

Out of State Travel/Training Request Presented to Finance Committee for Approval

Requesting Supervisor/Manager: Shawn Alfred

Department: Finance

Names of Employees Attending: Kim Lynch and Erika Luebke

Name of Training	Dates of Training	Location of Training
Springbrook User Conference	April 4 - 6	Portland, OR

Estimated cost of training	\$ 1,300
Estimated cost of travel	\$ 1,200
Estimated cost of meals	\$ 150
Estimated cost of accommodations	\$ 1,200
Estimated cost of misc. expenses	\$ 125 Please explain parking, train, mileage etc.
E-Credit for Flights (from 2020)	-\$1,200
Total estimated cost	\$ 2,775 (Budget = \$5,000) <i>SMA</i>

Requesting Supervisor/Manager Comments: ___The city has invested a substantial amount in the ERP software package and in an effort to maximize the full potential of the software ongoing training is essential.

What are the objectives for the training? ___Learn about new features and to better understand the capabilities of the product to obtain maximum functionality. There was a major upgrade to the Cloud in May of 2021 that we still need to gather training on. This will allow us to bring back ideas that can be shared via training sessions with other city workers. There are also new processes and reporting tools that need to be researched. We need that knowledge to utilize the product to full capacity. There is also a need to research options for security of the system's data.

How will this training be shared / implemented upon return? ___Training sessions will be established to share the information acquired with other city staff members as done in the past.

How will this training benefit the City? What is the return on the investment? ___From prior year attendees, which were from several different departments, the number of city employees who benefit from the training is then spread citywide. The data that is housed in the product needs to be secure. This training will identify options and solutions for doing that.

Supervisor Approval/Decline

Approved Declined Reason for decline: _____

Supervisor/Manager Signature: *Shawn Alfred* Dated: 2/10/2021

**Please attach any additional information you would like considered with this request

Objectives for Training

- We have implemented the basics from the Cloud upgrade, but other features for enhanced use need to be implemented. This training will identify those features not being utilized. This will also give us a better understanding of the platform overall and give us a chance for giving potential enhancement ideas to the product engineers/developers.

Training is Shared

- Training sessions in the past were well attended.
- Users are again asking for more training.
- There may have been some features missed when the department's do the training. They tend to train the essentials only to just get them by to get a task done. Like A/P: process an invoice, but not train on how to research historical data.
- There has been a lot of turnover and training for them is crucial.
- The more skilled users that attend training session are learning new features.
- Excellent suggestions for product enhancement come from the training sessions.

Training a Benefit to the City from past trips

- Building Inspection – returning to Springbrook after being with the Accela product
- Clerk's office – Licensing was fully implemented and continues to be enhanced with workflows
- Department of Infrastructure – overall training in the system since this department touches several modules
- Payroll – new employee getting hands on training acquiring resources to contact for support.
- Accountant – gaining more knowledge of the overall system to provide training to other staff.

Comptroller/Deputy Treasurer

- Job Description reads: "Serve as the "In-house expert" on the city's financial system and ancillary systems for purposes of developing and administering training programs for city personnel."
- Hasn't been to a conference in 9 years. This conference boasts advanced training sessions that include the new 'Cirrus' cloud development.
- Product Enhancement with a 'next generation look' coming from 'Cirrus':
 - Organized Forms – Drop & Drag files – toggles needed to clean up and/or organize data screens – Advanced criteria for searches – Robust Cash Receipting process – Fully functional bank reconciliation module - etc....