



## Committee of the Whole Report

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**Report Number:** CS2021-001  
**Meeting Date:** March 9, 2021  
**Title:** J. D. Edwards Case Management System Program Enhancements  
**Author and Title:** LeAnn Donnelly, Acting Manager, Customer Services

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### Recommendation(s):

**That** Report CS2021-001, J.D. Edwards Case Management System Program Enhancements, be received;

**That** this recommendation be brought forward to Council for consideration at the next Regular Council Meeting.

**Department Head:** \_\_\_\_\_

**Financial/Legal/HR/Other:** \_\_\_\_\_

**Chief Administrative Officer:** \_\_\_\_\_

## **Background:**

At the Council Meeting of October 20, 2020, Council adopted the following resolution:

**CR2020-302**

**Moved By** Councillor Ashmore

**Seconded By** Deputy Mayor O'Reilly

**That** Staff report back to Council by the end of Q1, 2021 on program enhancements that are available for case tracking through the J.D. Edwards Case Management System.

This report addresses that direction.

In 2017 the City transferred to a new Case Management System (J.D. Edwards) as outlined in the attached 2019 presentation to Council (see Appendix A). This system includes the following divisions:

- Roads
- Engineering
- Solid Waste
- Water and Wastewater
- Utility Billing
- Parks, Recreation and Culture (PRC)
- Building and Property

Human Services uses JDE Case but under a separate management cover for housing concerns. Municipal Law Enforcement uses a separate system, Cityworks, to track cases. Therefore, neither were included in this process. All other inquiries received that are not in the Case Management system are directed to the appropriate department for response via telephone or email.

JDE Cases are entered by Customer Service Staff who receive the call via the Municipal Call Centre or by Public Works staff who receive calls through the Roads/Waste call queue. The resident is then provided with the case number for reference. Each case is assigned to the applicable department for follow up within that department.

Residents can also enter concerns through our website at the Report an Issue page. A JDE Case is created based on the concern selected and sent through to the appropriate department for follow up. Once the concern is entered the system generates a case number which is provided on screen for the resident's reference.

## **Rationale:**

Early in the fall, Community Services, in cooperation with the Office of Strategy Management, underwent a review with various departments to determine what changes/enhancements they would find beneficial to the JDE Case module.

Through a series of meetings with Public Works, Engineering, Utility Billing, PRC, and the CAO's office the following items were discussed:

- Automatic Notifications
- Status of Case
- Case Closures
- Public Dashboard
- Other

While working closely with IT, each of the above was further investigated to determine how JDE Case could be modified to better serve residents and staff entering and closing entries.

### *Automatic Notifications:*

Currently the system does not automatically notify the resident of their case number. City staff provide the case number upon completion of the case entry. If a resident enters a concern through the Report It screen the number is displayed on the screen for their reference.

Moving forward changes will be made to the system so that upon completion of the original case entry an email notification would be sent to the resident with the case number and information on how to contact the Customer Service division for further information if needed. This email could also be sent when a resident enters a concern through the Report It page on the website.

The option can also be built in to notify residents upon case closure if requested. Case closure notifications would state that case has been closed and offer instruction on how to contact the Customer Service division for follow up if needed.

*Status of Case:*

When a case is created, it is automatically put into a status of 100 - Open. Currently there are six optional status built into the system:

- 100 - Open
- 200 - In progress
- 300 - On Hold
- 400 - Budget Consideration
- 800 - Cancelled
- 900 - Closed

As a case progresses, so should the status of the case to better indicate the current situation. In order to give a more accurate indication of what stage the case is at, modifications to status codes will be made as per below (On Hold has been replaced with 2 other options to provide more clarity – Under Review and Long Term Project):

- 100 - Open
- 200 - In progress
- 300 - Under Review
- 400 - Budget Consideration
- 500 - Long Term Project
- 800 - Cancelled
- 900 – Closed

Each department has different case options to select depending on their operations. For example, Public Works cases can be narrowed down to operations, then to grading concerns. PRC can narrow down to parks and trails, beaches. Some cases would be associated to a long term project, or could be a budget consideration item, or could simply just be in progress. By changing the status options as outlined above staff can more accurately reflect where a case is at.

*Case Closures:*

Cases are closed by staff entering comments on the case and changing the status to 900. Each department has their own process in place for who enters this information.

Some case issues have a standard response so the inclusion of a drop down menu field for certain concerns to enable quicker closure is being considered. This would not replace the comment field which would still be used for further information as required. In addition, the drop down menu would be more efficient for staff with the ability to close cases in the field.

While field closures will not work for all areas it may be beneficial for some. When equipped with the appropriate technology staff would have the ability to close the case immediately upon resolution. The PRC Arborist division will begin testing the functionality of this with chrome books in the near future.

#### *Public Dashboard:*

Along with the Office of Strategy Management and the IT Division research and testing has begun into the creation of a public facing dashboard on our Municipal website to indicate the number of current cases and their specific status. This would provide the public with real time information regarding open cases within our system. Continued testing and functionality of this will take place throughout Q2 with the public launch to our website in Q3.

#### *Other*

In addition to these modifications, we are researching ways to link Case to our GIS system which would provide us with the ability to sort cases by geographic areas (neighbourhoods, settlements, wards, for example). IT is currently testing various options to determine how best to do this as we move forward.

Currently there is no mandatory field entry within the system. Changes to add the use of mandatory fields for staff entry is a modification we can make to ensure all necessary fields are being used and the information needed for follow up is included.

While reaching out to each department, the current process for closing cases was looked at. Various reporting options are available for staff to ensure cases are kept up to date and closed in a timely manor. In addition, the changes and enhancements to the system outlined above will provide better tools for departments to manage cases in the system.

As we progress through these enhancements and process changes, updated training will be provided to staff. In addition, new instruction documents and reference material will be created and provided to all staff entering into the JDE Case module. Council will continue to be provided with an annual report in Q1 of each year to provide an overview of cases in the previous year.

### **Other Alternatives Considered:**

No other alternatives are recommended at this time.

## **Alignment to Strategic Priorities**

The recommendations in this report align with the following strategic priority within 2020-2023 Kawartha Lakes Strategic Plan:

Good Government – Increase efficiency and effectiveness of service delivery. The improvements to our Case management system help us to develop and document current levels of service and promote continuous improvement to Make It Better in all service areas.

## **Financial/Operation Impacts:**

No financial implications have occurred to date. While many of the enhancements can be made in house some of the recommended changes will come with associated costs from our software provider Mid-Range. The approximate cost is \$7,500, depending on the modifications we choose. This cost is accommodated in the 2021 operating budget.

## **Servicing Implications:**

There are no servicing implications associated with this report.

## **Consultations:**

CAO  
Director of Community Services  
Office of Strategy Management  
IT Division

## **Attachments:**

Appendix A – Council Orientation Customer Inquiries/Complaints – February 19, 2019.



Council  
Orientation.pdf

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