

Attachment A1

County of Santa Barbara Public Works

Surveyor Digital Intake and Review Web Application

Specifications and Implementation Proposal

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Project Scope

The County of Santa Barbara Public Works Department would like to create a Surveyor Digital Intake and Review web application to streamline the process of accepting maps to be reviewed. This online process will help with great time savings for the Surveyor's office and their customers. It will also alleviate the need for physical storage of maps by having most maps provided digitally along with all supplemental references. Customers will be able to pay online, review their submittals online and have easy access to the history of all submittals. The Surveyor team will also be able to provide updates to customers electronically and review all submittals in electronic format. This will eliminate any data entry errors and in person back and forth communication with the customer while increasing productivity and operational efficiency. The application will be responsive for easy viewing on a desktop or tablet. All of these benefits will enhance the customer experience while making the job Surveyor's team easier and much more efficient.

This document outlines the wireframes, business rules and specifications for implementing the website based on the input received during the design meetings and provides the overall estimated cost for the requested pages and functionality.

Home

Page Notes

Home

The homepage will include an image, a brief description of the purpose of the application and who should be using it, and a Login form (including forgot password and register new user links.)

Login

Login credentials will be an email address and a password (standard password controls and configuration.) Authentication will use ASP .Net Identity with entity framework as the storage medium. The County wants back office and admin users to sign in using their active directory credentials. The same login form will be used, and the code will interpret non-email address usernames to be active directory credentials and attempt to validate them that way. Active Directory users will need to have a record in the users database table, even though authentication will be delegated to AD, so we will need a flag in the users table to indicate that this is the case (and these users will be unable to use the forgot password functionality; clicking the link in this case should direct them to change their password from their workstation or office 365.)


Security Roles

The primary users (customers) of the system will be referred to as 'Applicants'. This terminology distinguishes them as the 'Applicant' or 'Agent' in the submittal process (although in many cases the applicant may be the same person as the owner or professional.) Back Office users will be county employees who have the ability to verify that a submittal was submitted using the correct project type and fee. They will also be able to make edits to the project/submittal details via the submittal details screen. They can also run reports and change their own user details. Admin users will have all the same permissions as Back Office users, but they will also be able to add new Back Office or Admin users, and they will also be able to make changes to the fee schedules.


Back Office / Admin Users

The County of Santa Barbara would like its own users to be able to log in to the system using their county credentials and be able to perform administrative and supervisory functions. Back office users will log in using the same login form as regular users. The system will interpret any username that is not an email address to be an attempt to log in with active directory credentials. The actual mechanism for validating credentials is TBD. It will most likely be accomplished via ADFS (Active Directory Federation Services). We will store the active directory username in the database, along with their role (Supervisor or Admin).

Wireframe



Surveyor Digital Intake and Review



Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam vitae porttito libero, at tempus nulla. Nulla blandit tortor at ipsum accumsan ornare. Aenean dictum velit augue, vitae egestas lectus scelerisque nec. Duis suscipit enim arcu, aliquam mollis risus imperdiet quis. Nulla at malesuada odio. Etiam eu commodo sapien. Phasellus luctus posuere lorem sed tincidunt.

Sed vitae augue ante. Pellentesque id tincidunt nulla. Curabitur eu mauris sit amet nisl vestibulum dictum eget quis eros. Donec at tortor nec sapien porttitor consequat. Nulla scelerisque nulla sit amet enim auctor condimentum. Vivamus vel leo nec lectus fringilla finibus in sit amet augue. Class aptent taciti sociosqu ad litora torquent per conubia nostra, per inceptos himenaeos. Donec aliquet libero et maximus dapibus. Vivamus vel eros hendrerit. sagittis ante accumsan, fermentum urna. Curabitur ut risus eros.

Welcome!

Email:

Password:

[Forgot Password](#)

Don't have an account?

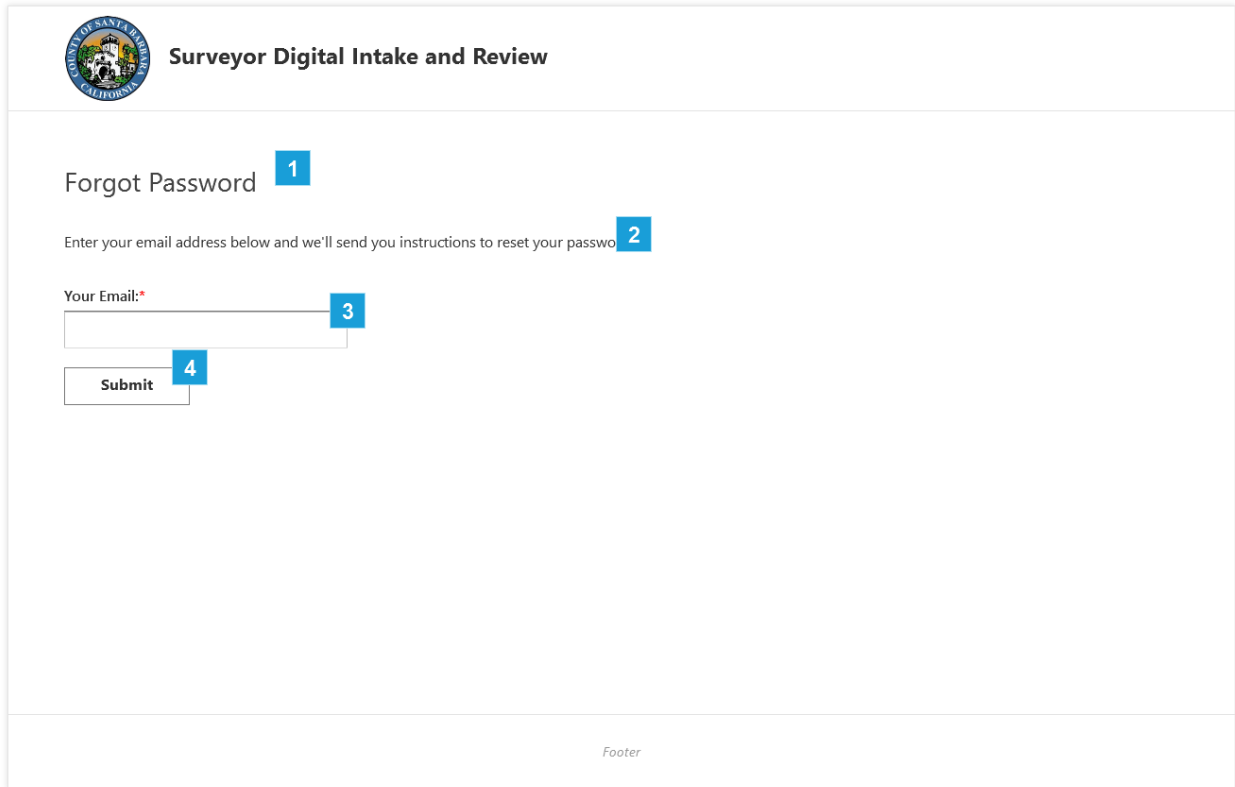
Footer


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Email	N/A	Text Field (type: email)	- Valid email address - Max length: 255 - Required	- "Please enter a valid email address" - "Please enter a value for Email"
2	Password	N/A	Text Field (type: password)	- Min Length: 8 - Required	- "Please enter a value for Password"
3	Login	- On successful login,	Button	- Entered credentials must be valid	- "The email/password combination was incorrect. Please try again or contact an administrator."
4	Forgot Password?	- Links to the Forgot Password page	Hyperlink	N/A	N/A
5	Sign Up		Button	N/A	N/A
6	Image	N/A	Image	N/A	N/A
7	Text	N/A	Text	N/A	N/A
8	Welcome!	N/A	Heading	N/A	N/A

Forgot Password

Wireframe



 **Surveyor Digital Intake and Review**

Forgot Password **1**

Enter your email address below and we'll send you instructions to reset your password **2**

Your Email:*

 3

Submit **4**

Footer

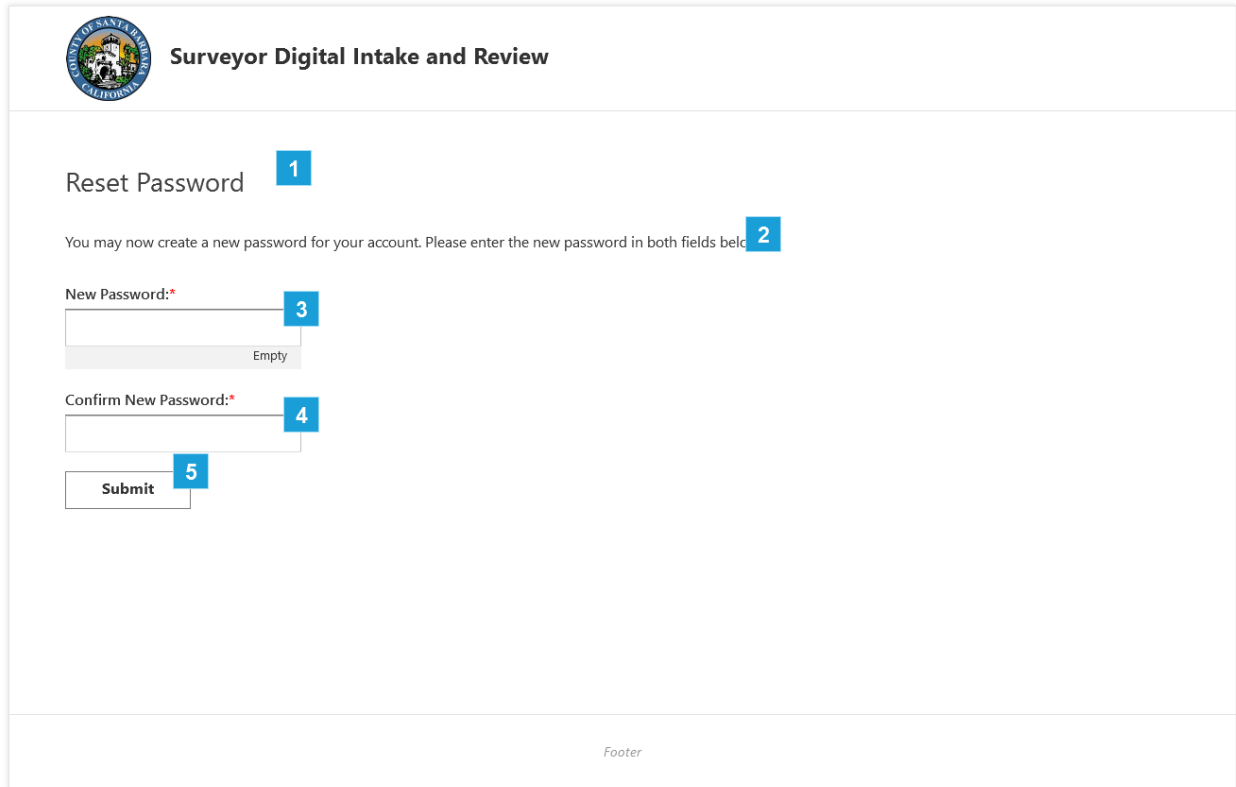
UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Forgot Password	N/A	Heading	N/A	N/A
2	Instructional text	N/A	Text	N/A	N/A

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
3	Your Email	N/A	Text Field (type: email)	- Valid email address - Max length: 255 - Required	- "Please enter a valid email address" - "Please enter a value for Your Email"
4	Submit	- If form validates, display message "Sent! You should receive an email shortly containing instructions to reset your password." - If the entered email does not exist on the site, "Sent!" message above should still be displayed to prevent users from guessing emails. - An email will be sent to the provided email address containing a link to a Reset Password page, where the user can enter a new password twice to reset it. (see Reset Password page)	Button	N/A	N/A

Reset Password

Wireframe



Surveyor Digital Intake and Review

Reset Password

You may now create a new password for your account. Please enter the new password in both fields below

New Password:*

Empty

Confirm New Password:*

Submit

Footer

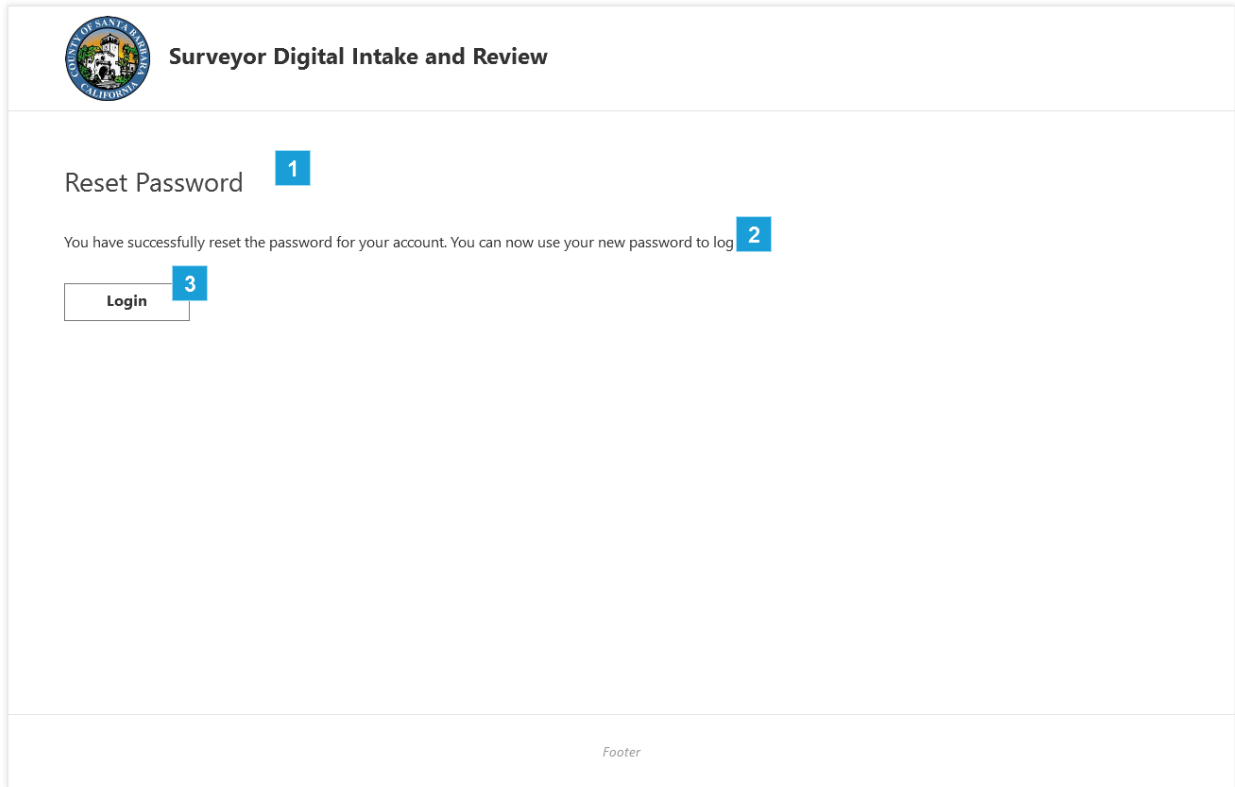
UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Reset Password	N/A	Heading	N/A	N/A
2	Instructional text	N/A	Text	N/A	N/A
3	New Password	- Includes Password strength meter	Text Field (type: password)	- Min Length: 8 - Minimum password strength must be "Mediocre" - Required	- "Password is not strong enough" - "Password must be at least 8 characters" - "Please enter a value for New Password"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
4	Confirm New Password		Text Field (type: password)	- Must match New Password field - Required	- "Passwords do not match" - "Please confirm your new password"
5	Submit	- If form validates, update password and link to Reset Password - Success page	Button	N/A	N/A

Reset Password Success

Wireframe



UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Reset Password	N/A	Heading
2	Success text	N/A	Text
3	Login	- Links to Login page	Button

Create Account

Page Notes


Applicant Users will register on the site using a link provided on the home/landing page. They will provide details necessary for filling in the applicant information for a submittal as part of the registration process. These details will be stored as an 'Applicant Profile' and populated automatically when making a submittal for a project. The fields collected will be:

- First Name (Required)
- Last Name (Required)
- Company Name
- Phone (Required)
- Extension
- Fax
- Email Address (Required) (Unique)
- Confirm Email Address (Required)
- Address (Required)
- Address 2
- City (Required)
- State (Required)
- Zip Code (Required)

The state field will be a dropdown box, and CA will be selected by default. The email address must be unique; there will be real-time verification on blur that validates that the entered address is unique.

After submitting the applicant profile information, an email will be sent containing a link where the applicant can set their password. A confirmation screen will be shown indicating that they should check their email inbox for this email and click on the link to set a password in order to continue. We will re-use the reset password functionality for this. This will also serve as email verification.

Wireframe



Surveyor Digital Intake and Review

Sign Up - Create Account **1**

First Name:* **2** Last Name:* **3**

Company Name: **4**

Phone:* **5** Extension **6**

Fax: **7**

Email:* **8**

Confirm Email:* **15**

Address:* **9**

Address 2: **10**

City:* **11** State:* **12** Zipcode:* **13**

Create Account **14**

Footer

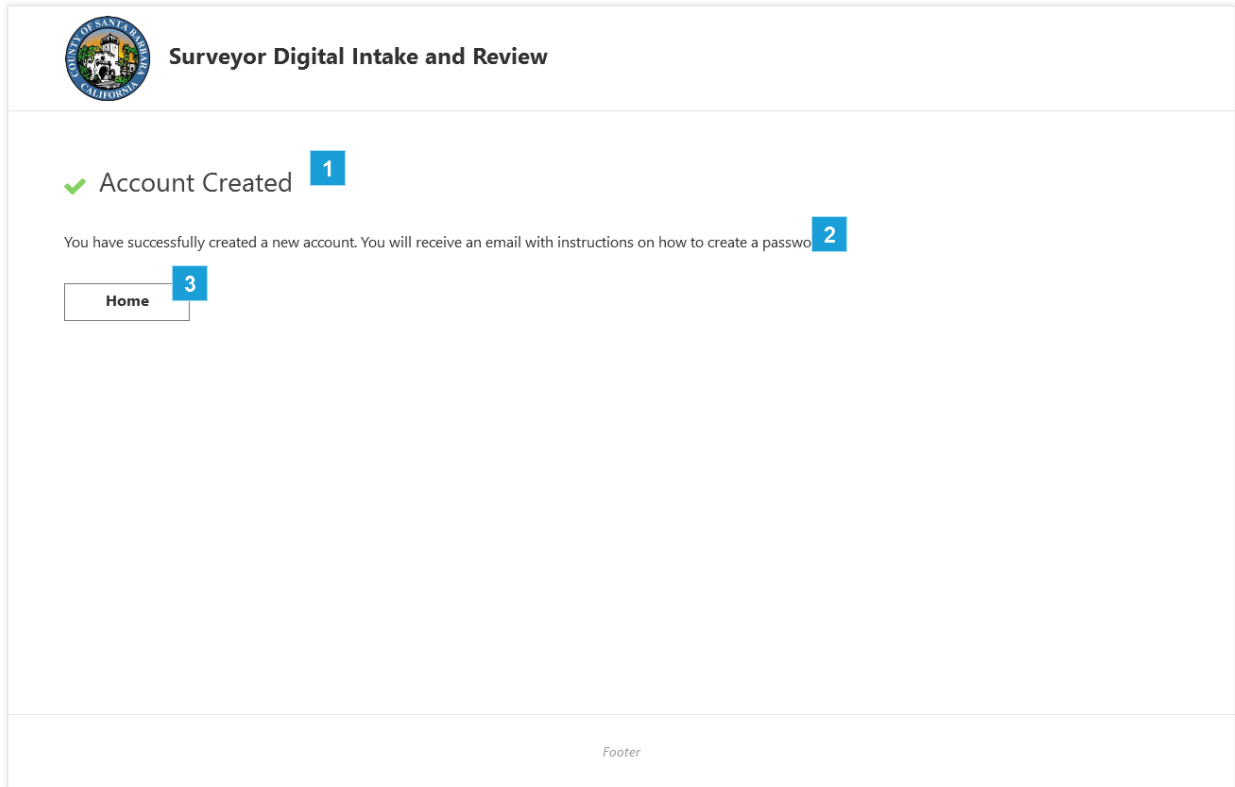
UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Sign Up - Create Account	N/A	Heading	N/A	N/A
2	First Name	N/A	Text Field	<ul style="list-style-type: none"> - Consists only of the letters a-z, spaces, and ,'- characters - Minimum of 1 alpha character - Max Length: 35 - Required 	<ul style="list-style-type: none"> - "First Name must start with a letter and may only contain the letters a-z, spaces, and the following characters: ,'-" - "Please enter a value for First Name"
3	Last Name	N/A	Text Field	<ul style="list-style-type: none"> - Consists only of the letters a-z, spaces, and ,'- characters - Minimum of 1 alpha character - Max Length: 35 - Required 	<ul style="list-style-type: none"> - "Last Name must start with a letter and may only contain the letters a-z, spaces, and the following characters: ,'-" - "Please enter a value for Last Name"
4	Company Name	N/A	Text Field	N/A	N/A
5	Phone	- Text field has masking to ensure to phone number is entered in the proper format (###) ###-####	Text Field	<ul style="list-style-type: none"> - Consists only of integers 0-9 - Min length: 10 - Max length: 10 - Required 	<ul style="list-style-type: none"> - "Phone number may only contain integers 0-9" - "Phone number must be 10 digits" - "Please enter a value for Phone number"
6	Extension		Text field		
7	Fax		Text field		
8	Email	N/A	Text Field (type: email)	<ul style="list-style-type: none"> - Valid email address - Max length: 255 - Email must be unique - Required 	<ul style="list-style-type: none"> - "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
9	Address 1	N/A	Text Field	- Required	- "Please enter a value for Address"
10	Address 2	N/A	Text Field	N/A	N/A
11	City	N/A	Text Field	- Required	- "Please enter a value for City"
12	State	N/A	Dropdown	- Required	- "Please select a value for State"
13	Zipcode	N/A	Text Field	- Consists only of integers 0-9 and - character - Min Length: 5 - Max Length: 10 - Required	- "Zipcode may only contain integers 0-9 and - character" - "Zipcode must be at least 5 characters" - "Please enter a value for Zipcode"
14	Create Account	- If form validates, link to Create Account - Success page	Button	N/A	N/A
15	Email	N/A	Text Field (type: email)	- Valid email address - Max length: 255 - Email must be unique - Required	- "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"

Create Account - Success

Wireframe



UI Specifications


Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Account Created	N/A	Heading
2	Success text	N/A	Text
3	Home	- Links to Home page	Button

Manage Profile

Page Notes

The manage profile screen will allow the applicant to edit all of the fields filled in during account creation. At the bottom of the screen, a 'Reset Password' button will take them directly to the second screen of the reset password workflow (as though they had received a reset password email and clicked on the reset password link in the email.)

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

Manage Profile 1

First Name:* 2 **Last Name:*** 3

Company Name:* 4

Phone:* 5 **Extensio** 6

Fax: 7

Email:* 8

Confirm Email:* 9

Address:* 10

Address 2: 11

City:* 12 **State:*** 13 **Zipcode:*** 14

Change Password: 15

16

Footer

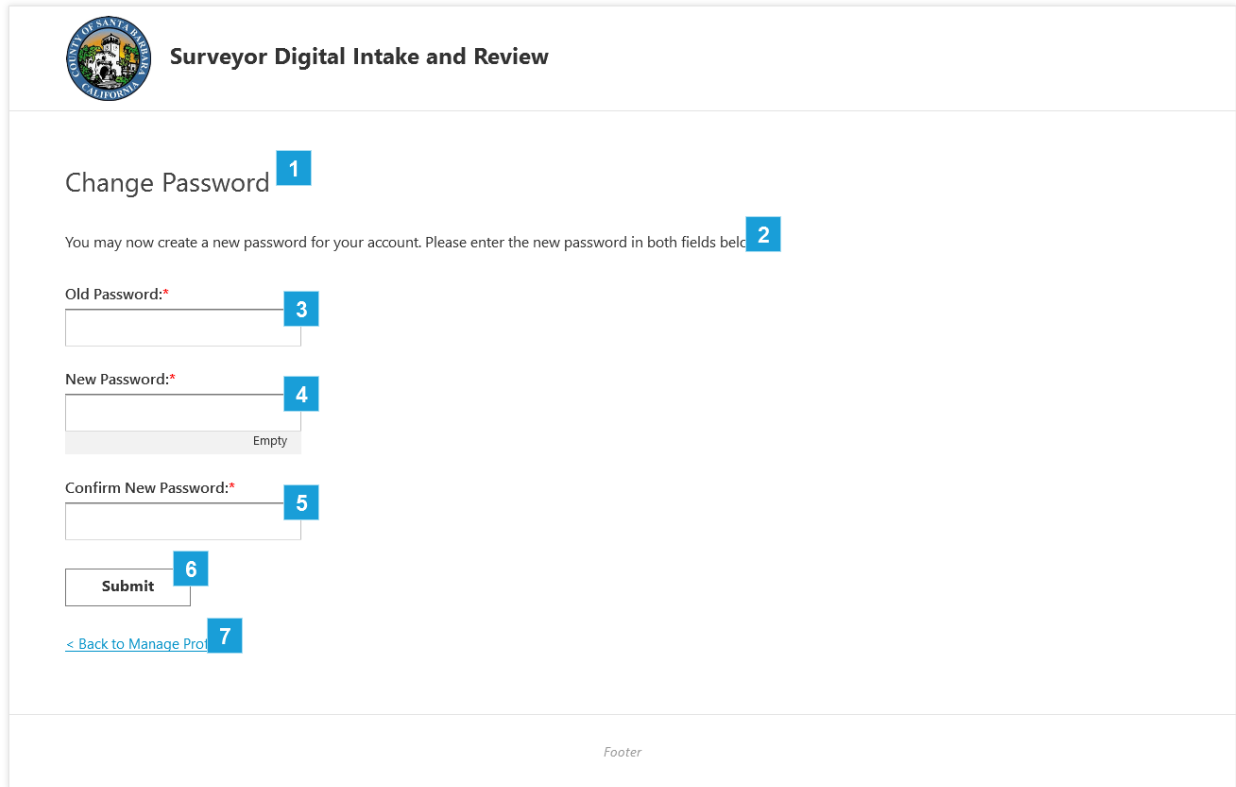
UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Manage Profile	N/A	Heading	N/A	N/A
2	First Name	N/A	Text Field	<ul style="list-style-type: none"> - Consists only of the letters a-z, spaces, and ,'- characters - Minimum of 1 alpha character - Max Length: 35 - Required 	<ul style="list-style-type: none"> - "First Name must start with a letter and may only contain the letters a-z, spaces, and the following characters: ,'-" - "Please enter a value for First Name"
3	Last Name	N/A	Text Field	<ul style="list-style-type: none"> - Consists only of the letters a-z, spaces, and ,'- characters - Minimum of 1 alpha character - Max Length: 35 - Required 	<ul style="list-style-type: none"> - "Last Name must start with a letter and may only contain the letters a-z, spaces, and the following characters: ,'-" - "Please enter a value for Last Name"
4	Company Name	N/A	Text Field	<ul style="list-style-type: none"> - Required 	<ul style="list-style-type: none"> - "Please enter a value for Company Name"
5	Phone	<ul style="list-style-type: none"> - Text field has masking to ensure to phone number is entered in the proper format (###) ###-#### 	Text Field	<ul style="list-style-type: none"> - Consists only of integers 0-9 - Min length: 10 - Max length: 10 - Required 	<ul style="list-style-type: none"> - "Phone number may only contain integers 0-9" - "Phone number must be 10 digits" - "Please enter a value for Phone number"
6	Extension		Text field		
7	Fax		Text field		
8	Email	N/A	Text Field (type: email)	<ul style="list-style-type: none"> - Valid email address - Max length: 255 - Email must be unique - Required 	<ul style="list-style-type: none"> - "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
9	Confirm Email	N/A	Text Field (type: email)	<ul style="list-style-type: none"> - Valid email address - Max length: 255 - Email must be unique - Required 	<ul style="list-style-type: none"> - "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"
10	Address 1	N/A	Text Field	- Required	- "Please enter a value for Address"
11	Address 2		Text Field	N/A	N/A
12	City	N/A	Text Field	- Required	- "Please enter a value for City"
13	State	N/A	Dropdown	- Required	- "Please select a value for State"
14	Zipcode	N/A	Text Field	<ul style="list-style-type: none"> - Consists only of integers 0-9 and - character - Min Length: 5 - Max Length: 10 - Required 	<ul style="list-style-type: none"> - "Zipcode may only contain integers 0-9 and - character" - "Zipcode must be at least 5 characters" - "Please enter a value for Zipcode"
15	Click here to Change Password		Button	N/A	N/A
16	Update Profile	- If form validates, saves the newly entered info, refreshes the page, and displays success message.	Button	N/A	N/A

Change Password

Wireframe



Surveyor Digital Intake and Review

Change Password

You may now create a new password for your account. Please enter the new password in both fields below

Old Password:*

New Password:*

Confirm New Password:*

Submit

[< Back to Manage Profile](#)

Footer


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Reset Password	N/A	Heading	N/A	N/A
2	Instructional text	N/A	Text	N/A	N/A
3	Old Password		Text Field (type: password)	<ul style="list-style-type: none"> - Required - Must match old password 	<ul style="list-style-type: none"> - "Please enter a value for Old Password" - "Password is incorrect"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
4	New Password	- Includes Password strength meter	Text Field (type: password)	- Min Length: 8 - Minimum password strength must be "Mediocre" - Required	- "Password is not strong enough" - "Password must be at least 8 characters" - "Please enter a value for New Password"
5	Confirm New Password		Text Field (type: password)	- Must match New Password field - Required	- "Passwords do not match" - "Please confirm your new password"
6	Submit	- If form validates, update password and link to Reset Password - Success page	Button	N/A	N/A
7	Back to Manage Profile	- Links back to Manage Profile page	Hyperlink	N/A	N/A

Change Password Success

Wireframe



Surveyor Digital Intake and Review

Change Password 1

You have successfully updated the password for your account. You can now use your new password to log 2

Login 3

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Reset Password	N/A	Heading
2	Success text	N/A	Text
3	Login	- Links to Login page	Button

Projects

Page Notes

Once the applicant's account has been created, they can log in using their email address and password as credentials. The initial screen they are shown will be referred to as the 'Applicant Dashboard'. This screen will show a grid with rows for their active projects. The grid columns will be as follows:

- Project # (This will be blank in some cases until an admin enters it)
- Project Name (This will link to the project details screen)
- Project Type
- Owner
- Licensed Professional
- APN (Show one APN, or if there are more than one, show the first one followed by a comma and an ellipsis to indicate that there are more.)

The Project Name column will contain links to the project details page for the various projects.

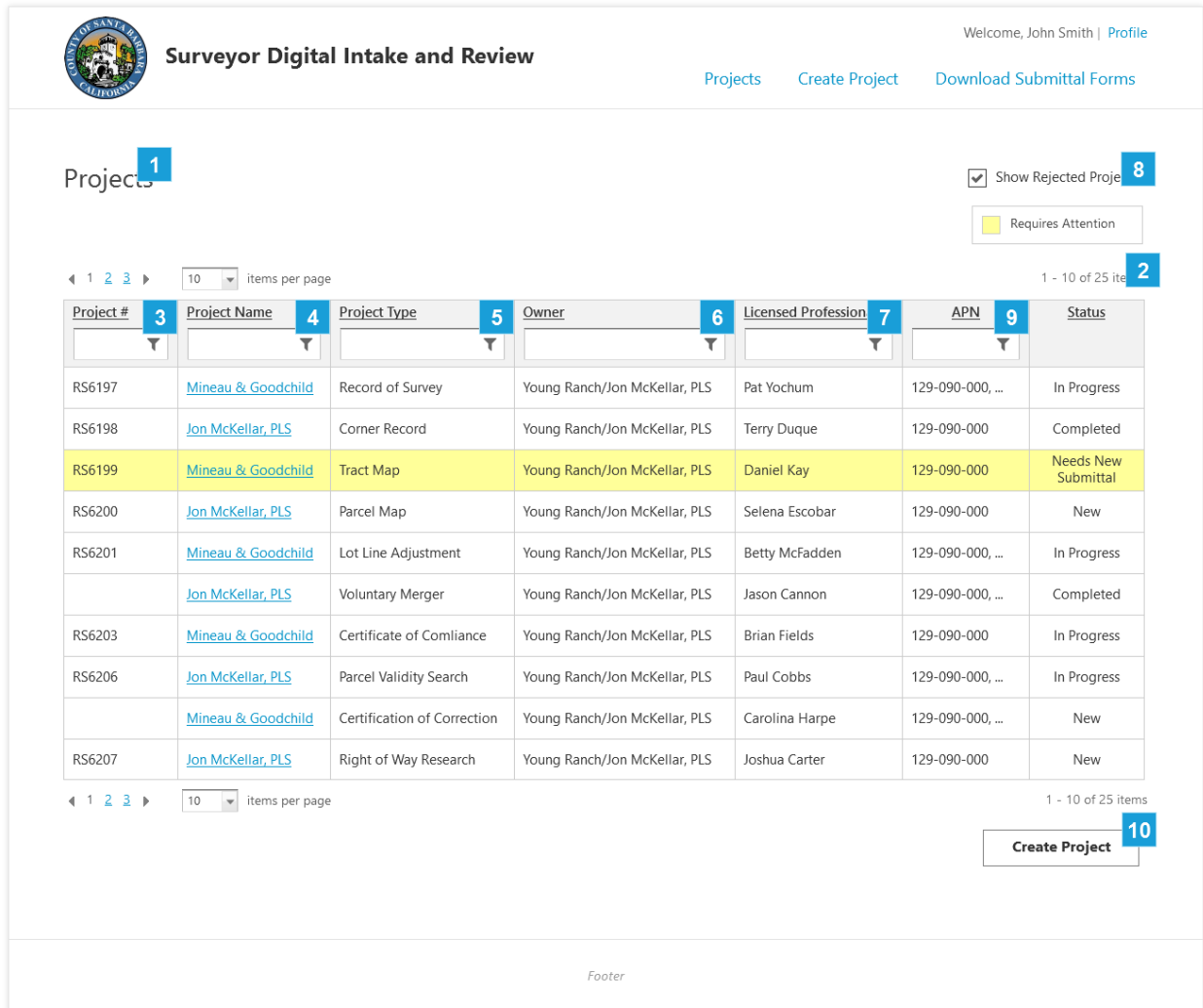
Applicants will be able to use the project details page to add submittals, or to add payment. Once created, applicants will not be able to edit project details at all. The grid will use Visus' standard paging and will have a filter row at the top for filtering the list of projects. Note that the filter fields should have an icon or placeholder text to clearly indicate that the fields are used for filtering, and not for adding a new row. Any project where the most recent submittal has been rejected will be highlighted to indicate that the status is on hold pending applicant input. Rejected projects will not be shown in the grid by default. Above the grid, there will be a checkbox (or other appropriate interaction) for the applicant to indicate that they want to include rejected projects in the grid. (Note: Consider using a toggle here to switch back and forth between rejected projects and projects which have not been rejected, rather than just including rejected projects in the list.)

The Applicant Dashboard and subsequent applicant pages will have a header specific to applicants. It will have a 'Welcome Applicant' text, substituting the applicant's first name, and a 'Profile' link for editing the application profile. The navigation will have three items:

- Dashboard (links to the applicant dashboard page)
- Create Project (links to the create project workflow)

- Download Submittal Forms (links to the submittal forms page)

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | Profile

Projects Create Project Download Submittal Forms

Projects

Show Rejected Projects

Requires Attention

1 - 10 of 25 items

Project #	Project Name	Project Type	Owner	Licensed Profession	APN	Status
RS6197	Mineau & Goodchild	Record of Survey	Young Ranch/Jon McKellar, PLS	Pat Yochum	129-090-000, ...	In Progress
RS6198	Jon McKellar, PLS	Corner Record	Young Ranch/Jon McKellar, PLS	Terry Duque	129-090-000	Completed
RS6199	Mineau & Goodchild	Tract Map	Young Ranch/Jon McKellar, PLS	Daniel Kay	129-090-000	Needs New Submittal
RS6200	Jon McKellar, PLS	Parcel Map	Young Ranch/Jon McKellar, PLS	Selena Escobar	129-090-000	New
RS6201	Mineau & Goodchild	Lot Line Adjustment	Young Ranch/Jon McKellar, PLS	Betty McFadden	129-090-000, ...	In Progress
	Jon McKellar, PLS	Voluntary Merger	Young Ranch/Jon McKellar, PLS	Jason Cannon	129-090-000, ...	Completed
RS6203	Mineau & Goodchild	Certificate of Compliance	Young Ranch/Jon McKellar, PLS	Brian Fields	129-090-000	In Progress
RS6206	Jon McKellar, PLS	Parcel Validity Search	Young Ranch/Jon McKellar, PLS	Paul Cobbs	129-090-000, ...	In Progress
	Mineau & Goodchild	Certification of Correction	Young Ranch/Jon McKellar, PLS	Carolina Harpe	129-090-000, ...	New
RS6207	Jon McKellar, PLS	Right of Way Research	Young Ranch/Jon McKellar, PLS	Joshua Carter	129-090-000	New

1 - 10 of 25 items

Create Project

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Projects	N/A	Heading

Footnote	Name	Business Rules/Data Fields	UI Functionality
2	Pager	Standard Kendo UI grid pager. Includes standard paging, results shown, and results per page dropdown. Defaults to 10 items per page. Items per page options: - 5 - 10 - 25 - 50 - 100	Pager
3	Project #	- Kendo row filtering textbox (filtering applied on blur)	Grid column
4	Project Name	- Kendo row filtering textbox (filtering applied on blur) - Links to Project Details page for selected project	Grid column
5	Project Type	- Kendo row filtering textbox (filtering applied on blur)	Grid column
6	Owner	- Kendo row filtering textbox (filtering applied on blur)	Grid column
7	Licensed Professional		Grid column
8	Show Rejected Projects		Checkbox
9	APN	- Kendo row filtering textbox (filtering applied on blur)	Grid column
10	Create Project	- Links to Create New Project page	Button

Create New Project

Page Notes


Clicking on the Create Project link in the navigation or the Create Project button on the applicant dashboard will take the applicant to the Create Project page. The create project page will be the main page for entering project information. This will be all of the information that will be common between the project submittals. Examples will be the applicant information, owner information, registered professional information, as well as the project name, type, APNs, and project type specific fields such as the planning case number and subdivision number fields. The following fields will be collected on the project creation screen:

- Project Name (Required)
- Project Type (Required)
- Fee Type (Not a field; displayed on the screen and updated when the Project Type is changed.)
- Fee Amount (Not a field; displayed on the screen and updated when the Project Type is changed.)
- Number of Lots (Required) (Shown only for the following Project Types: Tract Map, Parcel Map)
- Planning Case Number (Required) (Shown only for the following Project Types: Tract Map, Parcel Map, Lot Line Adjustment)
- Subdivision Number (Required) (Shown only for the following Project Types: Tract Map, Parcel Map)
- APN(s) (Required) (This will be a text field masked to ###-###-###. After typing an APN, the applicant will click a button marked 'Add'. This will cause the entered APN to be displayed on the screen with a delete button. Multiple APNs may be entered, but at least one is required.)
- Applicant (This will not be a field. It will just be the full name of the Applicant displayed on the screen.)
 - Owner
 - o First Name (Required)
 - o Last Name (Required)
 - o Company Name
 - o Phone (Required)
 - o Extension
 - o Fax

- o Email Address (Required)
- o Confirm Email Address (Required)
- o Address (Required)
- o Address 2 (Required)
- o City (Required)
- o State (Required) (Default to CA)
- o Zip Code (Required)
- o Same as Applicant (Default unchecked; When checked, this will populate all fields with the Applicant Profile info)
- o Include in Communications (Default unchecked; When checked, this will indicate that the Owner's email address should be cc'd on all communications)
- Licensed Professional
- o Company Name (Required)
- o Contact (Required)
- o Phone Number (Required)
- o Extension
- o Fax
- o Email Address (Required)
- o Confirm Email Address (Required)
- o Address (Required)
- o Address 2 (Required)
- o City (Required)
- o State (Required) (Default to CA)
- o Zip Code (Required)
- o License Number (Required)
- o License Type (Required) (Radio buttons: Registered Civil Engineer or Professional Land Surveyor)
- o Same as Applicant (Default unchecked; When checked, this will populate all fields with the Applicant Profile info)
- o Include in Communications (Default unchecked; When checked, this will indicate that the Licensed Professional's email address should be cc'd on all communications)

Once the form fields have been filled out and verified, the applicant will submit the form, and be directed to the Add Submittal page. Submitting the project creation form will write the project information to the database and trigger a verification email be sent to the Applicant, as well as the owner and licensed professional if indicated. The verification email will contain a brief summary of the project details.

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | Profile

[Projects](#) | [Create Project](#) | [Download Submittal Forms](#)

[Home](#) > [Create New](#) 1 2

Create New Project

Project Details 3

Project Name* 4 Project Type* 5

Record of Survey

Applicant 6 7

APNs 8

129-10 9 10 11 12

Owner 13

Owner same as app 14 Include in community 15

Company Name: 16

Contact* 17

Phone* 18 19

Fax: 20

Email* 21

Confirm Email* 22

Address* 23

Address 2: 24

City* 25 State* 26 Zipcode* 27

Licensed Professional 28

Licensed Professional same as app 29 Include in community 30

Company Name: 31

Contact* 32

Phone* 33 34

Fax: 35

Email* 36

Confirm Email* 37

Address* 38

Address 2: 39

City* 40 State* 41 Zipcode* 42

License Number* 43

License Type* 44

Registered Civil Engineer

Professional Land Surveyor

45

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)	N/A	N/A
2	Create New Project	N/A	Heading	N/A	N/A
3	Project Details	N/A	Subheading	N/A	N/A
4	Project Name	N/A	Text Field	- Required	- "Please enter a value for Project Name"
5	Project Type	Options: - Record of Survey - Corner Record - Tract Map - Parcel Map - Lot Line Adjustment - Voluntary Merger - Certificate of Compliance - Parcel Validity Search - Certificate of Correction - Right of Way Research (Public Request)	Dropdown	- Required	- "Please select an option for Project Type"
6	Fee Type	- Displays Fee Type	Text	N/A	N/A
7	Fee Amount	- Displays Fee Amount	Text	N/A	N/A
8	Applicant				
9	Saved APN	N/A	Text	N/A	N/A
10	Remove APN	- Removed the saved APN	Button	N/A	N/A
11	APNs	N/A	Text field	- At least 1 APN is required	- "Please add at least 1 APN"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
12	Add APN	<ul style="list-style-type: none"> - After entering an APN in the APN field and clicking this button, the APN is saved and displayed on screen. - The APN field is cleared and moved below the last saved APN, so that the user can enter another APN if desired. 	Button	N/A	N/A
13	Owner	N/A	Subheading	N/A	N/A
14	Owner same as applicant		Checkbox		
15	Include in communications		Checkbox		
16	Company Name	N/A	Text Field	N/A	N/A
17	Contact	N/A	Text Field	- Required	- "Please enter a value for Contact"
18	Phone	- Text field has masking to ensure to phone number is entered in the proper format (###) ###-####	Text Field	<ul style="list-style-type: none"> - Consists only of integers 0-9 - Min length: 10 - Max length: 10 - Required 	<ul style="list-style-type: none"> - "Phone number may only contain integers 0-9" - "Phone number must be 10 digits" - "Please enter a value for Phone number"
19	Extension		Text field		
20	Fax		Text field		
21	Email	N/A	Text Field (type: email)	<ul style="list-style-type: none"> - Valid email address - Max length: 255 - Email must be unique - Required 	<ul style="list-style-type: none"> - "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"
22	Email	N/A	Text Field (type: email)	<ul style="list-style-type: none"> - Required - Must match Email field 	<ul style="list-style-type: none"> - "Please enter a value for Confirm Email" - "Emails do not match"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
23	Address 1	N/A	Text Field	- Required	- "Please enter a value for Address"
24	Address 2	N/A	Text Field	N/A	N/A
25	City	N/A	Text Field	- Required	- "Please enter a value for City"
26	State	N/A	Dropdown	- Required	- "Please select a value for State"
27	Zipcode	N/A	Text Field	- Consists only of integers 0-9 and - character - character - Min Length: 5 - Max Length: 10 - Required	- "Zipcode may only contain integers 0-9 and - character" - "Zipcode must be at least 5 characters" - "Please enter a value for Zipcode"
28	Owner	N/A	Subheading	N/A	N/A
29	Owner same as applicant		Checkbox		
30	Include in communications		Checkbox		
31	Company Name	N/A	Text Field	N/A	N/A
32	Contact	N/A	Text Field	- Required	- "Please enter a value for Contact"
33	Phone	- Text field has masking to ensure to phone number is entered in the proper format (###) ###-####	Text Field	- Consists only of integers 0-9 - Min length: 10 - Max length: 10 - Required	- "Phone number may only contain integers 0-9" - "Phone number must be 10 digits" - "Please enter a value for Phone number"
34	Extension		Text field		
35	Fax		Text field		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
36	Email	N/A	Text Field (type: email)	- Valid email address - Max length: 255 - Email must be unique - Required	- "Please enter a valid email address" - "This email address is already associated with an account. Please enter a unique email address." - "Please enter a value for Email"
37	Email	N/A	Text Field (type: email)	- Required - Must match Email field	- "Please enter a value for Confirm Email" - "Emails do not match"
38	Address 1	N/A	Text Field	- Required	- "Please enter a value for Address"
39	Address 2	N/A	Text Field	N/A	N/A
40	City	N/A	Text Field	- Required	- "Please enter a value for City"
41	State	N/A	Dropdown	- Required	- "Please select a value for State"
42	Zipcode	N/A	Text Field	- Consists only of integers 0-9 and character - Min Length: 5 - Max Length: 10 - Required	- "Zipcode may only contain integers 0-9 and character" - "Zipcode must be at least 5 characters" - "Please enter a value for Zipcode"
43	License Number	N/A	Text Field	- Required	- "Please enter a value for License Number"
44	License Type	Options:	Radio Buttons	- Required	- "Please select an option for License Type"
45	Next	- If form validates, saves the project and links to Add Document/Submittal page	Button	N/A	N/A

Add Submittal - Record of Survey

Page Notes

Applicants will upload documents for their project, along with supporting references. A batch of uploaded files containing the primary file and supporting references along with any other forms required is referred to as a 'Submittal'. In all cases there will be at least one primary document uploaded... this is the 'application' document for the changes being made with the project. Each type of project has supporting documents that are required to be submitted with the application. For a list of these documents, reference the living document:

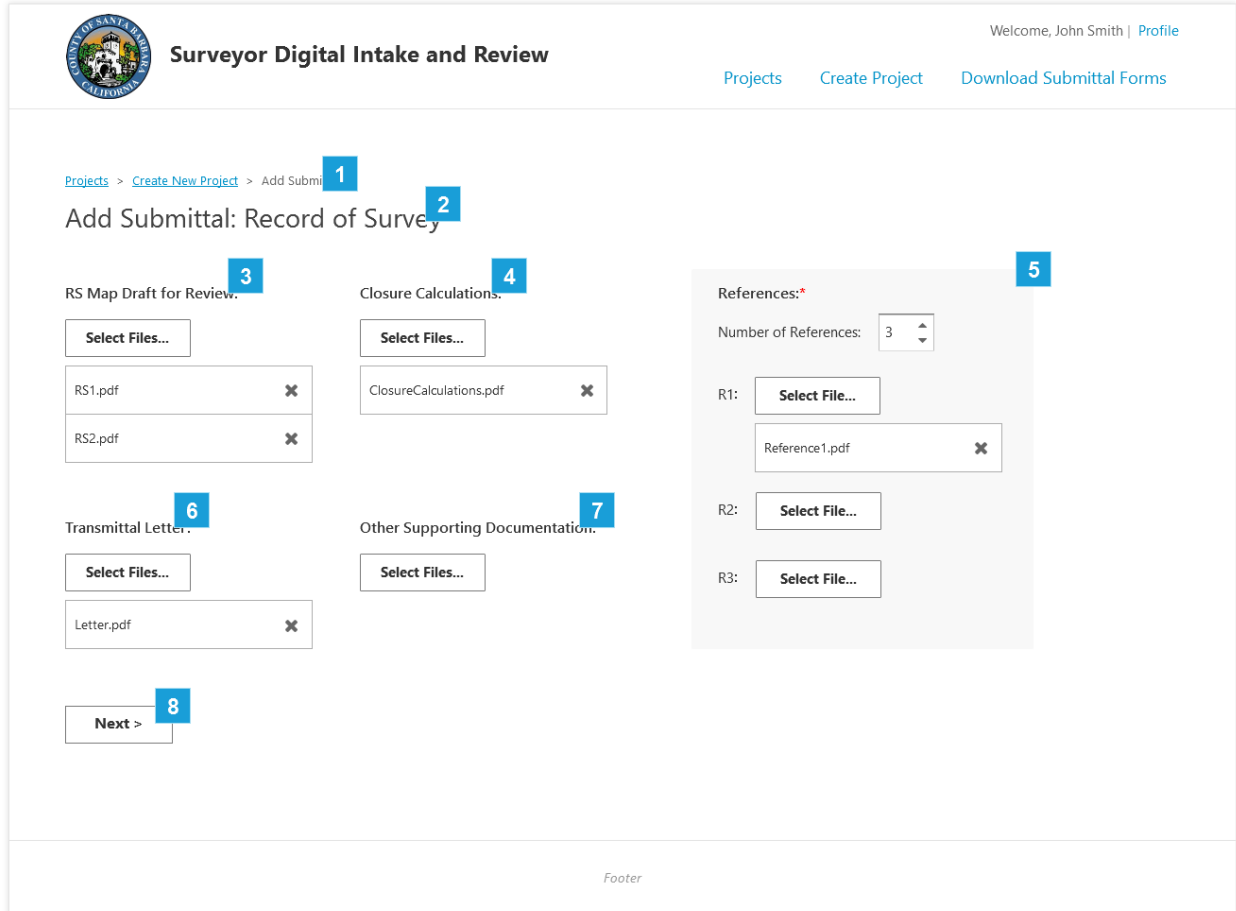
https://visusllc.sharepoint.com/:x:/s/drive/EbSss4_JooJMg7OoA5_FuQoBalUNw5n8q8Ko-

[dujS0bPwQ?e=Db6OsG](https://visusllc.sharepoint.com/:x:/s/drive/EbSss4_JooJMg7OoA5_FuQoBalUNw5n8q8Ko-). All documents must be uploaded as PDFs. No other file format will be accepted. Note that in cases where the 'Signed Letter of Agent Authorization' is indicated, this document is only required when the 'Same as Applicant' checkbox is NOT checked for the owner. In other words, if the person submitting the application is not the owner of the project, they must fill out and submit a 'Signed Letter of Agent Authorization' stating that they have permission to submit this application on behalf of the project owner.

For the Reference Documents upload, the user will first enter the number of documents being uploaded in a numeric text box. On blur or change, file uploads will be dynamically added to the page to correspond with the number of uploads indicated. Reference documents uploaded will be labelled on the page as 'R1', 'R2', etc., and the file names of these documents will be modified to reflect this labelling as well. Validation will be used to ensure that the number of reference documents uploaded matches exactly the number indicated in the text box. These uploaded reference documents will correlate with documents referenced in the uploaded application (this will not be validated in the Surveyor Intake Application.)

Excluding Reference Documents, all uploads will allow multiple files, and will include the functionality to display a list of chosen files and delete entries from the list prior to submission. For required uploads, validation will guarantee that at least one file has been uploaded.

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Create New Project](#) > Add Submittal **1**

Add Submittal: Record of Survey **2**

3 RS Map Draft for Review...

 RS1.pdf
 RS2.pdf

4 Closure Calculations...

 ClosureCalculations.pdf

6 Transmittal Letter...

 Letter.pdf

7 Other Supporting Documentation...

5 References:*
 Number of References: 3
 R1:
 Reference1.pdf
 R2:
 R3:

8

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)	N/A	N/A
2	Add Submittal	N/A	Heading		
3	RS Map Draft for Review		Upload		
4	Closure Calculations		Upload		
5	References		Text field (numeric) / Upload		
6	Transmittal Letter		Upload		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
7	Other Supporting Documentation		Upload		
8	Next	- If form validates, saves the project and links to Add Submittal page	Button	N/A	N/A

Add Payment

Page Notes

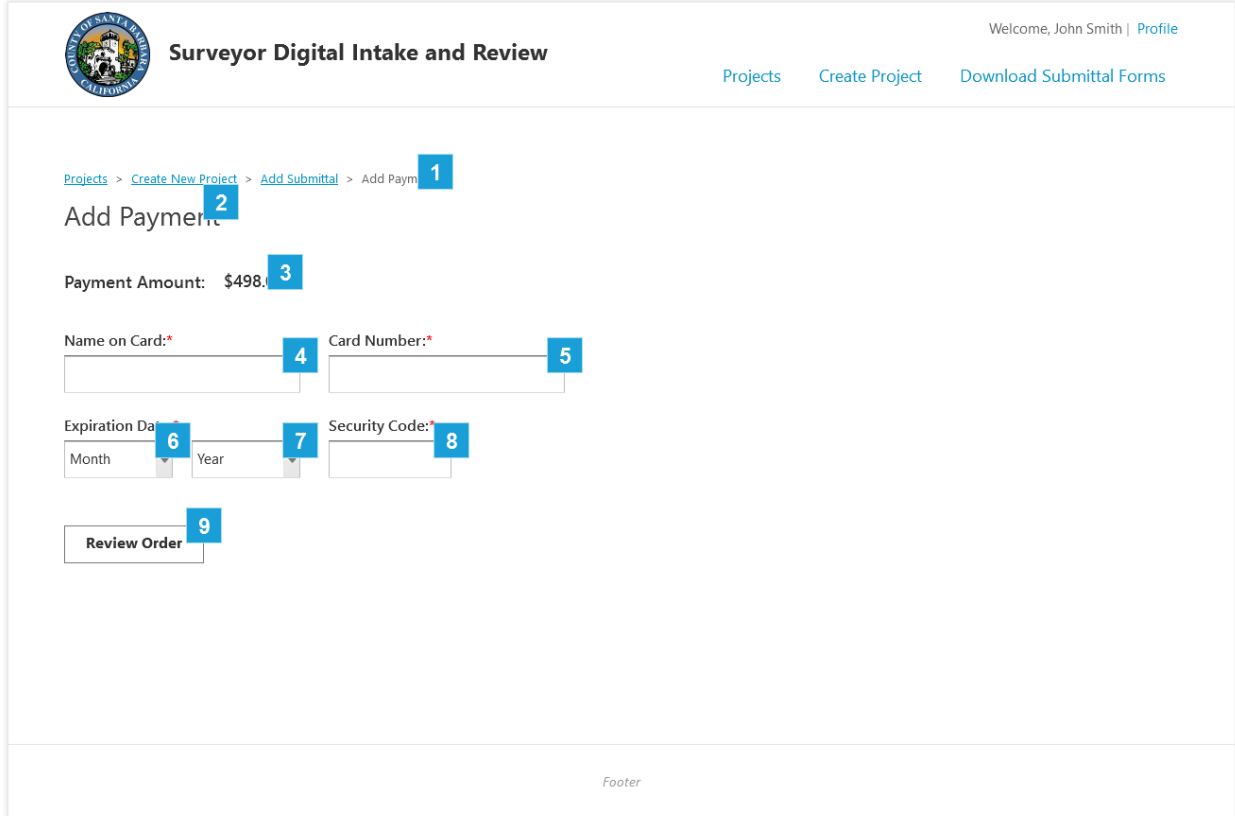
The next step in the process is to submit payment for the project fees. The amount is determined by the fee schedule. In some cases, this payment is just a deposit; this will be indicated on this screen. The payment information collected will be as follows (with the possible addition of address information if required by the payment processor):

- Name on the Card
- Credit Card Number
- Expiration Month
- Expiration Year
- Security Code

Note all fields are required.

The system will determine the type of credit card used automatically based on the card number and store that information along with the last four digits of the credit card number in the database for use in reporting and receipts.

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Create New Project](#) > [Add Submittal](#) > Add Payment **1**

Add Payment **2**

Payment Amount: \$498. **3**

Name on Card:* **4** Card Number:* **5**

Expiration Date **6** **7** Security Code:* **8**

Month Year

9 Review Order

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)	N/A	N/A
2	Add Payment	N/A	Heading	N/A	N/A
3	Payment Amount	- Displays Payment Amount	Text	N/A	N/A
4	Name on Card		Text Field	- Required	- "Please enter a value for Name on Card"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
5	Card Number		Text Field	-Consists only of integers 0-9 - Min length: 16 - Max length: 19 - Required	- "Please enter a valid credit card number" - "Card Number must be between 16 and 19 digits" - "Please enter a value for Card Number"
6	Month	Options: 01-12	Dropdown	- Required	- "Please select an option for Month"
7	Year	Options: 2017-2026	Dropdown	- Required	- "Please select an option for Year"
8	Security Code	- Blocks non-numeric input	Text Field	- Consists only of integers 0-9 - Min Length: 3 - Max Length: 4 - Required	- "Security Code may only contain integers 0-9" - "Security Code must be at least 3 characters" - "Please enter a value for Security Code"
9	Review Order		Button		

Submittal Review

Page Notes

The last step in the submittal process will be a verification page. It will show all project details, payment information, and a summary list of all uploaded documents. It will also display the Project Number field, which is a special field stored in the database, but not entered by the user. In cases where the Subdivision Number is entered, the Project Number will be automatically populated by the value for the Subdivision Number. In all other cases, the Project Number will be blank until the Admin/Back Office user verifies the submittal. They will enter the Project Number at that time. This page will not be editable. The only interaction will be a final submit button, or a make changes/edit button. Clicking the submit button finalizes the submittal and causes the documents to be stored in azure storage. Prior to verification by a Back Office or Admin user, the submittal will be stored in a temporary directory in Azure, and the folder will be labelled with an internal ID rather than the project number. Additionally, when the submittal is entered, an email will be sent to the County of Santa Barbara Intake email address which includes summary details of the submittal, as well as a link to go directly to the admin edit screen for the project/submittal details. A second email will be sent to the Applicant, as well as the Owner and Licensed Professional (if indicated), containing a confirmation of the submittal, and some boilerplate text indicating that it will be processed as soon as possible.


Note: This verification page will also be shown after a submittal is added to an existing project (by clicking Add Submittal from the project details screen) and after a payment is added to an existing project (by clicking Pay Balance on the project details screen.) When this screen is shown after either of those two workflows, whichever section is not relevant will not be displayed. When adding a submittal, the payment information will not be shown, and when adding a payment, the submittal information will not be shown.

Back Office/Admin Review:

Once the submittal has been entered, a County user will click on the link in the email to go to the review screen for the submittal. They will log in, and verify that the project details all look correct (project type and fees are right (they will have the option to update the project balance, but will be required to enter

a note describing why), required information is entered correctly, payment was made etc.) Additionally, for project types that do not require the subdivision number (and therefore do not have a pre-populated project number), they will also enter the project number. Once the review is complete, they will click on a button to 'finalize' the submittal, and that will initiate the process of copying the files from the 'temporary' directory in azure to the final location, which will be a folder named with the project number. At this time, another email will be sent to the county indicating that the project and submittal are ready for review. This email will include summary details about the project, including the project number, as well as links to the relevant documents in Azure storage. A second email will be sent to the applicant, and the owner and licensed professional (if indicated), letting them know that the preliminary verification is complete for their submittal, and the review is in process. There will also be an option to reject the project or submittal (two buttons... reject project and reject submittal.) If the admin/back office user rejects a project or submittal, they will be required to state a reason for why it was rejected. An email will be sent to the applicant (and owner and licensed professional if indicated) letting them know that the project or submittal has been rejected. Depending on the type of rejection, the applicant will need to create a new submittal to continue (or create a whole new project, if the entire project was rejected).

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Create New Project](#) > [Add Submittal](#) > [Add Payment](#) > Submittal Rev 1

Submittal Review 2

Project Details 3

Project Type: Record Survey	Fee Type: Fixed	
Applicant: John Smith	Fee Amount: \$498.00	
APN(s): 129-090-000 129-090-123		

Submittal 4

- RS1.pdf
- RS2.pdf
- ClosureCalculations.pdf
- Reference1.pdf
- Reference2.pdf
- Reference3.pdf
- Letter.pdf

Owner 5

Company: CompanyName	Contact: FirstName LastName	
Phone: (805) 123-5555 - 234	Fax: (805) 777-5555	
Email: email@gmail.com		
Address: Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Payment 6

Name on Card: FirstName LastName

Card Number: *****1234

Expiration Date: 12/20

Payment Amount: **\$498.00**

Licensed Professional 7

Company: CompanyName	Contact: FirstName LastName	
Phone: (805) 123-5555 - 234	Fax: (805) 777-5555	
Email: email@gmail.com		
Address: Address Line 1 Address Line 2 Santa Barbara, CA 93111		

[Edit Submittal 9](#)

[Edit Payment 10](#)

[Submit and Place Order 8](#)

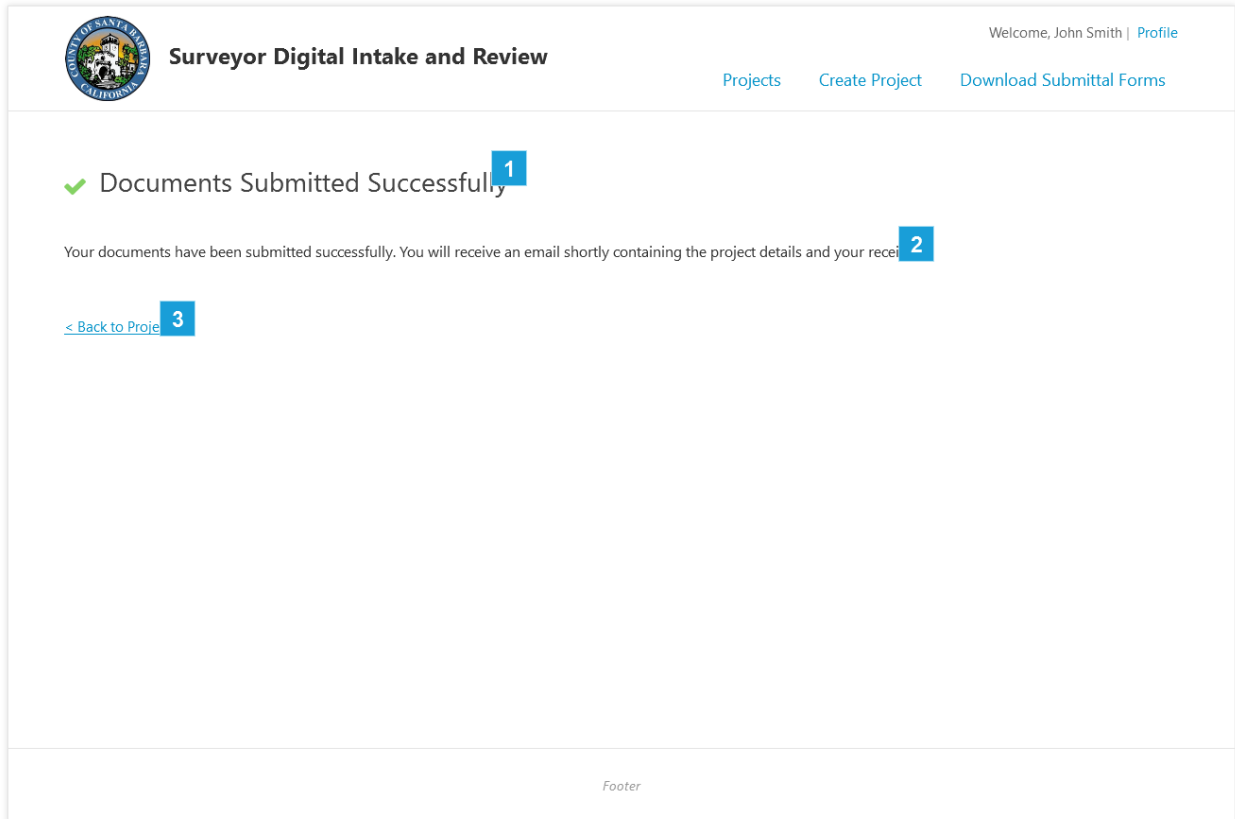
Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)
2	Submittal Review	N/A	Heading
3	Project Details		Text
4	Submittals		Text
5	Owner		Text
6	Payment		Text
7	Licensed Professional		Text
8	Submit and Place Order		Button
9	Edit Submittal		Button
10	Edit Payment		Button

Confirmation

Wireframe



The wireframe shows a web page for the 'Surveyor Digital Intake and Review' system. At the top left is the County of Santa Barbara logo. The page title is 'Surveyor Digital Intake and Review'. On the top right, there is a user greeting 'Welcome, John Smith | Profile' and three navigation links: 'Projects', 'Create Project', and 'Download Submittal Forms'. The main content area features a green checkmark icon followed by the heading 'Documents Submitted Successfully' (annotated with a blue box '1'). Below this is a paragraph of success text: 'Your documents have been submitted successfully. You will receive an email shortly containing the project details and your receipt' (annotated with a blue box '2'). At the bottom left of the content area is a blue hyperlink '< Back to Projects' (annotated with a blue box '3'). The footer area contains the word 'Footer'.

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Documents Submitted Successfully	N/A	Heading
2	Success text	N/A	Text
3	Back to Projects	- Links back to Projects page	Hyperlink

Project Details (in progress)

Page Notes


The project details page will be a snapshot of all relevant information for a project including submittals. Clicking on a project name in the application dashboard projects grid will take the applicant to this page. The heading for this page will display the project name and project status. The page will have a section for project details, owner information, licensed professional, submittals, and payment/balance history. None of the information on this screen is editable. Project details will show the project type, fee type, fee amount, applicant, APNs, as well as the subdivision number, number of lots, and planning case number (where appropriate.) The owner and licensed professional information will show the company name, phone number, email address, contact name, fax number, and address. The submittals section will be a list of submittals. Each submittal will have a heading which includes the date it was submitted as a way of distinguishing between submittals. Under the heading will be a list of the files uploaded as well as links to each file. If the submittal has been reviewed, there will be a link to the results from the review for the submittal. Under the list of submittals will be a link to add a new submittal to the project. This link will only be enabled if the project has a balance of \$0. The payment history section will contain a line showing the current account balance, as well as a button to pay the balance. The button will only be enabled if the balance is greater than \$0. When clicked, the 'Pay Balance' button will direct the applicant directly to the payment screen, where they will be required to go through the payment process to clear their balance. There will also be a grid showing the history of the account balance under the account balance line. The grid will include the following columns:

- Note
- Date
- Amount
- New Balance

This will display a line item for every incident that causes the account balance to change. This will include payments, automatic balance adjustments by the windows service, and changes to the balance made by back office users. The note column will display a maximum of 75 characters. If there are more than 75 characters, the notes column will cut off at 68 characters, and the text '... more' will be

appended to the notes field, with the word 'more' including a title tag that contains the full notes column, such that hovering over it will display the complete text in a tooltip.

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Project Details](#) **1**

Jon McKellar, PLS - Details **2** IN PROGRESS **3**

#18931203 **4**

Project Details **5**

Project Type: Tract Map (26-75 Lots)	Fee Type: Cost Recovery	
Applicant: John Smith	Fee Amount: \$6,365	
APN(s): 129-090-000	Subdivision #: 12345678	
129-090-123	Number of Lots: 70	
	Planning Case #: 12345678	

Owner **9**

Company: CompanyName	Contact: FirstName LastName	
Phone: (805) 123-5555 - 234	Fax: (805) 777-5555	
Email: email@gmail.com		
Address: Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Licensed Professional **10**

Company: CompanyName	Contact: FirstName LastName	
Phone: (805) 123-5555 - 234	Fax: (805) 777-5555	
Email: email@gmail.com		
Address: Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Payment **11**

Project Balance: \$450.00 Pay Balance **12**

History **14**

Note	Date	Amount	New Balance
Fee assessed during review	7/13/2019	\$350.00	\$450.00
Project converted to cost recovery. \$100 fee assessed.	7/10/2019	\$100.00	\$100.00
Payment submitted - Visa ending in 5108	7/1/2019	-\$6,365.00	\$0.00
Tract Map (26-75 Lots) Project Created	7/1/2019	\$6,365.00	\$6,365.00

[< Back to Project](#) **13**

Submittals **6**

Submittal 1

- [SignedApplication.pdf](#)
- [AgentLetter.pdf](#)
- [ProcessingFeeAgreement.pdf](#)
- [MapDraft.pdf](#)
- [TentativeMap.pdf](#)
- [PreliminaryTitleReport.pdf](#)
- [DraftofNoticeTitle.pdf](#)
- [ClosureCalculations.pdf](#)
- [ReferenceL.pdf](#)

County Review Results **8**

Add Submittal **7**

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)
2	Project Name - Details	[Project Name] - Details	Heading
3	Project Status		Label
4	Project Number		Heading
5	Project Details		Text
6	Submittals		Text
7	Add Submittal	- Links to blank Submittal page	Button
8	County Review Results	- Links to blank Submittal page	Button
9	Owner		Text
10	Licensed Professional		Text
11	Payment		Text
12	Pay Balance	- Opens modal popup with	Button
13	Back to Projects	Returns to Projects page	Hyperlink
14	Payment History Grid	Columns: - Note - Date - Amount - New Balance	Grid

Project Details (needs new submittal)

Page Notes

The project details page will be a snapshot of all relevant information for a project including submittals. Clicking on a project name in the application dashboard projects grid will take the applicant to this page. The heading for this page will display the project name and project status. The page will have a section for project details, owner information, licensed professional, submittals, and payment/balance history. None of the information on this screen is editable. Project details will show the project type, fee type, fee amount, applicant, APNs, as well as the subdivision number, number of lots, and planning case number (where appropriate.) The owner and licensed professional information will show the company name, phone number, email address, contact name, fax number, and address. The submittals section will be a list of submittals. Each submittal will have a heading which includes the date it was submitted as a way of distinguishing between submittals. Under the heading will be a list of the files uploaded as well as links to each file. If the submittal has been reviewed, there will be a link to the results from the review for the submittal. Under the list of submittals will be a link to add a new submittal to the project. This link will only be enabled if the project has a balance of \$0. The payment history section will contain a line showing the current account balance, as well as a button to pay the balance. The button will only be enabled if the balance is greater than \$0. When clicked, the 'Pay Balance' button will direct the applicant directly to the payment screen, where they will be required to go through the payment process to clear their balance. There will also be a grid showing the history of the account balance under the account balance line. The grid will include the following columns:

- Note
- Date
- Amount
- New Balance

This will display a line item for every incident that causes the account balance to change. This will include payments, automatic balance adjustments by the windows service, and changes to the balance made by back office users. The note column will display a maximum of 75 characters. If there are more than 75 characters, the notes column will cut off at 68 characters, and the text '... more' will be

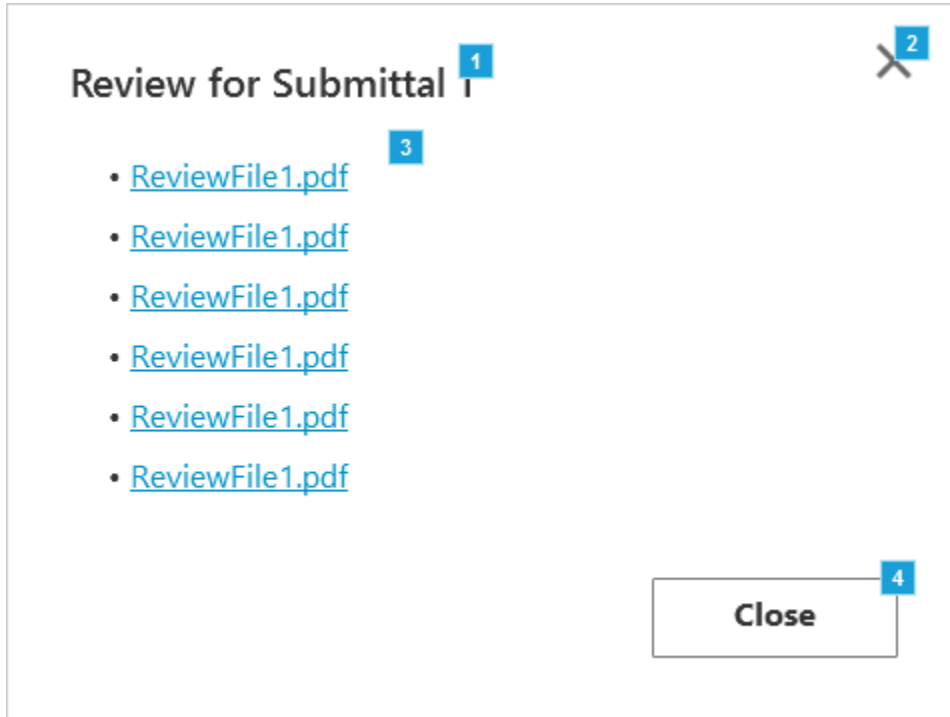
appended to the notes field, with the word 'more' including a title tag that contains the full notes column, such that hovering over it will display the complete text in a tooltip.

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)
2	Project Name - Details	[Project Name] - Details	Heading
3	Project Status		Label
4	Project Number		Heading
5	Project Details		Text
6	Submittals		Text
7	Add Submittal	- Links to blank Submittal page	Button
8	County Review Results	- Links to blank Submittal page	Button
9	Owner		Text
10	Licensed Professional		Text
11	Payment		Text
12	Pay Balance	- Opens modal popup with	Button
13	Payment History Grid	Columns: - Note - Date - Amount - New Balance	Grid
14	Back to Projects	Returns to Projects page	Hyperlink

Review for Submittal popup

Wireframe




UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation
1	Review for Submittal ([Date])	N/A	Heading	
2	Close button	Closes the popup	Button	
3	Review Links		List	
4	Close	Closes the popup	Button	

Add Submittal - Tract Map

Wireframe



Surveyor Digital Intake and Review

Projects Create Project Download Submittal Forms

Welcome, John Smith | [Profile](#)

[Projects](#) > [Project Details](#) > Add Submittal 1

Add Submittal: Tract Map 2

Signed Application... 3

Select Files...

Signed Letter of Agent Authorization... 4

Select Files...

Signed Agreement to Pay Processing Fee... 5

Select Files...

Subdivision Map Draft for Review... 6

Select Files...

Copy of Approved Tentative Map... 7

Select Files...

Preliminary Title Report... 8

Select Files...

Draft of Notice Title Page... 9

Select Files...

Closure Calculations... 10

Select Files...

Other Supporting Documentation... 11

Select Files...

Next > 13

References:* 12

Number of References: 5

R1: Select File...

R2: Select File...

R3: Select File...

R4: Select File...

R5: Select File...


Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)	N/A	N/A
2	Add Submittal	N/A	Heading	N/A	N/A
3	Signed Application*		Upload		
4	Signed Letter of Agent Authorization		Upload		
5	Signed Agreement to Pay Processing Fee		Upload		
6	Subdivision Map Draft for Review		Upload		
7	Copy of Approved Tentative Map		Upload		
8	Preliminary Title Report		Upload		
9	Draft of Notice Title Page		Upload		
10	Closure Calculations		Upload		
11	Other Supporting Documentation		Upload		
12	References		Text field (numeric) / Upload		
13	Next	- If form validates, saves the project and links to Add Submittal page	Button	N/A	N/A

Submittal Review

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#)
[Create Project](#)
[Download Submittal Forms](#)

[Projects](#) > [Project Details](#) > [Add Submittal](#) > Submittal Rev 1

Submittal Review 2

Project Details 3

Project Type:	Tract Map (26-75 Lots)	Fee Type:	Fixed
Applicant:	John Smith	Fee Amount:	\$6,365.00
APN(s):	129-090-000 129-090-123	Subdivision #:	12345678
		Number of Lots:	300
		Planning Case #:	12345678

Owner 5

Company:	CompanyName	Contact:	FirstName LastName
Phone:	(805) 123-5555 - 234	Fax:	(805) 777-5555
Email:	email@gmail.com		
Address:	Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Licensed Professional 6

Company:	CompanyName	Contact:	FirstName LastName
Phone:	(805) 123-5555 - 234	Fax:	(805) 777-5555
Email:	email@gmail.com		
Address:	Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Submittal 4

- SignedApplication.pdf
- AgentLetter.pdf
- ProcessingFeeAgreement.pdf
- MapDraft.pdf
- TentativeMap.pdf
- PreliminaryTitleReport.pdf
- DraftofNoticeTitle.pdf
- ClosureCalculations.pdf
- Reference1.pdf
- Reference2.pdf
- Reference3.pdf
- Reference4.pdf
- Reference5.pdf

Edit Submittal 7

Submit 8

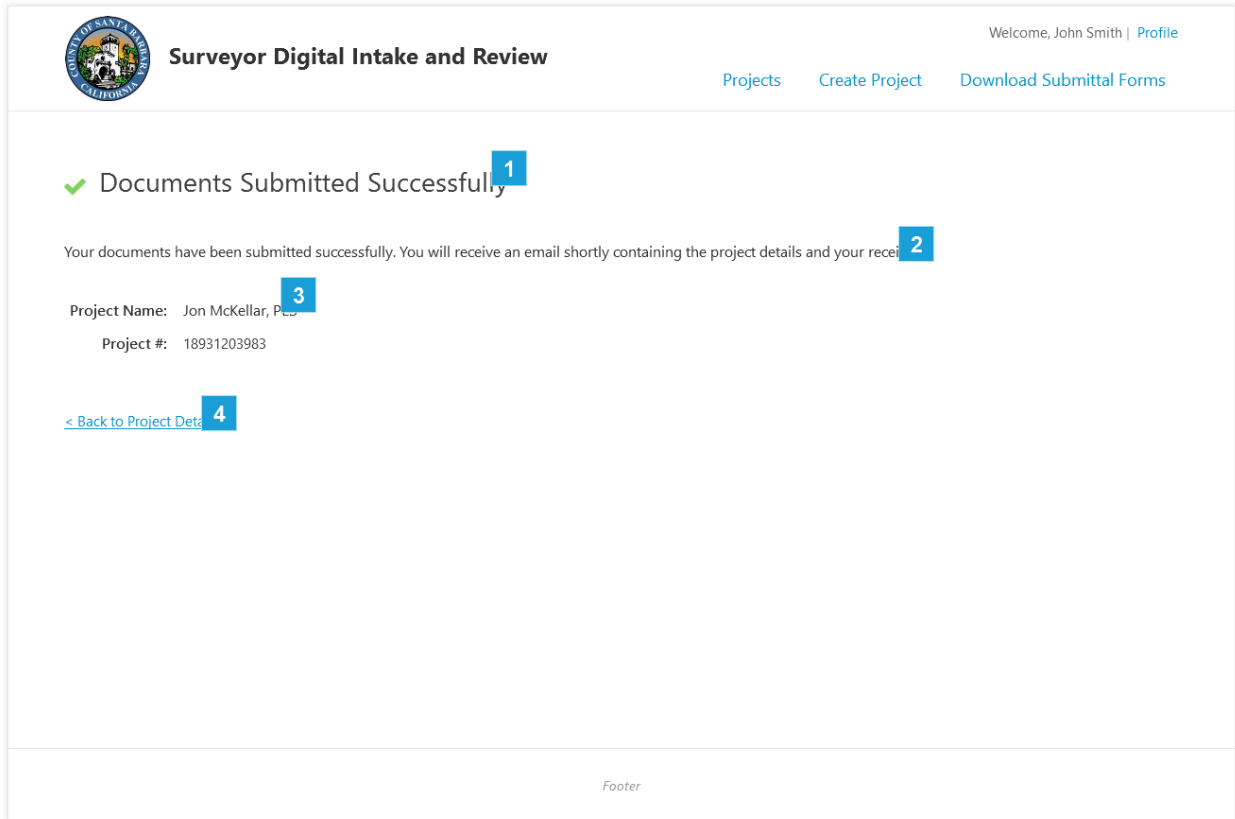
Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)
2	Submittal Review	N/A	Heading
3	Project Details		Text
4	Submittals		Text
5	Owner		Text
6	Licensed Professional		Text
7	Edit Submittal		Button
8	Submit		Button

Confirmation

Wireframe



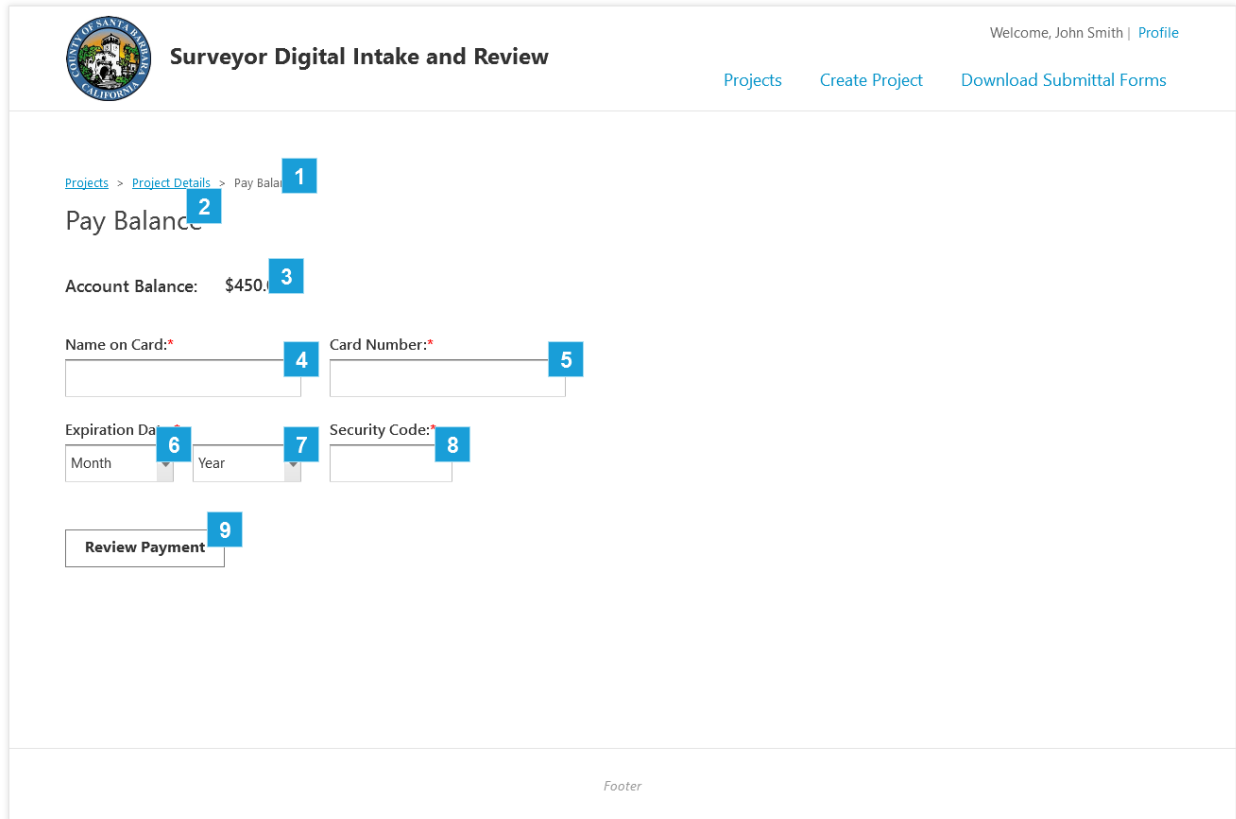
The wireframe shows a confirmation page for the 'Surveyor Digital Intake and Review' system. At the top left is the County of Santa Barbara logo. The page title is 'Surveyor Digital Intake and Review'. In the top right corner, there is a user greeting: 'Welcome, John Smith | Profile'. Below this are three navigation links: 'Projects', 'Create Project', and 'Download Submittal Forms'. The main content area features a green checkmark icon followed by the heading 'Documents Submitted Successfully' (annotated with a blue box '1'). Below the heading is a paragraph of success text: 'Your documents have been submitted successfully. You will receive an email shortly containing the project details and your receipt' (annotated with a blue box '2'). This is followed by project details: 'Project Name: Jon McKellar, P.E.' (annotated with a blue box '3') and 'Project #: 18931203983'. At the bottom of the main content area is a blue hyperlink '< Back to Project Details' (annotated with a blue box '4'). The footer of the page contains the word 'Footer'.

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Documents Submitted Successfully	N/A	Heading
2	Success text	N/A	Text
3	Project Name and Number		Text
4	Back to Projects	- Links back to Project Details page for this project	Hyperlink

Pay Balance

Wireframe



Surveyor Digital Intake and Review Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Project Details](#) > [Pay Balance](#) **1**

Pay Balance

2

Account Balance: \$450.00 **3**

Name on Card:* **4** Card Number:* **5**

Expiration Date **6** Year **7** Security Code:* **8**

9

Footer


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)	N/A	N/A
2	Pay Balance	N/A	Heading	N/A	N/A
3	Payment Amount	- Displays Payment Amount	Text	N/A	N/A
4	Name on Card		Text Field	- Required	- "Please enter a value for Name on Card"

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
5	Card Number		Text Field	-Consists only of integers 0-9 - Min length: 16 - Max length: 19 - Required	- "Please enter a valid credit card number" - "Card Number must be between 16 and 19 digits" - "Please enter a value for Card Number"
6	Month	Options: 01-12	Dropdown	- Required	- "Please select an option for Month"
7	Year	Options: 2017-2026	Dropdown	- Required	- "Please select an option for Year"
8	Security Code	- Blocks non-numeric input	Text Field	- Consists only of integers 0-9 - Min Length: 3 - Max Length: 4 - Required	- "Security Code may only contain integers 0-9" - "Security Code must be at least 3 characters" - "Please enter a value for Security Code"
9	Review Order		Button		

Submittal Review

Wireframe



Surveyor Digital Intake and Review

Welcome, John Smith | [Profile](#)

[Projects](#) [Create Project](#) [Download Submittal Forms](#)

[Projects](#) > [Project Details](#) > [Pay Balance](#) > [Payment Review](#) 1

Payment Review 2

Project Details 3

Project Type:	Record of Survey	Fee Type:	Cost Recovery
Applicant:	John Smith	Fee Amount:	\$498.00
APN(s):	129-090-000 129-090-123		

Payment 4

Name on Card:	FirstName LastName
Card Number:	*****5108
Expiration Date:	12/20
Payment Amount:	\$450.00

Owner 5

Company:	CompanyName	Contact:	FirstName LastName
Phone:	(805) 123-5555 - 234	Fax:	(805) 777-5555
Email:	email@gmail.com		
Address:	Address Line 1 Address Line 2 Santa Barbara, CA 93111		

Licensed Professional 7

Company:	CompanyName	Contact:	FirstName LastName
Phone:	(805) 123-5555 - 234	Fax:	(805) 777-5555
Email:	email@gmail.com		
Address:	Address Line 1 Address Line 2 Santa Barbara, CA 93111		

[Edit Payment](#) 8

[Pay Account Balance](#) 6

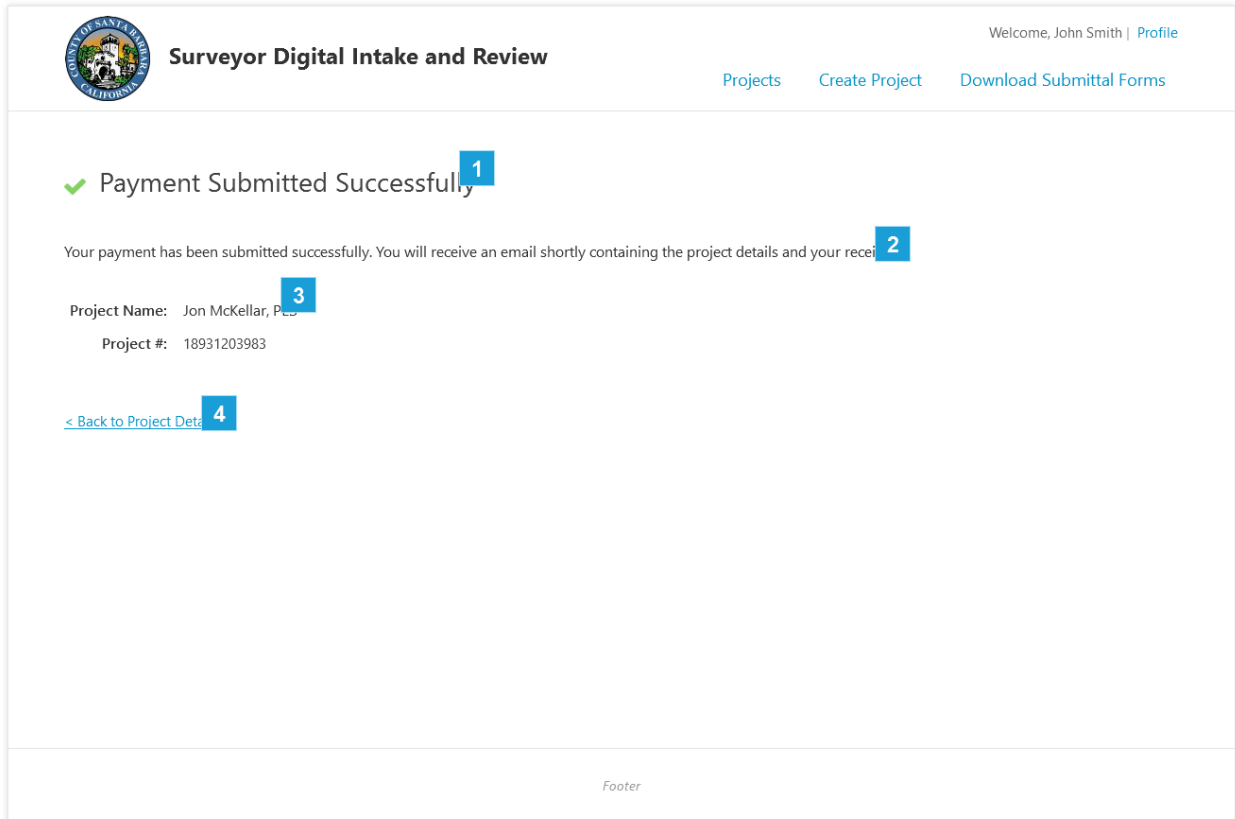
Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Breadcrumbs	- Links to previous pages in the flow	Hyperlink(s)
2	Submittal Review	N/A	Heading
3	Project Details		Text
4	Payment		Text
5	Owner		Text
6	Pay Account Balance		Button
7	Licensed Professional		Text
8	Edit Payment		Button

Confirmation

Wireframe



The wireframe shows a confirmation page for the 'Surveyor Digital Intake and Review' system. At the top left is the County of Santa Barbara logo. The page title is 'Surveyor Digital Intake and Review'. In the top right corner, there is a user greeting: 'Welcome, John Smith | Profile'. Below this are three navigation links: 'Projects', 'Create Project', and 'Download Submittal Forms'. The main content area features a green checkmark icon followed by the heading 'Payment Submitted Successfully' (annotated with a blue box '1'). Below the heading is a paragraph of success text: 'Your payment has been submitted successfully. You will receive an email shortly containing the project details and your receipt' (annotated with a blue box '2'). Underneath, the project details are listed: 'Project Name: Jon McKellar, P.E.' (annotated with a blue box '3') and 'Project #: 18931203983'. At the bottom of the main content area is a blue hyperlink '< Back to Project Details' (annotated with a blue box '4'). A 'Footer' label is centered at the very bottom of the page.

UI Specifications


Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Documents Submitted Successfully	N/A	Heading
2	Success text	N/A	Text
3	Project Name and Number		Text
4	Back to Projects	- Links back to Project Details page for this project	Hyperlink

Download Submittal Forms

Page Notes

The main navigation will include a link to a page called 'Download Submittal Forms'. This page will include links to various documents needed for the submittal process, including forms meant to be downloaded, filled out, signed (in some cases), and uploaded, as well as documents describing the policies, procedures, and requirements with regard to the various project types. This page is analogous to the County's current page entitled 'Forms/Policies/Regulations' (found here: <http://www.countyofsb.org/pwd/surveyorforms.sbc>).

Wireframe



Surveyor Digital Intake and Review

Projects [Create Project](#) [Download Submittal Forms](#)

Welcome, John Smith | Profile

Download Submittal Form 1

The following files are provided as guidelines and are included to provide suggestions on preparation of submittals to the County Surveyor's Office to make the process easier and more efficient for all involved. If you're surveying in Santa Barbara County, then this is the manual for you. It contains guidelines for submission of every surveying document our Office handles. Included are suggestions on preparation of records of surveys to make the process easier for all. They are by no means complete, and the user assumes all risk from decisions made regarding the use of them. The County Surveyor is providing this information as a way to make the submittal process easier and more efficient but will assume no liability for the validity of the information or the use that arises from it. Most documents are available in Adobe Reader (PDF) format.

	Date	Action
2	Agreement for Payment of Processing Fee <small>(Financially Responsible Party Form Required for all fee based projects)</small>	12/16/2007 Reused
	Electronically Processing Authorization Form <small>Fee Track</small>	01/21/2014 Updated
	Agent Authorization Form	01/21/2014 Updated
	Right Of Way Research Request Form <small>Application and Agreement for Right Of Way Research Services</small>	03/10/2013 Reused
	Corner Record Form <small>Accrobat PDF Format - SPLSIS 2016 Electronically Filable online</small>	03/23/2017 Updated
	Instructions - SPLSIS 2016	03/23/2017 Updated
	Parcel Validity Review Form	10/23/2013 Updated
	Certificate of Compliance Application	07/02/2014 Updated
	Standard Statements and Certificates	05/03/2018 Updated
3		
	Corner Records <small>Lot Line Adjustment</small>	07/02/2018 Updated
	Corner Records	05/23/2017 Updated
	Guide to Preparation of Records of Surveys and Corner Records <small>County Engineers Association of California</small>	12/02/2015 Reused
	Record of Survey <small>Guide to Processing a Record of Survey 2010</small>	06/22/2010 Adopted
	Guide to Processing a Record of Survey 2018	10/24/2018 Updated
	Voluntary Merger	05/03/2018 Updated
	Tract Maps and Parcel Maps <small>Includes Information on Tentative and Final Maps</small>	05/03/2018 Updated
	Recorded Map Modification	03/13/2017 Updated
	Certificate of Compliance	07/02/2014 Updated
	LARC Requirements for Maps and Legal Descriptions <small>County Surveyor and State Board of Equalization (SBE) standards for Maps and legal descriptions</small>	01/05/2005 Effective
	Example Exhibit A - LARC Legal Description <small>Example of legal description in compliance with County Surveyor and State Board of Equalization (SBE) standards</small>	01/05/2005 Effective
	Example Exhibit A - LARC Legal Description <small>Example of legal description in compliance with County Surveyor and State Board of Equalization (SBE) standards</small>	01/05/2005 Effective
	Example Exhibit A - LARC Legal Description <small>Example of legal description in compliance with County Surveyor and State Board of Equalization (SBE) standards</small>	06/01/2005 Effective
4		
	Santa Barbara County, California - Code of Ordinances <small>Link to MunicipalCode, a website library of enacted Santa Barbara County Code Ordinances. Opens in a new window, pick from menu of chapters on the left. Includes Chapter 21, Chapter 21A, and Chapter 35</small>	
	Historic Santa Barbara County, California - Code of Ordinances Archive <small>1881 - Present</small> Ordinances are laws adopted by the Board of Supervisors and generally amend, repeal, or supplement the County Code. Laws created by County Ordinance deal with a wide variety of County Government responsibilities and services including, but not limited to public health and safety, public infrastructure, as well as zoning, housing and planning. This archive contains scanned copies of the original enacted Ordinances as they were presented to the Board at the time of their adoption. All are in Adobe Acrobat (PDF) format.	
	Santa Barbara County, California - Board of Supervisor Minutes Archive <small>Historic</small> • 805 Minutes from 1880 - 1907 are now available to view in a digital format. Includes 1878, 1908 Board Books • From November 18, 1908 (the first day of the county's recorded history) to August 5, 1937, clerk of the board handwritten the legislative history of the County as minutes in 16 hard bound ledgers. • From September 5, 1937 to April 4, 1977, the 805 minutes were documented with a typewriter, spanning 199 3 1/2 inch hard bound books. • After 1977, the Board of Supervisor's minute books were archived to microfilm. <small>Contemporary</small> • Beginning in 2000 805 minutes have been published online.	
	County of Santa Barbara Subdivision Regulations Chapter 21 - Santa Barbara County Code, Planning & Development, Land Division <small>Administrative Code Required by Planning & Development in 1/2012</small>	
	<ul style="list-style-type: none"> • Article I, Subdivision (Includes Information on Tentative Maps, Final Maps, Tract Maps, Parcel Maps, Voluntary Mergers and Modifications to Recorded Maps) • Article II, Final Control • Article III, Lot Line Adjustments • Article IV, Park and Recreation Dedication and Fees • Article V, Condominium Conditions • Article VI, Special Planning Area Development Impact Fees • Article VII, General Planning Area Development Impact Fees • Appendix A, State of Ordinance Amending Chapter 21 	
	California Code of Regulations • Section 400, et seq., Title 16, Division 5, Board Rules and Regulations Relating to the Practices of Professional Engineering and Land Surveying	
	California Business and Professions Code Section 6700, et seq., Professional Engineers' Act Section 6700, et seq., Professional Land Surveyors' Act	
	California Government Code • Section 27250 et seq., Government of Counties, Officers, Other Officers, Surveyor • Section 54000 et seq., Corbin-Kaiser Interlocking Local Government Reorganization Act of 2000 • Section 64010 et seq., Subdivision Map Act	
	California Public Resources Code • DIVISION 8, Surveying and Mapping (Section 8801-8902) CHAPTER 1, California Coordinate System (Section 8801-8816)	

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Download Submittal Forms	N/A	Heading
2	Forms	N/A	Subheading
3	Forms	N/A	Subheading
4	Forms	N/A	Subheading


Active Projects

Page Notes

The landing page for back office users is like the dashboard page for applicants. The only difference is that it shows projects from all applicants, regardless of the logged in user, and the project list grid has different columns. The columns for the admin project list grid are as follows:

- Project # (May be blank)
- Project Name (will link to the admin project details screen)
- Project Type
- Applicant
- Owner
- Licensed Professional
- APN

Wireframe



Surveyor Digital Intake and Review

Welcome, Teñell Matlov | [Profile](#)

[Active Projects](#) [Reports](#)

Active Projects 1

Show Rejected Projects 2

Requires Attention

1 - 10 of 25 items 3

Project # 4	Project Name 7	Project Type 5	Owner 8	Applicant	Licensed Professional	APN 6	Status
RS6197	Mineau & Goodchild	Record of Survey	Young Ranch/Jon McKellar, PLS	Samantha Diaz	Pat Yochum	129-090-000, ...	In Progress
RS6198	Jon McKellar, PLS	Corner Record	Young Ranch/Jon McKellar, PLS	Irene Woodard	Terry Duque	129-090-000	Completed
RS6199	Mineau & Goodchild	Tract Map	Young Ranch/Jon McKellar, PLS	Rolando Green	Daniel Kay	129-090-000	Needs New Submittal
RS6200	Jon McKellar, PLS	Parcel Map	Young Ranch/Jon McKellar, PLS	Mark Salem	Selena Escobar	129-090-000	New
RS6201	Mineau & Goodchild	Lot Line Adjustment	Young Ranch/Jon McKellar, PLS	Justin Penaflor	Betty McFadden	129-090-000, ...	In Progress
	Jon McKellar, PLS	Voluntary Merger	Young Ranch/Jon McKellar, PLS	James Poole	Jason Cannon	129-090-000, ...	Completed
RS6203	Mineau & Goodchild	Certificate of Compliance	Young Ranch/Jon McKellar, PLS	Robert McAlpine	Brian Fields	129-090-000	In Progress
RS6206	Jon McKellar, PLS	Parcel Validity Search	Young Ranch/Jon McKellar, PLS	Christine Fuller	Paul Cobbs	129-090-000, ...	In Progress
	Mineau & Goodchild	Certification of Correction	Young Ranch/Jon McKellar, PLS	Wesley Burchette	Carolina Harpe	129-090-000, ...	New
RS6207	Jon McKellar, PLS	Right of Way Research	Young Ranch/Jon McKellar, PLS	Jason Schaeffer	Joshua Carter	129-090-000	New

1 - 10 of 25 items

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Active Projects	N/A	Heading	N/A	N/A
2	Show Rejected Projects		Checkbox		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
3	Pager	Standard Kendo UI grid pager. Includes standard paging, results shown, and results per page dropdown. Defaults to 10 items per page. Items per page options: - 5 - 10 - 25 - 50 - 100	Pager		
4	Project #	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
5	Project Type	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
6	APN	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
7	Project Name	- Kendo row filtering textbox (filtering applied on blur) - Links to Edit Project page for selected project	Grid column		
8	Owner	- Kendo row filtering textbox (filtering applied on blur)	Grid column		

Edit Project

Page Notes

Back office users will have the ability to review submitted projects and make updates, as well as approving or rejecting projects and submittals for review. Clicking on the project name for a project in the grid on the dashboard will take the user to the Edit Project Details screen. Alternatively, when a project/submittal is submitted, an email is sent to the intake address for the county, and clicking on the link in the email will also take the user directly to the edit project details screen for that project (requiring them to log in if they are not already logged in.) On the Edit Project Details screen, the back office/admin users will have the ability to edit the Project Number, APNs, Subdivision Number, Number of Lots, and Planning Case Number. (Note that editing the Subdivision Number also changes the value of the Project Number field, because in cases where the Subdivision Number is shown and relevant, the Project Number is the same as the Subdivision Number.

Back office users will also be able to adjust the balance on the project. There will be an 'Update Balance' button on the project details screen (in lieu of the Pay Balance button shown to applicants). Clicking on this button will open a modal dialog requiring the user to enter the new balance as well as a note describing why the change was made. The modal will also display the Current Balance, and the difference between the current balance and the new balance (if the balance is decreasing, the difference will be displayed as a negative number and shown in green text; if it is increasing, the balance will be displayed as a positive number and shown in red text.) The modal dialog will have an 'Update Balance' button which, when clicked, will commit the change to the balance and trigger an email be sent to the applicant (and owner and licensed professional, if indicated) containing the details of the change including the note. There will also be a 'Cancel' button on the modal, which clears the form fields and closes the dialog.

Note: We will need to display some text on the Edit Project Details screen informing the user that changes to the project details will not be saved until the 'Approve' button is clicked, except for changes to the balance, which take effect immediately.

Each submittal on the Edit Project Details screen will have a 'Reject Submittal' button which, when clicked, will open a modal dialog requiring the user to add a note describing why the submittal was rejected. The 'Reject Submittal' button will only be enabled when a new submittal has been created,

before the project/submittals have been approved. Once the 'Approve' button is clicked, none of the existing submittals can be rejected using the reject submittal button, nor can the project be rejected. When a new submittal is added, that submittal can be rejected, but none of the previous submittals can be rejected, and the project also cannot be rejected. The 'Approve' button will be available again at that point, to approve the new submittal.

When a submittal is rejected, the project is highlighted to indicate that it needs attention, and the status is changed to indicate that the submittal has been rejected, and applicant input is required. Note: The payment will not be refunded when a submittal is rejected. Additionally, when a new submittal is added, no additional payment will be required, as the fee is charged per the project and type, not per the submittal.

When a project is rejected, the applicant will be required to create a new project and submittal from scratch. Their payment will be refunded, and the project will be flagged as rejected, and can not be edited further at that point. Rejected projects will not be shown in the active projects grids for either the applicant or the back office/admin users unless the 'Show Rejected Projects' filter is enabled.

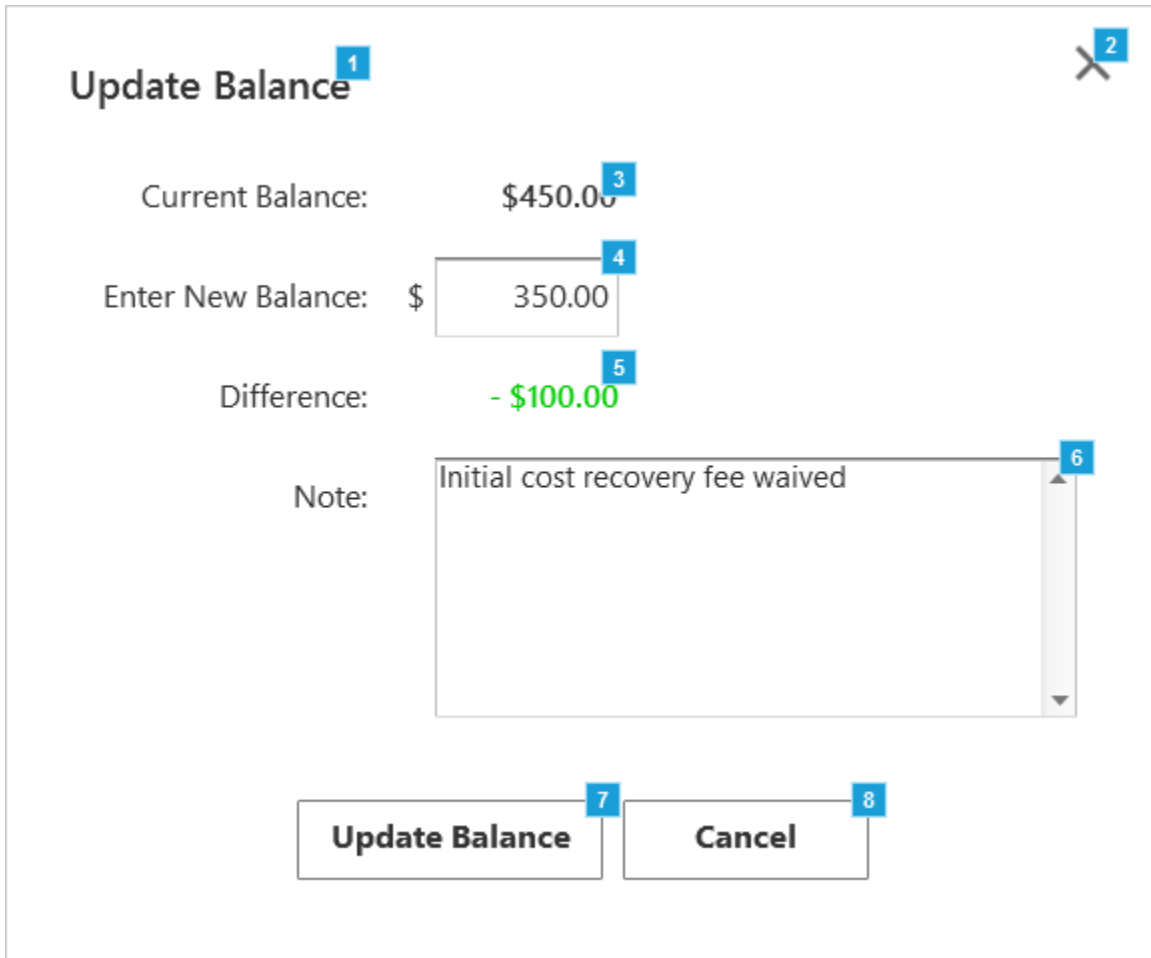
When a project is approved, an approval date will be written for the project and all submittals (which have not been previously rejected) at the time at which the button is clicked. After the project is approved, the project details will not be editable again, excluding the account balance, which will continue to function as described above. From that point forward, the 'Approve' button will only effect submittals, and have no bearing on the project (which would have already been approved). The 'Reject Project' button will not be shown after that point either. Finally, when the project has been approved, the application will move the project and submittal folder structure out of the temporary location in Azure Storage and into its permanent location (in a folder named the same as the project number.) Any updates to project status (approving a project, or rejecting a project submittal or project, or changing the project balance) will cause an email to be sent to the Applicant (as well as the project owner and licensed professional, where indicated). Additionally, when the project is approved, once the files are moved in azure storage, an email will be sent to the county intake email address with the project details, a note about the change in status indicating that the project is ready for review, links to all of the submittal documents, and a link directly to the edit project details screen for the project.

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Project Number		Text Field
2	Back to Projects	- Links back to Active Projects page	Hyperlink
3	Reject Project		Button
4	Approve		Button
5	Add Documents / Submittal		
6	Reject Submittal		
7	County Review Results		Button
8	Project Type	Options: - Fixed - Deposit - Cost Recovery	Dropdown
9	Payment History Grid	Columns: - Note - Date - Amount - New Balance	Grid

Update Balance Popup

Wireframe



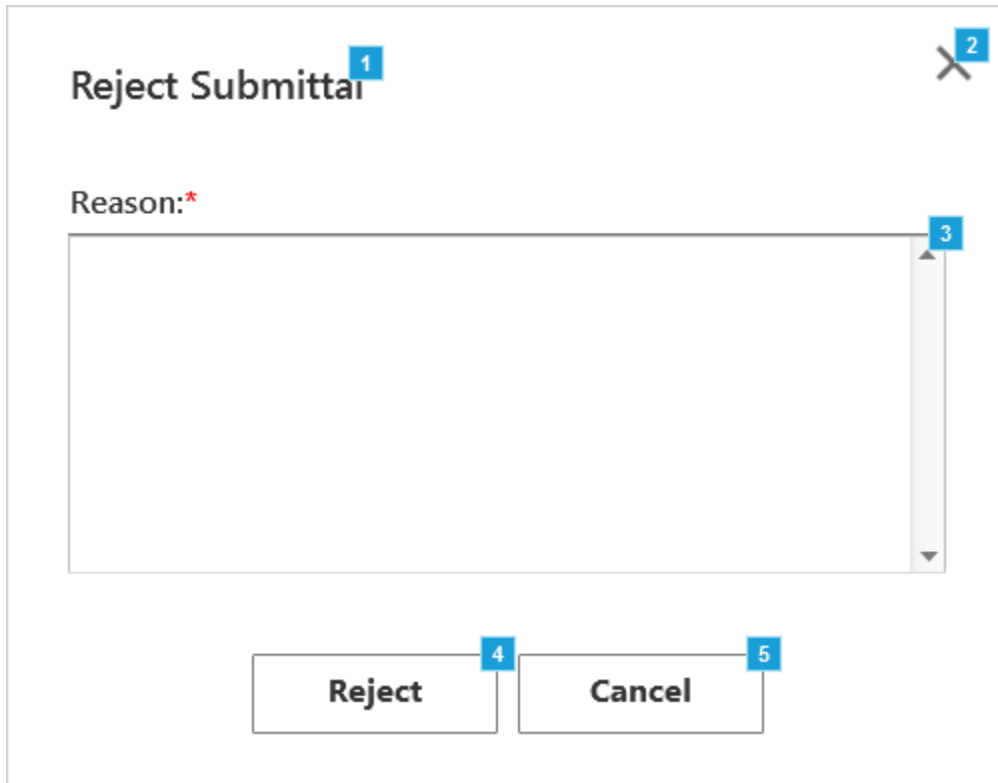
UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation
1	Update Balance	N/A	Heading	
2	Close button	Closes the popup without saving	Button	
3	Current Balance		Text	
4	New Balance		Text field	
5	Difference		Text	

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation
6	Note		Textarea	
7	Update Balance		Button	
8	Cancel	Closes the popup without saving	Button	

Reject Submittal Popup

Wireframe

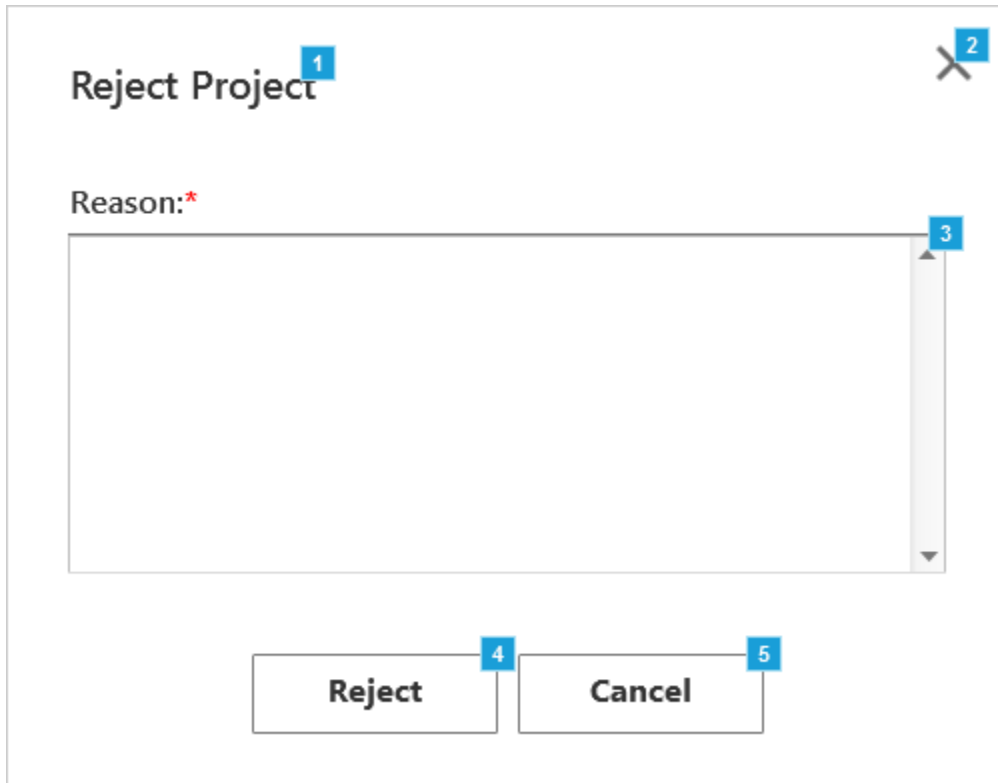


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Reject Submittal	N/A	Heading	N/A	N/A
2	Close button	Closes the popup without saving	Button	N/A	N/A
3	Reason		Textarea	- Required	- "Please enter a value for Reason"
4	Reject		Button	N/A	N/A
5	Cancel	Closes the popup without saving	Button	N/A	N/A

Reject Project Popup

Wireframe



UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Reject Project	N/A	Heading	N/A	N/A
2	Close button	Closes the popup without saving	Button	N/A	N/A
3	Reason		Textarea	- Required	- "Please enter a value for Reason"
4	Reject		Button	N/A	N/A
5	Cancel	Closes the popup without saving	Button	N/A	N/A

Reports

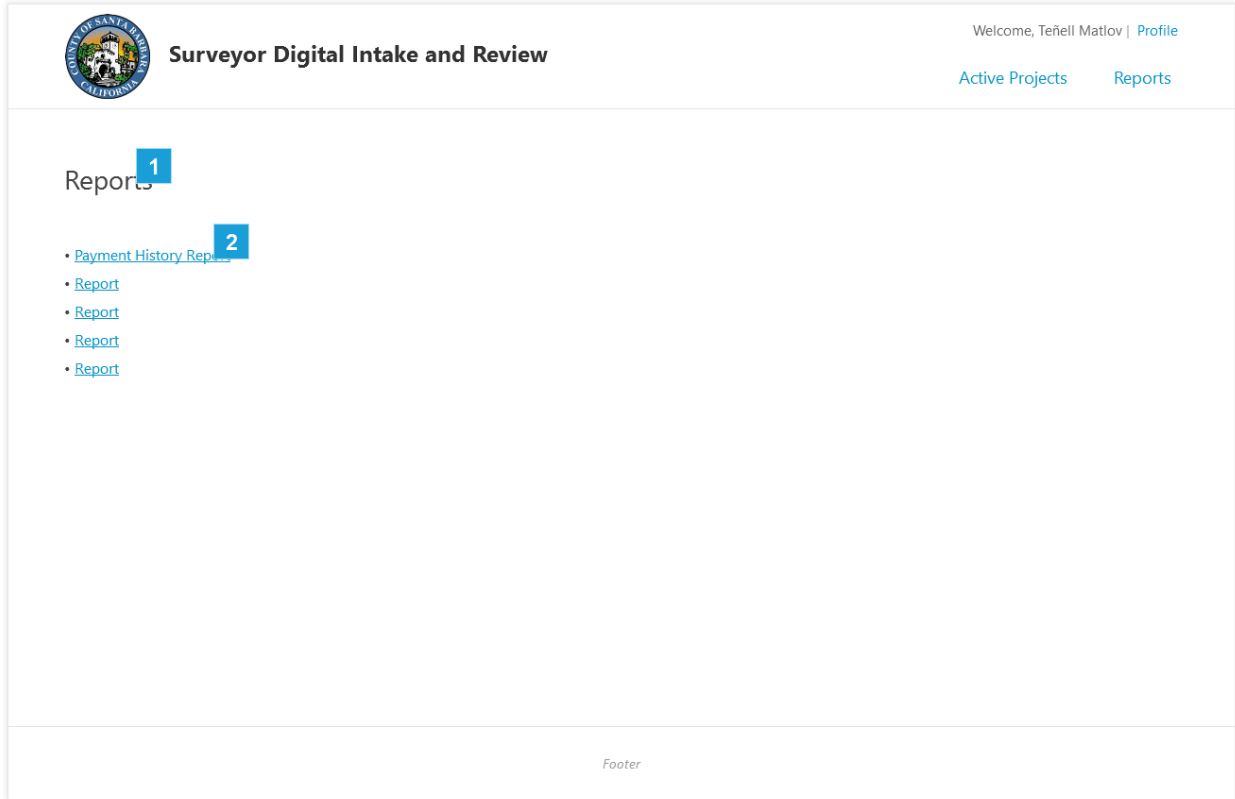
Page Notes

Back office users will have access to reports to run against the data stored in the system. Initially, there will only be a payment activity report. This report will just be a filterable grid showing the payment history for all projects and applicants. There will also be a date range selection above the grid, and an export to CSV (and/or PDF) of the data shown on the screen. The grid columns will be as follows:

- Project #
- Project Name
- Applicant Name
- Note
- Date
- Amount
- New Balance

The note field will include the payment information, including the name on the card and last four digits of the card number, and the card type (determined by the leading digit on the card number.)

Wireframe




UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Reports	N/A	Heading
2		N/A	Text

Payment History Report

Wireframe



Surveyor Digital Intake and Review

Welcome, Teñell Matlov | [Profile](#)

[Active Projects](#) [Reports](#)

Payment History Report 1

Filter Results

From: To: 2 Search 3 Clear 4 Export to CSV 5

◀ 1 2 3 ▶ items per page 1 - 10 of 25 ite 6

Project # 7	Project Name 8	Applicant Name 9	Note 10	Date 11	Amo 12	New Bal 13
123456	Mineau & Goodchild	Wendy Gray	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123457	Jon McKellar, PLS	Joan Hulbert	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123459	Mineau & Goodchild	Paul Couch	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123460	Jon McKellar, PLS	Ana Warner	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123462	Mineau & Goodchild	Barry Richard	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123463	Jon McKellar, PLS	Thomas Williams	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123464	Mineau & Goodchild	Bruce Turpin	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123466	Jon McKellar, PLS	Nicholas Fox	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123468	Mineau & Goodchild	Donna Hollowell	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00
123470	Jon McKellar, PLS	Robert Delisle	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras sodales tempor nibh eu... More	1/1/2019	\$00.00	\$00.00

◀ 1 2 3 ▶ items per page 1 - 10 of 25 items

Export to CSV

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Payment History Report	N/A	Heading		
2	Date Range		Datepicker (range)	Start date occurs on or before End date (If Start date = End date, includes all times during that date)	- "The Start date must take place before the End date"
3	Search	Applies filters to the grid	Button		
4	Clear	Resets the filters	Button		
5	Export to CSV		Button		
6	Pager	Standard Kendo UI grid pager. Includes standard paging, results shown, and results per page dropdown. Defaults to 10 items per page. Items per page options: - 5 - 10 - 25 - 50 - 100	Pager		
7	Project #	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
8	Project Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
9	Applicant Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
10	Note	- Kendo row filtering textbox (filtering applied on blur)	Grid column		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
11	Date	- Kendo row filtering datepicker (filtering applied on blur)	Grid column		
12	Amount	- Kendo row filtering numeric textbox (filtering applied on blur)	Grid column		
13	New Balance	- Kendo row filtering numeric textbox (filtering applied on blur)	Grid column		

Users

Page Notes

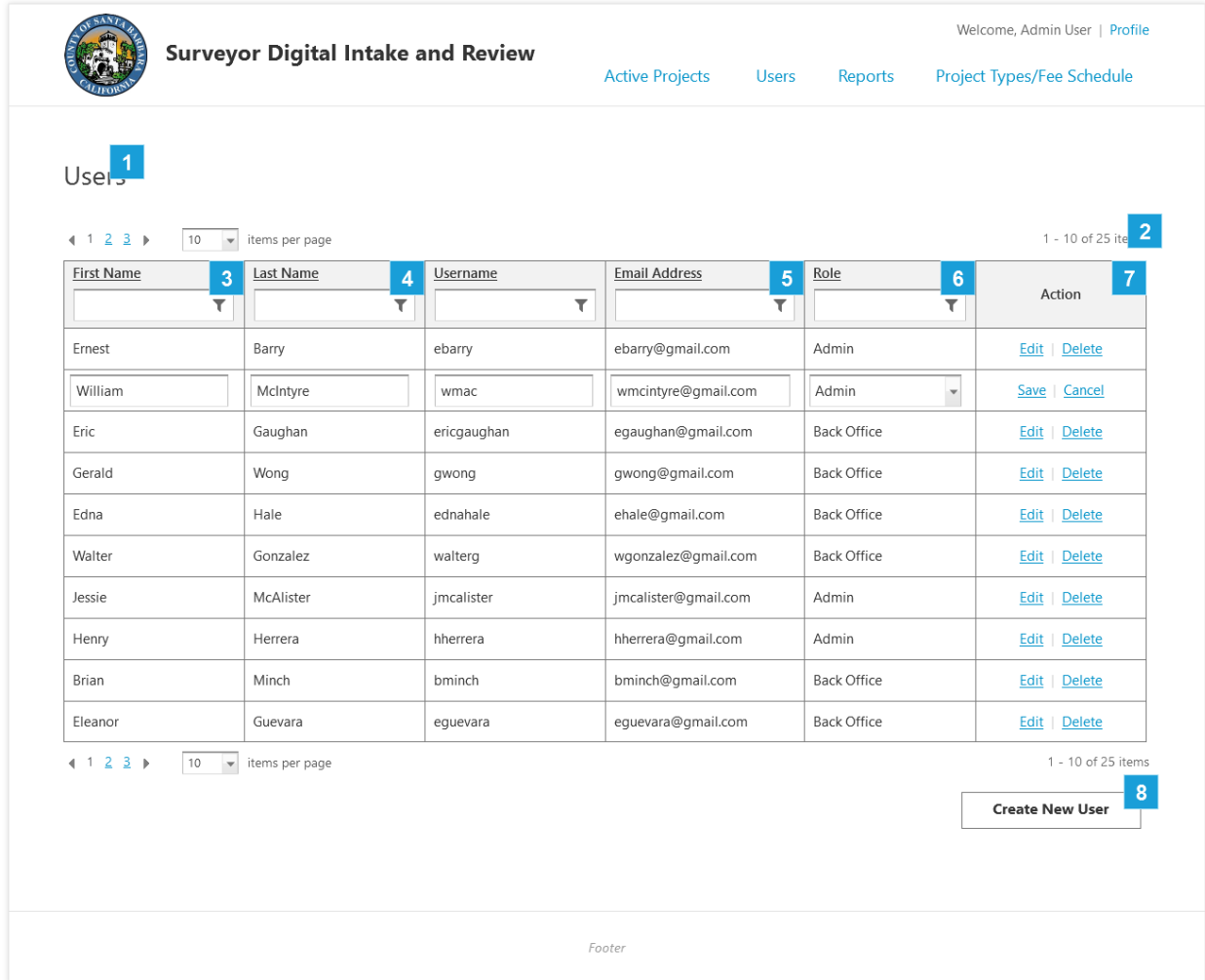
Admin users will have the same abilities as Back Office users with only two additional pieces of functionality. Admin users will be able to create and edit other back office or admin users, and they will also be able to edit the fees for the project types.

The admin users screen will have a grid showing all back office and admin users in the system. The grid will contain the following columns:

- First Name
- Last Name
- Email Address
- Username
- Role
- Action

The username column will contain their active directory account username. The role column will indicate whether they are a Back-Office user or an Admin user. The Action column will contain links to edit or delete the user. The grid will use inline editing for creating or editing a user, and there will be a 'Create New User' button below the grid which will add a row for creating a user. There will be no detail view for users, as they will not need any further editing beyond what can be accomplished with inline editing in the grid.

Wireframe



Surveyor Digital Intake and Review

Welcome, Admin User | [Profile](#)

[Active Projects](#) [Users](#) [Reports](#) [Project Types/Fee Schedule](#)

Users

10 items per page 1 - 10 of 25 items

First Name	Last Name	Username	Email Address	Role	Action
Ernest	Barry	ebarry	ebarry@gmail.com	Admin	Edit Delete
William	McIntyre	wmac	wmcintyre@gmail.com	Admin	Save Cancel
Eric	Gaughan	ericgaughan	egaughan@gmail.com	Back Office	Edit Delete
Gerald	Wong	gwong	gwong@gmail.com	Back Office	Edit Delete
Edna	Hale	ednahale	ehale@gmail.com	Back Office	Edit Delete
Walter	Gonzalez	walterg	wgonzalez@gmail.com	Back Office	Edit Delete
Jessie	McAlister	jmcalister	jmcalister@gmail.com	Admin	Edit Delete
Henry	Herrera	hherrera	hherrera@gmail.com	Admin	Edit Delete
Brian	Minch	bminch	bminch@gmail.com	Back Office	Edit Delete
Eleanor	Guevara	eguevara	eguevara@gmail.com	Back Office	Edit Delete

10 items per page 1 - 10 of 25 items

[Create New User](#)

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
1	Users	N/A	Heading		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
2	Pager	Standard Kendo UI grid pager. Includes standard paging, results shown, and results per page dropdown. Defaults to 10 items per page. Items per page options: - 5 - 10 - 25 - 50 - 100	Pager	N/A	N/A
3	First Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
4	Last Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
5	Email Address	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
6	Role	- Kendo row filtering textbox (filtering applied on blur)	Grid column		
7	Action	<p>Edit:</p> <ul style="list-style-type: none"> - Visible when not editing - Enables grid inline edit mode <p>- Inline Edit Mode:</p> <ul style="list-style-type: none"> o Save: Update grid record o Cancel: returns to non-edit mode without saving changes <p>Delete:</p> <ul style="list-style-type: none"> - Triggers "Are you sure" modal popup with "Delete" and "Cancel" buttons. o "Delete" button removes the user and refreshes the page. o "Cancel" closes the popup without making changes. 	Grid column		

Footnote	Name	Business Rules/Data Fields	UI Functionality	Validation	Validation Message
8	Create Project	<ul style="list-style-type: none"> - Creates a new row at the bottom of the grid with empty textbox for First Name, Last Name, Username, Email Address, and a dropdown for Role. All fields are required. - The Action cell has links "Save" and "Cancel". - "Save" updates grid if validation passes. - "Cancel" removes the new row and makes no further changes to the grid. 	Button		

Project Types and Fee Schedule

Page Notes

Admin users will be able to adjust fees for project types using the Project Types and Fee Schedule page. They will not have the ability to edit or create project types at all; all that will be editable is the fee amount and the fee type. This screen will show a grid containing all the current project types. The grid will contain the following columns:


- Project Type
- Fee Type
- Fee
- Action

The project type will be the name of the project type (Record of Survey, Corner Record, Lot Line Adjustment, etc.) The Fee Type will be either Fixed or Deposit. The Fee Amount will be a column expecting a dollar amount (meaning no negative numbers). The Action column will contain a link allowing the user to edit the Fee Type and Fee Amount for a given row.

Note: There will not be a create or delete option for this grid, and the project type will not be editable.

This grid is solely for changing the fee type and fee amount.

Wireframe



Surveyor Digital Intake and Review

Active Projects Users Reports Project Types/Fee Schedule

Welcome, Admin User | [Profile](#)

Project Types and Fee Schedule 1

Project Types 2	Fee Type 3	Fee 4	Action 5	Last Modified 6	Last Modified By 7
Record of Survey	Fixed	\$498	Edit	3/19/2017	Teñell Matlov
Corner Record	Fixed <input type="text" value="Fixed"/>	\$ <input type="text" value="17"/>	Save Cancel	3/12/2017	Aleksandar Jevremovic
Tract Map (1-25 Lots)	Fixed	\$5,450	Edit	2/21/2017	Aleksandar Jevremovic
Tract Map (26-75 Lots)	Fixed	\$6,365	Edit	2/21/2017	Aleksandar Jevremovic
Tract Map (76 Lots or More)	Fixed	\$10,518	Edit	2/21/2017	Aleksandar Jevremovic
Parcel Map	Fixed	\$3,041	Edit	10/17/2017	Teñell Matlov
Lot Line Adjustment	Fixed	\$1,568	Edit	7/30/2018	Teñell Matlov
Voluntary Merger	Fixed	\$1,190	Edit	3/9/2015	Teñell Matlov
Certificate of Compliance	Deposit	\$1,884	Edit	5/23/2018	Aleksandar Jevremovic
Parcel Validity Search	Fixed	\$63	Edit	4/6/2019	Teñell Matlov
Certificate of Correction	Fixed	\$14	Edit	8/11/2018	Teñell Matlov
Right of Way Research (Public Request)	Deposit	\$830	Edit	1/14/2019	Teñell Matlov

Footer

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Project Types and Fee Schedule	N/A	Heading
2	First Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column
3	Last Name	- Kendo row filtering textbox (filtering applied on blur)	Grid column
4	Email Address	- Kendo row filtering textbox (filtering applied on blur)	Grid column
5	Action		Grid column

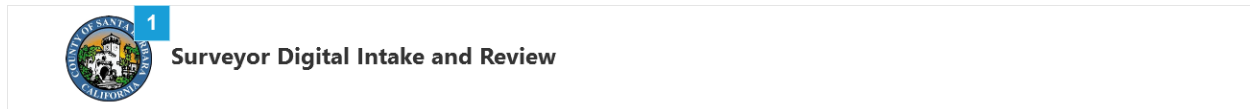
Footnote	Name	Business Rules/Data Fields	UI Functionality
6	Last Modified	Date the fee type or amount was last changed	Grid column
7		Who last modified the fee type or amount	Grid column



5385 Hollister Ave., Bldg. 12-101
Santa Barbara, California 93111
Phone: 805-683-5121
Fax: 805-456-3694
visusllc.com

Header - not logged in

Wireframe

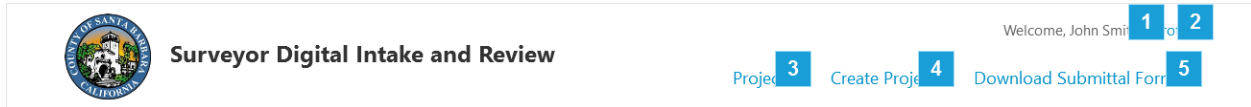



UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Logo	- Links to homepage	Image

Header - Customers

Wireframe



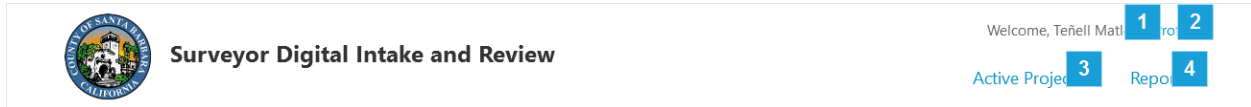

Surveyor Digital Intake and Review
Welcome, John Smit **1** to **2**
Projec **3** Create Proj **4** Download Submittal Form **5**


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Welcome text	Welcome, [FirstName] [LastName]	Text
2	Profile	- Links to Manage Profile page	Hyperlink
3	Projects	- Links to Projects page	Hyperlink
4	Create Project	- Links to Create Project page	Hyperlink
5	Download Submittal Forms	- Links to Download Submittal Forms page	Hyperlink

Header - Back Office

Wireframe




Surveyor Digital Intake and Review

Welcome, Teñell Matt **1** ro **2**

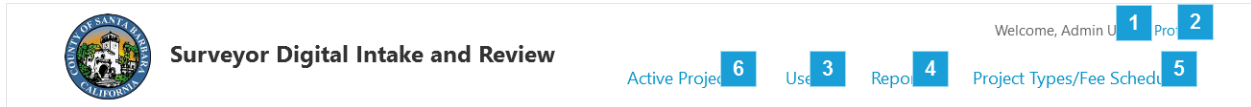
Active Projects **3** Reports **4**

UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Welcome text	Welcome, [FirstName] [LastName]	Text
2	Profile	- Links to Manage Profile page	Hyperlink
3	Active Projects	- Links to Active Projects page	Hyperlink
4	Reports	- Links to Reports page	Hyperlink

Header - Admin

Wireframe

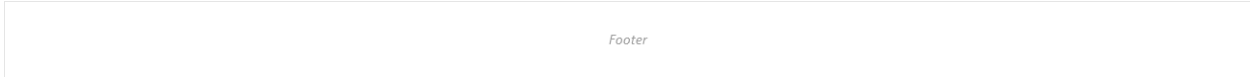


UI Specifications

Footnote	Name	Business Rules/Data Fields	UI Functionality
1	Welcome text	Welcome, [FirstName] [LastName]	Text
2	Profile	- Links to Manage Profile page	Hyperlink
3	Users	- Links to Users page	Hyperlink
4	Reports	- Links to Reports page	Hyperlink
5	Project Types/Fee Schedule	- Links to Project Types/Fee Schedule page	Hyperlink
6	Active Projects	- Links to Active Projects page	Hyperlink

Footer

Wireframe



Azure Storage File Handler

In order to keep the files uploaded to Azure Storage from needing to be publicly accessible, the Azure Storage will be implemented as a private storage container. The application will have access to it via the file storage APIs and will need to provide a handler for file URLs to allow applicants and county employees to download the files. The file handler will be a simple controller action that accepts an Azure Storage file path as a string parameter. It will deconstruct the string into account, container, and file path information, retrieve the file, and re-serve the file to the user via the Action's FileResult. The file handler will require that the user be authenticated and will verify that the file is one that the user has access to before retrieving it.

Payment Processing with Heartland

The County of Santa Barbara has opted to use Heartland Payment Systems as their payment processor. Heartland provides an ASP .Net SDK for use in web applications via Nuget. For more information see the Heartland developer portal: [Full SDK Documentation](#).

The Surveyor Intake application will submit payment details manually (rather than using a client-side interface to obtain a single-use token from Heartland.) Once the payment form is submitted, a 'CreditCardData' object will be created to contain the payment details. Then a call will be submitted using the 'Verify' API call to verify the payment information (in a way that does not cause an authorization to occur.) This will take place when the payment information form is submitted. If the verification fails, the user will be shown an error, and be required to enter new payment information and submit the form again. If the verification succeeds, then the payment will be charged using the 'Charge' method when the next (verification) screen is submitted. We will store the last four digits of the credit card number, as well as any relevant

response details from the server (transaction id, status, etc.) for display on confirmation screen and email, as well as for debugging purposes.

Additional reference information: [Global Payments .NET SDK](#)

Azure Storage Monitoring Agent

Separately from the web application, a small console application will be created (to be run as an Azure Web Job on a schedule.) The purpose of this application will be to monitor the directories in Azure Storage and check for updated files. If any newly uploaded documents are found, the agent will process them and make them available for download in the web application view hyperlink entries stored in the database. Primarily, this application will be used to monitor project submittals for reviews. When a review is uploaded, there will be a 'review' folder created inside the submittal folder. The 'review' folder will be named according to the naming convention specified by The County. The console application will detect the addition to the directory and compile a list of links to store in a 'Review' table in the database. The review will be tied to the submittal by an ID, and the lists of files will be displayed in a modal dialog from the project details screen. When a review is added, an email will be sent out to the applicant (and owner and licensed professional, if indicated) containing a list of the files and links to view each of them. Additionally, the project status will be updated to indicate that a review has been added, and that action is required on the applicant's part.

In addition to monitoring for reviews, the agent will also look for specific file names. If there is a file uploaded with a name indicating that a new fee has been assessed for the project, the console application will send the appropriate corresponding email, and update the project balance. (The exact name has not been determined yet, but it will indicate that the project balance has been updated and will include the new balance as part of the filename. The email

that gets sent out will include a link to the file in the body of the message so that the Applicant (and owner and licensed professional, if indicated) can view the letter that was uploaded as part of the review.

Technology

The application will be designed in ASP.NET MVC .NET 4.7.2, utilizing an Azure SQL database.

The application will target compatibility with latest version of current browsers: Chrome, Firefox, Edge, and Safari.

Deployments and Server Environments

To ensure rapid development, development releases will occur on an Azure PaaS platform, enabling Continuous Integration and automated testing.

For User Acceptance Testing (UAT) and production, it is expected that County of Santa Barbara will provide access to the UAT Azure environment to allow Visus to provision and configure appropriate resources.

Third Party Costs

Azure Pricing

The following are estimates for launching the application on Azure PaaS. Options are available to upgrade the Azure components. Final estimates will change with storage needs/growth and usage.

- App Service Plan: P1V2 - \$148.80/month
- Azure SQL Database - Standard S2 (50 DTU) \$75.02/month

- Azure Storage - \$10/month

Please note these estimates are based on pricing from Microsoft and are subject to change and to be updated by Microsoft.

These monthly hosting fees are not part of the Project Deliverables and Investment section.

Maintenance and Support

Post launch support and optimizations are a very important part of developing a new application. Maintenance and support will be used for new features, enhancements, and any potential production bugs and issues. Based on our many years of experience, we recommend a monthly block of support hours. A support plan will be presented prior to launching the application.

General Assumptions

Open and honest communication is essential to the success of any technology services project. As such the following list of assumptions will serve as talking points to help manage expectation.

1. The client and Visus shall jointly develop, concur and document the:
 - a. Completion criteria for the project.
 - b. Deliverable acceptance process used during the initiation of this project for the formal deliverables.
 - c. Define change control process used to affect the scope of the project.
2. Any custom graphics/branding will be estimated separately.
3. The client will provide remote administrative access during the duration of the project to systems and/or devices that may be affected by the project.
4. Documents will be reviewed and approved/returned by Visus within 3-5 business days.
5. The client will ensure that resources are available to Visus during the course of the project for knowledge transfer, to respond to Visus inquiries about current configuration and to help assess the impact or timing of proposed changes to systems or network. Access to these resources will be coordinated by the assigned Project Sponsor.
6. As requested by Visus, the client will supply documentation relating to the systems, network, and/or applications currently deployed that may be affected during the course of the project.
7. The client will coordinate with Visus any changes to the network and attached systems during the course of the project to ensure that the change will not adversely affect the deliverables required by this Proposal.
8. The client will make backups of current systems, user data, and/or network device configuration prior to the commencement of this project. Visus makes no warranty in regard to recoverability of systems data in the event of failure.

Project Deliverables and Investment

The projected investment for completing the development and implementation of the County of Santa Barbara Public Works Surveyor Digital Intake and Review web application, and all the of the above listed web pages and functionality, is estimated to be:

- The estimated effort for implementation of the Surveyor Digital Intake and Review web application as described in the above pages is estimated to be between 570 and 713 hours or \$94,050 and \$117,645 which includes:
 1. Full development of web application
 2. Testing
 3. Project Management
 4. Client meetings
 5. User Acceptance Feedback
 6. Deployment

- Savings: The above pricing reflects a preferred client rate for the County of Santa Barbara Public Works Department which amounts to approximately \$7,130 in savings.

This estimate is presented as a Time and Materials estimate. Only actual hours will be billed. This is not a fixed-bid or not to exceed proposal. The estimate provided is a general guideline for the estimated length and cost of the Development Phase based on the input received by the client. In the event, any part of the implementation will require more than the estimated total effort to complete, Visus will notify the client to receive approval.

Initials _____

Timeline

The timeline required to complete the above listed deliverables is estimated to be 4 to 6 months of development, depending on when approval is received.

At the end of the estimated timeline, the solution will be deployed to County of Santa Barbara's UAT environment for UAT (User Acceptance Testing) by the County of Santa Barbara team. Visus recommends a period of 2 to 4 weeks for UAT testing by the Surveyor team.

Once UAT is completed an additional 2 to 4 weeks is recommended to implement any UAT feedback and to deploy the application to production.

Once approval is received a final timeline will be provided.

Validity

This proposal is valid for 15 days from the date of submission.

Payment Terms

- Net 30 days
- Progressive Billing
- Past due payments will incur late fees
- Project efforts will be suspended if payments are past due by 10 days.

Initials _____

Authorized Client Approval

Name

Signature

Title

Date

Visus LLC Approval:

Michael Daoud

Name

Signature

President

Title

Date