



UNITE PROJECTS UPDATE COMMITTEE OF THE WHOLE



JULY 2020

AGENDA

1. Recap of UNITE Program
2. Highlights 2020 projects
 - Payroll Modernization
 - Project Management Improvement
 - CRM Phase II
3. Conclusions

1.0 BUSINESS DRIVERS AND ROADMAP



	2019 – 2020				2021 - 2023		
	2019 Q1-Q2	2019 Q3-Q4	2020 Q1-Q2	2020 Q3-Q4	2021	2022	2023
1. Payroll Modernization and Talent Management: Evaluate and implement, a payroll, staff scheduling and talent management (HCM) solution.		Planning	Execute	Execute			
2. CRM Streamlining: Improve the usability of Dynamics CRM for Customer Service area and related stakeholders.		Execute					
3. Dynamics 365 F&O Enhancements: List of sub-projects includes: (1) fix project accounting; (2) streamline procurement and; (3) implement budgeting/grants and; (4) review VeMax integration.		Planning	Projects Planning	Procurement Planning	Budgeting Planning	VeMax	
4. Office 365 Roll-Out: Migrate to O365. Targeting email and Teams and reviewing other opportunities.			Planning	Execute			
5. CRM Phase II - One Parkland Portal: Extend internal rollout and implement Citizen portal for on-line inquiries and reporting issues.				Planning	Execute		
6. Bellamy Retirement: Evaluate utility Billing/AR/Property Tax/Cashiering.				Planning	Execute	Execute	
7. Planning and Development Modernization: Evaluate alternatives and select a preferred option.					Planning	Execute	
8. Records Management: Staff training, creating tools, implementation, FOIP backup. Focus areas: Ag, Smart Parkland, Community Sustainability (bio reports, ESAs), cemeteries, community grants, OH&S and TRIM.						Planning	Execute
9. CRM Phase III Portal Update: Placeholder to enhance the portal with other Services.						Planning	Execute

2.0 PAYROLL MODERNIZATION (PHASE II - EXECUTION)

Completing Dec 2020

- Project Scope
- Project Schedule
- Project Budget

This project focuses on removing manual processes and streamlining the payroll function.

- Workshops underway with Ceridian.
- Internal team working well; on schedule and budget - No issues to report.



	<u>Duration</u>	<u>Attendees</u>	<u>Scheduling Options</u>
WFM			
Entitlements - load through Activate	1 hour	Pradeep , Steve, Natasha	Thurs June 18 - 12:30 - 2:00 MT
		Grace, Layale	Fri June 19 - 12:00 - 2:00 MT
Holidays & Pay calculations	1.5 hours/call	Pradeep , Natasha	Recurring twice weekly meetings until completed:
Pay Types, Pay Class, Status		Grace, Layale	
OT & Banked Time			
Shift Prem/Call in Pay			
Punch Policies			
Shift Rotations, Schedules			
Role Access Security			
Workflows & Forms			
Guided Processes			
Password Policies			
GL			
GL requirements and MS D365 FinOps integration		Iouri , Pradeep, Natasha Grace, Layale, Dephany, Robert Allen	

2.0 PAYROLL MODERNIZATION (PHASE II - EXECUTION)

Completing Dec 2020

- Project Scope
- Project Schedule
- Project Budget

This project focuses on removing manual processes and streamlining the payroll function.

- Pushing time entry to remote workers and reducing double entry

All timesheets

00000324 : Julia Funderburk

Lines Header

Timesheet

Posted

Resource: Julia Funderburk

Work week: 6/8/2020 - 6/14/2020

Timesheet total: 7.00

Timesheet period: 6/8/2020 - 6/14/2020

Approval status: Posted

Timesheet lines

+ New line Remove Copy from Save as favorites

Category	Equipment	Premium		Mon 06/...	Tue 06/09	Wed 06/10	Thu 06/11	Fri 06/12	Sat 06/13	Sun 0
PWNORMAL	EQ00001	PWNORMAL	LeadHand	2.00						
PWNORMAL	EQ00002	PWNORMAL	Acting	5.00						

Line details

Comments General Financial dimensions

Day: Mon 06/08

Internal comment

External comment



*No more paper timesheets.
No more double entry.*

2.0 PROJECT MANAGEMENT IMPROVEMENT PROJECT

Completing July 2020

- Project Scope
- Project Schedule
- Project Budget

Project timelines are May – July 2020. The goal is to streamline processes and reduce manual reporting.

- Works all completed with Engineering, Public works on the PMO.
 - 40 spreadsheets used in the current process will be retired and auto-generated by the systems.

Power BI Mockups - Power BI Desktop

File Home View Modeling Help

Clipboard: Paste, Copy, Cut, Format Painter

External data: Get Data, Recent Sources, Enter Data, Edit Queries, Refresh

Insert: New Page, New Visual, Ask A Question, Buttons, Text box, Image, Shapes

Custom visuals: From Marketplace, From File

Themes: Switch Theme

Relationships: Manage Relationships

Calculations: New Measure, New Column, New Quick Measure

Share: Publish

Filters: Program Category, Division, Department, Year

Program	Project Id	Project Type	Project Name	Project Stage	Council Budget	Contract
Bridge - New - Growth - Construction	3122004	Capital	Concept Design - Acheson 2020	Substantial Complete	504000	
Future Road Construction	3122003	Capital	Road Preservation/Innovation Consulting	Substantial Complete	576000	
Roads - Rural Service Area	3190001	Operating	Roadway-Rehab-Gen Road Program Training	In progress	288000	
Waste Water New - Growth- Construction	3132005	Operating	Trans Mountain Pipeline Staff Support	In progress	432000	
Wastewater System - Rural Service Area	3131903	Operating	Transportation Master Plan 2019	In progress	792000	
Water - New - Growth - Construction	3131906	Operating	Groupe Nordik - Water & Wastewater Eng Fees	Closed	720000	
Total					3312000	2

3.0 CRM PHASE II

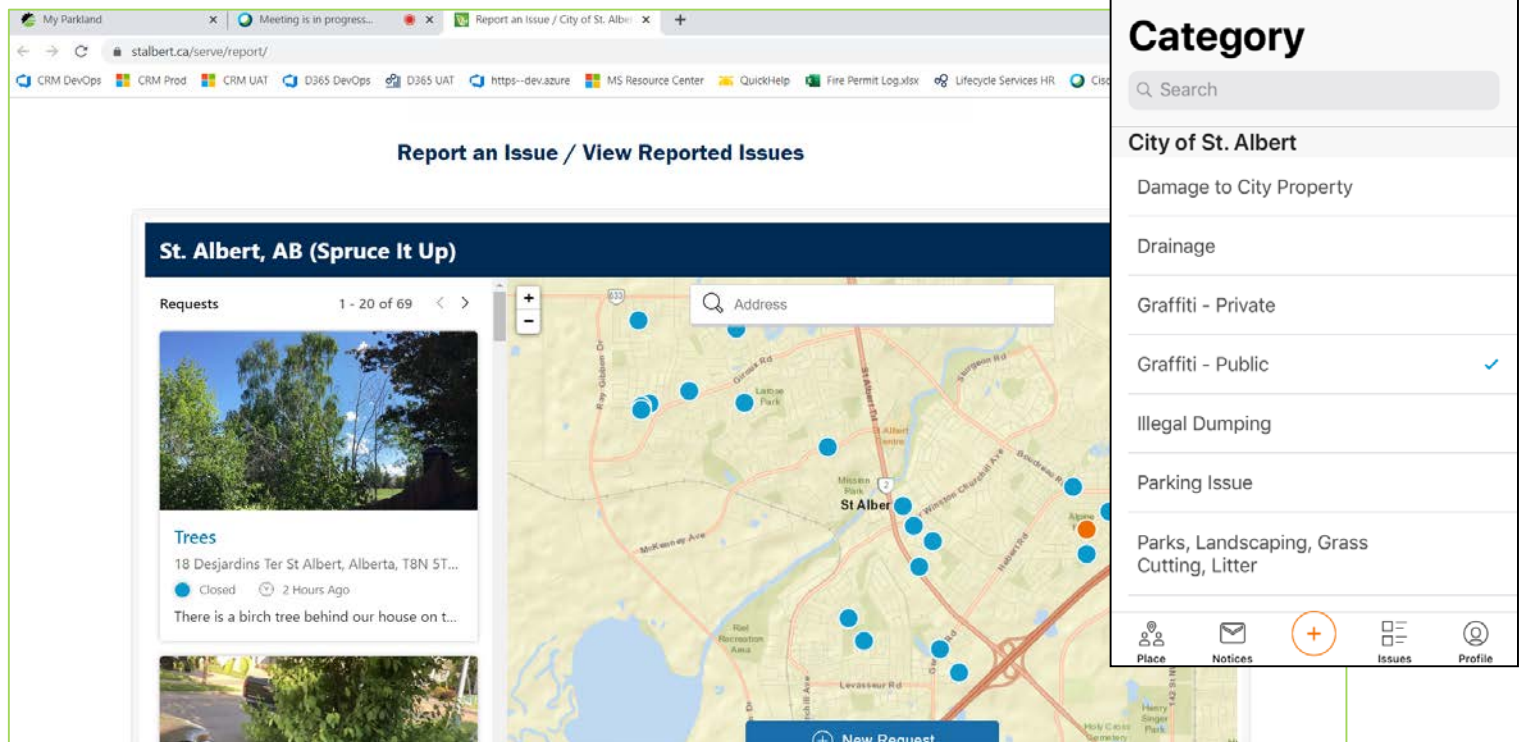
- Project Scope
- Project Schedule
- Project Budget

Project timelines are May – Aug 2020. The goal is to streamline processes and reduce manual processes.

- *Offering **more** online services to residents in this phase*
- *Accessible from a smartphone and auto-feeds the Customer Services CRM system .*

Scope:

- Agriculture (Complaints process)
- Land Management inventory
- PW – Solid waste card + Vemax WRR tickets replaced with CRM (Sept 30)



3. CONCLUSIONS

- The UNITE program remains tracking **on plan** for 2020.
- Teams working effectively remotely.
- Governance and oversight of the UNITE projects remains high.
- Vendors being actively managed; no significant issues to report at this time.

