordination with the Database Administrator, prepare any other database environments that might be required for data cuts

- In coordination with the Database Administrator, prepare the production database for the final cut data load
- Work in conjunction with CityView to identify and possibly resolve conversion issues by directly communicating them to the project team, CityView, users and management
- Participate in the Go-Live preparation planning
- 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:

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

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 County's Systems & Network Administrators:

1. Prepare servers for initial software setup and configuration
2. Provide setup of servers and provide network connectivity
3. Setup required peripherals for the different environments
4. Provide setup of clients' workstations if required
5. Setup testing environments as requested by the City's Project Manager
6. Participate in Go-Live preparation tests
7. Should be present for Go-Live

County End Users

These resources will be trained on the proposed products. Below is a list of responsibilities to be performed by the County'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

The project plan will be defined by the Project Managers as an initial step in the project. CityView has included a tentative project schedule that includes a very tight timeline that accounts for minimal disruptions to the project schedule. A schedule from the projected (subject to change) project manager, Teri Wright, will be produced as an initial step in the project.

IX. Project Acceptance

After delivery of the fully configured solution, we expect the County 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 County will be asked to formally accept the delivered solution for Go-live. Following go-live the CityView project team will work with the County to record any known issues. The project team is responsible for the resolution of these known issues. 30 days after Go Live CityView will request a formal letter of acceptance that substantiates the product has been delivered and is being used successfully in a live, production environment to accept permit applications, generate fees, record fee payments and generate correspondence associated with permit and license processing.

During the first 4 weeks after go-live, the project team will begin to familiarize and transition the project to the Technical Support group. At the end of 6 weeks the Project Manager will arrange a formal hand-off involving the County, 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

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 County 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 County 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 County Project Sponsor and CityView Project Manager for their review and approval.

Sample Change Order Document

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

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

XI. Issues & Problem Resolution

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 County'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.

XI.1 Escalation Process:

CityView escalation levels in the order listed below:

1. Project Manager
2. VP, Professional Services
3. VP, Business Operations

County escalation levels in the order listed below:

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