ERP - The Good, The Bad, and the Ugly

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Agenda

- Introduction
- Defining the Problem
- Creating the Vision, Scope & Timeline
- What is Needed for Success
- Good – Bad – Ugly?
- Success Factors
- Why do Failures Occur?
- Questions
Project Enterprise
ERP - Banner

• Replace our homegrown legacy mainframe systems (ISIS, FMS and HRS) with standardized state-of-the-art web-based commercial software with a modern integrated database.

  – Will require fewer modifications as a result of vendor package conforming to industry standards
  – Vendor provides support
  – Vendor will keep up with changes in laws, regulations, and industry business practices
  – Periodic updates will keep us current with changing technology
Defining the Problem in 2007

- Human Resources System (HRS) 15 years old
- Financial Management System (FMS) 21 years old
- Integrated Student Information System (ISIS) 25 years old
In 2007 – Defining the Problem

Legacy Limitations – These Systems Are Old!

• Programming language outdated (COBOL)
• Information not centralized
• Aging workforce - Average age = 52
  (retirement: 25% in 4 years, 40% in 6 years)
• No vendor support
• Many functional problems and disconnections
• Limited ability to support new technology
• Very complex infrastructure
A Look Behind the Scenes

- Established a Steering Committee
- Hired a consultant
- Set guiding principles
- Evaluated solutions
- Obtained Board and Presidential approval
- Selected SunGard Banner System
### Guiding Principles for ERP Evaluation and Selection

1. **Students, faculty, staff and prospects will have convenient and reliable access to their information.**

2. **Major functions (student, financial, human resources) of the ERP solution will be satisfied through a single software vendor that demonstrates a long-term commitment to maintaining and supporting the package.**

3. **ERP software vendor must be financially stable and viable in the higher education market.**

4. **Business processes will change to match the best practices found in the ERP package. Customizations will be limited.**

5. **ERP solution must be fully functional at a Carnegie Doctoral /Research Universities – Extensive institution.**

6. **ERP solution must have Internet native applications and system architecture.**
Who is Involved?
“Before I begin, I’d just like to make it known that I didn’t volunteer to do this presentation.”
“If we want to succeed as a team, we need to put aside our own selfish, individual interests and start doing things my way.”
Are We “Live” Yet?
5 Year Timeline – The Scope

- Student Recruiting/Enrollment Management
  8/2010 (Spring 2011)
- Admissions
  9/2010 (Spring 2011)
- Finance/ TUmarketplace
  7/2009
- Catalog/Scheduling
  10/2010 (Summer, Fall 2011)
- R25 – Room Assignments
  11/2010 (Summer, Fall 2011)
- Grading/Transcripts
  6/2011
- Decommission Mainframe
- Human Resources
  3/2010
- Advancement (2/2011)
- Registration/Cashiering/Billing
  3/2011 (Summer, Fall 2011)
- *Post Go-Live Application Tuning
## Concurrent Implementation

### Project Activities for Each Module

| Requirements Gathering | Business Rule Development  
|                        | Table Design  
| Configuration          | Conversion (FMS, HRS, ISIS data)  
|                        | External/Feeder (i.e., PNC/SAT Scores)  
| Interfaces             | Unit Test (i.e., Payroll, Hiring, AP, Registration)  
|                        | Integrated Test (i.e., Entire Cycle of Hiring Someone to Paying Someone, Payroll to Finance, Financial Aid to Student)  
|                        | Disaster Recovery Testing  
| Testing                | Stakeholder Identification  
|                        | End-User Training Procedural Manual Development  
|                        | Conduct Training Classes  
| End User Training      | Phased  
|                        | Big-Bang  
| Go-Live               |  

*It's a banner day!*
How we can use technology to help people and organizations to perform efficiently?

What’s Changing?
OPINION

TEMPEL UNIVERSITY 4TH MOST CONNECTED CAMPUS IN THE US!

SERVER DOWN!
SERVER DOWN!
SERVER DOWN!
SERVER DOWN!

it’s a **banner** day!
Where are you going Temple?

There's a party at self-service banner's house.

Can I come?

For the last time no, you're too old. It's weird.
Improved Interface & Accessibility

- One system with a consistent, web-based interface
- One integrated Oracle database
- 24-by-7 accessibility
- Convenient TUportal single-sign on with personalization features
- Robust reporting capabilities
- Move towards standardized workflow and imaging
New Functionality for Fall Semester:

- Pre-Requisite Checking Pilot
- Mid-Term Ratings / Progress now online!
- Tumobile
  - Roster
  - Grades are on the way!
  - Directory is on the way!
New Skills

• Opportunity for Temple employees to learn new software and the latest technologies
• Ability to use standard system capabilities to enhance your department’s way of conducting business
• Develop competencies on a system widely used in higher education
What is Needed for Success & Temple Stories
Characteristics of Successful ERP Projects

- Understanding that it is not a technology project
- Well managed time constraints and calendar
- Active Senior Sponsorship & Support
- Make decisions in a timely fashion
- Regular review of changing needs and priorities - checklists
- On-going evaluation is part of the plan
Critical Success Factors

• Open, active, timely communication between teams & community of users (Town Halls)

• Cooperation and collaboration of all team members

• Adequate training for all staff and stakeholders

• Willingness to change

• Limiting Customizations, Customize for Value – Implement Formal Process
The Good - Improvements

• SSB – Student Online Registration
• Grading
  – Incremental Grading – Earlier Opening
  – Online Mid Term Grading
  – Online Change of Grade Workflow
• Introduction of Parts of Term – $ Generator
• Electronic W2s & next generation processing
• Electronic Workflows to Handle cross-functional processes
• Standard technology platform - Oracle, Java, Cognos
• Opportunity to examine processes – “From Seed to Sale”

* it’s a banner day!
The Bad – WHAT?

• Yes – An Integrated System! Oh no, An Integrated System!

• We have to SHARE data – you didn’t tell us that!

• Reverted to some manual processing in HR

• One Screen in Legacy = Multiple Forms in Banner

• Very complex security, also loss of some fine-grain security, forcing changes in processes
The Ugly – Oh No!

• Implementation of Banner HR was delayed by 2 months

• Bought SGHE Advancement Analytics Component before maturity – 4 months of debugging & delay

• Financial Aid Challenges

• Running out of time (happened in each major module)

• “Blame it on Banner!”
ERP Implementation Failures Defined

• Project Failure Defined
Gartner defines "project failure" here as 1) project cancellation, or 2) delivery at least 50 percent over schedule and/or budget, or 3) delivery with significant promised functionality missing or impaired.
Most Reasons for failure of ERPs

• Unclear goals and needs (poorly defined scope)
• Senior sponsorship missing
• Inadequate funding and/or staffing
• Enterprise-wide commitment missing
• Poor selection process, not bringing right people together to sell the need and the solution
• Improperly conceived change management strategies
• Failure to adequately assess political realities
• Failure to manage time, the ripple effect
• Underestimate project requirements
• It’s Hard, It’s Complex
Five Biggest ERP Implementation ‘Urban Legends’

Legend 1: As soon as the implementation has “gone live,” the enterprise is “done” deploying ERP.

Legend 2: We will go “plain vanilla” to save money and time.

Legend 3: Big vendors are more stable than little vendors.

Legend 4: If we have executive go-ahead to implement an ERP, it must be everyone’s top priority.

Legend 5: Overpromising and agreeing to all user demands will keep them happy.
What’s Next for ERP at Temple?
Computer Services

Questions?