

An aerial photograph of a city waterfront. In the foreground, a large body of water is a vibrant turquoise color. A prominent feature is a peninsula with a lush green golf course. Several white sailboats are anchored in a marina area. To the right, there's a parking lot with several cars and a building with a red roof. In the background, a residential and commercial area with various buildings and trees stretches along the shoreline. The sky is clear and bright.

ERP Strategy & Roadmap Report

The Corporation of The City of Sault Ste. Marie
2025

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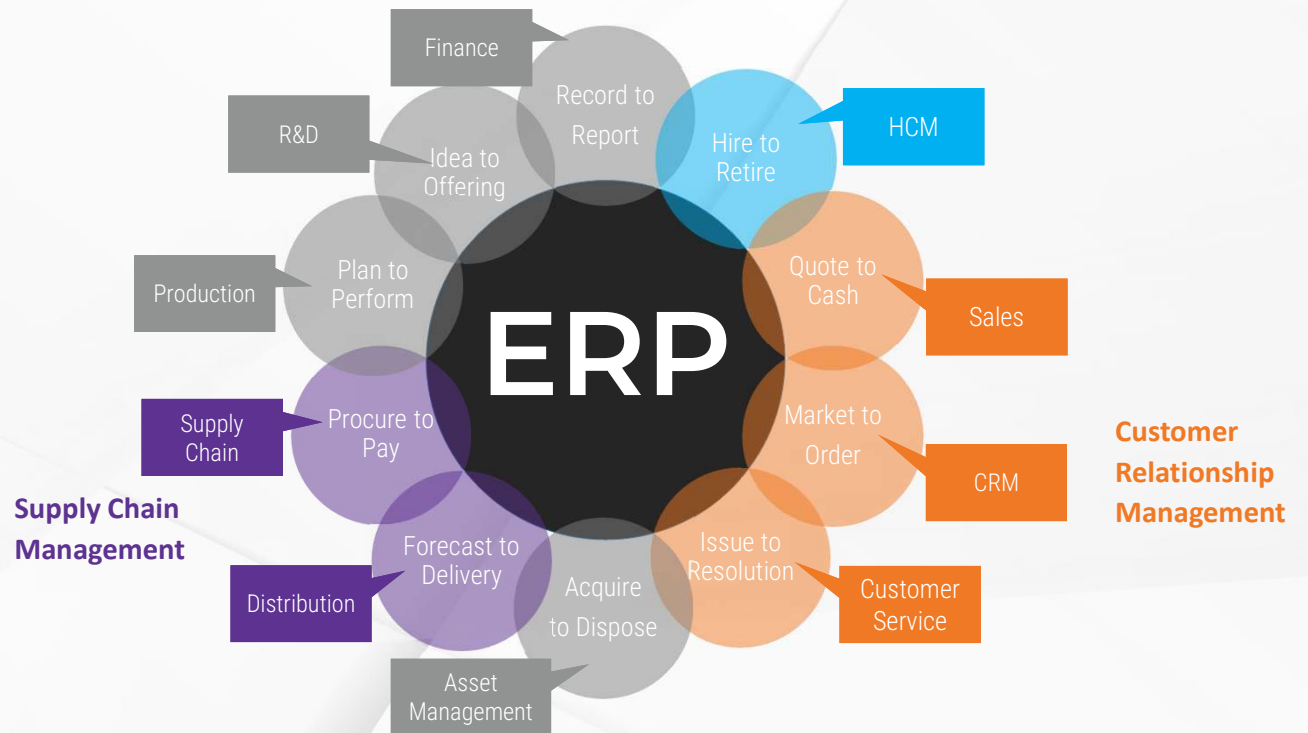
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- ERP systems facilitate the flow of information across business units. It allows for seamless integration of systems and creates a holistic view of the enterprise to support decision making.
- In many organizations, the ERP system is considered the lifeblood of the enterprise. Problems with this key operational system will have a dramatic impact on the ability of the enterprise to survive and grow.

- An ERP system:
 - Automates processes, reducing the amount of manual, routine work.
 - Integrates with core modules, eliminating the fragmentation of systems.
 - Centralizes information from multiple parts of the value chain to a single point.

What is an enterprise resource planning (ERP) system?



USE CASES



Product-Centric

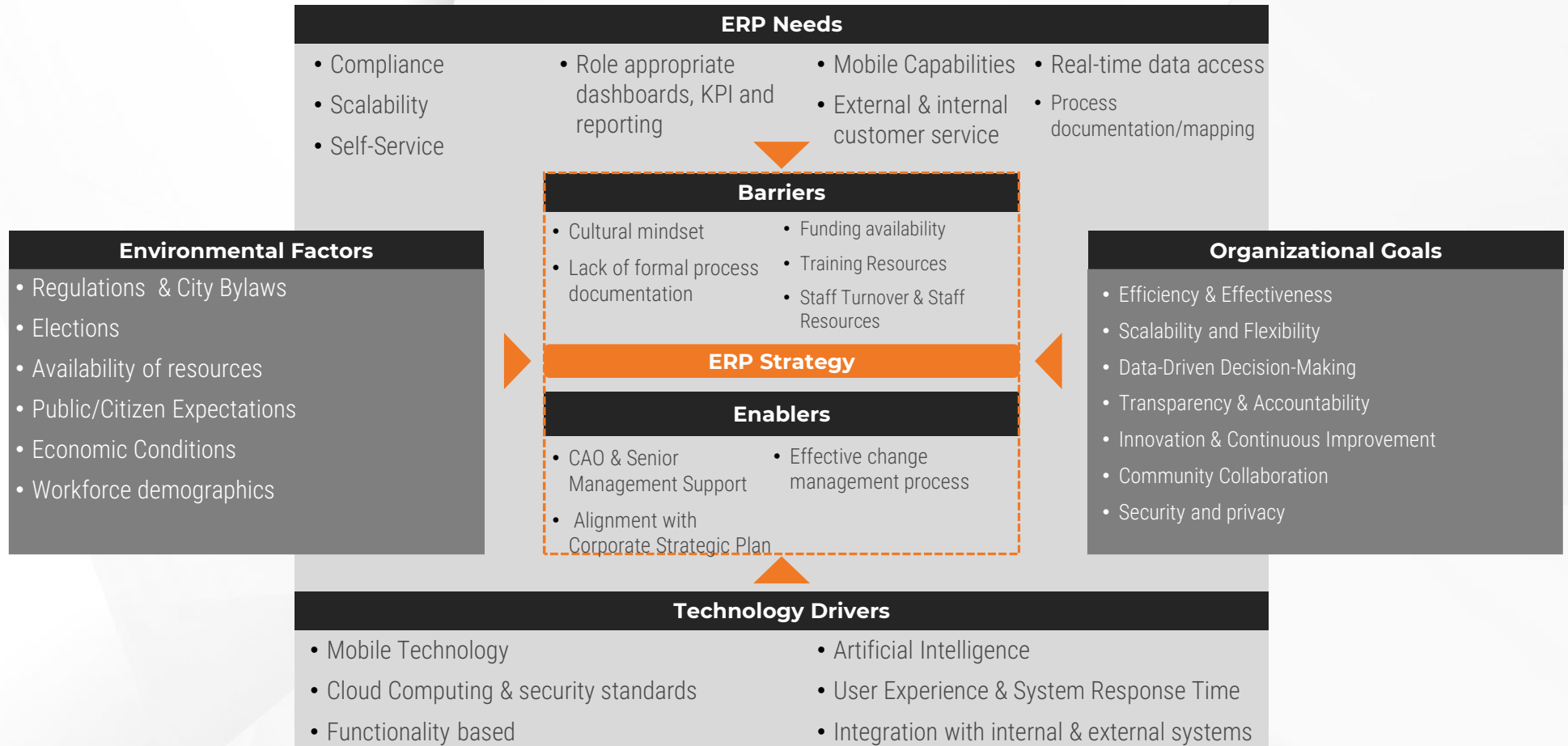
Suitable for organizations that manufacture, assemble, distribute, or manage material goods.

Service-Centric

Suitable for organizations that provide and manage field services and professional services.

ERP is about much more than just technology

Sault Ste. Marie - ERP Business Model



The Corporation of The City of Sault Ste. Marie discussed and identified its current ERP-related challenges

ERP - Related challenges

- | | |
|---|---|
| <ul style="list-style-type: none">• Process ownership and governance: Gap in effective and consistent maturity and associated metrics.• No single source of truth with the data, with lots of data manipulations and cleansings.• No common business and data definitions, business data glossary, or nomenclature.• The existence of CRM solutions is not a true Customer Service Platform.• System silos, data silos, and process redundancies.• Noticeably low to moderate process maturity levels with many critical processes.• There is a large reliance on Excel to complete core processes and reporting.• Many manual processes• There is no Power BI, dashboarding currently in place.• No evidence of a centralized analytics data warehouse.• Lack of overall integrations. Teams followed roundabouts and have been working like that for years. | <ul style="list-style-type: none">• Plenty of data is available, but the analytics are at a low maturity. Power BI has been identified as a future BI tool.• Gap in process awareness, documentation, and training.• The current ERP Financials system is reaching End-of-life by the year 2029.• Desire for self-services (both with ERP and reporting).• High importance to cybersecurity and information security.• Nonexistence of formalized and standardized processes around many of the departments.• Desire for automated processes and data flows.• Lack of budget and staff resources for the new ERP Strategy.• Great understanding of current business processes by business SMEs, but not all workflows are documented.• Integration checkpoints and requirements were not documented. This would have a huge impact on the ERP. |
|---|---|

The Corporation of The City of Sault Ste. Marie discussed and identified its ERP-Future State

ERP – Future State

- Comprehensive governance framework to enhance process ownership and maturity.
- Standardized process, metrics, and tracking systems to gauge process efficiency and compliance
- Deploys a Master Data Management (MDM) solution to centralize and synchronize data across systems, eliminating silos.
- Establishes a data governance framework including a standardized business data glossary and nomenclature.
- Integrates a CRM module within the ERP or choose an ERP with a robust customer service platform to ensure unified customer data and improve customer service processes.
- Strong integration capabilities to unify systems and processes across departments.
- Utilizes applications middleware to facilitate real-time data exchange and connectivity between legacy systems.
- Workflow automation tools to replace manual and Excel-based processes, enhancing efficiency and accuracy.
- Supports Power BI functionality with the capability of creating dashboards and visualizations that provide actionable insights.
- Centralized analytics data warehouse to serve as a reliable data repository for BI tools, improving decision-making.
- Enhanced security measures by implementing strong authentication, encryption, and regular security audits.
- Ability for self-service capabilities to empower users with reporting tools and on-demand information access.
- Ability to standardize processes across departments by establishing formal process documentation and compliance checkpoints
- Automation platform that enhances data flows and minimizes manual intervention.

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ERP – Key Recommendations

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- **Plan for a phased migration to a new ERP Solution**
- **Phase One:**
 - Develop “System Requirements” for all the ERP modules
 - Focus on replacing the Financials and City Tax modules before the current systems reach end-of-life in 2029
 - Evaluate ERP systems that offer robust financial modules tailored to the city’s requirements
 - Keep the current “HR-Payroll” module.
 - Re-evaluate the current HR - ERP solution against the newly established “HR - (Record, Workforce & Talent) Management” system requirements. Decide whether to replace or keep.
 - Re-evaluate the current “Works Management System” against the newly established “Works Management” system requirements. Decide whether to replace or keep.
 - Release a Request for Information/Interest (RFI) to evaluate:
 - Interested implementation partners
 - Implementation Costs, Ongoing licensing and support costs
 - Staff resource requirements
 - Implementation timelines.
 - Submit a budget request for capital resources (upfront costs, staffing and ongoing future operational costs)
 - Establish an ERP Project Team to develop/evaluate the RFI and RFP.
 - Establish an ERP Implementation Team to implement the new system, integrate with the current “HR-Payroll” system and train the end users.
- **Phase Two**
 - Decide the future state of the HR-payroll system based on a thorough re-evaluation.
 - Decide the future state of the Works Management system based on a thorough re-evaluation.

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ERP – Staffing Resources

The following staff resources are recommended for a successful ERP implementation. These resources will impact the 2027 municipal budget and will be requested during the 2026 budget deliberations.

- **Project Manager (Dedicated Internal Staff Resource or a Contracted Position):**

- This position oversees complete system project management, which would include several governance activities, including project administration, scheduling, project planning, and resource allocation support.
- This position could either be contracted or a current staff position seconded for the duration of the project.
- Backfilling the vacant position will be required to reduce the impact on operations. One FTE position request.

- **Project Implementation Team:**

- **Internal Dedicated Positions:**

- A number of internal staff are required for a successful implementation, to ensure consistency throughout the project, and for future support and training requirements.
 - One “Technical” position from the Information Technology Division
 - One “Business Analyst” position from the Finance Department
 - One position from the HR Department.
 - One position from ES & PW Department
- Backfilling the vacant staff positions will be required to reduce the impact on operations. Four FTE position requests.

- **Internal Dynamic Positions:**

- Staff positions dedicated to the project, typically comprised of a flexible group of staff that may change and shift as the project progresses through implementation. Their expertise is required for a successful implementation.

The Corporation of The City of Sault Ste. Marie developed a future state roadmap to operationalize ERP strategy

ERP strategy roadmap

Initiative	Owner	Start date	Estimated completion date	Notes
Establish ERP Team (city staff)	I.T.	Q2 - 2025	Q2 -2025	Staff from Finance, HR, PW, I.T.
Develop ERP Strategy & Roadmap <ul style="list-style-type: none"> Evaluate current state & current systems Develop Strategy (Maintain, Optimize, Replace) Define Future State 	ERP Team	Weekly meeting started Q2 - 2025	Q4 - 2025	ERP Team meets weekly and once a month with Info-Tech Research Group for the Guided Implementation.
Final ERP review and sign-off from ERP Team	ERP Team	Q3 - 2025	August/September 2025	
Present ERP report for review by (Shelley, Susan, Nicole)	Members of ERP Team	Q3	August/September 2025	Seek input and approval
Present report to CAO	Members of ERP Team	Q3	August/September	Seek approval
Present Report to City Council for approval	Members of ERP Team	Q4 – 2025	October 14 / 2025	Seek approval
ERP requirements Gathering	Members of ERP Team	Q4	December - 2025	Evaluate current system and gather system requirements.
Develop and publish RFI	Members of ERP Team	Q1 – 2026	March 1, 2026	Create RFI seeking interested vendors and solution partners
RFI evaluation (Solution Providers & Cost)	Members of ERP Team		May 1, 2026	Evaluate responses to gather the following: <ul style="list-style-type: none"> Estimated budget cost/request Vendors who are interested Required Resources (time and staff)

The Corporation of The City of Sault Ste. Marie developed a future state roadmap to operationalize ERP strategy

ERP strategy roadmap

Initiative	Owner	Start date	Estimated completion date	Notes
Municipal Budget Submission	I.T. & ERP Team	Q2/Q3 - 2026	Q3 2026	Capital Cost Staff Resources Ongoing operating Costs
Municipal Budget Approval	ERP Team	Q4 2026	December 2026	
Build RFP Document	ERP Team & Purchasing	Q3 2026	02/24/2024	
Build vendor demonstration scripts	ERP Team & Purchasing	Q3 2026	December 2026	
Build vendor scoring tool	ERP Team & Purchasing	Q3 2026	December 2026	
Publish RFP – wait for responses	ERP Team & Purchasing	Q1 2027	Jan 10, 2027	
Vendor Evaluation, Demonstrations	ERP Project Team & Purch.	March 2027	April 2027	
Vendor Selection & Awarding Contract	ERP Project Team & Purch.	April 2027	June 1, 2027	
ERP Implementation Kick Off Meeting	ERP Project Team	July/Aug 2027	July/Aug 2027	
ERP Implementation	ERP Project Team	September 2027	Q3/Q4 2028	

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The Corporation of The City of Sault Ste. Marie ERP vision and guiding principles

“The City will implement an integrated software suite that empowers Sault Ste. Marie with a unified, efficient, adaptive, and sustainable Enterprise Resource Planning system that meets stakeholders needs.”

Efficiency and Effectiveness

- Streamline municipal processes to reduce redundancy and increase operational efficiency.
- Implement automation where feasible to expedite service delivery.
- Develop an adaptable and flexible integrated business system providing a seamless user experience.
- Focus on modernization and sustainability.
- Focus on scope around core capabilities. Maintain scope control. Prioritize demand in line with the strategy.

Scalability and Flexibility

- Design systems that can adapt to the growing needs of The City of Sault Ste Marie and business partners.
- Ensure the ERP solution can be customized for different departments and scaled for future demands.

Data-Driven Decision-Making

- Strive for “One source of truth”: Unify data models and integrate processes where possible. Assess integration needs carefully.
- Foster a culture of informed decision-making through comprehensive data collection and analysis.
- Enable real-time data access to improve municipal response and planning.

Innovation and Continuous Improvement

- Encourage innovation, when necessary, through regular evaluation and upgrading of ERP systems and processes.
- Support a culture of continuous improvement through the use of feedback and research

Community Collaboration and Partnership

- Integrate community feedback mechanisms within the ERP to ensure solutions meet local needs.
- Promote inclusivity through initiatives and processes that support accessibility requirements.
- Foster collaboration across departments and various stakeholders to leverage shared knowledge and resources.

Transparency and Accountability

- Maintain transparency in processes and decision-making to build trust within the community.
- Ensure accountability by defining clear roles, responsibilities, and metrics for success

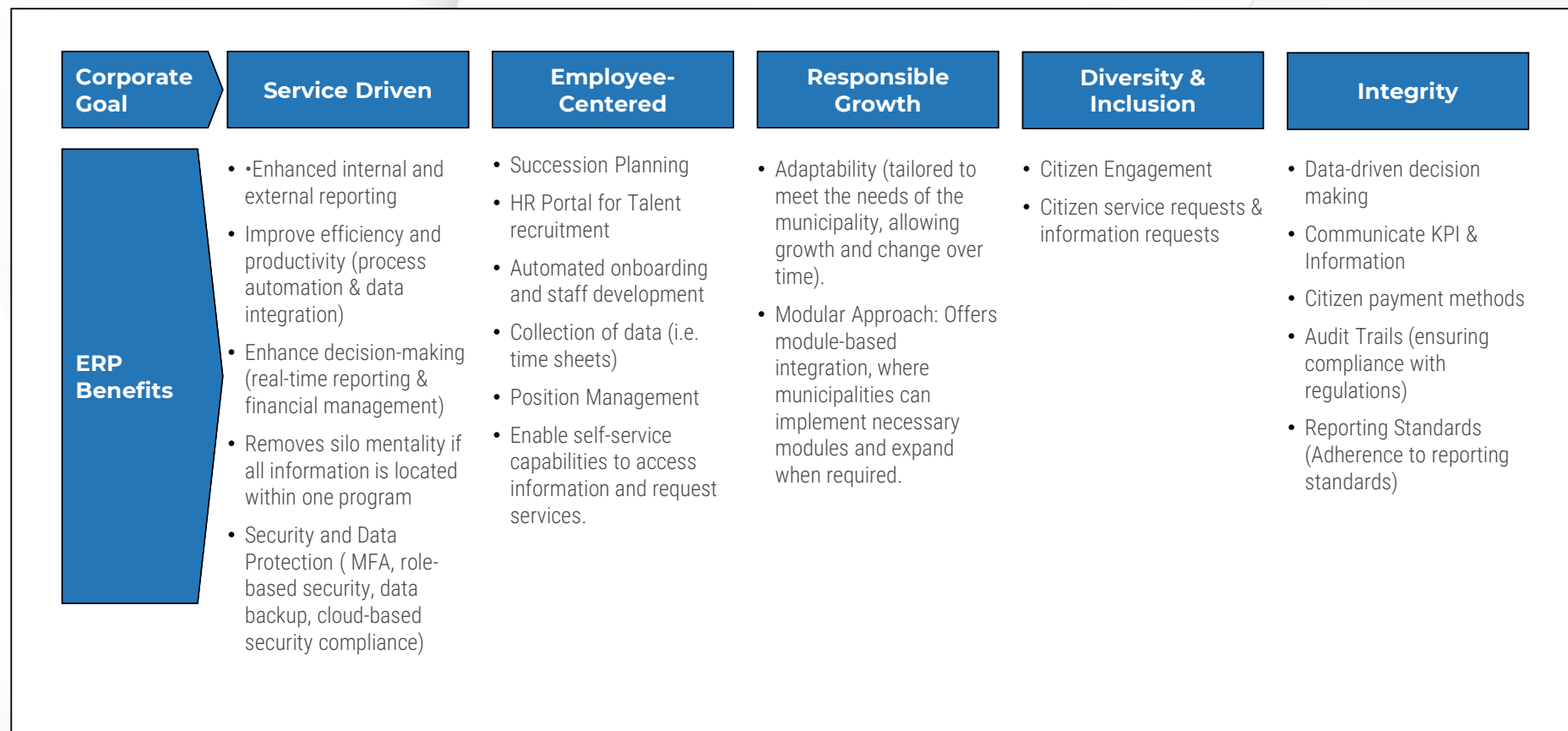
Security and Privacy

- Prioritize the security of data and privacy of individuals, ensuring compliance with relevant regulations.
- Maintain robust cybersecurity measures to protect against data breaches and other threats.

The Corporation of The City of Sault Ste. Marie

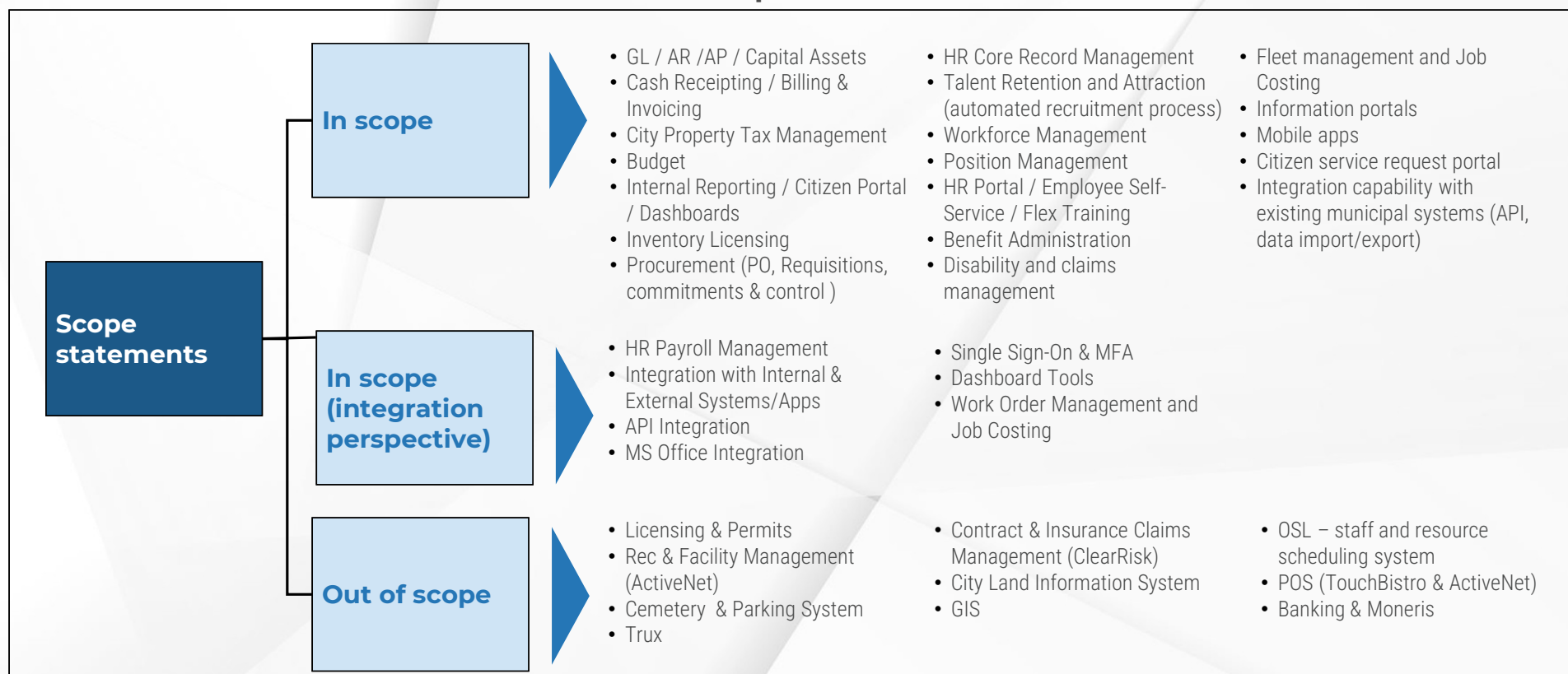
ERP benefits directly support its corporate goals

Corporate goals and ERP benefits



The Corporation of The City of Sault Ste. Marie Scope Statement: Implement a comprehensive ERP solution to optimize and integrate Financials, HRIS, Work Management, Asset Management and CRM processes.

ERP scope definition



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ERP operating model reflects the complete list of mega-processes and their prioritization at The Corporation of The City of Sault Ste. Marie



Capability maturity description

Capability Level	Process	Technology
Weak	<ul style="list-style-type: none">• The process is undocumented.• Exceptions to the process result in fire fighting.• There is no process consistency.	<ul style="list-style-type: none">• The process is not handled by software.• The process is manual, using ad hoc tools such as Excel.
Moderate	<ul style="list-style-type: none">• The process has some documentation.• Exception handling is not documented.• The process is somewhat consistently executed.	<ul style="list-style-type: none">• The process is partially executed in software.• Certain steps happen outside the software, e.g. approvals via email.
Strong	<ul style="list-style-type: none">• The process is fully documented.• Exception handling is documented.• The process is executed consistently.	<ul style="list-style-type: none">• The process executes completely within the software.• All steps, approvals, and documentation are captured and accessible in the software.

The Corporation of The City of Sault Ste. Marie discussed business capabilities, value streams, and business processes to generate an organization-wide ERP process inventory

ERP Process inventory

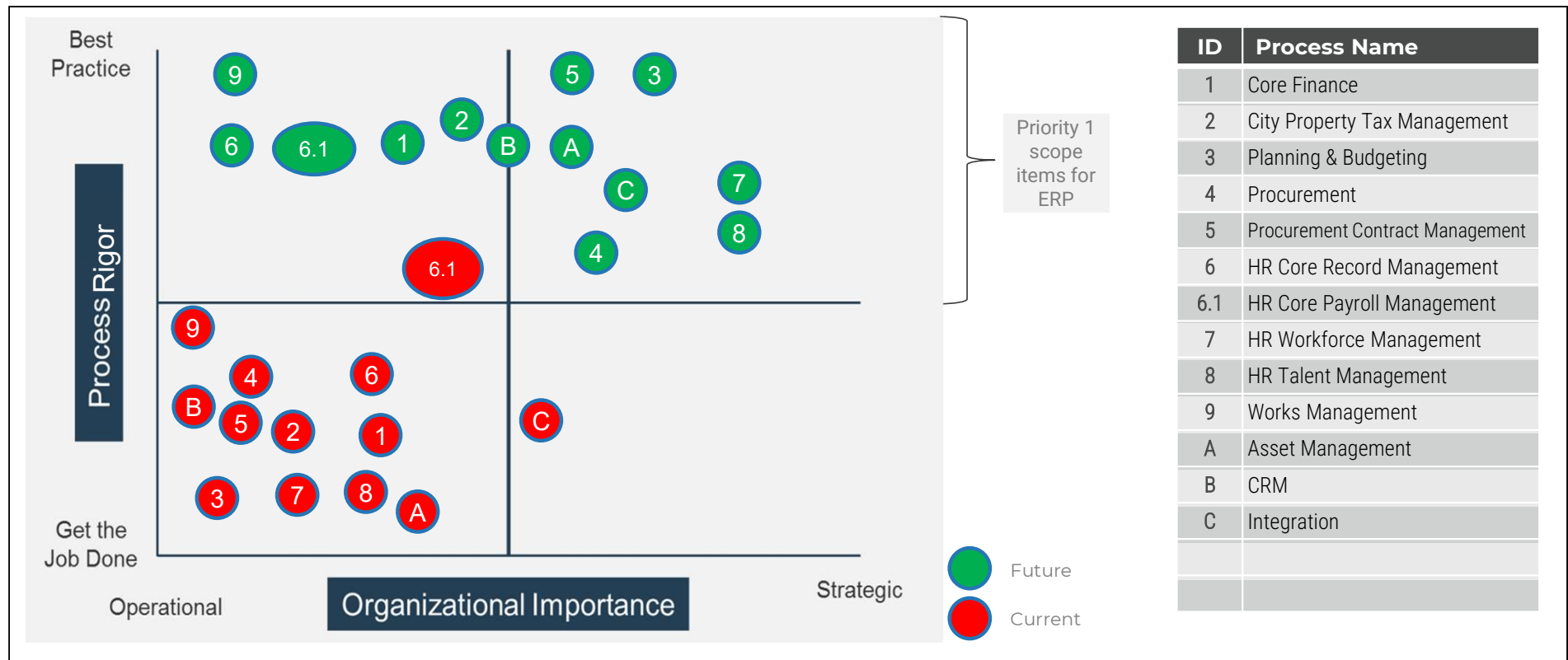
Core Finance Financial		City Property Tax Management		Planning & Budgeting		Procurement		Procurement Contract Mgmt.		HR Core Record Management					
Process	Technology	Process	Technology	Process	Technology	Process	Technology	Process	Technology	Process	Technology				
<ul style="list-style-type: none"> GL & GL consolidation AP & AR Billing and Invoicing Cash management Revenue accounting Payroll accounting Grants Management Financial Reporting Annual financial reports Inventory management Internal Controls 		<ul style="list-style-type: none"> City Tax management Property management Assessments Tax billing 		<ul style="list-style-type: none"> Budget reporting Variance analysis Multi-year operating plan Monthly forecasting Costing and allocation Annual operating plan 		<ul style="list-style-type: none"> Vendor approval and sourcing processes Requisition approvals PO generation Expense controls Post award tracking Procurements to Purchasing Budgeting and encumbrance 		<ul style="list-style-type: none"> Contract lifecycle management Contract repository Contract prequalification compliance 		<ul style="list-style-type: none"> Core HR record management Organizational structure Benefits Administration 					
										HR Core Payroll					
										<table border="1"> <thead> <tr> <th>Process</th> <th>Technology</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> Payroll administration Scheduling Time & Attendance Time Approval </td> <td></td> </tr> </tbody> </table>		Process	Technology	<ul style="list-style-type: none"> Payroll administration Scheduling Time & Attendance Time Approval 	
Process	Technology														
<ul style="list-style-type: none"> Payroll administration Scheduling Time & Attendance Time Approval 															
HR Workforce Management		HR Talent Management		Works Management		Asset Management		CRM		Integration					
Process	Technology	Process	Technology	Process	Technology	Process	Technology	Process	Technology	Process	Technology				
<ul style="list-style-type: none"> Leave Management Workforce planning Position management Succession planning Disability management Attendance management 		<ul style="list-style-type: none"> Talent acquisition Onboarding & offboarding Performance management Employee and union relationships Employee training management Job Evaluations 		<ul style="list-style-type: none"> Work Order Management Work Order Job Costing Fleet Management Inventory management Shift Log Crew Scheduling Call out management Time Entry & Time Clocks 		<ul style="list-style-type: none"> Incident reporting consistency Safety and hazardous reporting Standard document management Digitized incident reporting Policy & protocol acknowledgement 		<ul style="list-style-type: none"> City Tax Information City Tax payments Financial Reporting Work order requests and tracking KPI Dashboard Reporting 		<ul style="list-style-type: none"> API Integration Integration with internal and external systems Microsoft Signal Sign-On integration Multi-Factor Integration 					

Capability maturity

● Strong
 ● Moderate
 ● Weak

The Corporation of The City of Sault Ste. Marie prioritized ERP processes that can potentially impact vendor selection and implementation roadmap

ERP Process Prioritization



The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

ERP Application portfolio

Application Name	Satisfaction	Processes Supported	Future Disposition
Dynamics GP Core Financials	Medium and declining	Core financials (GL, AR, AP, Billing)	Replace
Dynamics GP City Tax	Medium and declining	City Property Tax Management	Replace
Dynamics GP Procurement	Medium	Procurement Management (Requisition, PO)	Replace
Dynamics GP VCH	Medium	Online Tax Info and payment portal	Replace
Questica Budgeting	Medium to Low	Budget Management (Operating)	Evaluate (Update or Replace)
Avanti Payroll	Medium to High	Payroll management	Evaluate (Update or Replace)
Avanti Core HR	Medium	Core HR record management	Evaluate (Update or Replace)
Avanti Workforce Management	Module not implemented	Workforce management	Evaluate (Update or Replace)
Avanti Talent Management	Module not implemented	Talent management	Evaluate (Update or Replace)
Avanti Time & Attendance	Medium – Module not fully implemented	Time & and attendance, time approval	Evaluate (Update or Replace)

The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

ERP Application portfolio

Application Name	Satisfaction	Processes Supported	Future Disposition
WorkTech Work Management	Medium and declining	Work management system (employee activities, time, attendance, scheduling, job costing)	Evaluate (Update or Replace)
Faster FMIS	Low	Fleet Management Information System	Keep / Upgrade
Asset Management	Medium	Maintaining, upgrading, and operating physical assets cost-effectively within a municipality	Update or Replace
ClearRisk – Contract Management	ITSM: High CSM: Med-Low	Risk management software (risk, incident, policy, document, and contract management)	Keep
Licenses & Permits	IT: High Business: Med-Low	Regulatory and development solution(permitting, licensing, inspections, code enforcement, etc.)	Keep
Cemetery Management	Medium	Cemetery Management System	Keep
Parking Ticket Management System	Low	Parking infraction management system.	Keep
ActiveNet – Recreation & Facility Management System	Medium	Recreation and Facility Management System (facility, program, membership, event and financial management)	Keep or Upgrade
Prolifik Marina Management System	Med-High	Marina management system (slip and contract management, AR/AP, complaints, etc.)	Keep
Trux – Landfill Scales System	Med-High	RUX Weigh-IT is the industry standard software for ticketing, billing, and accounts receivable processing in the waste industry.	Keep

The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

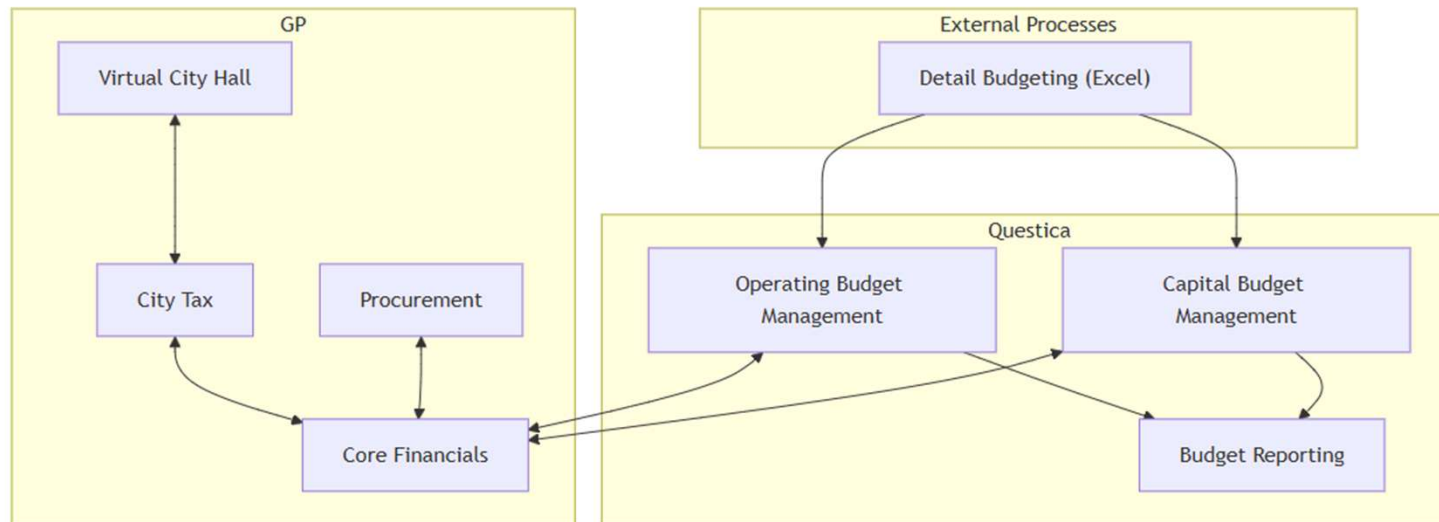
ERP Application portfolio

Application Name	Satisfaction	Processes Supported	Future Disposition
Profuel – PW Fuel Management System	Medium	Fuel dispensing and tracking system.	Keep
CLIS (Civic Land Information System)	Medium to High	Civic land information system.	Keep
POS – ActiveNet and TouchBistro	Medium	All-in-One POS and restaurant management system	Keep
SSMIC - GIS	Medium to High	Geographical Information Systems managing municipal special data for PW, Planning, and Engineering.	Update
Cerolink – Planning	Low to Medium	Regulatory and development solution(planning)	Keep
Moneris	Medium	Payment processing management system.	Keep
Passport (Transit)	Medium	Parking enforcement system (mobile pay, digital permits, payment, etc.)	Keep
Trapeze – Parabus booking system	Medium-High	Parabus transportation management system.	Keep
OSL (staff & resource scheduling)	Med-High	Police & Fire staff and resources management system (time & attendance, scheduling, roster management)	Keep
Parklane – WSIB	Med-High	Worker compensation claims management system.	Keep or Replace

The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

Visual Application Portfolio

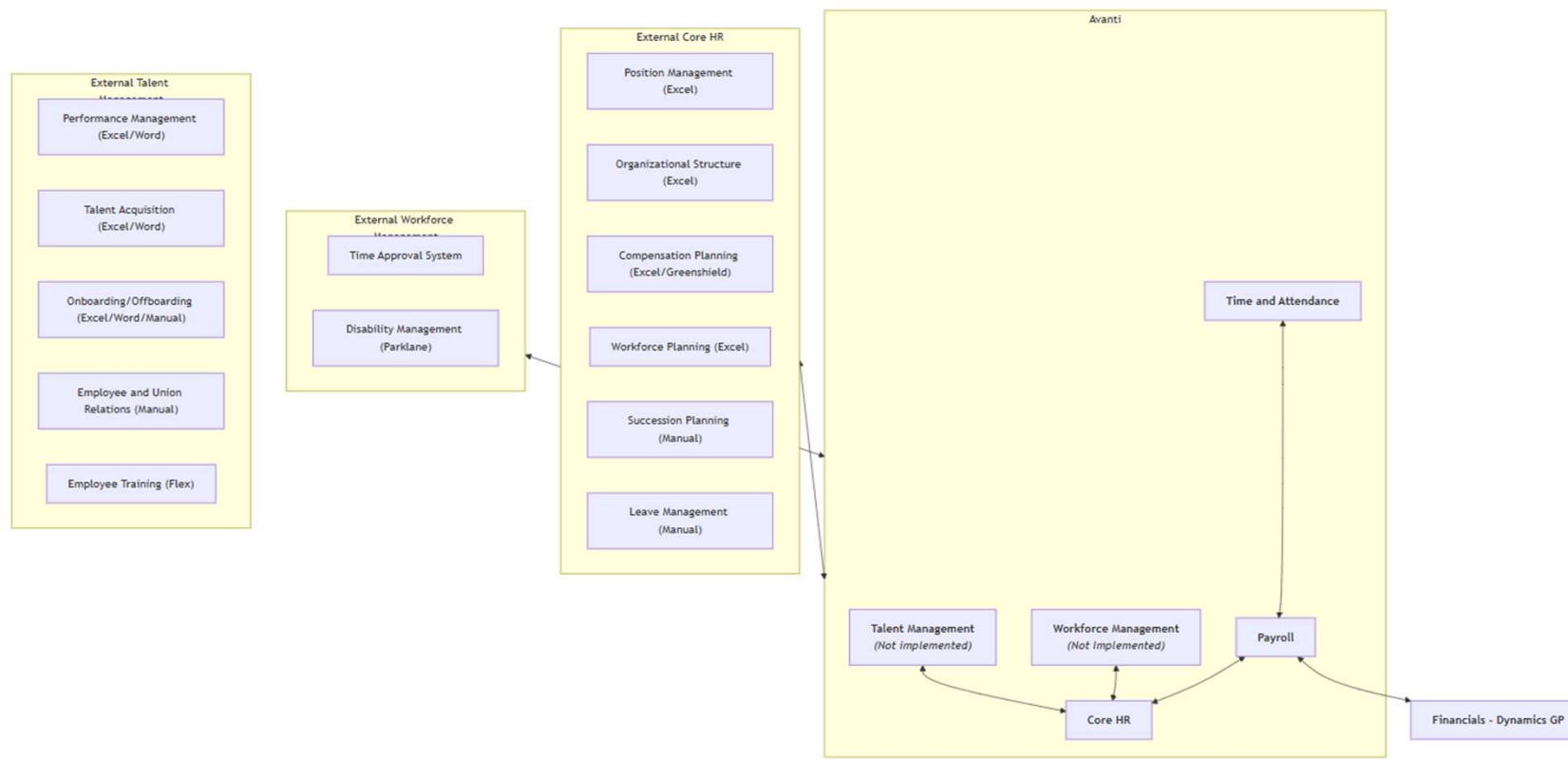
Financials



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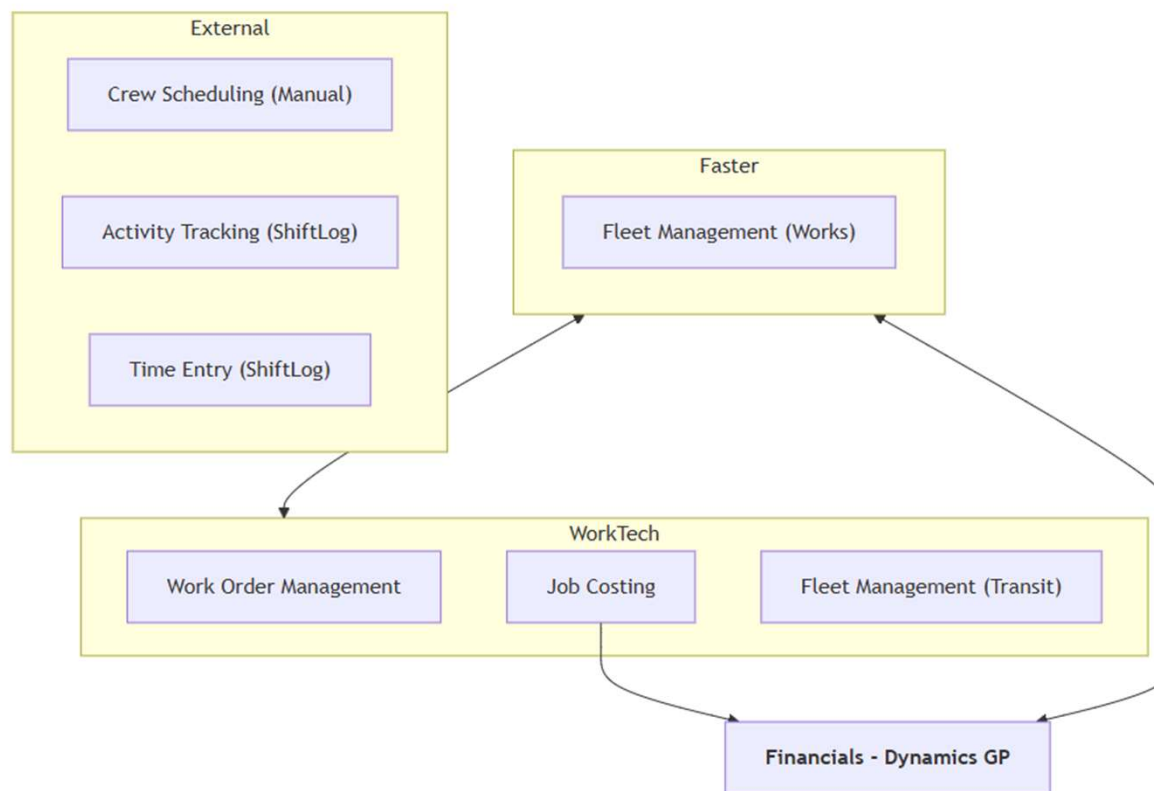
HRIS



The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

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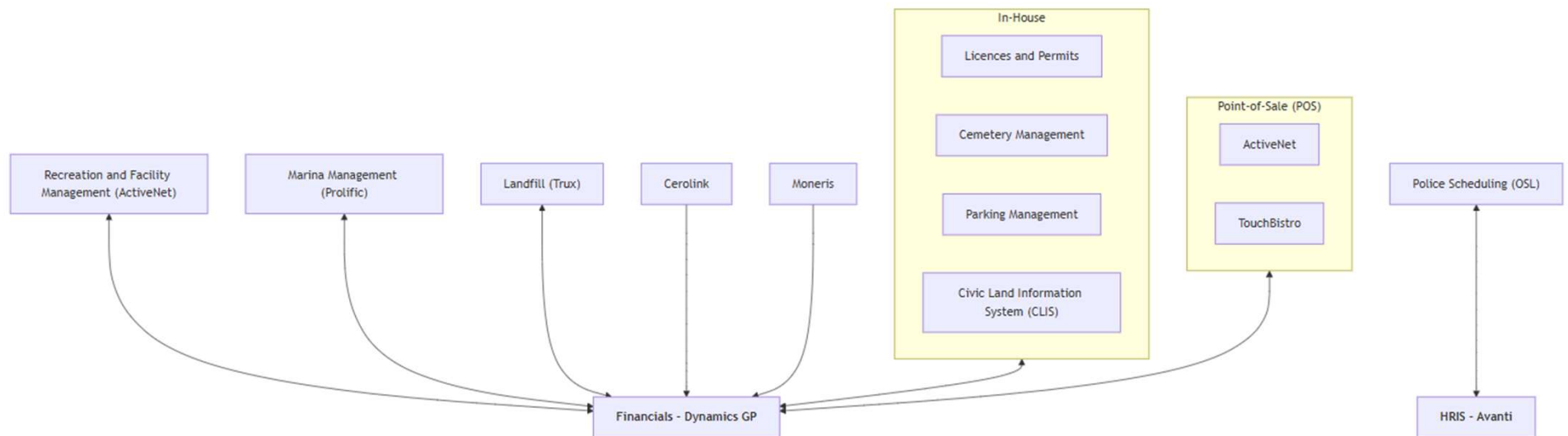
Works Management



The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

Visual Application Portfolio

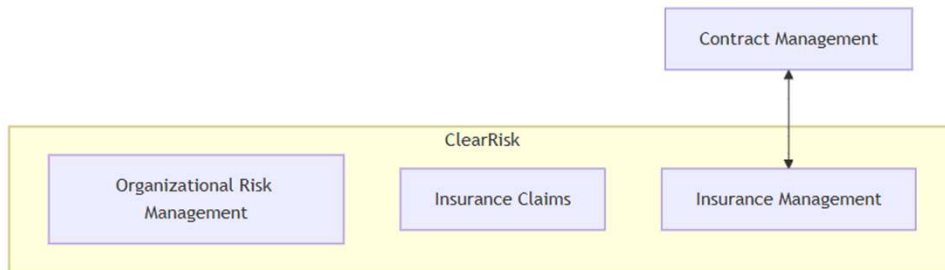
Service Management (Other Systems)



The Corporation of The City of Sault Ste. Marie developed an inventory of its applications that support the ERP business processes

Visual Application Portfolio

Risk & Compliance



Asset Management



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The Corporation of The City of Sault Ste. Marie mapped the stakeholders based on their expected influence and involvement in the ERP project

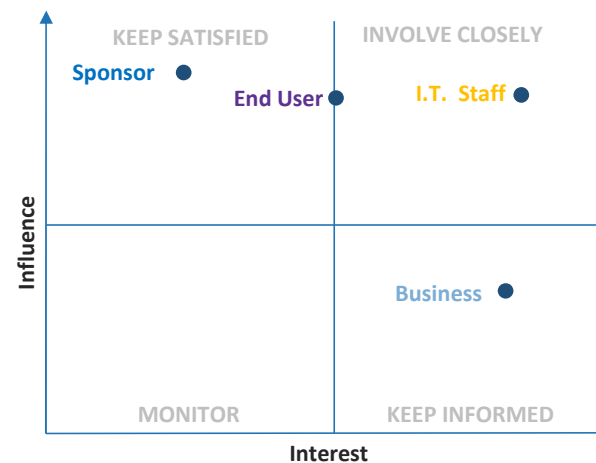
Stakeholder mapping Category definitions

The stakeholders and their level of involvement in the ERP Project

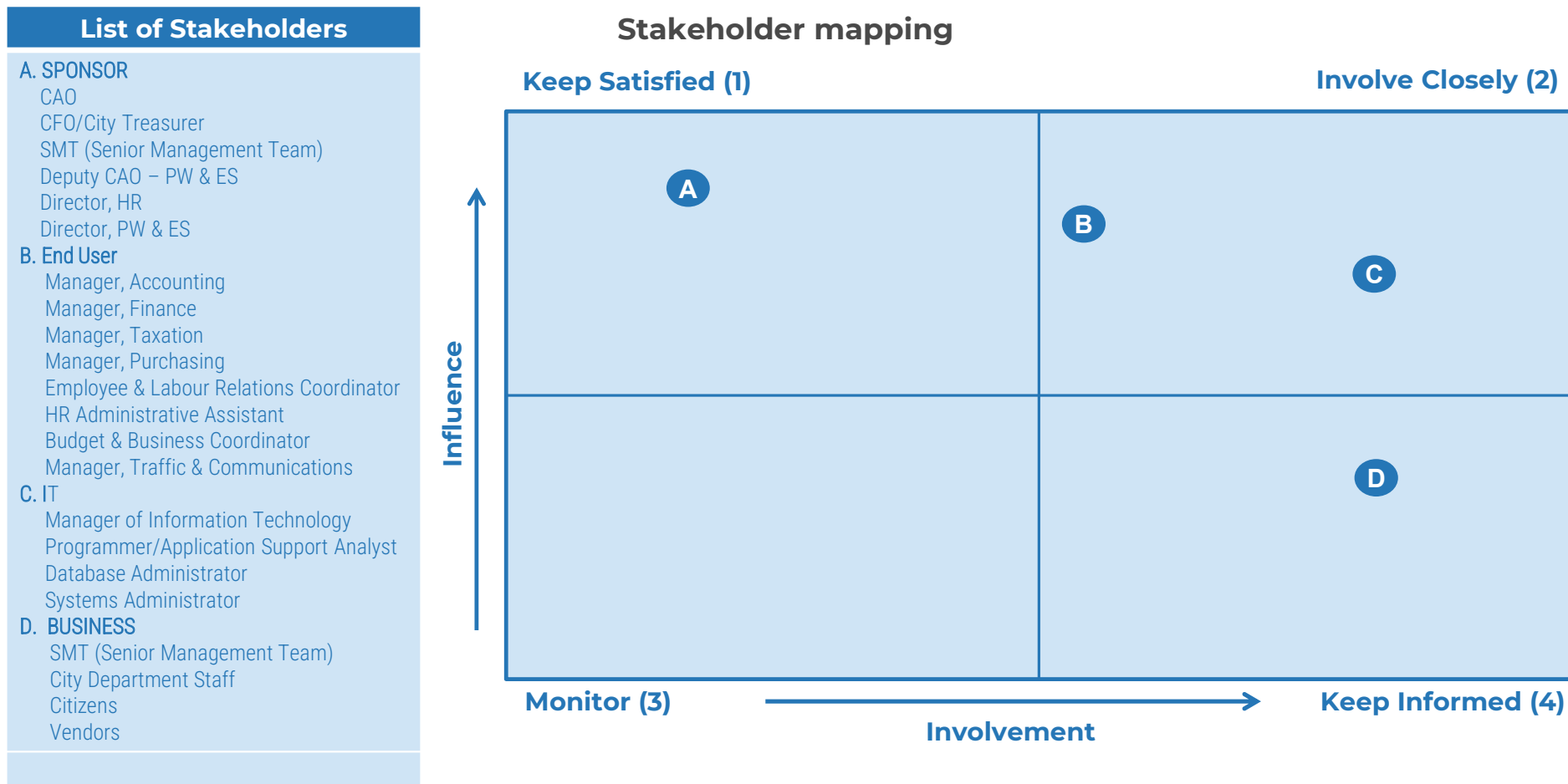
	Sponsor	End User	IT	Business
Description	An internal stakeholder who has final sign-off on the ERP project.	Front-line users of the ERP technology.	Back-end support staff who are tasked with project planning, execution, and eventual system maintenance.	Additional stakeholders that will be impacted by any ERP technology changes.
Examples	<ul style="list-style-type: none"> • CAO • CFO/City Treasurer • SMT 	<ul style="list-style-type: none"> • Finance Staff • HR Staff • PW & ES 	<ul style="list-style-type: none"> • ERP Team • I.T. Staff 	<ul style="list-style-type: none"> • SMT • Department Staff • Vendors • Citizens
Value	Executive buy-in and support is essential to the success of the project. Often, the sponsor controls funding and resource allocation.	End users determine the success of the system through user adoption. If the end user does not adopt the system, the system is deemed useless and benefits realization is poor.	IT is likely to be responsible for more in-depth requirements gathering. IT possesses critical knowledge around system compatibility, integration, and data.	Involving business stakeholders in the requirements gathering will ensure alignment between HR and organizational objectives.

Large-scale ERP projects require the involvement of many stakeholders from all corners and levels of the organization, including project sponsors, IT, end users, and business stakeholders. Consider the influence and interest of stakeholders in contributing to the requirements elicitation process and involve them accordingly.

EXAMPLE: Stakeholder involvement during selection



The Corporation of The City of Sault Ste. Marie mapped the stakeholders based on their expected influence and involvement in the ERP project



The Corporation of The City of Sault Ste. Marie identified potential risks that may impede the successful completion of project and for each risk, planned mitigation tactics

Potential risks and mitigation strategies

Potential Risk	Impact	Likelihood	Mitigation Effort
Project approval.	1	2	Build a strong business case for project approval and allow adequate time for the approval process. Maintain regular updates to keep leadership engaged and informed. Change the scope of the project (i.e. reduce the scope)
Inadequate budget for additional staffing resources.	1	1	Communicate the cost of communication. Reduce the scope of the project. Increase the timelines for completion.
Pushback or resistance to a new ERP solution.	2	2	Implement a structured change management process that includes communication plans, training programs, and stakeholder engagement activities.
Overworked resources.	1	1	Create a detailed project plan that outlines resources and timelines in advance. Manage expectations,
Under estimation of staffing levels required, i.e. staff utilized at 25% for project when they are still 100% on their day job.	1	2	Build a proper business case around staffing. Manage expectations. Push for proper resources Communicate the cost of implementation
Underestimating project scope and complexity	1	2	Detailed project planning, clearly defining the scope with acceptance criteria. Define a scope change process.

Rating Scale:

Impact: **1- High Risk** **2- Moderate Risk** **3- Minimal Risk**
 Likelihood: **1- High/Needs Focus** **2- Can Be Mitigated** **3- Remote Likelihood**

The Corporation of The City of Sault Ste. Marie identified potential risks that may impede the successful completion of project and for each risk, planned mitigation tactics

Potential risks and mitigation strategies

Potential Risk	Impact	Likelihood	Mitigation Effort
RFP Creation, Evaluation and Vendor Section	1	2	Ensure the proper team is assembled and the final selection is based on consensus. Create a detailed evaluation script addressing all key ERP functional requirements which the vendor must demonstrate to meet the specifications.
Software does not work as advertised resulting in custom functionality with associated costs to create/maintain.	2	2	Work with staff to change processes to match the software.
Problem with integrating the ERP solution with the existing systems	2	2	Plan for robust integration with existing technology infrastructure and consider middleware or API solutions for seamless interoperability
Inaccuracies or issues during data migration	2	2	Perform a detailed data audit and cleansing before migration, and test data migration processes thoroughly before the final cutover
Insufficient Training	3	3	Develop extensive training programs and user support systems, offering role-based training tailored to different user groups.
Cloud ERP solution has a greater security concern.	2	2	Implement comprehensive security policies, conduct regular vulnerability assessments,

Rating Scale:

Impact: **1- High Risk** **2- Moderate Risk** **3- Minimal Risk**
 Likelihood: **1- High/Needs Focus** **2- Can Be Mitigated** **3- Remote Likelihood**

The ERP evaluated the following question to help determine the value and commitment to the project.

The ERP Team evaluated how much they agree or disagree with each of the following statements.

Question #	Question	Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
1.	I have everything I need to succeed.	1	2	3	4	5
2.	The right people are involved in the project.	1	2	3	4	5
3.	I understand the process of ERP selection.	1	2	3	4	5
4.	My role in the project is clear to me.	1	2	3	4	5
5.	I am clear about the vision for this project.	1	2	3	4	5
6.	I am nervous about this project.	1	2	3	4	5
7.	There is leadership support for the project.	1	2	3	4	5

Project team

Role	Candidate	Responsibility	Commitment
Project champion	CAO	<ul style="list-style-type: none"> • Provide executive sponsorship. 	1 hours/week
Steering committee	SMT and their delegates	<ul style="list-style-type: none"> • Establish goals and priorities. • Define scope and approve changes. • Provide adequate resources and resolve conflict. • Monitor project milestones. 	2 hours/week
Project manager	Manager of Information Technology and Delegates	<ul style="list-style-type: none"> • Prepare and manage project plan. • Monitor project team progress. • Conduct project team meetings. 	20 hours/week
Project team	Implementation Team (designated staff)	<ul style="list-style-type: none"> • Drive day-to-day project activities. • Coordinate department communication. • Make process and design decisions. 	35 hours/week
Subject matter experts by area	End users from every city department.	<ul style="list-style-type: none"> • Attend meetings as needed. • Respond to questions and inquiries. 	5 hours/week

ERP Project roles and responsibilities to improve progress tracking

Responsible
Accountable
Consulted
Informed

- ▶ Conducts work to achieve the task
- ▶ Answerable for completeness of task
- ▶ Provides input for the task
- ▶ Receives updates on the task

Benefits of assigning RACI early:

- Improve project quality by assigning the right people to the right tasks.
- Improve chances of project task completion by assigning clear accountabilities.
- Improve project buy-in by ensuring stakeholders are kept informed of project progress, risks, and successes.

Project RACI

Responsible Accountable Consulted Informed	Project champion	Project advisor	Project steering committee	Project manager	Project team	Subject matter experts
Determine project scope and vision	I	C	A	R	A	C
Document business goals	I	I	C	R	A	C
Inventory ERP processes	I	I	C	A	R	C/I
Map current state	I	I	I	A	R	C
Assess gaps and opportunities	I	C	C	A	R	C
Explore alternatives	R	R	A	I	C	I
Build a roadmap	A	C	C	R	A	C
Create a communication plan	R	C	R	C	C	I
Present findings	R	C	R	C	C	I

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- ERP vision and guiding principles
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- Project RACI

4 Appendix

- Level 1 Decomposition:
 - Core Finance
 - City Property Tax Management
 - Planning & Budget
 - Core HR
 - Procurement
 - Procurement Contract Management
 - Core HR (Record Management & Payroll)
 - HR Workforce Management
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Core Finance

Stakeholders

Accounting Division
Finance Dept
Purchasing

Capability maturity

- Strong
- Moderate
- Weak

Description	Core finance capabilities	
Key Success Factors	Accurate financial data management Regulatory Compliance Integration Capabilities Financial Planning and Analysis Capabilities	Real-Time Reporting & Analysis Audit Trails & Transparency Security & Access Controls Scalability & Flexibility
Current Pain Points	Consolidation of 2 subsidiaries involves a lot of manual journal entries Processing of payments Electronic billing / invoicing	Reporting is "not great" Integrations cause month end reporting delays Integrations use flat files Poor data quality of import files

Capability	Maturity		
	Proc	Tech	
General Ledger	P	T	• General functionality is working fine.
Account Payable	P	T	• Limitations related to banking and multi-currency • Lack of online approvals
Accounts Receivable	P	T	• Lack of support for payment cards – possible Moneris vault customization issue • No self service for payment
GL Consolidation	P	T	• Manually via Excel • Elite interface not providing sufficient info
Cash Management	P	T	• All manual • Cash flow done in excel
Billing and Invoicing	P	T	• Dated self service and reliance on Excel for large data uploads

Capability	Maturity		
	Proc	Tech	
Fixed Assets	P	T	• Managed in Excel
Inventory	P	T	Basic inventory management Integration with sub-systems is a challenge
Internal Controls	P	T	• Well-defined user roles and security access • Admin roles and operational roles are separate.
Financial Reporting	P	T	• Basic Report Writer • Report Generated externally
Annual Financial Reports	P	T	• Reports generated manually using Excel and Word.
Integration	P	T	• CSV and Text Importing • Scheduled tasks • Support by I.T.

City Property Tax Management

Stakeholders

Tax Division
Finance Dept
Accounting Division

Capability maturity

- Strong
- Moderate
- Weak

Description	City Property Tax Management	
Key Success Factors	<p>Accurate property assessment management</p> <p>Regulatory Compliance</p> <p>Integration with financials, billing, and property management modules</p> <p>Timely generation of tax bills and clear communication of payment deadlines and methods.</p>	<p>Automated reminders and follow-up processes for overdue accounts, improving collection rates.</p> <p>Advanced reporting tools to analyze trends, monitor compliance, and forecast revenues.</p>
Current Pain Points	<p>Lack of Vendor Customer Support Service</p> <p>Lacks Reporting functionality</p> <p>Manual process required to overcome the system's lack of functionality.</p>	<p>Issues with processing large batches and billing</p> <p>The system lacks operational functionality</p>

Capability	Maturity		
	Proc	Tech	
Tax Management	P	T	<ul style="list-style-type: none"> Basic tasks require workarounds Manual processes
Property Management	P	T	<ul style="list-style-type: none"> Basic property management functions are present Lacks in reporting
Assessment management	P	T	<ul style="list-style-type: none"> Utilize a third-party service, MPAC, to import assessment information.
Tax Billing	P	T	<ul style="list-style-type: none"> Basic tax billing is a complex and elaborate process Printing issues Lacks the capability of reprinting tax bills easily.
Comprehensive Reporting & Analytics	P	T	<ul style="list-style-type: none"> Duplication of data information on reports Lack of standard reports Minimal report filtering options Excel used as a replacement reporting tool

Capability	Maturity		
	Proc	Tech	
Public Engagement & Communication	P	T	<ul style="list-style-type: none"> Very basic information Not user friendly Limited functionality Does not work properly
Scalability to adapt to new tax structures	P	T	<ul style="list-style-type: none"> Capability does not exist in the application Managed manually
Dashboards & KPI's	P	T	<ul style="list-style-type: none"> Workarounds using other applications Manual task
Data Security	P	T	<ul style="list-style-type: none"> VCH lack MFA capabilities Core application has user-based security

Planning & Budgeting

Stakeholders

Finance Dept
Accounting Division

Capability maturity

- Strong
- Moderate
- Weak

Description	Budgeting, forecasting, variance analysis, and integration with corporate planning cycle	
Key Success Factors	Automated integration from multiple sources Delegation to managers (self service) with commentary in the system Audit trail/version control Annual op plan done in system (nice to have)	System approvals Integration of the capital budget in the system Integration with HR, including FTE information Multi-year planning with scenarios and assumptions
Current Pain Points	Dept/Dev Detailed budget done in Excel, over 100 spreadsheets	Reporting is "not great" Integrations cause month end reporting delays Integrations use flat files Poor data quality of import files

Capability	Maturity		
	Proc	Tech	
Operating Budget	P	T	<ul style="list-style-type: none"> Third-party app – Questica Lacks detailed line budgeting and actuals
Capital Budget	P	T	<ul style="list-style-type: none"> Fully managed in Excel manually.
Multi-year Budget & long-term planning	P	T	<ul style="list-style-type: none"> not done whatsoever outside of the budget process (for capital) which is all excel.
Forecasting	P	T	<ul style="list-style-type: none"> non-existent but would like for it to be in future ERP system
Financial Reporting	P	T	<ul style="list-style-type: none"> Capital reporting is a work in progress, with Operating being the Management Reporter.

Capability	Maturity		
	Proc	Tech	
Variance Analysis	P	T	
	P	T	
	P	T	
	P	T	

Procurement

Stakeholders

Purchasing Division
Accounting Division
Finance Department

Capability maturity

- Strong
- Moderate
- Weak

Description	Procurement Management	
Key Success Factors	Seamless integration with financial systems to streamline processes. Robust reporting tools for transparency, accountability and auditability Supplier Management (prequalification & managing contracts). Automated workflows (automated approval process and notifications)	Security and data protection (user authentication & authorization controls) Scalability and flexibility Efficient Data Management (centralized repository for all procurement data to facilitate easy access and analysis)
Current Pain Points	Email notifications for requisition approvals failing Carry through of information Requisition to PO experiences issues (tax ID reference, line item detail)	

Capability	Maturity		
	Proc	Tech	
Requisition Management	P	T	<ul style="list-style-type: none"> • Tax schedule information tied to account #'s not carrying through (ITC) • Lacking quote attachments • Various errors in email approval process notifications
PO Management	P	T	<ul style="list-style-type: none"> • PO's lacking automated tie in to contract management tools • Inability to edit PO lines (fixing req.error details) • PO merges multiple requisition lines into one, where line items & unit costs are same

Capability	Maturity		
	Proc	Tech	
Vendor Approvals & Sourcing Process	P	T	<ul style="list-style-type: none"> • Data & Processes are outside the ERP system
Budgeting & Encumbrance	P	T	<ul style="list-style-type: none"> • Budget VS Actual Encumbrance not reflecting PO commitments live. (as Finance noted – manual excel tracking)

Procurement Contract Management

Stakeholders

Purchasing Division
Accounting Division
Finance Department

Capability maturity

- Strong
- Moderate
- Weak

Description	Procurement Contract Management	
Key Success Factors	<p>Contract lifecycle management (creation, renewal, termination and notification) Integration with financial and procurement systems Compliance and Risk Management (risk assessment, contract review, policy compliance)</p>	<p>Audit & Reporting (contract status, performance, audit trail for contract-related activities) Secure access (role-based access & user authentication to secure contract data) Change Management (contract version control, amendments & approvals) Supplier Collaboration (portals for suppliers to access relevant contract details and communications.</p>
Current Pain Points	<p>Three separate systems manage procurement and contract management (integration is a challenge) Data exchange is done manually and is a challenge</p>	

Capability	Maturity		
	Proc	Tech	
Contract Lifecycle Management	P	T	<ul style="list-style-type: none"> Multiple tracking mechanisms (at Department; Purchasing; Legal; and Clerks) Each has its specific information requirement
Contract Repository	P	T	<ul style="list-style-type: none"> Records and database at Clerks

Capability	Maturity		
	Proc	Tech	
Contract Prequalification Compliance	P	T	<ul style="list-style-type: none"> Web Application Hire Ready available for 'view' of vendor status The program is Manual, no link to Vendor in ERP system Clear Risk's automated expiry notices not functioning consistently

Core HR (Record Management & Payroll)

Stakeholders

HR Department
Accounting Division
Finance Department

Capability maturity

- Strong
- Moderate
- Weak

Description	Employee records, payroll, and benefits.	
Key Success Factors	<p>HR Information System (HRIS/HRMS) to replace reliance on current paper-based system – ease of access to all employee records, integration with all related processes</p> <p>HRMS linked to Finance (i.e. salary grids tied to positions, integrated with payroll and salary budgets)</p> <p>Enhanced reporting and analytics</p> <p>Enhanced self-service for employees and managers</p> <p>Linkage to RMS (nice to have) (tender in place) (document repository)</p>	<p>Streamlined (optimized) processes (no Excel), interconnected database/systems</p> <p>Automated position approval</p> <p>Sync with Active Directory</p> <p>System stores documents including employment records</p>
Current Pain Points	<p>Excel or paper-based (manual employee files)</p> <p>Reporting</p> <p>Permission management</p> <p>Don't track FTEs/hours in position and linked to finance (impacts forecasting and budgeting)</p>	<p>Application training materials are not user-friendly</p> <p>Organization charts done in Visio/PowerPoint – manual & not real-time data</p> <p>Employment records are stored on the filesystem and hard copy</p> <p>Lack of self-service (for employees and managers)</p>

Capability	Maturity		
	Proc	Tech	
Payroll Admin	P	T	<ul style="list-style-type: none"> Documentation on process may be dated Current technology would benefit from modernization and integration with other systems
Benefits Admin	P	T	<ul style="list-style-type: none"> Documentation on process may be dated Current technology would benefit from modernization and integration with other systems
Position Mgmt	P	T	<ul style="list-style-type: none"> Manual approvals and changes FTEs don't exist in the system
Organizational Structure	P	T	<ul style="list-style-type: none"> Visio/PPT for creating Org chart – not real-time data Limited reporting to functionality

Capability	Maturity		
	Proc	Tech	
Reporting	P	T	<ul style="list-style-type: none"> Over-reliance on Excel and manual processes severely limits reporting capabilities (not all information is captured in Avanti) Avanti reports are limited and not easily accessible
Compensation Planning	P	T	<ul style="list-style-type: none"> Excel is used in budgeting process for employee benefit premiums Full-picture costing for salary budgets is difficult to obtain
Self-Service	P	T	<ul style="list-style-type: none"> Current capabilities limited to accessing pay statements and T4s online
Core HR Records	P	T	<ul style="list-style-type: none"> Does not store any forms or employment records (i.e. offer letters, signed agreements/forms, all contents of hard copy employee docket) No link to assets

HR Workforce Management

Stakeholders

HR Department
Legal Department

Capability maturity

- Strong
- Moderate
- Weak

Description	Workforce performance and efficiency management	
Key Success Factors	<p>One source of information</p> <p>Built-in exception reporting</p> <p>Real-time balances</p> <p>Historical data reporting</p> <p>Formal system for tracking labour relations issues/grievances</p> <p>Attendance management</p>	<p>Generation of consistent timecards</p> <p>Electronic time off requests and leave requests and approvals</p> <p>Automation of Collective Agreement rules by union group</p> <p>Self-service for employees and managers (i.e. time off requests and approvals)</p> <p>Position management and job evaluation (including salary grids)</p> <p>Disability management</p>
Current Pain Points	<p>Email notification of new hires</p> <p>No exception reporting exists</p> <p>Accruals are not real-time</p> <p>Manual process for time off approvals – varies across departments, and difficult to pull historical data</p> <p>No calendar view</p> <p>Lack of coordination with benefits, payroll</p>	<p>Managers must enter time for employees in some departments</p> <p>All queries and Excel for reporting</p> <p>Time off requests are not in the system</p> <p>Schedules are done off-system, with multiple points of duplication. Not done in a consistent manner</p> <p>Manual letter distribution</p> <p>Lack of self-service (employee & manager)</p>

Capability	MaTturity		
	Proc	Tech	
Workforce Planning & Position Management	P	T	Recruitment Approval Form (RAF) done manually The system does not capture the FTE count
Leave Management	P	T	Entitlements per CAs, policy, ESA, including accruals and days taken (sick leave, LOA, bereavement, STD, vacation, etc.) – rules not automated Process/technology used varies by department with no self-service capabilities for employees or management
Succession Planning	P	T	No formal system/technology used for succession planning; all manual
Disability Management	P	T	Parklane is a robust and functional system but is not integrated with other systems.
Job History	P	T	System does not capture full picture of history

Capability	Maturity		
	Proc	Tech	
Attendance Management	P	T	Reports into Excel; meet base-level needs. No integration with Parklane Would benefit from automated reminders and triggers (i.e. when thresholds are met)
Scheduling	P	T	Mostly manual; differs across departments
Time & Attendance	P	T	Mostly manual; differs across departments
Time Approval	P	T	Mostly manual; differs across departments Payroll done electronically.
Grievance Tracking	P	T	No formal system in place for LR issues/grievances (manual tracking)
Job Evaluations	P	T	No formal records management system in place

HR Talent Management

Stakeholders

HR Department
Legal Department

Capability maturity

- Strong
- Moderate
- Weak

Description	The onboarding, offboarding, and performance management of staff, including training (L&D)	
Key Success Factors	<p>Transparency for managers and employees in all these areas</p> <p>Employee manager self service for performance management</p> <p>Automated process flows (onboarding/offboarding)</p> <p>Training compliance and record management</p> <p>Integration with Learning Management Systems</p> <p>Individual job history within the organization</p>	<p>Online approvals</p> <p>Automatic notifications</p> <p>Dashboards to see what is complete or not (statuses)</p> <p>Management of progressive discipline for employees</p> <p>Performance and probation reviews</p>
Current Pain Points	<p>Excel, Word, PDFs, and emails</p> <p>All manual tasks for performance management (probation)</p> <p>Lack of a formalized/consistent performance management program beyond probationary review</p> <p>Mostly manual for onboarding and offboarding (except the service request form)</p>	<p>Reporting, tracking, and versioning are all issues</p> <p>No analytics</p> <p>L&D manually updated</p>

Capability	Maturity		
	Proc	Tech	
Performance Management	P	T	Lack of formalized/consistent performance management program beyond probationary review; any measures currently in place are manual
Talent Acquisition	P	T	Excel and manual for all tracking/records
Offboarding & Onboarding	P	T	Excel and manual for all tracking/records New hire documentation is paper-based
Employee Development	P	T	No formal system in place
Probation Reviews	P	T	Currently using Outlook calendar invitations as reminders to follow-up with managers to complete probationary reviews – tracked manually

Capability	Maturity		
	Proc	Tech	
Employee Training	P	T	Flex – Learning Management System
Employee & Union Relationships	P	T	Communication with union reps Seniority lists
Progressive Discipline Tracking/Management	P	T	All manual currently (hard copy files and some electronic records)

HR Employee Health & Safety

Stakeholders

HR Department
Legal Department

Capability maturity

- Strong
- Moderate
- Weak

Description	Module that ensures that legal requirements are met and creates a safe working environment for employees.	
Key Success Factors	Policy and Procedure Management Risk Assessment and Management Incident Reporting and Investigation Compliance and Legal Requirements Document management system Tracking staff trainings and certifications and renewals Workplace inspection tracking	Hazard management Disability case management Integrated WCB forms Ergonomic case tracking, including equipment Communicate health and safety information to staff Auditing and Continuous Improvement
Current Pain Points	No system beyond email and Excel Pulling data from custom time system No metrics or file management	Outlook task lists SharePoint for communications and confidential file storage

Capability	Maturity		
	Proc	Tech	
Risk Management	P	T	<ul style="list-style-type: none"> Identify risks, assessments and mitigation management.
Incident Management	P	T	<ul style="list-style-type: none"> Facilitate easy reporting and tracking of incidents to improve responsive & preventive measures.
Regulatory Compliance Management	P	T	<ul style="list-style-type: none"> Manage employee compliance with the Ontario Health & Safety Act. Help manage a safe work environment
Training Management	P	T	<ul style="list-style-type: none"> Provide functionalities for managing mandatory health & safety training, including tracking completion and scheduling refreshers. Support initiatives to promote safety awareness, including updates on safety protocols.

Capability	Maturity		
	Proc	Tech	
Policy & Procedure Management	P	T	<ul style="list-style-type: none"> Store and manage health and safety policies, procedures, and manuals with version control capabilities. Tools to enforce health and safety policies and continuously update them to reflect changes in legislation or internal policies.
Document Management	P	T	<ul style="list-style-type: none"> Health & Safety record storage and management Report management
Audit & Inspection Management	P	T	<ul style="list-style-type: none"> Allow scheduling regular safety audits and inspections.

Works Management

Stakeholders

Public Works Dept.
Engineering Dept
Finance & Accounting

Capability maturity

- Strong
- Moderate
- Weak

Description	Facilitate the efficient management, tracking, and execution of work orders and job costing. Maintenance of City infrastructure (Roadways, Sidewalks, Buildings, Fleet(Public Works, Transit, Engineering, Cemeteries), Waste Management, Traffic Signals & Signs, Parks)	
Key Success Factors	Minimum Maintenance Standards (Municipal Act) Project Management – multiple areas Inventory/Stores management Enhanced reporting and analytics	Decision tracking with supporting data; Possible integration with GIS system Automation of data gathering Resource planning; Budget at program level, including reporting Integrate with City Financial System
Current Pain Points	WorkTech moving to web-based system – Pearl Learning curve	Does function, not sure if all functionality will move into Pearl

Capability	Maturity		
	Proc	Tech	
Service Development & Maintenance	P	T	• Work order tracking, resource assignment
Service delivery governance & Strategies	P	T	• Project planning, inventory usage, job costing
Transportation Systems	P	T	• Log defects, follow up, cost , execute.
Fleet Management	P	T	• Work order tracking, PM scheduling, costing, vehicle maintenance tracking.
Public Safety documentation & corrections	P	T	• Work order tracking public calls and corrective action if required.

Capability	Maturity		
	Proc	Tech	
Job Costing	P	T	• Material time & equipment. Budget at the job level for tracking and budget management.
Inventory Management	P	T	• Stores items issued to work orders, reorder points
Work Order management	P	T	• Grouping, classifying, costing, scheduling, including billable work order functions
Job Planning	P	T	• The ability to create job plans across multiple work orders
Project Planning	P	T	• The ability to create job plans across multiple work orders
Estimating & Costing	P	T	• The ability to add resources to create an estimate track project through same work order

CRM

Stakeholders

Finance, Accounting, Procurement, Tax
HR & I.T.
Eng Services & Public Works

Capability maturity

- Strong
- Moderate
- Weak

Description	Managing the interactions and relations with Staff, Citizens and other customers. Ensuring that the CRM efficiently supports citizen engagement and service delivery.	
Key Success Factors	Eliminate “common entity” Common location for notices across systems Integration with ERP submodules. Connect with third-party social media platforms Accurate and up-to-date data notification	Multi-channel communications (email, phone, web portals, smartphones) Reporting dashboards showing municipal KPIs Access services, self-register issues and check statuses
Current Pain Points	Notices tracked via emails and phone messages ServiceNow used for special orders (lack of documented, standard processes)	

Capability	Maturity		
	Proc	Tech	
Contact management	P	T	<ul style="list-style-type: none"> A common one-stop portal does not exist. Every department uses its own manual processes
City Tax Information	P	T	<ul style="list-style-type: none"> Limited information on current platform
City Tax Payments	P	T	<ul style="list-style-type: none"> Limited payment options and capabilities with the current portal.
Financial Reporting	P	T	<ul style="list-style-type: none"> Lack of dynamic financial reporting capabilities on an information portal. Done manually

Capability	Maturity		
	Proc	Tech	
Work Order Requests & Tracking	P	T	<ul style="list-style-type: none"> Manual process using phone and email Manual tracking process
KPI Dashboards & Reporting	P	T	<ul style="list-style-type: none"> Does not exist.

ERP Integration

Stakeholders

Information Technology
Finance/Accounting/Tax/
HR & Public Works

Capability maturity

- Strong
- Moderate
- Weak

Description	Enabling seamless data flow and process automation across various departments and systems within the city organization	
Key Success Factors	<ul style="list-style-type: none"> • Ability to connect and share data across multiple systems • Support and use standard protocols (XML, JSON, etc.) • API integration enabling real-time data exchange and process automation • Data synchronization ensures consistency and accuracy • Connector Tools facilitating integration with other applications. 	<ul style="list-style-type: none"> • Automate cross-system triggering actions and ensure that processes extend smoothly beyond the ERP functionalities. • Secure data transfer • Reduce the need for switching between applications to access data
Current Pain Points	<ul style="list-style-type: none"> • API are not available for all systems • Integration is done manually in most cases • Access to Cloud-based SaaS DBMS Tables for data management. 	<ul style="list-style-type: none"> • Lack of standardization • Limited Vendor Support • Technical Dependency and knowledge Silos (cross-functional understanding)

Capability	Maturity		
	Proc	Tech	
API Integration	P	T	<ul style="list-style-type: none"> • Authentication protocols do not exist for certain applications • Reliable API service from the vendor • Managing API versions (version upgrades)
Integration with internal & external systems	P	T	<ul style="list-style-type: none"> • Integration requires additional tools and utilities. • Custom integration created and maintained by Information Technology. • Upgrade and update challenges
MS Office Integration	P	T	<ul style="list-style-type: none"> • Lacks a streamlined integration with office products like Excel and Power BI.
MS Single Sign-On	P	T	<ul style="list-style-type: none"> • Single sign-on does not exist on many applications • Separate username & password.

Capability	Maturity		
	Proc	Tech	
Multi-Factor Integration	P	T	<ul style="list-style-type: none"> • Exists in some but not all applications
Integration with Dashboard Tools (PowerBI)	P	T	<ul style="list-style-type: none"> • No defined integration • Manual data exchange and process
Data Mapping, Transformation & Error Handling	P	T	<ul style="list-style-type: none"> • Lack of vendor data definitions and data schemas
Access to the Systems DBMS Tables	P	T	<ul style="list-style-type: none"> • Cloud based solution have no access

Enterprise Asset Mgmt

Stakeholders

Finance
Accounting
Stakeholder 3












Capability maturity

- Strong
- Moderate
- Weak

Description	The administration of acquiring and disposing of assets	
Key Success Factors	<ul style="list-style-type: none"> • Reconciliation tool that takes external source data as input (VLT quarterly reconciliation) • Nice to have: Right to use assets (IFRS 16) support <ul style="list-style-type: none"> • Leases as an asset 	<ul style="list-style-type: none"> • Accurate and flexible reporting • Maintenance and planning support
Current Pain Points	<ul style="list-style-type: none"> • Lack of controls (i.e., can dispose of an asset twice) • Reporting is terrible (i.e., no continuities for multiple business units) 	<ul style="list-style-type: none"> • Reporting typically involves export to Excel • Inconsistent behavior • No integration to procurement

Capability	Maturity		
	Proc	Tech	
Asset lifecycle management	P	T	<ul style="list-style-type: none"> • Managed using Excel • Fixed Asset management Program in place
Supply chain management	P	T	<ul style="list-style-type: none"> • Not part of current process
Core EAM	P	T	<ul style="list-style-type: none"> • Asset registry • Compliance • Financials • Analytics
Monitoring	P	T	<ul style="list-style-type: none"> • Does not apply
Maintenance planning & scheduling	P	T	<ul style="list-style-type: none"> • Nice to have

ERP players to consider

	Name	Module	Priority notes
	CentralSquare	Supports ERP modules & Works management	Vendor solution and Implementor (NaviLine ERP)
	Microsoft Dynamics 365	Supports ERP modules Works Management unknown	Vendor solution and Implementor (Dynamics 365)
	Endeavour	Supports all ERP modules Works Management unknown	Microsoft Dynamics 365 Implementation Partner Sylogist Implementation Partner
	SylogistGOV	Supports all ERP modules Works Management unknown	Vendor solution and implementor (built on the Microsoft 365 platform)
	Oracle NetSuite Oracle PeopleSoft	Supports all ERP modules Works Management unknown	Vendor solution and Implementor
	Workday	Supports all ERP modules except for City Tax Management	Vendor solution and Implementor
	SAP Business One	Supports all ERP modules Works Management unknown	Vendor solution and Implementor
	Deloitte	Supports all ERP modules except for Works Management not supported	Oracle Implementation Partner
	Unit4	Supports ERP except for City Tax Management & Works Mgmnt	Vendor solution and integrator
	ADP	HRIS (supports the HR modules)	Vendor solution and Implementor
	Tyler Technologies	Supports ERP modules & Works management	Vendor solution and Implementor

The Corporation of The City of Sault Ste. Marie developed a glossary to create a shared understanding of terms used by various ERP stakeholders

ERP Business Glossary

Term	Definition
HRMS, HRIS, HCM	Human Resource Management System, Human Resource Information System, Human Capital Management. These represent four capabilities of HR: core HR, talent management, workforce management, and strategic HR.
Finance	Finance includes the core functionalities of GL, AR, AP. It also covers such items as treasury, financial planning and analysis (FP&A), expenses, and asset management. Also includes City Tax Management.
Supply Chain	The processes and networks required to produce and distribute a product or service. This encompasses both the organization and its suppliers.
Procurement	Procurement is about getting the right products from the right suppliers in a timely fashion. Related to procurement is vendor contract management.
Distribution	The process of getting the things we create to our customers.
CRM	Customer Relationship Management, the software used to maintain records and contact with our citizens.
Sales	The process of identifying customers, providing quotes, and converting those quotes to sales orders to be invoiced.
Customer Service	The process of supporting customers with challenges and non-sales questions related to the delivery of our products/services.
Field Service	The group that provides maintenance services to our customers.