



License Division Accela LMS Update

JIM COONEY, LICENSE DIVISION MANAGER

SAM DAWSON, BUSINESS SYSTEMS SPECIALIST

NOVEMBER 14, 2024

Agenda

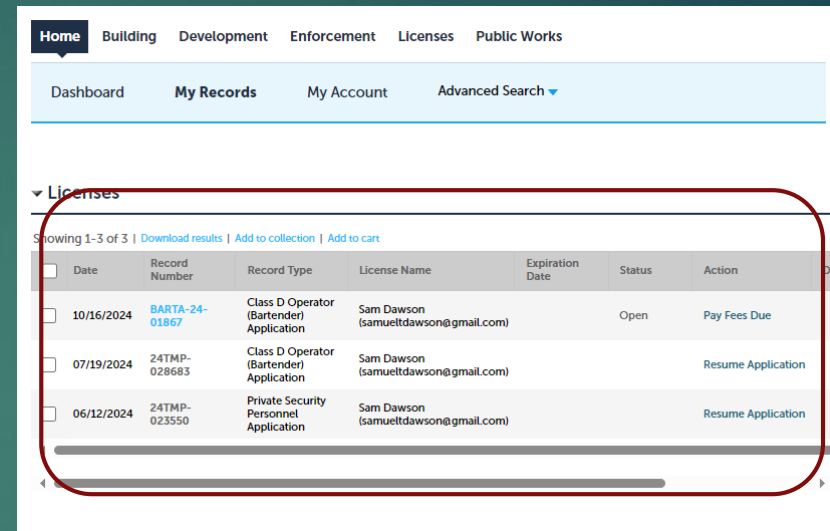
- ▶ Status of Accela LMS Project and Timeline
- ▶ Public User Experience
- ▶ Cross-departmental Workflows
- ▶ Alderperson Workflow
- ▶ Alderperson Tools
- ▶ Questions/Feedback

License Division Online Licensing Platform Status and Timeline

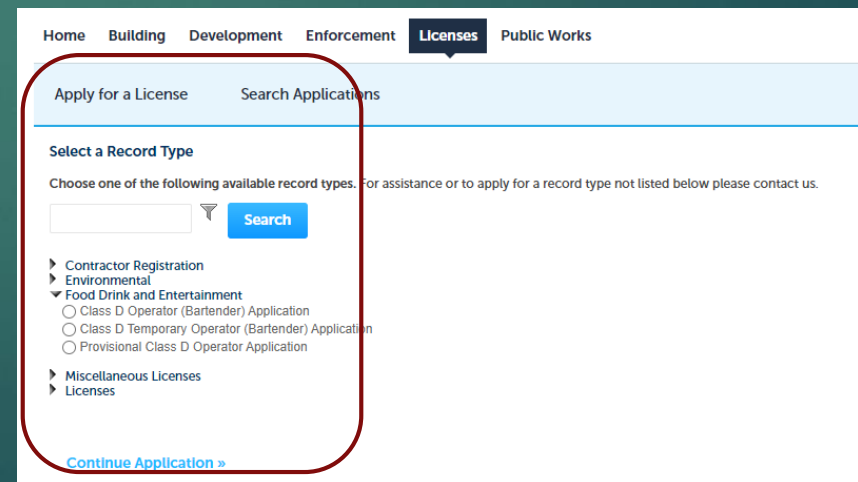
- ▶ Individual Licenses:
 - ▶ Class D Operators (Bartenders) are live.
 - ▶ Municipal Identifications are also processed by in Accela by the License Division. Using Accela LMS allows us to include signatures on the cards, a key feature in increasing the utility of the cards.
- ▶ Business Licenses
 - ▶ We are currently in Phase III of the project, which involves testing the product as public users and administrators to identify bugs, such as incorrect fields, workflow errors, and report creation.
 - ▶ Critical the success of the launch is training with License Specialists and other City personnel.
 - ▶ The License Division is creating guides for public users and staff to assist with navigating the new interface.
 - ▶ The goal is to take the Business Licenses live in early 2025, with the understanding that this may be delayed in order to ensure the product is ready for public users.

Public User Experience

- ▶ The transition to Accela presents **significant time savings for applicants**, who will no longer have to visit City Hall to submit applications, and allows for **streamlined communication between City personnel and applicants**.
- ▶ Applicants will be able to submit and manage applications and licenses online at www.Milwaukee.gov/lms.
- ▶ In their account, applicants can apply for new licenses, renew existing licenses, pay fees, update their contact information, review the status of their applications and amend licenses.
- ▶ Applicants applying for multiple licenses can easily incorporate existing information, such as premises data and hours of operations, into supplemental application, reducing redundancies in the application process, and ensuring consistency in information across applications.



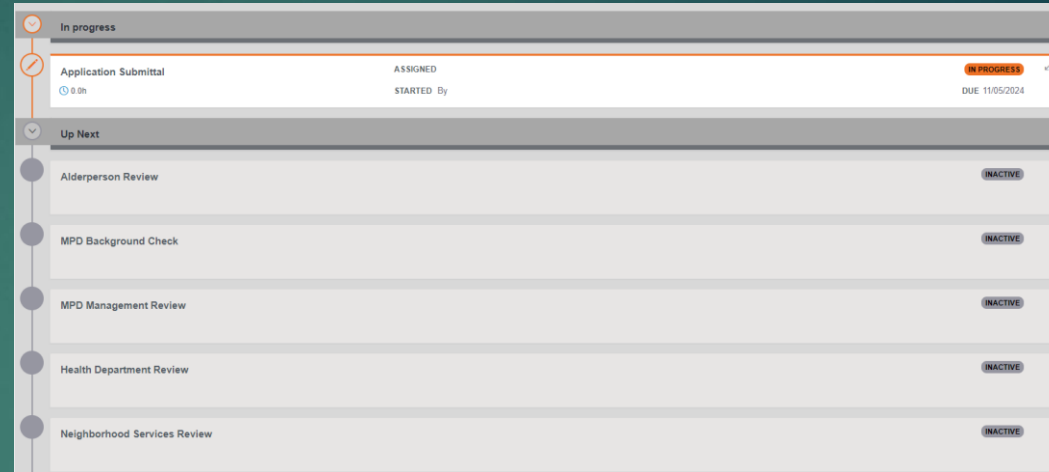
This is an example of what users see. In the top image, a user can review actions needed for applications or licenses.



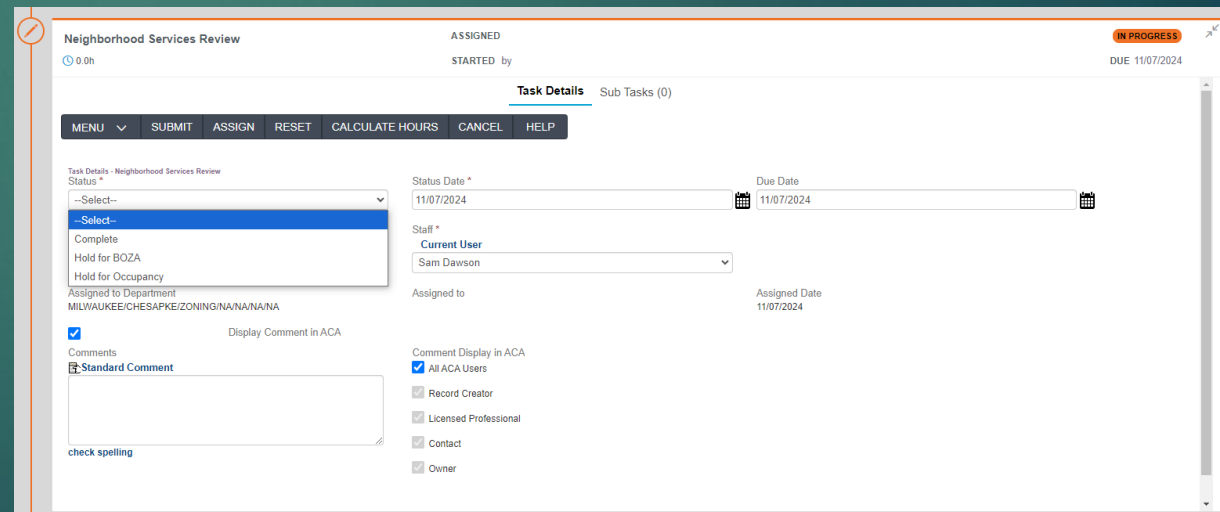
In the bottom image, a user can select the type of License they wish to apply for.

Cross-Departmental Workflows

- ▶ Once applications are submitted, the License Division will certify the application before advancing it to other departments in the workflow.
- ▶ Other departments, such as the Department of Neighborhood Services, will be able to sign-off on the status of the application as it relates to their department, **ensuring that licenses are not issued without proper departmental approvals.**



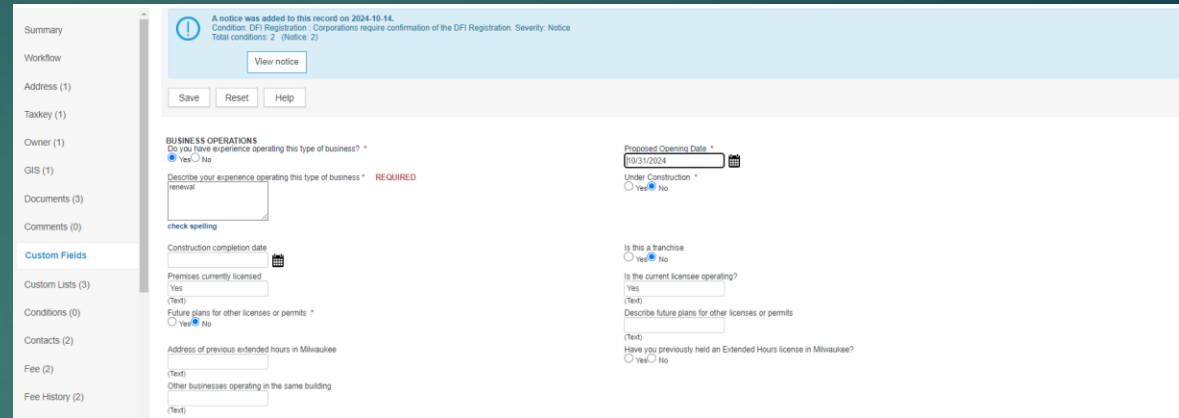
This image shows an overview of an application workflow.



This image shows the Neighborhood Services Review Workflow step.

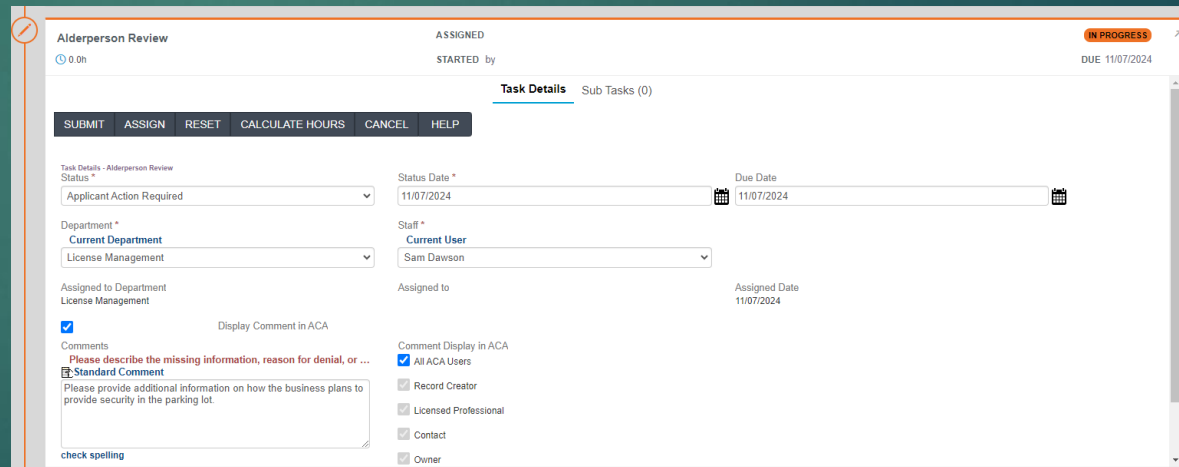
Alderperson Review

- ▶ When an application is ready for Alderperson review, the Alder will be notified. The **Alder can review applications and request additional action by the applicant if needed.**
- ▶ Once reviewed, Alders are able to advance the application through the workflow.



A screenshot of a web application interface showing the 'Custom Fields' tab. The interface includes a sidebar with navigation options like Summary, Workflow, Address, Taxkey, Owner, GIS, Documents, Comments, Custom Fields (selected), Custom Lists, Conditions, Contacts, Fee, and Fee History. The main content area displays a form with various fields: 'BUSINESS OPERATIONS' with radio buttons for 'Yes' and 'No', a 'Describe your experience' text area, 'Proposed Opening Date' (10/31/2024), 'Under Construction' radio buttons, 'Is this a franchise?' radio buttons, 'Is the current licensee operating?' radio buttons, 'Describe future plans for other licenses or permits' text area, 'Address of previous extended hours in Milwaukee' text area, and 'Have you previously held an Extended Hours license in Milwaukee?' radio buttons. A notification banner at the top states: 'A notice was added to this record on 2024-10-14. Condition: DFI Registration - Corporations require confirmation of the DFI Registration. Severity: Notice. Total conditions: 2 (Notice: 2)'. Buttons for 'View notice', 'Save', 'Reset', and 'Help' are visible.

This image shows the Custom Fields tab for an application. This is where information on operations are saved.



A screenshot of the 'Alderperson Review' workflow task details. The task is 'ASSIGNED' and 'IN PROGRESS'. It shows the task started by '0.0h' and is due on 11/07/2024. The task details include: Status (Applicant Action Required), Status Date (11/07/2024), Due Date (11/07/2024), Department (Current Department: License Management), Staff (Current User: Sam Davson), Assigned to (License Management), Assigned Date (11/07/2024), and a checkbox for 'Display Comment in ACA' which is checked. The comments section contains a 'Standard Comment' with the text: 'Please describe the missing information, reason for denial, or ... Please provide additional information on how the business plans to provide security in the parking lot.' There is also a 'check spelling' button. A list of checkboxes for 'Comment Display in ACA' includes 'All ACA Users' (checked), 'Record Creator', 'Licensed Professional', 'Contact', and 'Owner'.

This image shows the Alderperson Review Workflow. In this example, the Alder wishes the applicant to share more information about security. By submitting this request, the applicant will receive an email asking them to address the matter.

Alderperson Tools

- ▶ **Ebook Report:** when a license application is brought to committee, the License Division will generate an Applicant Ebook. This document will incorporate **the plan of operation and attach any relevant documents, including police reports, concentration maps, and objections.**
- ▶ **License Renewal Changes Report:** this report will **highlight all changes to the plan of operation between the existing license and the renewal application**, such as hours of operations and persons involved in the business.

BUSINESS LICENSE PLAN OF OPERATION
 Office of the City Clerk License Division
 200 E. Wells Street City Hall Room 105 Milwaukee, WI 53202
 Phone: 414-286-2238 E-mail: license@milwaukee.gov
<https://city.milwaukee.gov/cityclerk/license/LicensesPermits>

Type of Business

Applying for: _____

Detailed description of the type of business planned for operating:

Experience operating this type of business:

Business Operations

Proposed Opening Date: 10/15/2024

Is the premise under construction? No Yes Estimated completion date: _____

Is this a franchise? No Yes

Is this premises current licensed? No Yes

Is the current license operating? _____

Future plans for other licenses or permits: No Yes

Address of previous extended hours in Milwaukee: _____

Other businesses operating in same building: _____

Litter & Noise

How are grounds kept clean? _____

How often will grounds be cleaned? _____

Grounds cleaned by: _____

How are noise issues prevented and/or addressed?

Describe sound amplification system if used: _____

Smoking & Sanitation

Are there designated outdoor smoking areas? Yes No Describe areas: ashtrays are provided

Number of Garbage Cans Inside: 4 Describe locations: bathrooms, behind bar, near door

Number of Garbage Cans Outside: 2 Describe locations: smoking area

Describe crowd control barrier, if used: None Yes

Number of restrooms on premises: _____

Name of solid waste contractor: Waste Management

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This excerpt from a Ebook Report shows a summary of the plan of operation. The Ebook also includes attached documents, such as floor plans and objections.

Changes on BFOOD-R24-00005 from BFOOD-24-00003

CONTACT CHANGES	
Change Type	Description
Addition	Addition of: Business Shareholder - UCC/ELA PROPERTY, INC. - ATTN: JUAN A. RUIZ C/O KEVIN A MARTIN - MICHAEL BEST & FRIEDRICH LLP

CUSTOM FIELD CHANGES		
Field Group	Field Name	Description of Change
SMOKING AND SANITATION	OUTSIDE GARBAGE CAN LOCATIONS	CHANGE FROM '1' TO '2'
GENERAL INFORMATION	ALDERMANIC DISTRICT	CHANGE FROM '4' TO '8'
GENERAL INFORMATION	FOOD DISTRICT	CHANGE FROM '23' TO '11'

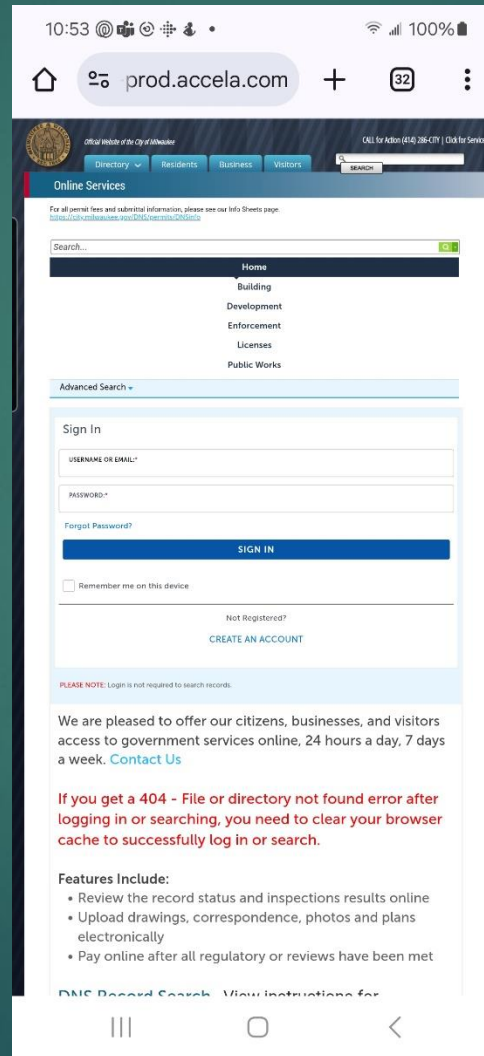
CUSTOM LIST CHANGES	
Table Name	Description of Change
Monday	Changed from closed= to closed= No
Monday	Changed from open time= to open time= 2:00pm
Monday	Changed from close time= to close time= 5:00pm

This excerpt from a License Renewal Changes Report compares the existing license information with the changes presented on the renewal application.

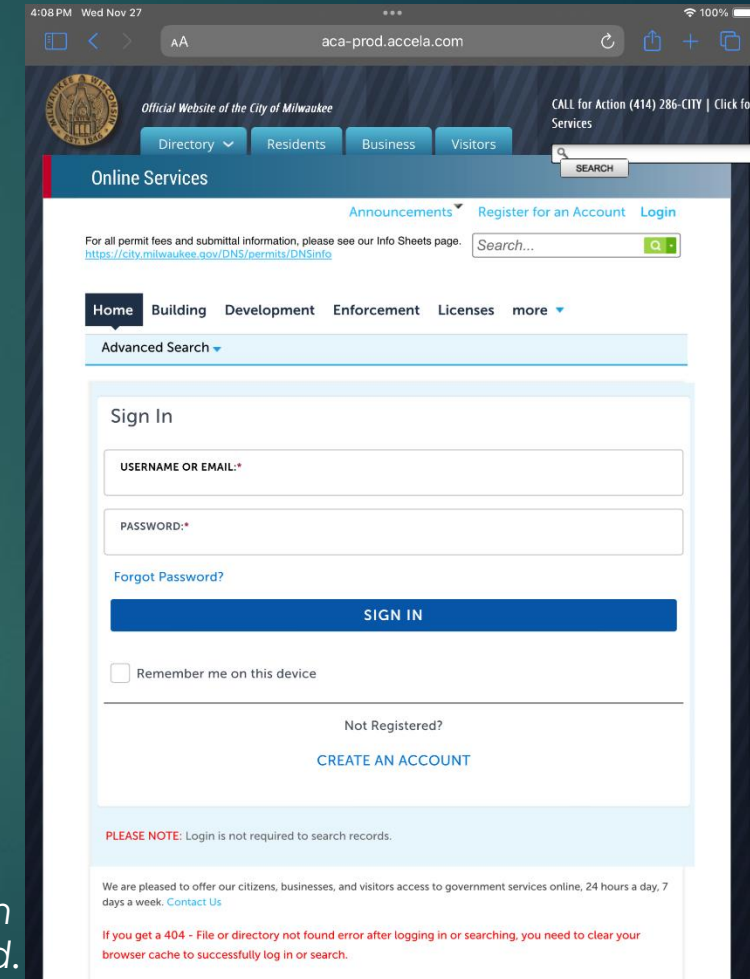
ITMD – Accela LMS Mobile Functionality

▶ **Mobile Device Support:** On mobile devices, Accela LMS is accessed through a web browser. There is no dedicated app. The site loads with a mobile-friendly interface that automatically adjusts based on screen size.

▶ **Future Improvements:** ITMD will be exploring the product roadmap with Accela for increased mobile usability.



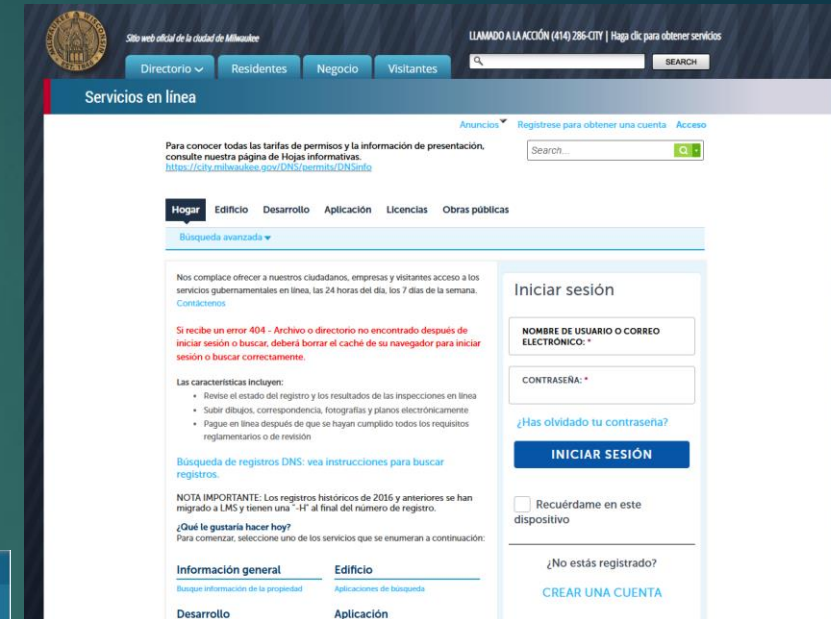
This image shows the LMS home page as seen on an Android smartphone.



This image shows the LMS home page as seen on an Apple iPad.

ITMD – Accela LMS Multi-Language Support

- ▶ **Multi-Language Support:** Accela LMS offers multi-language support through web-browser or device settings.
- ▶ **City Template Translation:** City website offers a translation option prominently on top of pages, but this hasn't yet been implemented for Accela LMS hosted solution.
- ▶ **Future Improvements:** ITMD will be exploring the product roadmap with Accela for increased multi-language functionality and commits to updating the Accela LMS page style to match current City site style that includes the translation option by go-live of remaining License Division licenses.



This image shows the LMS home page as seen on a desktop computer.

This image shows the Common Council home page as seen on a desktop computer.

ITMD – OpenCounter Permit Discovery

- ▶ **OpenCounter Study:** In Summer/Fall 2023, the City of Milwaukee engaged UW-M Lubar School of Business to review options to improve the license/permitting experience. The study recommended OpenCounter or a similar product.
- ▶ **OpenCounter Features:** OpenCounter acts as a guided service for someone interested in a project from the initial questions, “Where is my project allowed? Which permits will I need? How much will it cost? How do I apply?” through project completion.

The image displays four service modules from the OpenCounter website, arranged in a 2x2 grid. Each module includes the OpenCounter logo, a title, a brief description, and a call-to-action button.

- Business Portal:** Help entrepreneurs to understand the costs and requirements of starting a business. [Discover the Business Portal](#)
- Residential Portal:** Show homeowners how to stay in compliance on home improvement projects. [Discover the Residential Portal](#)
- Special Events Portal:** Guide event planners through the process of organizing large-scale events in public spaces. [Discover the Special Events Portal](#)
- ZoningCheck:** Help applicants to understand how the zoning ordinance will impact site selection and project requirements. [Discover ZoningCheck](#)

This image from the OpenCounter website shows the service modules they offer.

ITMD – OpenCounter Permit Discovery (cont.)

- ▶ **OpenCounter Follow-Up:** ITMD had separate discussions and demos with OpenCounter and Accela following up on the study. Accela indicated they had plans and we might want to wait for future announcements. Accela announced the acquisition of OpenCounter in July 2024 and started discussing plans for OpenCounter in October.
- ▶ **OpenCounter Next Steps:** OpenCounter advertises they provide “24/7/365 answers online to relevant questions (in any language, on mobile, or desktop).” Accela indicates they are rolling out advanced features in the near future. ITMD wishes to focus on a successful migration of licensing to Accela LMS through go-live and one year of the licensing application/renewal cycle. Further enhancements would likely happen no earlier than 2026 or beyond.

What to Expect

In the near future, we will be rolling out these enhanced solutions to our customers. This integration will bring about numerous benefits, including:

- **Simplified Licensing and Permitting:** Accela and OpenCounter will provide an intuitive, step-by-step guide, ensuring residents and businesses obtain the correct licenses and permits with clear cost information, enhancing transparency and ease of use.
- **Increased Efficiency and Accuracy:** The user-friendly interface reduces errors and saves time, minimizing the need for rework and allowing agency staff to focus on more critical tasks.
- **Enhanced Satisfaction and Productivity:** By simplifying the process and reducing administrative burdens, OpenCounter boosts satisfaction while improving operational efficiency for municipalities.

This image from the Accela website describes how they will integrate OpenCounter.



Thank you!

Any questions or feedback?