STAFF REPORT

REPORT OF THE ACTING DIRECTOR OF PUBLIC WORKS FOR THE CONSIDERATION OF COUNCIL

DESCRIPTION

Re: Fieldpoint Workorder Software Licensing

RECOMMENDATION

THAT the report from the Acting Director of Public Works be received;

AND THAT staff be directed to move forward with licensing Fieldpoint work order software initially for Parks, Facilities and some Recreation staff with eventual wider rollout;

AND THAT costs for this software licensing be incorporated into IT operational budgeting moving forward, with initial configuration costs being reflected in the 2023 IT contracted services budget.

BACKGROUND

Staff has placed a focus on investigating various IT solutions to improve operations since late summer 2022. From a high-level, the intention has been to identify a collection of software packages that will work together in an integrated way to improve and increase the efficiency of the processes that staff uses to administer city operations.

The first major component of this overhaul has been the GIS (geographic information system) solution that was rolled-out in fall 2022. This system allows for cataloguing and viewing geo-referenced data about the City's physical assets using a map-based interface.

Other major components include: a new financial accounting system to replace the current system that is nearing end of support, an inventory control system that is more integrated with the accounting system, an asset management package to assist in preparing financial forecasts relating to infrastructure repair and maintenance, and work order software to better direct staff and to facilitate easier and more comprehensive reporting on the tasks that staff undertake.

Staff has taken great care to ensure that all of the solutions being investigated work in a harmonized way not only to work with the existing systems in place, but to share a centralized data store with the

accounting system so that information does not have to be entered multiple times into various software. Staff expects the complete migration to these new systems to span months and perhaps years before full implementation is achieved.

ANALYSIS

Workorder software solutions provide organizations with the ability to assign and schedule tasks to various employees on an individual basis, and allows for employees to report on the completion of those tasks while easily collecting field data about the work they are doing.

For example, a Facilities employee could be assigned the task of conducting a maintenance inspection of the HVAC system in a city building. The assignment would appear in an app on the employee's mobile phone. Included in the assignment would / could be details on how to carry out the task, any safety information that the employee would need to be aware of related to the task, supporting documentation about the equipment that is to be inspected, information about what to do in case there was difficulty during inspection, etc.

Once the task was completed, the employee would confirm that it was complete in the app, and would record the time spent doing the task. The time recording would take the place filling out paper timesheets as City employees currently do. This action not only replaces that manual process, but creates a digital log of the task being completed that would be searchable and useful for future maintenance as well as for reporting for insurance or warranty compliance. In addition to creating that digital activity log, the app can also ask for photos of the equipment being inspected to catalog its condition through time, and can also prompt the employee to fill out questionnaires to ensure that the appropriate maintenance records are being collected. The app can be configured to have the employee confirm that each step of a given task is completed to ensure compliance.

After reviewing several competing software packages and engaging in demonstrations and technical discussions with the development team, Staff has identified that Fieldpoint workorder software is an appropriate solution for the City's needs. The software has a reputation for being robust and well-developed. Fieldpoint is also unique in that it is compatible and able to be integrated with various accounting solutions, including the two primary solutions that Staff is investigating for future implementation - but it is also able to be run standalone without integration.

Given the above Facilities workorder example, one can see that the effort required to define and document all of the various routine tasks that City workers do will be substantial.

Normally, workorder software would be one of the final solutions to be configured in an integrated system. Staff has spoken with technical representatives from the company to confirm that a minimal install of the software implemented in a limited way could later be integrated with a future accounting system once it is in place. This approach would allow the migration to a new software solution at the City to be rolled out in parallel, and would allow staff to begin the job of task/data entry in the workorder package and to learn the system while the accounting solution is being configured. Being able to work

on multiple parts of the software migration at once will shorten the timeline involved in moving to the new systems.

Staff recommends beginning with licensing enough software seats to accommodate a roll-out to Facilities staff, Parks staff and some Recreation staff in order to strike a balance between getting a head start on configuration and managing the workload of a wider implementation that incorporates more workers.

A copy of Fieldpoint Service Applications Inc.'s proposal for this initial install is attached to this report for Council's review.

FINANCIAL IMPACT

Initial configuration and installation of the software on Fieldpoint's servers will cost $12,600.00. This is a fixed cost that includes consultation with City staff by the vendor to ensure that the software is customized and configured for the City's needs. Thereafter, the licensing fees for 13 users (combined) is $1,985.00 per month with the first 12 months of licensing charges due upon the order being placed.

Staff recommends that these licensing expenses be incorporated into the IT operating budget for the City moving forward, and that the initial configuration and installation expenses be addressed in the 2023 IT operating budget.

LINKS TO STRATEGIC PLAN

This project directly relates to the following key section of the strategic plan:

Strong municipal corporate administration and governance.

SUMMARY

Staff recommends that Council gives direction to license an initial limited install of Fieldpoint workorder software for use by Parks, Facilities and some Recreation workers with the intention of implementing the system to a wider range of departments in the future.