



REQUEST FOR QUOTE

ACCELA DEVELOPMENT (REPORTS AND CONFIGURATION CHANGES)

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City of San Leandro

Coordinator:

Tony Batalla

Information Technology Manager

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## Purpose and Objective

The purpose of this document is to provide descriptive information about each Report or Configuration change to be developed, updated, corrected, or created. The objective of this document is to receive a fair market value quote for the work detailed herein and to establish guidelines for working together on this project.

## Background

The City of San Leandro has several outstanding issues related to its Accela implementation since going live in February, 2015. It would like to request an established consultant (i.e., Accela Partner) to help the city resolve these issues. Affected divisions include: Planning, Building, and Engineering. Leads for each group have been identified and will work closely with the consultant to resolve specific issues related to their division.

## Report Approval Section

This section contains steps that the City of San Leandro has identified as its preferred way of managing this project. The process would include at minimum six steps with several City approval steps. The first step is for the City to propose a body of work to be completed (this will be based on the City's needs, priorities, and preference). approval is needed upon finishing this document stating all known requirements are clear so development of the report/chart can proceed. The second approval is needed after testing is complete and the report/chart is ready to be implemented into Production.

<b>Approval Steps</b>	<b>Approver (Name/Signature)</b>	<b>Date</b>
1. City proposes "body of work" (e.g., a Chart/Report to be created, modified, updated, etc AND/OR a configuration change in the Accela system)	City Project Team	
2. Consultant reviews request and estimates time and cost for the body of work	Consultant	
3. City reviews cost and time estimates and approves/denies	City Project Team	
4. If approved, work is scheduled and executed per requirements	Consultant	
5. City tests and approves final results	City Project Team	
6. Consultant closes request and sends invoice	Consultant	

## Request and Configuration Changes List (as of 11/09)

This section includes all known issues, errors, and changes that are required as of 10/30/15. The list, although comprehensive, is not exhaustive as there may be other issues identified that the City would require be reviewed. However, the City expected a quote for work based on this list. Examples can be provided and in many cases are already available as needed.

<b>Number</b>	<b>Name</b>	<b>Requirements</b>	<b>Type (New Report, Fix, Bug)</b>	<b>Examples Provided</b>
1	Project permits by entitlement	Number of planning project permits by entitlement (such as CUP, AR, AE, etc.) and to be able to sort by zoning district, multiple zoning districts, neighborhood, HOA, City Council District, date range, date received, and date closed (or final per Tidemark)	New Report	No
2	Residential square footage	Amount of new residential square footage sort by date range	New Report	No
3	Number of project permits	Number of planning project permits sort by date range, date received, and date closed (or final per Tidemark)	New Report	No
4	Staff assigned	Staff assigned to active planning projects, planning appeals, and planning pre-application	New Report	No
5	Planning Case Report	Need to run a report similar to the one from Tidemark called PLN – Planning Case Report (see attached), but with additional information: Type of project, Closed date or final (per Tidemark), Denied, Withdrawn, Expired, Revoked, Fees paid, and Zoning district	New Report	Yes (Confirmed )
6	Ad-hoc Report Training	Train key staff on how to use ad-hoc reports in Accela	Training	
7	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up comments from the Workflow Comment Box. Also, can the Workflow Comment Box have unlimited characters?	Fix Report	No
8	Building Reports Fix:	Consolidated Comments Report for Building Permits need to pick up comments from comments tab, Conditions from Conditions Tab and Documents from the Documents Tab (that way these items all get to the applicant at one time through Consolidated Comments)	Fix Report	Yes

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9	fees not calculating	Mike Schaffer added but fees not calculated; believe related to scripts written by TruePoint, include training or procedure on how to add additional users	Bug Fix/Training	Yes
10	Future new users	How to add/remove users and rates	Fix/Training	Yes
11	Grading, Encroachment Permit New Workflow Tasks during review and post-issuance	Need to add new workflow tasks: <ul style="list-style-type: none"> <li>• 6 tasks in Grading Permit</li> <li>• 3 tasks in Encroachment Permit</li> </ul> Include training or procedure on how to do this for ourselves.	Fix/Training	Yes (See Update)
12	Encroachment permit report	Add new items to encroachment permit report, report is written in crystal reports, specifically the deposit amount field and the total amount field.	Fix Report	Yes (Confirmed (
13	Permit intake fields	modify permit intake fields to help streamline permit intake, train on doing this in house	Fix/Training	No
14	Missing permits	(See #15 below)	End User Issue/ACA	No
15	Unable to access system	Cannot find permit using search and users thus are unable to schedule inspection. Issue is because outside users need to use record number/permit number to find anything using search. Address, parcel, etc search results are hit and miss.	End User Issue/ACA	No but confirmed by IT on 10/30
16	Report Scheduled by today department	Inspection scheduled for 6/9. However it does not show up to be printed out in, "Scheduled by today department."	Fix Report	No
17	Missing Clients	Client unable to pull up in Accela	Bug Fix	No
18	Add Supervisor button to Grading Permit workflows	Add Supervisor button to Grading Permit workflows	Fix	Yes

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19	Inspection error	Inspection scheduling error message,	Bug Fix	Yes
20	Receipt error	Payment receipt number different when than report, example record payment receipt #73509 is #73510 when report is ran	Bug Fix	No
21	Inspection scheduling	Accela will not schedule an inspection afterhours (such as a weekend).	Bug Fix	No
22	Parcels in Flood Zone	Parcels that are not in flood zone are showing that they are	Bug Fix	No
23	License numbers cant be changed	Auto populates license numbers for architects, engineering, contractors and program will not let you correct the number or unattached the professional from the record	Bug Fix	No
24	Health and Safety Fee	Fee is not calculating right come up \$0 every time	Bug Fix	Yes
25	Fire Permits	Creating new Fire Application, program does not give you a contractor option	Bug Fix	no
26	Encroachment Permit Inspections	Better grouping of inspections, fix some of the autofill fields when resulting inspections, tie inspection rates to the master rate table	Bug Fix	no
27	Billable button in Encroachment & Grading Permit Workflows	All time entered should be default billable. Change checkbox to read "unbillable" instead of "billable"	Fix	Yes
28	Admin reports	Update Payment Record, Invoice and Receipt documents	Fix	Yes
29	Automatic emails	Setup automatic emails to notify other Accela users when a task is assigned to them.	Fix	No
30	Notices of Violation	Setup notice of violation reports for encroachment permits and grading permits	New Report	Yes

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### Timeline for Project

The City would like to begin **as soon as possible** and will coordinate with the Consultant to determine timelines for each item listed above.

