



## Legislation Details (With Text)

**File #:** 20-0026      **Version:** 1

**Type:** Gen. Bus. - Staff Report      **Status:** Agenda Ready

**In control:** City Council Regular Meeting

**On agenda:** 2/18/2020      **Final action:**

**Title:** Enterprise Project Implementation Quarterly Update of 1) Enterprise Resource Planning (ERP) and 2) EnerGov Land Management System (LMS) Solutions, Including a Demonstration of the LMS Customer Tool, Known as Citizen Self Service (Interim Information Technology Director Griffin).  
RECEIVE REPORT

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:**

| Date      | Ver. | Action By                    | Action | Result |
|-----------|------|------------------------------|--------|--------|
| 2/18/2020 | 1    | City Council Regular Meeting |        |        |

**TO:**

Honorable Mayor and Members of the City Council

**THROUGH:**

Bruce Moe, City Manager

**FROM:**

Patrick Griffin, Interim Information Technology Director

**SUBJECT:**

Enterprise Project Implementation Quarterly Update of 1) Enterprise Resource Planning (ERP) and 2) EnerGov Land Management System (LMS) Solutions, Including a Demonstration of the LMS Customer Tool, Known as Citizen Self Service (Interim Information Technology Director Griffin).  
**RECEIVE REPORT**

---

**RECOMMENDATION:**

Staff recommends that the City Council receive the quarterly status report regarding implementation of the two enterprise solutions.

**FISCAL IMPLICATIONS:**

There are no fiscal implications associated with the recommended action. However, this report discusses projects with fiscal implications previously approved by the City Council.

**BACKGROUND:**

On July 17, 2018, the City Council approved the purchase of two major software enterprise solutions: 1) Tyler Munis Enterprise Resource Planning (ERP) system, supporting all financial, human resources, and payroll activities; and 2) Tyler EnerGov Land Management System (LMS) supporting planning, permitting, inspection, and code enforcement activities. During that meeting, the City

Council requested quarterly updates on the implementation of both projects to ensure they remain on target and within budget. Prior project updates were provided to the City Council on January 2, 2019, May 7, 2019, and November 19, 2019.

## **DISCUSSION:**

### **Munis Enterprise Resource Planning (ERP) Software**

After the City Council approval of the project in July 2018, an internal project launch to establish project teams and begin initial work was held August 2018, and the official Tyler project kickoff meeting took place October 2018.

Since project launch, Information Technology (IT) and Finance departments have been meeting weekly to address project milestones, deliverables, and requirements. Several major activities have been completed including development of a revised Chart of Accounts, establishment of user roles and permissions, configuration of the new system, forms development (i.e. checks; purchase orders) and significant training in the various modules of the financial system. In addition, IT staff have been working closely with Tyler to convert data from the City's existing financial system (Eden) to the new system.

During these activities, staff throughout the organization have been identifying opportunities for business process improvement to improve efficiencies and reduce redundancies in work processes. This has been an ancillary benefit of the project and will help contribute to efficiencies in processing and reporting of financial data.

Finance and IT continue to move forward with project activities, and the City is on schedule to implement the Financials application of the Tyler Munis software on July 1, 2020. Additionally, project costs remain within budget.

A second major milestone for the Munis software is implementation of the Human Resources / Payroll applications. A project kickoff meeting was held December 9, 2019 to introduce the City team to the Tyler project team and begin planning for implementation, which is scheduled for January 2021. Work has begun to properly configure the new system and to convert existing data, and this work will affect Finance, Human Resources, and IT; thus the reason for project launch with a twelve month timeline. When fully implemented, the new system will provide for features including online timekeeping with electronic review and approval, and an Employee Self Service portal that employees can use to update personal data such as address changes, tax withholding modifications, and other functionality that is currently primarily manual.

### **EnerGov Permitting Solution**

In July 2018, the City Council also awarded a contract to Tyler for the EnerGov Land Management System (LMS) solution. The EnerGov project kickoff meeting took place January 2019 and was well attended by personnel from several City departments.

City staff meet weekly to discuss project activities and to ensure project milestones are addressed in a timely manner. Several onsite configuration and training sessions have been conducted by Tyler, and City staff from Community Development and IT have been working diligently to ensure the project stays on schedule.

During the quarterly update provided at the November 19, 2019 City Council meeting, staff presented a staggered approach for go-live to minimize disruption to customer service and to make certain that

project resources can address issues as they arise during go-live. The Council was amenable to this, and staff proceeded with planning efforts to launch the first phase of the project on January 21, 2020. This first phase includes permits processing (application, calculation, and issuance), mobility for field personnel, and implementation of the Customer Self Service portal for use by applicants to track the status of their projects and schedule inspections.

Staff is happy to report that the January 21st go-live launch for Phase One was a success. Customers are able to apply online for permits, field mobility via iPads is in place, and customers and staff both are seeing the benefits of the new system. Within the first week of launch, there were over 200 user accounts established in the Customer Self Service system.

The next phase of implementation will include the various “special” permit types including Special Event, Banner, Sound, Block Party, and Fire one-time use permits. These permits require extensive review by multiple departments, which in turn requires focused attention on the development of the permit application workflow. Focused training on each of these permit types is occurring this week, with the go-live scheduled for Thursday February 20, 2020.

The final phase of the EnerGov project will be the implementation of the Planning module, which will provide the City with an electronic system to track all types of planning applications, monitor the status of review and approval, and provide the public the ability to access this information electronically via the Customer Self Service portal. Additionally, the final phase will include the implementation of electronic plan review, which allows for review and transmittal of plans and comments electronically. This will decrease paper usage and cut down on the need for physical transportation of plans and plan comments, while increasing efficiency through collaboration-style review. The Planning module, including electronic plan review, is scheduled for implementation by May/June 2020.

Both the Munis and EnerGov projects are on schedule and within budget. With the implementation of both of these critical enterprise applications, I.T. staff will be budgeting for ongoing disaster recovery / business continuity services from Tyler Technologies beginning in Fiscal Year 20-21. This will ensure that, in the event of a disaster, the City can continue critical operations with little or no interruption, including processing of payments to vendors, issuance of payroll checks, and inspection of structures to identify potential damage resulting from the disaster.

#### **CONCLUSION:**

Staff recommends that the City Council receive the quarterly status report regarding implementation of the two enterprise solutions.

#### **PUBLIC OUTREACH:**

Staff determined that public outreach was not required for this item.

#### **ENVIRONMENTAL REVIEW:**

The City has reviewed the proposed activity for compliance with the California Environmental Quality Act (CEQA) and has determined that there is no possibility that the activity may have a significant effect on the environment; therefore, pursuant to Section 15061(b)(3) of the State CEQA Guidelines the activity is not subject to CEQA; thus no environmental review is necessary.

**LEGAL REVIEW:**

The City Attorney has reviewed this report and determined that no additional legal analysis is necessary.