Lessons Learned in Systems Implementation

FOCUS Spring 2012

Wendell Vest
Agenda

• Reasons for New Implementations & Upgrades
• User Involvement & Acceptance
• Project Management
• Information Sharing
• Use of Metrics
• Training Programs
• Community Source
Reasons for New Implementations and Upgrades

- New Technologies
- Y2K
- Automate Paper Processes
- Mandatory Upgrades
- BOV Mandates
VT Projects In-Process

• Banner Travel & Expense Management System
• TimeClock Plus (Timekeeping System)
• TALX (I-9 & eVerify System)
• Quarterly SciQuest Upgrades (Hosted System)
• Annual or Semi Annual Banner Upgrades (Non-Hosted)
• Banner Effort Reporting System
• Recently Completed Banner Labor Redistributions
What Systems are Your Schools Implementing Currently?
User Involvement & Acceptance

- Departmental User Group
- Change Acceptance
- How to Motivate in an Electronic Environment
  - Sense of Accomplishment
  - Sense of Progress
Project Management

- Establish Steering Team with Periodic Meetings
- Appoint Project Managers
  - Assign Responsibility and Accountability
  - Assign a Functional & Technical Leader
- Establish a Working Team with Periodic Meetings
  - Ensure that Functional & Technical Group Interacts
- For Reoccurring Upgrades Create Test Scripts
- Comply with Code of Virginia IT Project Requirements
Project Management

• Code of Virginia defines major IT project as “any Commonwealth information technology project that has a total estimated cost of more than $1 million or that has been designated a major information technology project by the Secretary (of Technology) pursuant to § 2.2-225.”

• VT has policy on IT Project Management

• Under restructuring, VT uses best practices promoted by the nationally recognized Project Management Institute (PMI)
Project Management

- VT uses IT procurement questionnaire if purchase > $2,000

- IT security review must be performed if certain criteria met

- Notifications to other offices required

- Complete project management documents with risk assessment
Information Sharing

• Create a shared space for documentation
  • Example is a Wiki site (Confluence)
  • Agenda & Minutes for Meetings
  • Project plans (functional & technical specifications)
  • Status of Test System
  • Other Documentation
System Status

Mission:
The Banner Finance Team, part of Application Information Systems (AIS) at Virginia Tech, exists to provide information systems management, support, maintenance, and modification services to the university offices served by Banner Finance and Accounts Receivable Systems. We have been tasked to configure, implement, and support the new Travel and Expense Module being delivered by allucian.

Status - Development Instance
Banner Instance: DVLP  Workflow Instance: WFDVLP  BDMS Instance: DMS_DVLP

<table>
<thead>
<tr>
<th>Component</th>
<th>Status</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Application</td>
<td>✅</td>
<td>No known problems</td>
</tr>
<tr>
<td>Baseline Workflow Approver &lt;&gt; tae_approver</td>
<td>🟡</td>
<td>WFDVLP refreshed from WFPROD, DMS working to resolve outstanding issues</td>
</tr>
<tr>
<td>Custom Workflow Approver – tae_approver</td>
<td>🟡</td>
<td>WFDVLP refreshed from WFPROD, DMS working to resolve outstanding issues</td>
</tr>
<tr>
<td>Attachments</td>
<td>✅</td>
<td>Must use IE to add attachments</td>
</tr>
</tbody>
</table>

Status - Test Instance
Banner Instance: PPRD  Workflow Instance: WFPPRD  BDMS Instance: DMS_PPRD
Information Sharing

• Read the Release Notes for an Upgrade

• Attend a Webinar that Previews an Upgrade

• When testing a New System:
  • Document items you learn about how the system works
  • Document items about the system that you think do not work correctly
  • Document items where your operating procedures will need to change
Use of Metrics

• Measure the Success of Project with Metrics

• This can be done project completion or goals can be established upfront and measured afterwards

• Examples may be:
  • Improved processing time – travel reimbursements paid faster
  • More invoices received electronically
  • More students/employees paid by ACH instead of check
# Metric – Invoices Received Electronically

## Invoice Statistics for FY 11

<table>
<thead>
<tr>
<th>Invoice Type</th>
<th>Count</th>
<th>% of Count</th>
<th>Dollars</th>
<th>% of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>177,156</td>
<td>70%</td>
<td>$530,717,814</td>
<td>83%</td>
</tr>
<tr>
<td>eInvoices</td>
<td>29,103</td>
<td>11%</td>
<td>6,602,096</td>
<td>1%</td>
</tr>
<tr>
<td>Batch</td>
<td>46,842</td>
<td>19%</td>
<td>99,519,666</td>
<td>16%</td>
</tr>
<tr>
<td>Totals</td>
<td>253,101</td>
<td>100%</td>
<td>$636,839,576</td>
<td>100%</td>
</tr>
</tbody>
</table>
Metric – Invoices Received Electronically

Invoice Statistics for FY 12 (YTD March 31)

<table>
<thead>
<tr>
<th>Invoice Type</th>
<th>Count</th>
<th>% of Count</th>
<th>Dollars</th>
<th>% of Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper</td>
<td>131,893</td>
<td>67%</td>
<td>$383,583,140</td>
<td>80%</td>
</tr>
<tr>
<td>eInvoices</td>
<td>26,157</td>
<td>13%</td>
<td>5,424,367</td>
<td>1%</td>
</tr>
<tr>
<td>Batch</td>
<td>39,666</td>
<td>20%</td>
<td>91,998,996</td>
<td>19%</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>197,716</td>
<td>100%</td>
<td><strong>$481,006,503</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Electronic Payment Statistics – FY11

<table>
<thead>
<tr>
<th></th>
<th>Vendor Payments</th>
<th>Person Payments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>Dollars</td>
<td>Percentage</td>
</tr>
<tr>
<td>ACH</td>
<td>6,328</td>
<td>167,901,950</td>
<td>31%</td>
</tr>
<tr>
<td>Payment Card</td>
<td>5,128</td>
<td>16,393,019</td>
<td>3%</td>
</tr>
<tr>
<td>Check</td>
<td>58,454</td>
<td>355,571,353</td>
<td>66%</td>
</tr>
<tr>
<td></td>
<td>69,910</td>
<td>539,866,322</td>
<td>100%</td>
</tr>
</tbody>
</table>

- Above percentages are for dollars
- The percentage of total count that is ACH is 42%
Training Programs For New Systems

- Hands on versus Auditorium Style
- Online Tutorial versus In Person Training
- Reference Guides to be Placed Online
  - Protect Proprietary Vendor Information
- Don’t Forget Training for Employees Offsite
Training Programs for New Systems

- Powerpoint Presentation for Auditorium Training
- Demo in test system for Auditorium Training
- Recorded GoToMeeting for Offsite Training
- Microsoft Word reference manuals with system screen shots saved as pdf available on website
- Online training
  - Captivate – Scholar or Online (website)
  - Adobe Presenter – place in Scholar environment
Community Source

- Collaborative Effort by Schools for ERP Systems
  - Kuali
  - Banner (Ellucian)

- Share Resources to Enhance ERP System

- Modifications Become Part of Baseline
  - Eliminates Modifications Needed in Future Upgrades

- Code Repository
  - Share Items Not in Baseline
Questions?