

ESS

Electronic Services System – Coordinating Committee Meeting

Agenda

Web Conference

July 21, 2023

2:00 P.M. to 2:30 P.M.

- **Welcome and Introductions**

- **Contracts and Agreements**
 - **Reserve Fund Expenditure Authorization and**
 - **Lean Techniques Work Authorization**

- **Adjourn - Next Regular Meeting August 8, 2023**

July 21, 2023

To: ESS Coordinating Committee
From: Phil Dunshee
Re: Reserve Fund Expenditure Authorization

Background

As previously reported, Phase 2 of the ILR software development projects concluded on May 28, 2023. Since then, the new search application and organization/user management system have been moved into production. More than half of all E-Submission organizations have been enabled to access and use the search application, and the ILR team is working to assist the remaining organizations with the transition. On August 9, 2023, we will begin the process of accepting applications from other organizations to access the search application.

During this period, we have identified several software bugs and other workflow issues in the applications which should be fixed or changed to improve both the user experience as well as the efficiency of managing the applications. While our internal development team has assumed responsibility for maintaining the infrastructure and software for these newly developed systems, they are also engaged in the development and implementation of updated application interfaces for the integrations with local county land record management systems (LRMS county upload and E-Submission functions). The transition to the new API includes efforts to assist the county LRMS service providers with these integrations.

For this reason, it will be necessary to secure additional outside support to address the various bugs and issues with the search and user management applications. A Phase 3 development cycle using reserve funds is proposed. This will be a much more limited engagement when compared with Phases 1 and 2.

Three actions are requested.

- A new reserve fund expenditure authorization for the period of July 21, 2023, to December 31, 2023, in the amount of \$54,000.00
- General approval to establish work authorizations with vendor personnel as schedules and resources allow during this same period
- Approval of a specific work authorization with Lean Techniques for the period of July 21 through July 31 in the amount of \$10,500.00

We had originally planned to bring this issue to you at the regular August ESS Coordinating Committee meeting. However, during recent discussions with our primary vendor, Lean Techniques, we became aware that the developer who had worked on many of the recent software developments would be available in the near term, but otherwise not available for August and September. This person is very familiar with the ILR software and would require no learning curve. To take advantage of this opportunity, it was necessary to move quickly to finalize a work authorization. This is the main reason for convening a special purpose meeting.

I will look forward to the discussion and answering your questions.

pd

Attachment: Work Authorization LT-3.1

WORK AUTHORIZATION

Authorization #: LT-3.1 **Cost Estimate:** \$10,500.00 **Effective Date:** 7/21/23
Agency: Electronic Services System (ESS) **Vendor (Service Provider):** Lean TECHniques , Inc.
Valid Through: 07/31/23

Project Phase: Phase 1 – Admin and Org Management Functions

RFQ/Contract Number: RFQ Number: ESS-2021-1

Work Requested By: Phil Dunshee **Lean TECHniques Contact:** Melissa Sporrer

Statement of Work Lean TECHniques will provide software development services for the Admin, ESS Payment, E-Submission and Search applications. Activities for the project will include the following:

- A. ADM2-8 Make submitted image available to ESS Admin
- B. SPRTPTL-1938 Township and Range Transposed
- C. SPRTPTL-1942 Review & Make search of book/page/number text fields (location) case insensitive
- D. SPRTPTL-1941 Allow Reference Search by Book Only
- E. DEV-8 Allow Spaces in First/Last Name Fields
- F. ADM2-30 Organizations - Correct Transposition of Column Headings - Type/Submission Type
- G. ADM2-22 Application Management Menu Order
- H. ADM2-17 22342 Enable filter for recently recorded for county

- 1. ADM2-13 Restore Document Reset Function in ESS Admin
- 2. PRTL-285 Redaction/public Search for recorders
- 3. ADM2-20 Enable ESS Admins to activate/deactivate account users in Manage Users
- 4. SPRTPTL-1940 In Search App - column with Doc Details, PDF, and Report Icons, Include Icon for Ass. Reference
- 5. ESSI-185 Each account requires an Admin - cannot delete admin user or change to other role if no admin see also CAS-194
- 6. ADM2-23 Modify Advanced Search Submission Interface (See also ADM2-16)
- 7. PRTL-286 Search Users – Adjustments
- 8. Additional Tasks will be added as time permits.

Deliverables include the following working software functions:

- Complete as many SOW tasks as possible in the specified time frame.

Activity	Rate
Delivery Lead (Amber)	\$150.00/hr.
Senior Software Developer (Travis)	\$150.00/hr.
Software Developer (Kevin)	\$150.00/hr.
Total Cost - Not to Exceed	\$10,500.00

With respect to this work authorization, Lean TECHniques will provide ESS with a detailed invoice bi-weekly.

Work Included: Status Reports for ESS Project Manager/Product Owner as needed
Stand Up with ESS Technical Lead (current cadence is twice per week)

ESS will provide Lean TECHniques with access to necessary software and accounts, and ensure timely communications regarding Deliverables, Acceptance or Non-Acceptance, Deficiency, Error, Enhancement, Services, and Specifications as referenced in the master Agreement.

Approved: Lean TECHNIQUES	Approved: Electronic Services System
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