Staff Report

Report Title: Laserfiche Staff Training Opportunity

Prepared By: Jennifer White, Manager of Legislative Services/Clerk

Department: Clerk

Date: Feb. 21, 2023

Report Number: CLK-2023-02-13   **File Number:C11 CLK23**

Attachments:

Recommendation:

THAT Council provide an exemption to the Professional Development and Expense Policy (By-law No. 2022-137) to permit Staff to attend the Laserfiche Training Conference as recommended in Report 2023-02-13.

Background:

Through the Municipal Modernization Program Funding, Council has committed to implementing an Electronic Records Management (ERM) System to maintain and control official documents of the Municipality. The Software being used for the ERM is Laserfiche, and Staff are moving forward with a workplan for implementation.

Staff have been invited as part of the support provided by the Laserfiche Service Provider, Thinkdox to participate at reduced costs in the Laserfiche Empower Training Session and Conference in Orlando Florida on April 4 and 5th, 2023. As this training would occur outside of the province, Staff are requesting an exemption to the policy to permit Staff to attend and receive advanced training.

Discussion:

At the meeting of February 6, 2023 through the Municipal Modernization Funding, Council approved the implementation of an Electronic Records Management System. Staff have been creating a workplan for implementation with supplier Thinkdox. As part of the implementation agreement, Thinkdox provides initial training to an organization's administrators, who then provide training to staff of the organization.

The timing of the Township's implementation of ERM coincides with the annual training and convention of the software manufacturer. As such, the supplier has invited staff to be sponsored as their guests at this conference as a means of

providing initial administrator training, hands-on lab training with experts, and the opportunity to network with other municipalities using or implementing the software. Believing attendance at this convention to be of such value during the Township's implementation of electronic records management, the supplier has offered to support Staff attendance by covering the cost of registration and transportation to the event. The Township would only be responsible for the cost of overnight accommodation to participate in this two-day event of training sessions.

The agenda for the April 4 and 5 event includes General Sessions on municipal use and governance implementation and Breakout Sessions on Security, Administration and User Management, Time Saving Tips and Tricks, Reporting and Analytics, Workflow and Forms Integration, as well as hands on lab training with experts.

The Township staff (2) who will be implementing the ERM have user experience with Laserfiche, but not administrator experience. This is an opportunity for Staff to receive in-depth training that would otherwise be unavailable, or cost-prohibitive to receive. This opportunity would be very valuable to a quick, thorough roll-out of the new software, and may assist Staff in avoiding difficulties in implementation.

Financial Impacts:

The cost to the Township would be the cost of accommodations, and any meals which were not provided within the scheduled agenda. Staff are recommending that two staff members attend. The value of this training being provided directly through the supplier is estimated at $200/hour.

Strategic Alignment / Link:

We are a prosperous community that continues to grow in a sustainable manner by investing in infrastructure.
We are an environmentally conscious community that are good stewards of our natural environment by using our resources wisely.

Respectfully Submitted By:
Jennifer White, Manager of Legislative Services/Clerk

Report Approved By:
Mary Rose Walden, Chief Administrative Officer