



UNITE PROJECTS UPDATE COMMITTEE OF THE WHOLE



OCTOBER 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.

- All workshops are completed; Ceridian payroll configuration is completed.
- Starting parallel testing in October and continues for 8 weeks
- Starting user testing in October using new streamlined processes
- Internal team working well; on schedule and budget - No issues to report.
- On target for January go-live.

Implementation at a Glance



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.

- System in production!!!
 - 40 spreadsheets used in the current process are being retired for new projects
 - Engineering Services feedback is very positive regarding new processes.

Project management

My work Analytics

Classification	Industrial	Funding Approval	Blank	Start Date	7/1/2020 12:00:00 AM
Department	Engineering Services	Project Owner	Hancock, Jody	End Date	12/31/2020 12:00:00 AM
Program Category		Project Manager	Bobey, Keith	Schedule Health	Blank
Project Description	Prepare 5 and 25 year water project	Financial Controller	Hurley, Colleen	Budget Health	Blank
Project Group	ONETIME	Variance Explanation	(Blank)	Project Life	Operations

Activity Number	Category ID	Task Name	Project Budget	Annual Year	PTD_Budget	PTD_Actual	PTD Variance	YTD_Budget	YTD_Actual	YTD Variance	ITD_Budget	ITD_ACTUAL	ITD Variance	Forecast to Complete	Estimated Cost at Completion	Budget Variance
AAN1005260	ENGF-OP	Consultant (Primary Assignment)	2,500.00	2,500.00	0.00		0.00	2,500.00	1,858.75	641.25	2,500.00	1,858.75	641.25	2,500.00	4,358.75	-1,858.75
AAN1005274	ENGF-OP	Consultant (Primary Assignment)	2,500.00	2,500.00	2,500.00		2,500.00	2,500.00	2,500.00	0.00	2,500.00	2,500.00	0.00	2,500.00	5,000.00	-2,500.00
Total			5,000.00	5,000.00	2,500.00		2,500.00	5,000.00	4,358.75	641.25	5,000.00	4,358.75	641.25	5,000.00	9,358.75	-4,358.75

3.0 CRM PHASE II

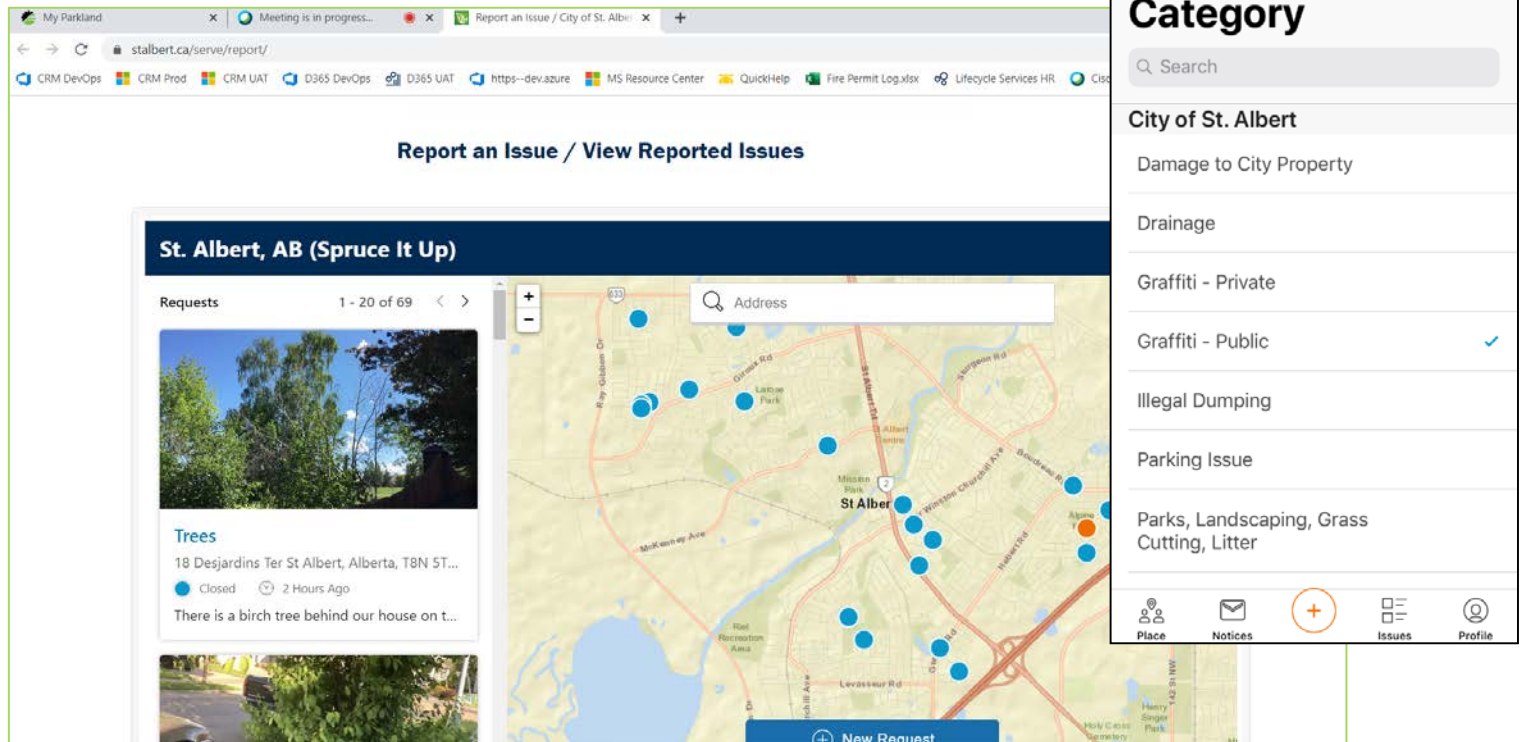
- Project Scope
- Project Schedule
- Project Budget

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.
- Target to get this project completed by end-of-year

Scope:

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



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.

- Taking the opportunity to automate other paper processes by having smart phone apps feed requests directly into CRM

The screenshot shows a web form titled "Parkland County STARS Program STARS OBSERVATION CARD". It includes fields for "When did this happen?" (9/3/2020), "Employee" (Type Name), "Department" (dropdown), "Corporate Value Demonstrated" (dropdown), and a text area for "Explain how the employee demonstrated the corporate value(s) and why you feel they deserve recognition under the STARS Program". There is also an optional field for "Provide an optional personal note (optional)". At the bottom, there are fields for "Observed By" (Anonymous) and "Employee's Supervisor" (Type Name), followed by a green "Submit" button.

The screenshot shows a mobile app interface for "Facilities Requests". It features a header with the title "Facilities Requests" and a large image of a landscape. Below the image are two blue buttons: "Submit Request" and "View Previous Requests". To the right, a modal form titled "Facilities Requests" is open, containing fields for "Subject" (Broken window), "Location" (Agricultural Services Building), "Priority" (High), and "Description" (Window is broken and the rain is coming in.). There is also a section for attachments with the text "There is nothing attached." and an "Attach file" button. At the bottom of the modal is a blue "Submit Request" button.

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.
- Starting to plan 2021 UNITE projects such as retiring Bellamy ERP and implementing a modern Planning and Development system with on-line services.

