# REQUEST FOR DECISION

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| SUBJECT: | **Software Project Update** | | |
| SUBMISSION TO: | COMMITTEE OF THE WHOLE | REVIEWED AND APPROVED FOR SUBMISSION | |
| MEETING DATE: | July 15, 2025 | CAO: | MANAGER: |
| DEPARTMENT: | CORPORATE SERVICES | DIR: EK | PRESENTER: DB |
| STRATEGIC PLAN: | Economy | LEG: SS | |

RELEVANT LEGISLATION:
**Provincial** (cite) – N/A

**Council Bylaw/Policy** (cite) – N/A

RECOMMENDED ACTION:
**MOTION: That Committee of the Whole receive the Software Project Update as information.**

BACKGROUND/PROPOSAL:
In 2022, Greenview embarked on a critical Financial Software refresh project to deploy a new Asset Management tool with advanced capabilities (Citywide), rewrite the Chart of Accounts, replace the aging Diamond software with a new Enterprise Resource Planning system with modules to support several departments across Greenview (TownSuite), re-implement Questica as the budgeting tool to reflect changes brought by the related projects and to better use the capabilities of the software itself. Each project is a significant undertaking on its own, with various dependencies across each initiative in the transformation. The Finance team committed to a minimally disruptive, consultative, and deliberate approach recognizing the risk of these substantial, though necessary, changes to benefit Greenview. The budget for this series of projects was $1,365,000.00.

**STATUS**
Work on the Asset Management tool was completed over 2022 and 2023 and was highly consultative including mapping workflows and work profiles for each department followed by a department-by-department phased roll out wrapping up mid-2024. This implementation has significantly increased Greenview's ability to track and manage assets thus far and will continue to expand as data is constantly added and the other projects reach completion and integration. Ultimately enabling a better understanding and planning of future maintenance and replacement costs to manage critical expenditures.

The Chart of Accounts work began in 2023 with the goal to build a standardized and flexible chart with meaningful categories to generate and monitor key metrics across all departments. This required working with department leaders to understand their needs to shape the requirements for Greenview. All tools within this project are reliant on the updated Chart. It is expected to be used for the 2026 budgeting process.

The reimplementation of Questica brings an updated cloud-based version of the existing budgeting and financial planning tool for Greenview. Additionally, with the new Chart of Accounts, new Asset Management tool and Financial software, updates are required to the reporting structure. Upgrading the current system minimizes cost and amount of change for Greenview while adding value through better use of the tool and is highly compatible with the new financial system. The Questica reimplementation is expected to be used for the 2026 budgeting process.

The replacement of the Diamond software began in the first half of 2023 moving to TownSuite, a flexible tool focused solely on municipal operations. Work to this point has included an initial assessment by the vendor to understand Greenview's current processes, needs, mapping and validating Greenview's data for the new system. The implementation work is ongoing and at the end of the first quarter 2025, reached a critical milestone with the Greenview Corporate Services team training and testing module by module, as they are ready. Extensive testing and validation are required for a project of this size covering so many different finance areas (journal entries, accounts payable, receivable, billing, banking, reporting). While testing is ongoing, it is going well so far and the finance module in TownSuite is expected to be live before the end of the year.

Following the financial implementation of TownSuite, the additional modules will be implemented. This includes the Employee Portal and Payroll module, and a collection of Community Services software made up of the Customer Portal (an online portal for Ratepayers) and Point of Sale modules, the Service Request module (also referred to as 3-1-1), and the Recreation and Events module. This additional work will begin after finance is live as it is dependent on final financial configurations however, the TownSuite team has been working in the background to the extent they can.

Once TownSuite Financial is live, Citywide will begin using the new Chart of Accounts, integration work between TownSuite and Citywide will be completed. The goal is to have seamless data transfer between the two systems to better manage asset values, capital spending, and reporting.

This is a transformational undertaking for Greenview and the project is progressing very well with 2025 being a critical year of progress.

A further update will be provided at the conclusion.

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BENEFITS OF THE RECOMMENDED ACTION:
1. The benefit of accepting the presentation is to confirm the Committee of the Whole update on the Software Project update.

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DISADVANTAGES OF THE RECOMMENDED ACTION:
There are no perceived disadvantages to the recommended motion.

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ALTERNATIVES CONSIDERED:
There are no alternatives, as this is for information purposes only.

FINANCIAL IMPLICATION:

There are no financial implications to the recommended motion.

STAFFING IMPLICATION:

There are no staffing implications to the recommended motion.

PUBLIC ENGAGEMENT LEVEL:

Greenview has adopted the IAP2 Framework for public consultation.

**INCREASING LEVEL OF PUBLIC IMPACT**

Inform

**PUBLIC PARTICIPATION GOAL**

Inform - To provide the public with balanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions.

**PROMISE TO THE PUBLIC**

Inform - We will keep you informed.

FOLLOW UP ACTIONS:

There are no follow up actions to the recommended motion.

ATTACHMENT(S):

- PowerPoint Presentation – Software Project Update – COTW July 2025