



Memorandum

TO: Public Safety, Finance and
Strategic Support Committee

FROM: Randall Murphy
Interim CIO

SUBJECT: Report on Department Business
Technologies

DATE: June 9, 2008

Approved

Christine J. Shippey

Date

6-11-08

RECOMMENDATION

It is recommended that the Public Safety, Finance and Strategic Support Committee accept this report on Department Business Technologies.

BACKGROUND

At the January 17, 2008 Public Safety, Finance and Strategic Support Committee meeting, the Information Technology Department (ITD) presented an update of the technology applications that are common to the organization. This report complements the prior memorandum and provides a status update on a number of applications that provide a specific business solution throughout the City.

ANALYSIS

Integrated Billing System

The Integrated Billing System provides staff with the management tools to oversee annual revenues approaching \$250 million. In addition, it is estimated that the City responds to over 350,000 citizen and customer calls per year with the aid of this application. The system provides revenue management capabilities for the Recycle Plus, Municipal Water, Storm Water and Sanitary programs, as well as customer relationship management for these programs and the City's Customer Contact Center. As previously reported, work is currently underway to integrate another important revenue stream, Business Tax Licensing, into this application.

Recent Accomplishments

The IBS Business Tax License project began in late 2007, and has continued at an aggressive pace. At \$16 million annually, the City's Business Tax License program represents an important program with a significant revenue stream. This project will integrate Business Tax License functionality into the IBS platform and is a key step in moving the City forward in reducing its reliance on aging equipment and software (VAX) that is overdue for replacement. Thus far, the IBS Business Tax License project has met all key milestones and is within budget. All functional requirements have been defined and the project has progressed into the technical development phases.

In addition to the Business Tax License project, the project teams continued to deliver significant enhancements on IBS. More than 80 service requests from IBS users have been addressed since November of 2007. These service requests range from queries and reports to significant functionality upgrades. The following represents some key IBS accomplishments:

- *Billing system adjustments to support drought mitigation actions:* ITD and staff from the Environmental Services Department (ESD) have worked cooperatively to define configuration and other requirements that may be needed to support water conservation measures. Due to favorable rainfall amounts this past winter, Muni Water decided not to proceed with water conservation measures this year. However, the work that has been done will be useful in the preparation of any future water conservation programs that the City wishes to adopt.
- *Summary Bills/Customer Service:* Staff completed and implemented an automated summary bill print option through the City's vendor, Kubra, available upon customer request. This new option reduces staff time by replacing manual operations, while maintaining a high level of service. Customers may still request a detailed report through the Customer Contact Center at any time. There are over 40 accounts that receive summary bills, representing over 3,000 locations in the City.
- *Performance Improvements:* Adjustments were made to certain IBS modules to significantly reduce the processing time to search customer's billing and payment information. In some instances, the search time was reduced from 45+ seconds to between 3 and 4 seconds.
- *Process improvements in loading county data:* Staff implemented programming changes to further automate the process to load County data (e.g., lien information, property ownership data, Storm and Sanitary data, etc.) into IBS. This has reduced staff time necessary to manipulate and verify data that is received from the County.
- *Process improvements with haulers:* Staff implemented process improvements to automate field activity file reconciliation with haulers. As a result, there has been a decrease in staff time required to track down missing field activity orders.
- *Improvements in lien process:* ITD and Finance worked cooperatively to further improve the lien process. Due to these efforts, Staff anticipates significant data quality improvements (including more accurate address information) and timesavings on future lien cycles.

Currently in Progress

Staff from the Finance, Environmental Services and Information Technology Departments are working cooperatively to accomplish the following key tasks:

- *Integrate Business Tax License into IBS:* Focus will continue on the remaining phases of this project. The project is currently in the technical development phase and will soon move into the testing and verification stages. The “go-live” date is still anticipated for December 2008.
- *Process Improvements for Muni Water Field Orders:* Staff is reviewing and assessing configuration and other requirements that will streamline the Field Order processes for Muni Water. A key change will involve converting some Field Order processes that are currently handled by the bill print vendor, to be run in-house by staff. The current process requires additional report processing time for data transfers from IBS to the vendor, and vendor outputs often do not present the information as well as possible. By eliminating the additional processing time and streamlining Muni Water workflow, staff anticipates valuable timesavings by those that are impacted by these processes.
- *Rate Changes:* Staff from ITD, ESD, Finance, and the Customer Contact Center are working cooperatively to implement rate changes for Water, Storm, Sanitary, Garbage and other fees that are proposed for an effective date of July 1, 2008. The implementation of these rate changes involves significant configuration updates to the IBS system, changes to customer bills and letters, and training for Contact Center staff.
- *IBS procedures improvement:* Staff continues to look for ways to improve the clarity and efficiency of its operating procedures. IBS represents numerous procedures throughout all of its departments. Significant timesavings have been realized through improved processes but many improvements can still be made. Staff is working to identify methods of accelerating process improvement tasks, including the use of consulting resources where beneficial.

HR / Payroll

The HR/Payroll system provides staff with the management tools to oversee a workforce of over 7,000 employees and an annual employee payroll of approximately \$600 million. As a complement to its previously existing human resources and payroll functions, integrated recruitment functionality was added late last year. This replaced the stand-alone QuickHire application with one that is integrated with the human resource planning application.

Recent Accomplishments

In March 2008, the server and storage infrastructure was successfully upgraded. The net results are more storage space for future database growth, and faster servers for increased system performance. Some payroll processes, which took 5-6 hours prior to the upgrade, are now completing in 10-15 minutes. A direct benefit has been the elimination of overtime and/or staggered shifts to complete biweekly payroll processing.

In May 2008, a new "Vacation Sell-Back" feature was implemented at the request of the Office of Employee Relations (OER). IT partnered with Finance and Human Resources to implement new functionality that will allow qualified employees to sell back eligible vacation time online via Time Card Front End (TCFE) timecards, replacing a redundant manual data entry procedure. Employees are also able to track vacation sell-back balances on their check stub and via eWay online. Benefits realized include ease of use for the employee, timesavings for Payroll staff, better enforcement of maximum vacation sell-backs, and ease of reporting for OER and Finance.

Currently in Progress

A key focus for the HR / Payroll Team will be examining the requirements and benefits of an eDevelopment module to accomplish the following:

- Integrate training with other employee data allowing employees and department to view and query training history for every employee.
- Eliminate the stand-alone system that the City is currently using which is maintained by an outside vendor.

The implementation of eDevelopment will streamline City training administration, including training schedules employee enrollment, updating of employee training history, and conversion of the existing system. ITD and the HR/Payroll Steering Committee will be developing a strategy and project timeline. Staff is also considering implementation alternatives that fully utilize in-house resources to minimize or eliminate set-up and configuration costs.

Financial Management System

The Financial Management System used in the City of San José is FMS and is based on the Cayenta Financial Management Application Suite. Initially installed in 1989, FMS has been in use for numerous years in this City. While it has served its purpose well, it lacks the functionality and robustness currently available in the marketplace.

Recent Accomplishments

Staff recently completed the configurations and preparations that are necessary for FMS to function properly in the new fiscal year beginning July 2008.

Currently in Progress

Staff will be focused on the following key priorities over the next several months:

- *Infrastructure Improvement:* Staff is in the process of upgrading the hardware infrastructure for FMS. The server environment for FMS will essentially be re-architected to separate the application hardware from the database hardware. This should result in improved performance and reliability. More importantly, the new architecture will facilitate the City's migration to the Storage Area Network (SAN) infrastructure.
- *Report Migration:* Even though the recent upgrades to FMS have increased user access to web-based reports, there still exist many financial reports that may only be accessed through the old terminal emulation method. It has been an objective for ITD to translate these reports into a format that will be supported by a browser-based client. Due to personnel resource constraints, staff has not been able to focus on this effort. Staff is evaluating options that would allow work to begin on the most critical reports in the Fall 2008 timeframe.
- *Critical Business Needs:* Departments continue to express concerns about the lack of functionality and the integration limitations of FMS. While FMS has modules that provide for General Ledger, Accounts Receivable, Accounts Payable, Cash Collection and Purchasing functionalities, some of these modules are not being utilized because their capabilities fall short of the needs expressed by departments. It has been an objective for ITD and Finance to begin the replacement process for FMS. The initial step should be an assessment study to examine the City's requirements for a new system. This study was initially estimated to cost approximately \$500,000 and was identified as part of the spending plan for the 2007-2008 Technology Reserve. This amount was appropriated in 2007-2008, but later redirected in October of 2007 to the Information Technology Business Tax Appropriation in order to fund the more critical Business Tax migration. ITD will continue to work with Finance staff to advocate for the replacement of FMS and in the short-term, provide operational "work-arounds" within the constraints of FMS in order to meet critical business needs as options for funding sources are explored.

On-line Permits System

The On-line Permits System used in the City of San José is based on CSDC Systems AMANDA software. The on-line permits application facilitates the management and administration of approximately 30,000 permits per year, representing approximately \$60 million annually. The system provides on-line permitting and retrieval capabilities for development services including Planning, Building, Fire and Public Works permits.

Recent Accomplishments

- *Off-Sale Alcohol Billing:* Staff recently completed installation of the Off-Sale Alcohol module to the AMANDA system. This feature allows for billing and fee recovery of off-

sale alcohol permits. Prior to this implementation, these permits were tracked on a legacy (VAX) application. Migrating this application from the old platform allows payment information to be linked with other permit information providing a more complete and accurate picture for staff.

- *New Ortho-photography Integration:* Many ortho layers were processed and integrated into the GIS Viewer in AMANDA. Processing times and accuracy were greatly improved. The ortho-photographic information allows staff to have an aerial view of a location. Additionally, changes in conditions can be more quickly determined by reviewing this information at different points in time.

Currently in Progress

Migrate Multiple Housing Occupancy Permits from the VAX system to the AMANDA system: This feature will allow for the issuance of 7,000 permits annually with an expected revenue of \$3.5 million. It is a major step toward integrating stand-alone permit tracking systems into one comprehensive system that contains all permit, land use, and geographic data pertaining to a specific parcel. This project is tentatively scheduled for completion in early 2009.

Public Safety Applications

Responding to emergency calls is arguably one of the highest priorities for the City. It takes a well-coordinated and managed effort to answer and respond to the number of emergency calls generated by a city the size of San José. The ability for Public Safety to provide a timely response is reliant on the Computer Aided Dispatch (CAD) system.

Recent Accomplishments

- *Upgrade of Computer Aided Dispatch System:* In a coordinated effort among Police, Fire and the Information Technology Departments, staff recently completed the upgrade of CAD software. These updates focus on improving the reliability of the system as well as the provision of increased functionality. Equally important is that many of the improvements identified and implemented by the City are now included in the core software product.
- *CAD Hardware Upgrade:* As a prerequisite to upgrading the CAD software, new servers and workstations were installed to replace some of the aging equipment at the Dispatch Center. Storage and processing speed were improved to meet software requirements and to increase reliability of the system. Additionally, this new hardware had capabilities that allowed staff to train on and thoroughly test the new system before the final go-live date, ensuring a smooth transition.

- *Records Management Requirements Study (RMS)*: The Police Department recently completed a requirements study that provides a foundation for moving forward with a new Records Management System. The study validated that a new RMS would be beneficial, but also identified the possibility of substantial time resources required for implementation.

Currently in Progress

- *Upgrade of the CAD Mobile Clients*: With completion of the CAD server and workstation updates, staff will be working toward upgrading the client software in the Police and Fire vehicles.
- *Fire Department Intranet Portal*: The Fire Department seeks to upgrade its Intranet site to improve accessibility of critical information for staff. ITD is working with the Fire Department on a pilot project to first examine and identify the business opportunities for this system, and then implement in such a way that the experience gained in this effort can be leveraged throughout the entire organization. It is anticipated that the consultant contract will be executed in early June, and the requirements gathering to start shortly thereafter.

Additional Departmental Systems Activities

The City has identified a significant need for providing greater resident access to recreational classes and programs. The Recreation and E-Commerce System (RECS) provides significant opportunities to streamline and automate service delivery processes, as well as improve the customer experience. The ability to quickly register on-line is expected to be welcomed improvement by the majority of our customers. Recent activity with the RECS project include the following:

- *Completion of the Contract with Active Networks (RECS)*: Late last year, Council approved moving forward with a pilot project for a system to streamline PRNS business processes and offer on-line registration. Negotiations with Active have been completed and a contract executed.
- *RECS Business Process Review*: One of the first tasks for the RECS implementation is to examine current processes and to assess the modification in current operations that will be needed to implement the system. These initial set of these review sessions was completed in late May.

Currently in progress

- ITD will be working with the Budget Office over the next several months to identify improvements to the current Budget System.

- ITD is taking a leadership role in coordinating Computerized Maintenance Management Systems (CMMS). Several departments are currently working on either implementing or expanding systems. The objective of ITD's effort is to look at specific activities that will bring Citywide consistency, and leverage the systems and skills where possible to take advantage of scales of economies.

If you have any questions, please contact Steve Turner, Deputy Director of Business Applications, at 793-6971.

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