

- ✦ Most of the month has been spent working on various facets of the document library. After considerable user feedback, I made some user interface design change and Mark implemented them. Feedback so far has been favorable. Four additional changes were identified and work on them is in progress. Mark plans to publish Tuesday evening and I expect most of the items will be published at that time.
- ✦ At the City Manager's request, we have implemented a weekly training / discussion with the office staff. The plan is to continue these sessions until staff feel they are no longer needed. I am making an effort help staff both understand how the system works and what it can do to save them time and work.
- ✦ I have held training sessions with the chair of Public Works and Parks & Commons and assisted several members of the Planning Commission answering questions and showing them how to access data they need for their meetings.
- ✦ Refined design specifications for the Parks & Commons room reservation system and shared this document with the database developers. That document follows this report.
- ✦ For the past two months we have been recruiting an experienced .Net / SQL server developer. We hope to interview an applicant within the next two weeks.
- ✦ I have cleaned up broken links on the city YachatsOregon.org web site that occurred when the migration to the new system was made.
- ✦ I am working on draft #2 of the design specifications for a complaint system. This is a project identified and approved by council during the recent vacation rental review and recommendations. Staff have provided design feedback. Currently, this is priority number 2 in our project list. If our current recruitment is successful, this will be his first assignment. Most of the code stands independent of the existing code. There will be some integration with the property inventory and e-mail within the database.
- ✦ Created new categories for Yachats History and another for GeoTech Reports. The city planner has a number of property GeoTech reports he wants to link to specific property records. The reports have been entered. We are waiting for developers to add the new fields to property records. The History section will contain documents about the early years of Yachats. The presentation by Bill Hall and Joanne Kittel have been added to the library already. The plan is to move copies of documents on the Yachats.info/History are to the new History category.
- ✦ When I don't have other work, I have been reviewing the design and use of document library categories. These exist because the old document library had an ineffective search capability and categories provided a basic way to filter records. However, the new library has a good search capability. Seeing 500 documents in a category doesn't enhance the search process. I believe we need to reduce the number of categories and within the remain buckets, reduce the number of records that could be high priority items. With well over 5,000 records in the system, this phase of the work is going to take some time to complete.

- ✦ Add facility reservation rates to database; staff should be able to add/modify room rates & equipment options & rates.
- ✦ Add a table for user categories (standard, private, community); there will be no category for free as that will be handled by a staff waiver.
- ✦ Reservation form should include options for user category, coffee maker; piano, audio, drapes. Charges for the coffee maker, piano, audio, & drapes are a flat rate no matter how many rooms are rented.
- ✦ There is a \$100 cleaning deposit for full day or multiple day events.
- ✦ Once a date and times room & user category have been selected, there should be an option to calculate the the reservation amount and this should be displayed on the reservation form. The person filling out the form, should be able to modify options and recalculate the charge. Nothing would be firm until the form is submitted. Staff will have the ability to make changes and recalculate the fee. Fee calculation will be: (room rate for user + equipment rate) x time (days/ hrs) for each room listed on the form
- ✦ When a reservation request is submitted, it first needs to be routed to staff to validate the renter category before it is forwarded for approval. We need more granularity in the routing process so that we can specify one group for validation and a different list of e-mail addresses for approval.
- ✦ Attachments currently sent out after approval should now be sent with the invoice.
- ✦ When request is approved by staff, an invoice would be generated and sent to the applicant's e-mail. The reservation will not be considered complete until the invoice has been paid. Generate an invoice for \$0 when user type "free" is selected. When the reservation balance is \$0, the reservation can be considered complete.
- ✦ When a reservation spans multiple years, calculate an invoice for each fiscal year (July1 - June 30). When the reservation for the first year is paid, that reservation will be considered valid. Need to track reservations & the invoice for future years and activate future invoices based on a schedule defined by staff. This last part to be determined.
- ✦ The invoice should break down the cost for each room. The detail section of the invoice should list the room and the charge for that room.
- ✦ In addition, include payment options for Liens and Local Improvement District (LID)
 - ✦ The current property inventory has a field for Lien & LID balances. This is a temporary field for staff to track these obligations. What we need is a way for staff to enter a beginning balance; a payment month & day and billing frequency for the system to generate an invoice which would be sent by e-mail to the property owner. In other words, this would be a reoccurring transaction based on the frequency until the balance is zero.
 - ✦ The invoices and liens will track with the property via a page with this information in a table that can be printed or exported to excel.
- ✦ We never implemented the change to allow us to factor in setup and takedown time in calendar entries. The goal is events on the community calendar would only reflect the actual event time

while the facility & organization calendars would include setup and takedown time in addition to the event. This isn't a super high priority but I want you to be aware of it & consider implementing it if it doesn't involve too much work. At some point, we need to do this but it doesn't have to be now. This should be a topic for further discussion as your evaluation about the scope of work evolves.

- ♦ Incorporate an option for credit card payment; technical specifications for doing this have been provided. Greg has two PDF files that outline the handoff and communications between the Yachats database and the credit card processing center.
- ♦ Need a report for reconciliation of daily receipts for each module that is invoicing & a total for the month.
 - ❖ Need to generate a receivable report for all invoiced areas at a specific date. (date to be specified by user)
- ♦ There are one or two items in the matrix below that may change. I need to confirm if we need a charge for the coffee maker, portable audio, and drapes.

Room	Standard	Private	Community
3	24/hr; \$120/day	\$14/hr; \$70/day	\$7/hr; \$35/day
5	36/hr; \$180/day	\$18/hr; \$90/day	\$9/hr; \$45/day
5K	\$100/4hr; \$200/day	\$65/4hr; \$130/day	\$40/4hr; \$80/day
8	36/hr; \$180/day	\$18/hr; \$90/day	\$9/hr; \$45/day
9	\$60/hr; \$300/day	\$30/hr; \$150/day	\$15/hr; \$70/day
picnic shelter	\$36/hr; \$120/day	\$22/hr; \$72/day	\$11/hr; \$36/day
kitchen	\$100/4hr; \$200/day	\$65/4hr; \$130/day	\$40/4 hr; \$80/day
grand piano	\$100/day	\$50/day	\$25/day
coffee maker	\$15/day	\$10/day	\$5/day
portable audio	\$15/day	\$15/day	\$15/day
pipe & drapes	\$100/day	\$100/day	\$100/day

Notes for Greg:

Consider showing a link to the rate schedule to prospective renters as a pop up window

Greg to provide definition of user class via the help system (Standard, Private, Community, Waiver).

Given council's decision about the library going to the 501 building & the council MOU with the library commission, we are not including that building in the rate schedule.