

Accele **User Conference** 2012

City of Lincoln, NE – How to Maximize Your AIM

Getting the most from your Accele Implementation Methodology

Room, Day and Date



Accela **User Conference** 2012

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Lincoln Nebraska



The City of Lincoln, Nebraska has earned a reputation as one of the Midwest's most beloved cities. Home to fine culinary and artistic treasures; a budding live music scene; breathtaking parks, golf courses and trails; and a friendly Midwestern attitude, Lincoln offers the exhilaration of a big city and the serenity of the countryside all in one place.

- **TYPE:** City
- **POPULATION:** 255,000
- **GEOGRAPHY:** Mid-west
- **# ACCELA USERS:** 175
- **PRODUCTS USED:** AA Building/Health, AMO, AGIS, ACA
- **ACTIVITY:** 55,000 permits 2011



Development Services Center

“We have a new vision statement - to improve everything we touch!” – Fred Hoke, Building and Safety Director/Manager of Development Services Center

Challenge

- Mayor needing to respond to the building community to improve application, review, and inspection times.
- Replace legacy Permits Plus system that had been out grown and streamline processes with new technology.
- To repair internal disconnects between DSC related department personnel and processes.

Solution

- The physical creation of the DSC service space.
- Implementation of Accela Automation to streamline and automate planning, permitting and business licensing.
- Give the workers a better toolset by implementing Accela Automation, Mobile Office, Citizen Access, and GIS enabling field staff and construction industry professionals.

Results

- Go-live planned September 17, 2012.
- Construction community involvement with BETA testing.
- Project implementation completed \$100K under budget.
- Mayor’s objectives met.

Important Viewpoints

Consider this - do you want to be the best?

- It's not just a software project – achieve differentiation!
- Write your project success story before you start.
- Establishing relationships that last – Connecting!
- Create an Overwhelming Success Framework (brainstorm, fill a white board, find the stack of energy for change, and gain commitment!)
- Communications Plans – Keeping it Real!
- The team that works – Lincoln SME's are the best!
- Opportunities exist in every step of the AIM

Establish relationships that last - Connecting!

- Take time to build relationships and celebrate success!



E.g. Host an Accela dinner party at your home!

Establish relationships that last - Connecting! ²

- Solicit pictures of project staff and place them in your “Accela Analysis Center”. People will talk about the pictures and people in them. Also, those who travel can stay connected to loved ones.
- Organize and SME meal out to celebrate milestones.
- Keep management involved and informed with participation in SME meetings and threaded discussions.
- Lincoln Mayor Chris Beutler has many times been on our project “construction” site and has appeared in our newsletter many times.

Overwhelming Success Framework

- **Constancy of Purpose**

 - Leadership

 - Spirit to be the best

- **Collaboration**

 - Organization shares in the understanding and resolution of business challenges as a collaboration norm

- **Communication**

 - Two way understanding and articulation of vision

 - Proactive internal and external communication

- **Cultural Change**

 - Establish an identity for the DSC

 - Become value focused

- **Create Innovation**

 - Welcome innovation and challenge the workforce

Communications - Keeping it real!

Newsletter

- Content
- Use
- Planned Growth
- Context beginning/end

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June 8, 2012

ACCELA
Government Software

focus

Please print a copy of this newsletter for staff that do not have e-mail.

Designed for all staff and departments who use Accela

Project Status Report

What busy week! Accela's Rocky Copeland was on-site helping us keep the project ball rolling. Much progress was made in all areas. Subject Matter Experts (SME's) are still digging in! The conversion effort is still extremely labor intensive. The core conversion effort will escalate into the first pass conversion which Accela's Andy Winningham will execute June 18. We will be on pins and needles waiting for the conversion results.

Credit card processing took a leap forward this week. A core group met to discuss the many facets regarding the manner in which credit cards will be accepted in the DSC and through Accela's Citizen Access. Part of setting up the credit card process is compliance with merchant agreements which sometimes make simple tasks complex.

The development of the GIS component has also been moving along. James Newman from Health delivered a remaining piece to our GIS puzzle and Jeff McReynolds will be constructing the final layers and producing mapping services to connect with Accela's GIS. Jeff says he can deliver the initial AGIS services in the next two weeks.

Project Dox upgrade has been wrapped up. Sure, there are a few things that need some attention; however, the core upgrade to 8.1 is complete. Also, we have had discussions with Avolve Software to keep moving forward with another important task - building an interface between Accela Automation and Accela. We have determined that Project Dox will basically tap on Accela's door on a scheduled basis to pick up the permit record types which have been flagged with a check box we will call electronic plan review (Y/N). Project Dox will really just need to pull several fields necessary to create projects from this service.

Accela's Mobile Office has been loaded onto a Panasonic Tough Book. Jerris Nider finished the download and we are connecting to the Accela DEV environment...anxious for converted data; also, anxious for the reports. Our SME's will need to begin reviewing/approving Accela's report specifications so that the Accela report writers (several of them) can get moving ahead. Meanwhile, these Accela resources are idling. SME's will need to begin to carve out some time to review these report specs every day.

Regarding Crystal Reporting for our project, we have run into a peculiar issue with the execution of certain reports (built through the Crystal Wizard) and certain desktop systems which will not execute reports from the Accela environment. They execute from Crystal though. Regardless, we have some resources who are shaking out the details of this peculiarity. The Script writing is still coming along. We are going to engage Accela's Seth Axthelm to help us complete the Script writing effort. Matt Hart, who was on-site last week helping with Script writing, is now working on the configuration of Accela's Citizen Access. Rocky met with Casey Winkels and Mark Bronzynski from eDocument Resources to work out some of the Accela - On Base integration issues. The SME's provided critical information to Casey and Mark regarding document types and volume of documents to expect from the business processing in Accela. A big thank you to everyone for creating such a productive week!

See them all at <http://dsc.lincoln.ne.gov/accela>

Communications - Keeping it real!

- Project challenges
- Project contests
- Question of the week
- Interesting events
- Engage your future AA users

Page 2

Current Project Challenges

OnBase EDMS - After many months of evaluation, ROI models, and proof of concept projects, OnBase - an enterprise electronic document management system (EDMS) - has now become a reality. This is such great news for the project and for Lincoln! This is a significant commitment in software and financial resources. There are so many "thank yous" that need to be extended for all of the due diligence and extensive behind the scenes work that went into making an enterprise EDMS a reality for the City. A group meeting was held on-site Wednesday with e-Document Resources, the State, IS and related staff. Project plans are being made to rapidly bring the focus of the project first upon the needs of the Accela Automation project and then an extended implementation to meet the many needs of other city departments. In our preliminary discussions with eDocument Resources, a secondary solution surfaced regarding the scanning needs of the Health Department as an interim solution for scanning during the first six months of the project go-live period. There are some contractual issues being worked out between the parties. Meanwhile, the Accela Automation implementation team is working with e-Document Resources in creating an environment for Accela Automation. Initially, it appears that having an environment created and communicating with Accela may be possible within the next two weeks.

Credit Cards - The credit card solution for use at the DSC counter is moving along nicely. Lana Tolbert and Justin Meyer hosted a credit card meeting with the City Treasurer, Budget Office, and others. Some of the discussion points include how to handle the expenses the credit card company charges on a percentage basis, the physical type of credit card authorization devices, and reconciliation. Also discussed were compliance with the bank and on-line merchant accounts and use of VeriSign/PayPal. One decision point is whether or not to create a merchant account for each of the Building and Safety sections. At this time, we will move ahead with a credit card swipe device (about \$500) in the DSC. We will most likely end up with one merchant bank account and use the City Treasurer's arrangement with VeriSign/PayPal. Credit card usage on-line via Accela Citizen Access module will be worked out in the next two months. Also, the reporting mechanisms in Permits Plus already sorts and totals report data by money source so credit cards as a source is already accounted for. So, we appear to be ready in the current environment now. A similar report will need to be developed in the Accela Automation environment for use in September. It's exciting to see this group of people push ahead with credit card processing today instead of waiting for a future date after Accela Automation has been implemented. Way to go!

Crystal Report Enterprise - We still are celebrating this great news of the purchase and installation of an enterprise Crystal Report solution for the project and for Lincoln! Having the Accela Automation project be a catalyst of so many positive improvements is such a great thing to be part of. Bob Loos in IS made it his priority to get our Crystal Reports Server changes completed this week. We are now running Crystal Reports 2008 in our BOBI Edge 4.0 environment. We still have to deploy standard reports in this new environment; however, the interface with the Accela Adapter is in working order. We are anxious to see some of the reports begin to appear on the Accela Automation user console. When this is complete the issue will be removed from our current project challenge list.

ProjectDox - We are finding that ProjectDox is beginning to ramp up their use of i-OS platforms too. We may find that using i-Pads for field inspections may allow access to plans to review at our fingertips. We have continued to research other installations. We are getting more impressed at how the software is used to make some great benefits in other cities. Bend City Oregon is one which has done such a great job implementing ProjectDox and making improvements that they host a number of other governments on-site to demonstrate what a difference it has made in their city. We are waiting for Avolve Software to contact us to nail down the project plan and schedule for the upgrade. One more thing about plans. This week we have been looking at projection and display tables which are used as collaborative devices for plan review and GIS mapping discussions. We have found that this technology is evolving and we could potentially create a remarkable center for collaboration, plan review and brainstorming.



JIM WALKENHORST FRED A. HOKE
PROJECT MANAGER PROJECT SPONSOR

Our Accela project newsletter now reaches 367 people!

Subject Matter Experts

- Get those involved who have great current knowledge, experiences and want to do things the right way.
- Leave those who seem to be kicking and screaming!
- Get SME's with good technical abilities.

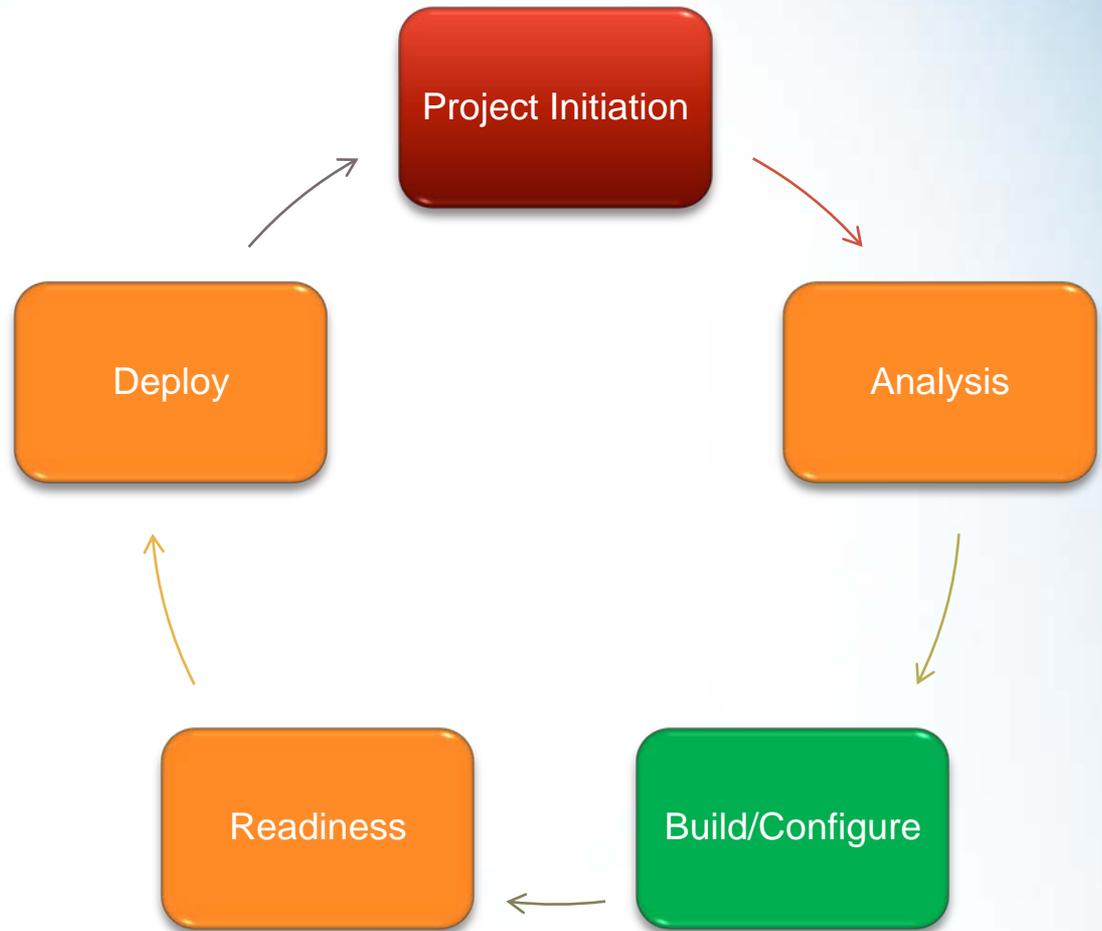


The project workers, SME bees, make quality honey!

Opportunities exist in every step of the lifecycle!

- Scope maximization
- Cost savings
- Process improvement
- Sub-project opportunities

Accela AIM Lifecycle



Scope Maximization

- Schedule a work session with the vendor to gain a greater understanding of each software module's functionality so you can gain an expanded sense of opportunity
- Find project hours to reapply/reuse
- Create parallel success

Accela Automation used as a catalyst for two major enterprise decisions:

- 1) On Base EDMS implementation
- 2) Crystal Reports Enterprise implementation

Cost Savings

Identify opportunities to manage and improve project costs every step of the way!

• Accela Analysis Center install after hours, avoid IS charges	\$1,500
• Accela comps (DK) site visit in the spirit of the dinner party	\$1,500
• Chg'd Accela product install/configuration saving COL	\$51,000
• Identified & recoup costs for IVR (no longer a project obj.)	\$48,195
• Negotiate software exchg, maint, credits, & adjustments	\$39,047
• Total-to-date	\$141,242
• New Expenditures/Purchases	
• Crystal Reports Enterprise (project contribution)	\$30,000
• Additional Script Writing (net hours swap)	\$13,200
• Net Saving to-date	\$98,042

Process Improvement

1 of 2

Mayor's Objectives

Identify the most dramatic changes in how you do business before anything else!

- Promote consistent building permitting practices throughout the City of Lincoln and Lancaster County
- Improve data sharing through efficient systems integrations
- Enhance functionality offered by current solutions to further develop and improve business processes
- Increase the availability of, and access to, pertinent information by appropriate users through single system/database
- Decrease support costs by implementing one system, configured to meet the needs of each participating department and/or agency
- Implement Accela Automation to allow various departments to provide the citizens with enhanced services via the internet with Accela Citizen Access (ACA), decreasing the need for face-to-face interaction
 - On-line customer access and self-service (electronic permits)
 - On-line submission of permit applications and inspection requests
 - On-line inspection scheduling
 - Create the ability for automated notification of results via email
 - Give customer(s) the ability to monitor the status of projects
 - On-line, document storage and retrieval;
 - Electronic fee payment (integration with financial system)
 - Prepare for the ability to facilitate the contractor licensing process electronically

Process Improvement

2 of 2

Mayor's Objectives

- Provide easy access to centralized geographic information by establishing a seamless integration with ESRI Geographic Information Systems (GIS)
- Provide wireless access to allow for inspections in the field using Accela Mobile Office
 - transmission of inspection results in real-time
 - leveraging GIS to determine optimal inspection routing
 - Create the ability to perform inspections and print reports in a wireless environment
- Increase reporting and performance management capabilities through standardized Reference Data (Address, Parcel and Property Owner) using a consolidated data repository (GIS and Assessors information system)
- Create the ability to view parcel and building records by leveraging GIS
- Improve business processes, resource management and customer service through Accela Automation
- Implementation of management dashboards for management reporting and monitoring of key activities and processes
- Assure data and financial accuracy in a secure environment

Sub-project Opportunities

- Implement credit card services
- Installed water billing customer payment Kiosk
- Project Dox was upgraded to 8.1
- Project Dox expanded role in Building and Safety
- Create a plans for use of i/OS platform and new apps

Project Initiation

- Opportunity for the Mayor to have project kick-off presentation with contractors, community, and subject matter experts.
- Set a project schedule, however find as many parallel tasks as possible.
- Look for ways to “crash” the project schedule as soon as possible.
- Hey, requirements change. Review the SOW carefully!
- Seek commitment to succeed and test willingness for change as soon as possible.
- Select only the best Accela professionals and SME’s

Analysis

A great opportunity for change is here!

- Identify as many changes as possible and assign them to the design effort, as a sub-project, or place in the project parking lot of great ideas
 - Parking Lot Sample:
 - Develop a World Class Web site
 - Single Complaint Tracking System
 - Property Genealogy
 - Integrate Clerk's Office permits
 - others ...
- Consolidation of permit record types
- Clean up workflow and streamline processes
- Identify/request product mods for Accela:
 - 1) Point-of-record scanning functionality
 - 2) Embedded checklists
 - 3) Contact info updates via ACA for Building module
 - 4) Others...
- Interface Fire Inspection data to mainframe LFR system
- Eliminate stand-alone work order/permitting system

Build/Configure

Maximize Accela build-out of contracted services:

- **Record build** – selected 80 specific records that work to Lincoln’s benefit as templates for building 60 of our own records
- **Script writing** – selected 30 specific scripts that work to the benefit of all departments to be used as templates for building 90 of our own records
- **Reports writing** – departments selected 15 reports each that work to their advantage that Accela would write.

Readiness

- Opportunity for the Mayor to invite certain members of the construction community to field test new services
- Introduce train-the-trainer concept
- Create hybrid UAT power user training
- Submitted 10 improvements to Accela's training center

Deploy

- Opportunity for the Mayor to “go public” – a planned event heralding the new system and accomplishment of published project objectives
- Begin gaining the benefits of the project deliverables
- Opportunity to reward the team
- Schedule meeting to begin the process of prioritizing parking lot projects

Opportunity to celebrate!

Additional Reasons-Lincoln's Success

- Mayor Beutler's support as visionary project leader
- Accela became a great partner and have been willing to work with us in all project aspects all along the way
- Project critical path was well communicated
- All the "right" resources were employed from Accela & Lincoln to carry the project to the finish line
- From initiation – completion, from agendas – final tasks, the SME's "brought it"!
- We accomplished more than we set out to do with the time/dollars committed to the project

The ahhh, gottcha's!

- Lincoln did not budget for Crystal Reports software
- Accela Crystal Adapter not certified for CR Server 2011
- Crystal Reports data connection execution problem
- The conversion effort was underestimated 4-6 weeks
- Some conversion data could not go through ADMT
- Travel budget was underestimated by 100%
- Did EMSE (Scripting) class via web, don't do that!
- EDMS solution was not finalized before the project start
- EDR solution was not finalized before the project start
- Our AMO laptops are worse than originally thought to be
- Interfaces that surfaced; e-gads!

Bonus Slide 1 – SME's on Conversion

- I wish that the team which Accela assigned to work with Health and Public Works had experience working in Permits Plus. It would be so helpful for us all. Also, I wish that for each record type, if they were in existence in permit Plus, the team would have at least gone through it and see how it works before/during the analysis sessions.
- I think my biggest problem was not knowing originally the amount of time I would spend on the old tool to then find out that it wouldn't work with the amount of data that we had.
- The new tool was great in helping to speed things up, but I know the old tool would "warn" you if you were mapping two different data types. The new tool had none of these features and I am sure they will be building them in. To me it was a minor thing since I was very concerned with making the go live date with the old version.
- I think there could have been more instructions that went along with the tool. Like the others said it wasn't very user friendly and I was leaning on Missy since she had already been through some of the things and I was so far behind at that point.
- I think if we were aware of some of the conversion items ahead of time I might could have done some data clean up. The spreadsheet for me has been very valuable and I could have possibly had some of that done ahead of time if I had known what we were going to be doing.
- I think the 2 person limit on the server cause some heartache since we all were trying to make sure we got our work done in the allotted time.
- I think the project schedule was very intensive considering the amount of data, record types, scripts and reports we have/had left to do ourselves.
- Many conversion issues could have been avoided by staying more in-line with legacy builds. That is, changing the values of drop downs to a different set of values that mean the same thing was not necessary and creates more problems than it solves. Same could be said to a lesser degree with the use of ASIT versus checkboxes. More of the same with system dates and fields like location, subtype, and title. A list of what converted directly, and where it goes, would be helpful.

Bonus Slide 2 – SME's on Conversion

- I don't think any of the lead SME's had any idea how much of their time would be spent doing this. I think we all figured this was much more automated, and that it was going to involve more work by Accela's team. I think Accela should have had a conversion expert sitting in on the analysis sessions, or reviewing the record configurations prior to signing off.
- The training and supporting documentation for this was very thin. I feel a lot of my time was spent using trial and error methodology. The ADMT tool is not conducive to intuitive use.
- Status and/or Status Dates may not be a problem for those that used workflow in Permits Plus. Health did not use workflow, but use it extensively in AA, and are having a hard time connecting the dots.
- I agree that web video with actual mapping sessions involving our data in the tool would have been helpful.
- Even when mapped according to the plan, some critical data did not get converted. Not sure what went wrong.
- There was/is no way to see what is not mapped on the AA side of the tool. Mapped items change color on the left side of the tool. You cannot tell what is already mapped on the right side. Maybe this is different in the new tool?
- I think that the Gotha's were mostly related to the volume of the work effort and the complexity of the mapping tool. Perhaps it had more to do with my lack of understanding, but I found the tool very intimidating. I didn't – and still don't – have a clear understanding of what I was doing. Without step by step click here, click here notes from our calls I am very uncomfortable using the tool.
- Prior to beginning mapping, I think that a little more discussion with Accela about what to expect would have been helpful - perhaps even some discussion about our data prior to beginning. We went to great lengths to do the analysis on the processes and records, and then it seems we just fumbled through all the rest of it, including, but not limited to the mapping and conversion.

Question & Answer Session



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