

# CITY OF PUYALLUP

## ONE PUYALLUP - DEVELOPMENT & PERMITTING SERVICES DEPARTMENT

CityView Permitting Software

Project Update

9.22.2020



# PERMITTING SOFTWARE OBJECTIVES

- ▶ To improve overall customer service relating to development and permitting
- ▶ To improve overall permitting efficiencies
- ▶ Provide transparent permitting processes
- ▶ Provide a user friendly customer permitting portal to allow one-stop, digital access to permit applications, inspection requests, and planning and zoning approval
- ▶ Provide dashboard reporting by having the ability to track permit review and turnaround times, overall project progress, and staff workloads
- ▶ Transition to a paperless review process using Electronic Plans Review
- ▶ Empower inspectors to schedule, complete site visits and upload results directly from the field via a mobile application
- ▶ Transaction Management by allowing for online payments and in-person cashiering/receipting



CityView



# CITYVIEW SOLUTIONS

AN OUT OF THE BOX BEST  
PRACTICES/INDUSTRY STANDARD  
PERMITTING SOFTWARE



CityView Property  
Information



CityView Permits &  
Inspections



CityView Planning



CityView Code  
Enforcement



CityView Cashiering



# HIGHLIGHTS OF CITYVIEW SOFTWARE & OUTCOMES

## ► CityView Customer Portal = Improved Customer Convenience

*“if I did everything right, this has been the easiest submittal I have ever done” – Sharon R Bowles, Patterson Group*

- ❑ Portal provides a 24/7 customer service option
- ❑ Flexible online application process where users are prompted for only the required data, including electronic documents specific to the type of application.
- ❑ A messaging and notification mechanism for the City to communicate with applicants, request additional information, and to allow applicants to modify their application.
- ❑ A fully integrated shopping cart that will allow citizens to pay for City services conveniently and safely



# CONTINUED

## ▶ CityView Digital Review = Time Savings

*“South Jordan is now meeting their goal of a 14-day turnaround from acceptance of a permit application to approval.” – Cory Day, Chief Building Official, City of South Jordan, UT*

- ❑ Provides an electronic plan review process and tool(s) for marking up plans and noting deficiencies
- ❑ Integration with the customer portal to reflect status changes to applications and correspondence, including electronic documents, with applicants
- ❑ Software has built in transparency by design which results in better accountability
- ❑ Customizable form letters and permit templates for outcomes of application processes that are integrated with workflow for ease of generation



# CONTINUED

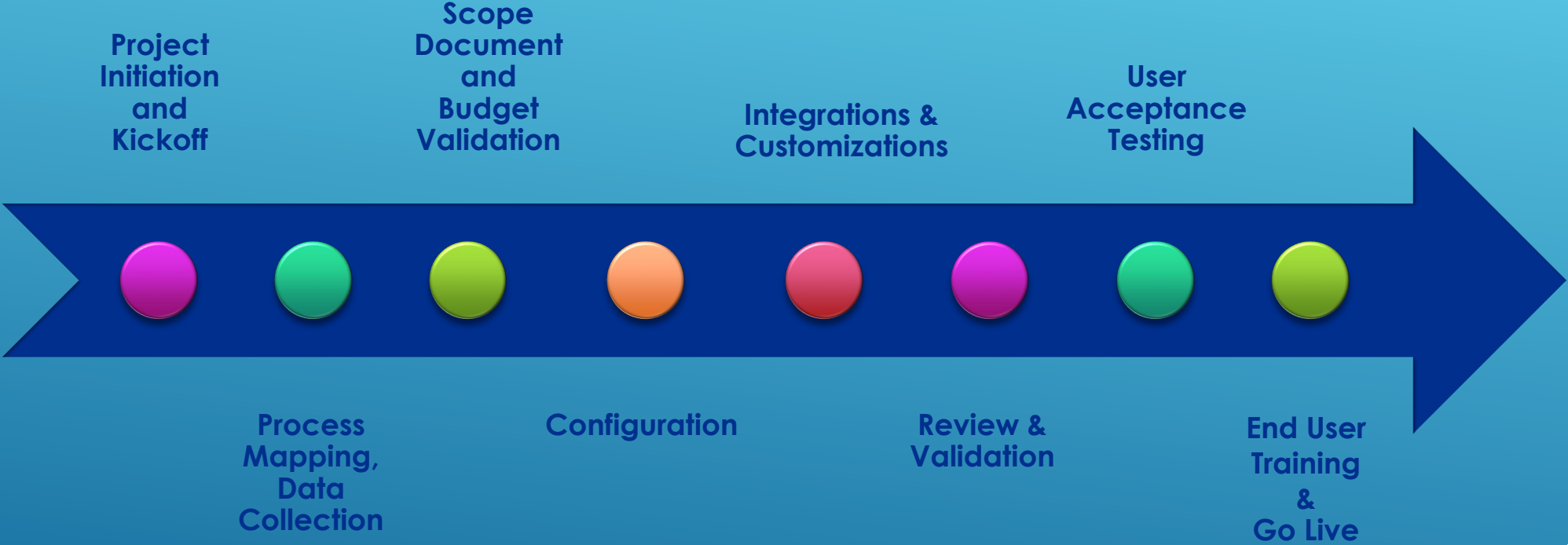
## ► CityView Mobile = Field Staff Efficiency & Improved Customer Service

*“Our building inspectors love it because they can look at all documents related to the project which may affect how they measure the requirements of the inspection.” - Kevin Cully, DBA Administrator/Analyst, Cherokee County*

- ❑ Building & property information along with the digital plans available in the field to inspection staff
- ❑ Manage assigned inspection queues for inspectors by automating inspection scheduling
- ❑ The ability to email inspection results including corrections in real-time to permit contacts
- ❑ Improved customer service as CityView Mobile communicates with CityView Portal and the office staff interface in real-time so less burden on internal staff to support field staff



# Implementation Methodology



**CityView**



# PROJECT INITIATION/KICKOFF (CURRENTLY UNDERWAY - OCTOBER 2020)

- ▶ Contract review and project planning [Done]
- ▶ Resourcing & scheduling [In Progress]
- ▶ Initial client pre-work & information gathering – [In Progress]
- ▶ Project kick-off - [October]





# PROCESS MAPPING/DATA COLLECTION

(NOVEMBER 2020/JANUARY 2021)

- ▶ Solution walkthroughs (Administrator & Workbooks)
- ▶ Collection of business process data
- ▶ Collection of output requirements (documents/letters/reports)
- ▶ Collect and document fees
- ▶ Define and document requirements for integrations & customizations

**Outcome** – Scope document & process/workbooks sign-off



# SCOPE DOCUMENT (INCL DATA MAPPING DOCS)/BUDGET VALIDATION (DECEMBER 2020 – JANUARY 2021)

- ▶ Audit scope document requirements and contract
- ▶ Finalize contract estimates and 'new' work identified
- ▶ Sign off any required change orders
- ▶ Client milestone sign-off before configuration begins

**Outcome** – Approved scope document & Budget



# CONFIGURATION (JANUARY 2021 – APRIL 2021)

## ► Configuration is comprised of creation of:

- ❑ Letter templates
- ❑ Fees, valuation, work items, classifications
- ❑ Activity workflow
- ❑ Custom data fields
- ❑ Look-up table values
- ❑ Security
- ❑ Batch rules & scheduled processes

## ► Initial property data load

## ► Configuration of CityView Portal and Mobile



# INTEGRATIONS & CUSTOMIZATIONS (INCL QA) – (APRIL 2021 – MAY 2021)

- ▶ Develop customizations as per scope document
- ▶ Develop integrations as per scope document

**Outcome** – Configured system ready for client validation



# REVIEW & VALIDATION (MAY 2021 – JUNE 2021)

- ▶ Validation reviews with SMEs (12 sessions - 2 hours each)
- ▶ Subject Matter Experts (SME) validation testing
- ▶ Client driven test scripts
- ▶ In-scope refinements (concurrent)
- ▶ All on CityView's hosting center [Orion]

**Outcome:** Approved environment for User Acceptance Testing



# USER ACCEPTANCE TESTING (JULY 2021 – AUGUST 2021)

- ▶ Environment moved to client onsite for UAT
- ▶ Integrations tested **thoroughly** against City's infrastructure
- ▶ Final acceptance testing is conducted
- ▶ In scope refinements will be made in **hosted** environment
- ▶ **Deliverable:** Formal acceptance of solution for Go Live



# END USER TRAINING & GO-LIVE (SEPTEMBER 2021 – OCTOBER 2021)

## ▶ End User Staff Training

- ❑ City User Training for business use of the system
- ❑ Citizen/Customer Portal – Select City Users will be trained to navigate through portal processes so that they can train citizens to not only use the portal but to also answer citizen questions on the use of the portal
- ❑ City Field Staff will receive training on the highly intuitive CityView Mobile
- ❑ City Review Staff will receive training to effectively conduct Electronic Plan Review using Bluebeam Revu markup tools

## ▶ Final on-premise environment delivery

## ▶ Go Live - Production! [5 days Go Live Facilitation]

## ▶ Begin Advanced Training (Configuration and Report Writer)

Outcome – **WE ARE LIVE!**



# POST GO LIVE

- ▶ Continue Advanced Training
- ▶ Provide go-live Support (approx. 1-1/2 months)
- ▶ Transition to Software Support and Maintenance Agreement

