



Integrated Work Order/Work Flow
Software for Local Governments

Project Charter

Town of Minto

January 31,2017

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Version 1.0
Version 2.0

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1. Contact List

Town of Minto ("Client")

| Name | Title | Tel | E-mail |
|-------------|----------------------|----------------------|--|
| Gordon Duff | Treasurer/Deputy CAO | 519 338-2511 EXT 235 | gordon@town.minto.ca |

Public Sector Digest ("PSD")

| <i>Name</i> | <i>Title</i> | <i>Tel</i> | <i>E-mail</i> |
|----------------------|--|---------------------------|--|
| Matthew Van Dommelen | General Manager, Business Development | 519-690-2565 Ext. 2410 | mvd@publicsectordigest.com |

2. Statement of Confidentiality:

This document has been prepared specifically for "The Town of Minto"

During the Term of this Agreement and thereafter, The Public Sector Digest Inc. (PSD) shall treat as confidential all information obtained by PSD for and from the Client as well as all information compiled by PSD under this Agreement for the Client, including without limitation: business and marketing information, technical data, programs, source codes and other software, plans and projections.

This proposal and all of its associated pricing shall remain valid for 60 calendar days from the date of issue indicated below.

Date of Issue: January 31, 2017

3. Background:

CityWide Works is a work order/work flow software application designed to enable public works departments to prioritize, schedule and track projects. In addition, the application calculates resources utilized, inventory consumed as well as direct and indirect labour. The application integrates with CityWide Tangible Assets and CityWide CPA (Capital Planning & Analysis) and can also Interface with other Financial Management Systems.

CityWide Works is designed to provide customized metrics relating to business processes. The application builds upon the investment local governments have made in the capturing of their TCA inventories and ensures that the infrastructure data remains current and accurate.

4. Client Requirements & Benefits.

This should be a list of high level requirements gathered by the Account Manager or via a pre implementation review such as

| High Level Client Requirements | |
|--------------------------------|---|
| 1 | Ability to track, update and report on customer/citizen requests calls |
| 2 | Tools to monitor service request and work order reports through a Reports dashboard, with the ability to drill down for greater detail. |
| 3 | Functionality to track and report project work status |
| 4 | Ability to implement and manage a preventative/scheduled maintenance program |
| 5 | Ability to implement and manage a work order process. Assign project work and track against multiple service providers |
| 6 | Ability to create, respond and update work order by field operations staff using mobile devices |
| 7 | Ability to create and track road operations patrol routes and identify defects on the fly. |
| 8 | System should have built-in map viewer to display and analyze work order and problem locations |

5. Project Scope

The scope of this project includes and excludes the following items.

In Scope:

Client Business Units to be Implemented

| Business Unit* | Implementation Phase |
|---------------------------|----------------------|
| Public Works - Operations | Phase 1 |
| Parks & Recreation | Phase 2 |
| Fleet | Phase 2 |
| Facilities | Phase 2 |
| By-Law | Phase 2 |

*Business unit to be defined by each client and is typically is an operational work group that has common work process, workflow and data needs.

Asset Profiles to be Imported/Configured

| TA Asset Profile | Exists in TA Inventory | Asset Registry Build or Breakdown Required |
|---------------------|------------------------|--|
| Water, Sewer, Roads | Yes | Yes |
| Facilities | Yes | Yes |
| Water Valves | Yes | Yes |
| Water Meters | Yes | Yes |

Works Modules to be Implemented

| Works Functional Module | Current Implementation | Future Need |
|---------------------------|------------------------|-------------|
| Service Request | Yes | |
| Work Orders | Yes | |
| Mobile Workforce | Yes | |
| Parts & Materials Costing | Yes | |
| Equipment Costing | Yes | |
| Preventative Maintenance | Yes | |
| Labour Costing | Yes | |
| Asset Based Work Orders | Yes | |

Throughout the Works Implementation, clients will also have provided input relative to the design of the application and also be able to direct the development team towards functionality specific to the needs of local governments. Emerging functionality (i.e. maintenance and other legislated standards) will also be encouraged and supported by the PSD research group.

Out of Scope:

The following items have been discussed as future offerings/consideration, but are not included as part of this initial implementation project

| Out of scope Items | |
|--------------------|---|
| 1 | Future need for a Payroll Interface has been discussed. Requirements, scope discussion and associated costs will be a separate project for consideration |
| 3 | Client Asset registry is not ready for full asset based tracking of work orders. Professional services required to assist the client with re-building their asset registry will be a separate project for consideration. This has begun with looking at GIS information from BM Ross Find It Tool. The TA register will be refined and Minto Staff is assisting with this task. If PSD staff is needed a hourly charge may be required. |

Project Constraints and Assumptions

The following constraints and assumptions have been identified. If these are invalidated at a later date, then the activities and estimates in the project plan should be adjusted accordingly.

Constraints:

- to be discussed and determined with clients during project kickoff meeting*

Assumptions:

- Client resources will be consistent and available to provide required data, testing and feedback through the project implementation schedule.
- to be discussed and expanded on with clients during project kickoff meeting*

6. Success Criteria/Major Deliverables

- Populate and implement the CityWide Works application, via a PSD web hosted application.
- Launch the CityWide Works application with successful remote access, data retrieval and data export by participant organization.
- Enterprise License for the CityWide Works application.
- Annual Support & Maintenance is included

7. Project Approach

The CityWide Works Implementation approach will consist of three Stages;

- Project Initiation & Planning
- Configuration & Analysis
- Training & Go-Live

Stage 1 - Project Initiation & Planning

Kickoff Meeting (PSD, Client) – 2 hours

The kickoff Meeting is the formal launch of the CityWide Works Implementation project. The goal of the kickoff meeting is to define the key stakeholders and introduce the members of the project team, define scope, requirements (business & data) and deliverables and to review the data templates and refine project plan.

Blank Templates sent to client (PSD)

Blank PSD Works Templates will be delivered to the client in excel. Portions to be completed can be defined during the kickoff meeting.

Client site created (PSD)

A CityWide Works Web hosted application site will be created for the client. At least 1 Admin users will be created and login details will be e-mailed to the applicable contacts.

***Milestones**

1. Project Work Plan approved - 5%
2. Client site created and accessible by the client - 8%
3. Client has received blank excel Works Data Templates – 10%
4. Completed templates have been delivered to PSD team – 25%

Data Provision (Client) – 3 - 5 days to gather data and complete templates

Clients will complete the excel data templates for all areas of the application where they would like to bulk load data.

Completed data templates typically will include:

- Departments
- Users
- Work Order Types
- Equipment Listing
- Parts & Materials Inventory
- Vendors/Contractor Listing,
- Customer (resident) listing & related Properties

Any data not yet available for bulk load at this point can be entered as needed by the client's Admin or Subject Matter Expert (SME) users. Documentation of the clients current Work Order, Service Request or Preventative Maintenance processes could also be delivered to the PSD Implementation team to aid in the analysis process.

Stage 2 – Configuration & Analysis

Process & Data Analysis (PSD)

Once completed templates are delivered to the PSD Project manager, they will be reviewed and analysed in order to identify data gaps and opportunities for process improvement. Works template delivered data will also be imported into the clients Works Application site at this time.

Process Review Workshop (PSD, Client) - ½ day

Following the initial data import there is usually a process review workshop (Web or on-site when feasible). Existing processes will be reviewed and recommendations can be made to better enable the client to utilize the available functionality of the Works application. This could take the form of 2 or 3 meetings depending on scope and individual client's needs.

Admin User Training (PSD, Client) - ½ day

Admin Training is typically given to the client's key Subject Matter Expert (SME) or Power User and is intended to ensure the client is familiar enough with the core functionality and flow of the Works Application, to be able to test and refine the system configuration to best fit their individual needs. The extent and duration of this training will vary depending on the requirements set out in stage 1, but typically includes: How to Create Service Request & Work Orders and Admin functionality such as creating users, setting permission & notifications and creating and configuring Work Order Types.

Test & Refine (Client) – 2- 3 week testing period

Once trained, the clients Admin user(s) should be able to spend a few weeks testing and refining the system configuration. The PSD implementation team will be available for questions and assistance during this time. If necessary, supplemental data imports via Works templates can be executed by the PSD Implementation team.

*Milestones

4. All client data is uploaded and available for Township Use – 40%
5. Admin/SME users are trained and comfortable with the system – 50 %
6. New processes/configurations & user profiles finalized – 75%
7. User acceptance testing is complete and signed-off – 90%

Stage 3 –Training & Go-Live

Schedule & Conduct End User Training (PSD or client)

1 day -

Go-Live planning (PSD, Client)

Schedule and plan rollout to business unit(s) and end users. At this point the PSD implementation team can have all test WO, SR & PM records cleared from the database for a fresh GO-Live starting point.

Ongoing Upgrades and Support (PSD)

*Milestones

8. Training completed for Works Admin & all other users - 95%
9. Live system finalized and ready for use by Client Business Units – 100%

See **Appendix A** for proposed project schedule

8. Project Budget: CityWide Works

| SOFTWARE LICENSES | | | |
|---|--|------------|-------------|
| SOFTWARE | LICENSE | LIST PRICE | TOTAL |
| CITYWIDE WORKS INTAKE 1 | Enterprise License ¹ | 16,490.00 | 16,490.00 |
| | Annual Web Hosting ² Support/Version Protection ³ | 5,990.00 | 5,990.00 |
| SUBTOTAL SOFTWARE LICENSES | | | \$22,480.00 |
| PROFESSIONAL SERVICES | | | |
| SERVICE | | | TOTAL |
| CityWide Works Service Request API | | | \$3,500.00 |
| Project Management ⁴ Data Migration and Implementation ⁵ | | | \$10,000.00 |
| Training ⁶ | Admin User Training – 2 Days | | |
| | End User Training – 1 Day | | |
| <i>Professional Fees Total</i> | | | |
| PROFESSIONAL SERVICES | | | \$10,000.00 |
| PROJECT TOTAL | | | \$35,980.00 |

¹Enterprise License allows all employees of the “client” under this agreement to utilize the software application without additional seat or per user charges. ²Version Protection means that during the course of adding enhancements to the “Software”, clients will have access to any new features without additional cost over the annual version protection fee. Software support means the correction of defects to the Software. ³Web Hosting includes vendor provided redundant Internet connections, Daily backup both on and off-site of client data, 24 Hour video, on-site security and fire suppression. ⁴Project Management services include client assistance with the development of the asset registry framework, work flow/process, strategic planning and progress reports. ⁵Data Migration and Implementation includes the review of the CityWide templates and entering of client data within the application by PSD. Data to be provided to PSD by client pre-populated and formatted onto PSD standard Excel data collection templates. 1 initial load for testing purposes, then 1 final re-load if necessary is included. If extra assistance is required exporting and formatting data from existing systems, advanced data assistance fees would apply. ⁶Training includes scheduled web delivered sessions introducing and preparing users to effectively and thoroughly use CityWide Works. Scheduling, format and location of the above training days to be finalized as per client’s needs.

Estimated PSD expenses for onsite training/meetings (subject to prior written approval by the Client)

1 Day visit: Mileage only - Burlington to Minto 250 km @ \$0.54/km – \$135

2 Day visit: Mileage + Accommodations + Per Diem

9. Terms of Payment – Works Project:

- Enterprise License and Professional Services will be invoiced in **Four equal monthly payments** following the execution of the project charter.
- Annual Software Support and Web Hosting (12-month Period) are billed 30 days following the execution of the project charter.
- Taxes are extra where applicable. (GST, PST, HST)

- PSD expenses including airfare, mileage, accommodation, meals, and ground transportation are extra where applicable and subject to prior written approval by the Client.
- Annual Software Support/Version Protection as well as the Annual Web Hosting Fee will be limited to a maximum annual escalation of 5%.

10. Additional Considerations:

Ownership

All Client data stored within the CityWide Works application remains the legal ownership of the Client and can be extracted and used without restriction. All enhancements and customization to the CityWide Works application are included.

Confidentiality

PSD shall treat as confidential all information obtained by PSD for and from the Client as well as all information compiled by PSD under this Agreement for the Client, including without limitation: business and marketing information, technical data, programs, source codes and other software, plans and projections.

Security

PSD performs regular security audits of our systems to ensure current updates and patches are applied on all hardware, along with updated antivirus software. All users are forced to use secure passwords which are stored on the server only in encrypted format. Nightly backups are done off-site. The PSD Firewall is configured to only allow traffic to enter the network for required services such as our web server.

Timelines indicated may change based upon the size of the participating organization, complexity of the environment and accessibility to resources.

12. Authorization:

This proposal shall be deemed to have come into force when executed by representatives authorized to bind the respective corporations; The Town of Minto and The Public Sector Digest Inc.

13. Terms and Assumptions Accepted:

BETWEEN:

Town of Minto

5941 Highway 89
Harriston, Ontario N0G 1Z0

The Public Sector Digest Inc.

1410 Fullarton Street, Suite 1410,
London, Ontario N6A 5P3

By: _____
(Print Name of Authorized Signing Officer)

By: _____
(Print Name of Authorized Signing Officer)

(Signature of Authorized Signing Officer)

(Signature of Authorized Signing Officer)

(Date)

(Date)

Appendix A: Proposed Project Schedule

High-level Project Schedule

| Task Name | Start Date | End Date | Resource | 2017 | | | | | | |
|---|------------|----------|----------|------|-----|-----|-----|-----|-----|-----|
| | | | | Jan | Feb | Mar | Apr | May | Jun | Jul |
| CityWide Works Implementation - Town of Minto | | | | | | | | | | |
| Phase 1 - Public Works (Operations) | 02/06/17 | 04/14/17 | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 02/06/17 | 02/28/17 | | | | | | | | |
| Stage 2 - Configuration & Analysis | 02/07/17 | 03/31/17 | | | | | | | | |
| Stage 3 - Training & Go Live | 04/03/17 | 04/14/17 | | | | | | | | |
| Phase 2 - (Parks & Rec, Fleet, Facilities, By-Law) | 04/17/17 | 07/10/17 | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 04/17/17 | 05/08/17 | | | | | | | | |
| Stage 2 - Configuration & Analysis | 04/25/17 | 06/20/17 | | | | | | | | |
| Stage 3 - Training & Go Live | 06/27/17 | 07/10/17 | | | | | | | | |

Proposes Detailed Project Schedule

| Task Name | Start Date | End Date | 2017 | | | | | | | | | | | |
|--|------------|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| | | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
| CityWide Works Implementation - Town of Minto | | | | | | | | | | | | | | |
| Phase 1 - Public Works (Operations) | 02/06/17 | 04/14/17 | | | | | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 02/06/17 | 02/28/17 | | | | | | | | | | | | |
| Kickoff Meeting | 02/06/17 | 02/06/17 | | | | | | | | | | | | |
| Blank templates delivered to client | 02/07/17 | 02/07/17 | | | | | | | | | | | | |
| Client site created and logins e-mail to client | 02/07/17 | 02/07/17 | | | | | | | | | | | | |
| Project Work Plan Created & Approved | 02/07/17 | 02/07/17 | | | | | | | | | | | | |
| Data Provision (data templates completed, sample WO's emails) | 02/08/17 | 02/28/17 | | | | | | | | | | | | |
| Completed Works templates delivered to PSD team | 02/28/17 | 02/28/17 | | | | | | | | | | | | |
| Stage 2 - Configuration & Analysis | 02/07/17 | 03/31/17 | | | | | | | | | | | | |
| Operations Inventory - Process & Data Analysis | 02/07/17 | 03/17/17 | | | | | | | | | | | | |
| TA Inventory Formatting & Upload | 02/07/17 | 03/17/17 | | | | | | | | | | | | |
| TA Inventory is uploaded & configured for PW Operations Use | 03/17/17 | 03/17/17 | | | | | | | | | | | | |
| Works - Process & Data Analysis | 03/01/17 | 03/03/17 | | | | | | | | | | | | |
| Works Data Formatting & Upload | 03/01/17 | 03/02/17 | | | | | | | | | | | | |
| All client data is uploaded and available for Township Use | 03/02/17 | 03/02/17 | | | | | | | | | | | | |
| Process Review Workshop | 03/03/17 | 03/03/17 | | | | | | | | | | | | |
| Admin User Training | 03/10/17 | 03/10/17 | | | | | | | | | | | | |
| Key users are trained and comfortable with the system | 03/10/17 | 03/10/17 | | | | | | | | | | | | |
| Test & Refine Works V2.0 Configurations (weekly updates, fixes as req) | 03/13/17 | 03/31/17 | | | | | | | | | | | | |
| New processes/configurations & user profiles finalized | 03/20/17 | 03/20/17 | | | | | | | | | | | | |
| User acceptance testing is complete and signed-off | 03/27/17 | 03/27/17 | | | | | | | | | | | | |
| Stage 3 - Training & Go Live | 04/03/17 | 04/14/17 | | | | | | | | | | | | |
| End User Training | 04/03/17 | 04/03/17 | | | | | | | | | | | | |
| Database Cleared | 04/06/17 | 04/06/17 | | | | | | | | | | | | |
| Go Live - Public Works (Operations) | 04/07/17 | 04/07/17 | | | | | | | | | | | | |
| Go-live Support | 04/10/17 | 04/14/17 | | | | | | | | | | | | |
| Phase 2 - (Parks & Rec, Fleet, Facilities, By-Law) | 04/17/17 | 07/10/17 | | | | | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 04/17/17 | 05/08/17 | | | | | | | | | | | | |
| Stage 2 - Configuration & Analysis | 04/25/17 | 06/20/17 | | | | | | | | | | | | |
| Stage 3 - Training & Go Live | 06/27/17 | 07/10/17 | | | | | | | | | | | | |

Detailed Project Schedule Cont...

| Task Name | Start Date | End Date | 2017 | | | | | | | | | | | |
|--|------------|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|--|--|--|
| | | | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | | | |
| CityWide Works Implementation - Town of Minto | | | | | | | | | | | | | | |
| Phase 1 - Public Works (Operations) | 02/06/17 | 04/14/17 | | | | | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 02/06/17 | 02/28/17 | | | | | | | | | | | | |
| Stage 2 - Configuration & Analysis | 02/07/17 | 03/31/17 | | | | | | | | | | | | |
| Stage 3 - Training & Go Live | 04/03/17 | 04/14/17 | | | | | | | | | | | | |
| Phase 2 - (Parks & Rec, Fleet, Facilities, By-Law) | 04/17/17 | 07/10/17 | | | | | | | | | | | | |
| Stage 1 - Project Initiation & Planning | 04/17/17 | 05/08/17 | | | | | | | | | | | | |
| Blank templates delivered to Phase 2 business units | 04/17/17 | 04/17/17 | | | | | | | | | | | | |
| logins e-mail to Phase 2 SME's | 04/25/17 | 04/25/17 | | | | | | | | | | | | |
| Project Work Plan Updated & Approved | 04/24/17 | 04/24/17 | | | | | | | | | | | | |
| Data Provision (data templates completed, sample WO's emails) | 04/18/17 | 05/08/17 | | | | | | | | | | | | |
| Completed templates delivered to PSD team | 05/08/17 | 05/08/17 | | | | | | | | | | | | |
| Stage 2 - Configuration & Analysis | 04/25/17 | 06/20/17 | | | | | | | | | | | | |
| Remaining TA Inventory - Process & Data Analysis | 04/25/17 | 06/08/17 | | | | | | | | | | | | |
| TA Inventory Formatting & Upload | 04/25/17 | 06/08/17 | | | | | | | | | | | | |
| TA Inventory is uploaded & configured for PW Operations Use | 06/08/17 | 06/08/17 | | | | | | | | | | | | |
| Works Process & Data Analysis | 05/16/17 | 05/25/17 | | | | | | | | | | | | |
| Data Formatting & Upload | 05/16/17 | 05/17/17 | | | | | | | | | | | | |
| All client data is uploaded and available for Township Use | 05/17/17 | 05/17/17 | | | | | | | | | | | | |
| Process Review Workshop | 05/25/17 | 05/25/17 | | | | | | | | | | | | |
| Admin User Training | 05/25/17 | 05/25/17 | | | | | | | | | | | | |
| Key users are trained and comfortable with the system | 05/25/17 | 05/25/17 | | | | | | | | | | | | |
| Test & Refine Works V2.0 Configurations (weekly updates, fixes as req) | 05/30/17 | 06/19/17 | | | | | | | | | | | | |
| New processes/configurations & user profiles finalized | 06/13/17 | 06/13/17 | | | | | | | | | | | | |
| User acceptance testing is complete and signed-off | 06/20/17 | 06/20/17 | | | | | | | | | | | | |
| Stage 3 - Training & Go Live | 06/27/17 | 07/10/17 | | | | | | | | | | | | |
| End User Training | 06/27/17 | 06/27/17 | | | | | | | | | | | | |
| Database Cleared | 06/30/17 | 06/30/17 | | | | | | | | | | | | |
| Go-live - (Parks & Rec, Fleet, Facilities, By-Law) | 07/03/17 | 07/03/17 | | | | | | | | | | | | |
| Go-live Support | 07/04/17 | 07/10/17 | | | | | | | | | | | | |

Appendix B: PSD Value Added Services

In addition to the service offered in the standard Works Implementation package, CityWide offers a variety of training and consulting services to help our clients get the most value out of their investment in the CityWide Suite of software.

Pre Implementation Needs Assessment

Implementing a new Enterprise Asset & Maintenance Management System can be a daunting task, especially if coming from many manual process, across multiple work groups. The CityWide team will help to define your high level requirements, goals, risks and constraints and prepare a needs assessment report which will be used to define and customize your Works implementation to best meet your short & long-term strategy needs.

Reporting Services

Although there are multiple built in options for reporting data within CityWide Works, there is often a need for specific reports to suit a client's individual needs. CityWide can gather your requirements, build such reports for you and have them integrated directly into the system.

Additional Consultation support hours

Examples of how a client might use extra consultation support hours

- 1) Once a client has been using Works for a few months and is comfortable with the system and their own internal work flow processes, they can utilize consultation time for assistance configuring and utilizing additional works feature such as Processes, Timesheet, Daily, Schedules & Road Patrol.
- 2) On initial setup of works, a client has decided to implement a basic list of work order types without attaching assets to each work order. After a few months, the client is then ready to start creating work orders against specific assets. Consultation time could be used to provide assistance reviewing, streamlining and building out the Asset Inventory in TA as well as configuring defaults within the Work Order Type setup.

Workflow Process Mapping

More detailed business process analysis, whereby the Works Implementation team will work closely with the client to analyze their current business processes, to define and document their list of activity work order types, work flow processes and configuration requirements. The team will make process improvements recommendations, and provide a final Implementation Control Document outlining the new processes and system configurations.

Custom User Manuals

CityWide Implementation Team and/or Trainers will work with the client to create custom, business specific, on-line or printed user instruction manuals. These can be useful tools for new hires or for those who need to utilize the Works application on an in-frequent basis.

Legacy Data Conversion Assistance

as needed and defined by the account manager, in consultation with the client

Custom Integration

as needed and defined by the account manager, in consultation with the client

Post Implementation Audit

Most clients have taken a simplified approach to implementing Tangible Assets and Works. However, as municipalities mature with their asset management strategy, as well as their use of the CityWide Suite of software, a re-visit of how they are using the system is often required. The CityWide team can analyze your current use of our software modules and make recommendations of improvements to asset inventory and work flow processes. Thus allowing your municipality to make the most of your investment in CityWide Works through expanded business use, better reporting and more detailed activity based costing.

Additional/Refresher Training

as needed and defined by the client

Mobile Workforce Implementation

For clients who opted for an initial implementation of Works with paper based work assignments and whom are then ready to further enhance your use of the works system by implementing mobile work workforce management. The CityWide team with work closely with you to determine your specific work and technical requirements and configure and train your staff.

Implement Preventative Maintenance Programs

CityWide will use industry leading experience and knowledge to review your current work practices to make recommendations and develop and implement a plan for the expanded use of CityWide Works Preventative Maintenance functionality.