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Title: Enterprise Project Implementation Quarterly Update of: 1) Munis Enterprise Resource Planning (ERP), and 2) EnerGov Land Management System (LMS) Solutions; Demonstration of Munis Financials Module (Information Technology Director Hackelman).
RECEIVE REPORT

Sponsors:

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Attachments:

Date	Ver.	Action By	Action	Result
7/6/2021	1	City Council Regular Meeting	received and filed	

TO:

Honorable Mayor and Members of the City Council

THROUGH:

Bruce Moe, City Manager

FROM:

Terry Hackelman, Information Technology Director
Steve S. Charelian, Finance Director
Tatyana Roujenova-Pelteкова, Senior Management Analyst

SUBJECT:

Enterprise Project Implementation Quarterly Update of: 1) Munis Enterprise Resource Planning (ERP), and 2) EnerGov Land Management System (LMS) Solutions; Demonstration of Munis Financials Module (Information Technology Director Hackelman).

RECEIVE REPORT

RECOMMENDATION:

Staff recommends that the City Council receive the quarterly status report regarding the implementation of the two enterprise solutions, and accept a presentation on the features of the new Munis Financials module.

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, payroll, utility billing, asset management, and business license 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. The following project updates were provided to the City Council:

- 2019 - January 2, May 7, and November 19;
- 2020 - February 18, June 23, and November 4; and
- 2021 - February 2.

DISCUSSION:

Due to the COVID-19 virus outbreak, the project was put on hold in March 2020 and restarted in July 2020. As a result, staff re-calibrated the project schedule to accommodate for the lost time and to reflect the challenges of implementing both systems using vendor resources that were 100% remote. At this time, both projects are within budget and meet the re-calibrated schedule.

Since the July 2020 restart, staff has made significant strides in implementing the ERP and LMS projects. The following is a status on the ERP and LMS implementations.

Tyler Munis ERP

On January 4, 2021, the City went live with the Tyler ERP Financials. The financial modules implemented included general accounting (general ledger), budget, project accounting, purchasing, contracts, accounts receivable, general billing, accounts payable, and more. To streamline processes further, system integrations were established amongst Munis Financials, EnerGov LMS, Content Management, Cashiering, and Hub (user dashboard).

The ERP financial modules have been successfully used by staff for all financial activities, including the budget process. Staff is benefiting from the electronic workflows (eliminating paper and email offline processes) that support more efficient processes and increased visibility of financial data and supporting documentation (via the electronic Tyler Content Management System).

The successful implementation of the ERP Financials was critical because the modules provide the foundation upon which the subsequent ERP components are implemented: Human Capital Management (Payroll and Human Resources), Business Licensing, Utility Billing, and Asset Management.

At present, HCM project activities are progressing and following the current schedule closely. This is a major implementation including payroll, human resources, and electronic timekeeping. The project tasks include components configuration, data migration, integration, testing, and training with a go-live date of September 2021. During the implementation, as staff learns more about the HCM features and functionality, they continue to evaluate existing business processes and identify opportunities for business process improvements to increase efficiencies and reduce redundancies in work processes.

Once HCM is implemented, staff will continue with the remaining ERP modules as follows:

- Business License - June 2022
- Asset Management, Transparency - December 2022

- Utility Billing - June 2023

Tyler EnerGov LMS

EnerGov's initial phase was implemented in January 2020 and included online permitting, field mobility, electronic document management, and customer online portal components. Despite the impacts of COVID-19, staff continued to roll out online permits and planning application types. In addition, staff implemented an online payment system to support the permit and planning activities and digital plan submittal and review processes.

On June 17, 2021, the EnerGov solution was upgraded to a more current software version that provides enhanced capabilities and functionality including:

- Streamlined electronic plan review
- Improved customer experience via the online portal allowing citizens to track projects through the “My Work” dashboard
- Improved search and query capabilities
- Addressing identified system bugs and updating the technology framework

In February 2022, staff anticipates upgrading EnerGov to version 2021, which provides additional features and functionalities that further benefit the City. Thanks to Tyler’s evergreen philosophy committed to continuously evolve its technology, the City can upgrade the system at no additional cost and get a full value of the newest features and functionality. The EnerGov version 2021 further modernizes the technology framework to support current and future needs and further improves the user experience.

IT Enterprise Systems Updates

Staff successfully implemented Tyler’s Disaster Recovery Services last December which ensures system access if a disaster event occurs. In July, staff will perform the annual verification testing to confirm that Tyler can successfully support the agreement recovery time objective of 24 hours.

Staff continues to learn more about the Tyler systems and is persistently working to improve system performance, stability, reliability, and security. This includes leveraging Tyler solutions that are used by both ERP and LMS such as Tyler Content Management, Tyler Cashiering, Tyler Hub (dashboard - shared user launchpad), Tyler Enterprise Identity Management, and more. Staff carefully plans and analyzes each system upgrade to ensure there are no adverse impacts, particularly considering the complex ecosystem interconnecting the multitude of systems.

CONCLUSION:

Both Tyler ERP and LMS projects are on schedule and within budget. City staff is seeing the benefits of the new systems through electronic (paperless) workflows, improved data access, improved reporting and analytics, elimination of redundant processes, increased security, improved mobility/field access, and customer service via online portals. Staff recommends that the City Council receive the quarterly status report regarding the implementation of the two enterprise solutions.

PUBLIC OUTREACH:

After analysis, staff determined that public outreach was not required for this issue.

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.