



# Proposed ERP Strategy for the BC Public Post- Secondary Sector

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# ERP Vision Statement

*Increase alignment and integration of Sector ERP solutions to enable enhanced service delivery to student populations, improved cost management and a reduction of overall risk.*

## ➤ Background, drivers and considerations

# ERP Strategy Background

- ERP systems in the BC public post-secondary sector consist of multiple solutions and configurations
- Some alignment exists within the sector, but there is an opportunity for increased collaboration and efficiency
- Over the next 7-10 years, all institutions will need to implement either a complete change of ERP system, version upgrades, or a replacement of components
- For many institutions, this work incurs considerable risk due to the lack of IT resource capacity
- ASDT struck a working group to recommend a Sector ERP Strategy by March 31, 2016 – this presentation represents the working group's output

# Drivers for a sector ERP Strategy

## ➤ **Business risk:**

- many institutions report that some business requirements are not being met by their current ERP solution
- Some parts of purchased products are not being used

## ➤ **Technology risk:**

- Dependence on aging infrastructure and legacy custom ERP systems that are no longer sustainable
- Challenge of attracting and retaining expert technical resources
- Customization has increased the complexities of data management and created a backlog of needed changes

# Drivers for a sector ERP Strategy – Continued

- **Cost and risk of replacement or upgrade** – replacement systems will be a significant cost and change management challenge. Many institutions will apply extensive upgrades in the near future.
- **The risk of not having a Sector strategy** – Some Sector collaboration occurs through BCNET working groups and the Colleague ASC consortium, however without a formal Sector ERP Strategy there is a risk of increased duplication of effort and divergence of solutions, with a resultant increase in Sector-wide maintenance and support costs.

# Anticipated Change

From an ERP perspective the Sector is about to embark upon significant change:

Change Item	Institution(s) Impacted	EST. Timeframe
The replacement of Legacy custom built systems	VIU, Selkirk	2016 - 2018
The upgrade to Banner Extensible Ecosystem (XE)	All Banner institutions	2016 – 2018
The replacement of an SIS PeopleSoft upgrades/additions (with reduction of customizations)	UBC UBC, SFU (upgrade in-process)	2015 - 2019
The roll-out of Colleague to Finance and HR	JIBC	2018-2019
The uptake of BCNET's Educloud	UBC, NIC, CSB members, others...	2016.....
Transitioning from PLNET to BCNET	Okanagan, Emily Carr, others...	2016
Implementing functionality to support P2P	Pilot institutions (TBA)	2017
Implementing functionality to support COAP	All	2018-19

## ➤ Proposed ERP Strategy

# Strategy Considerations

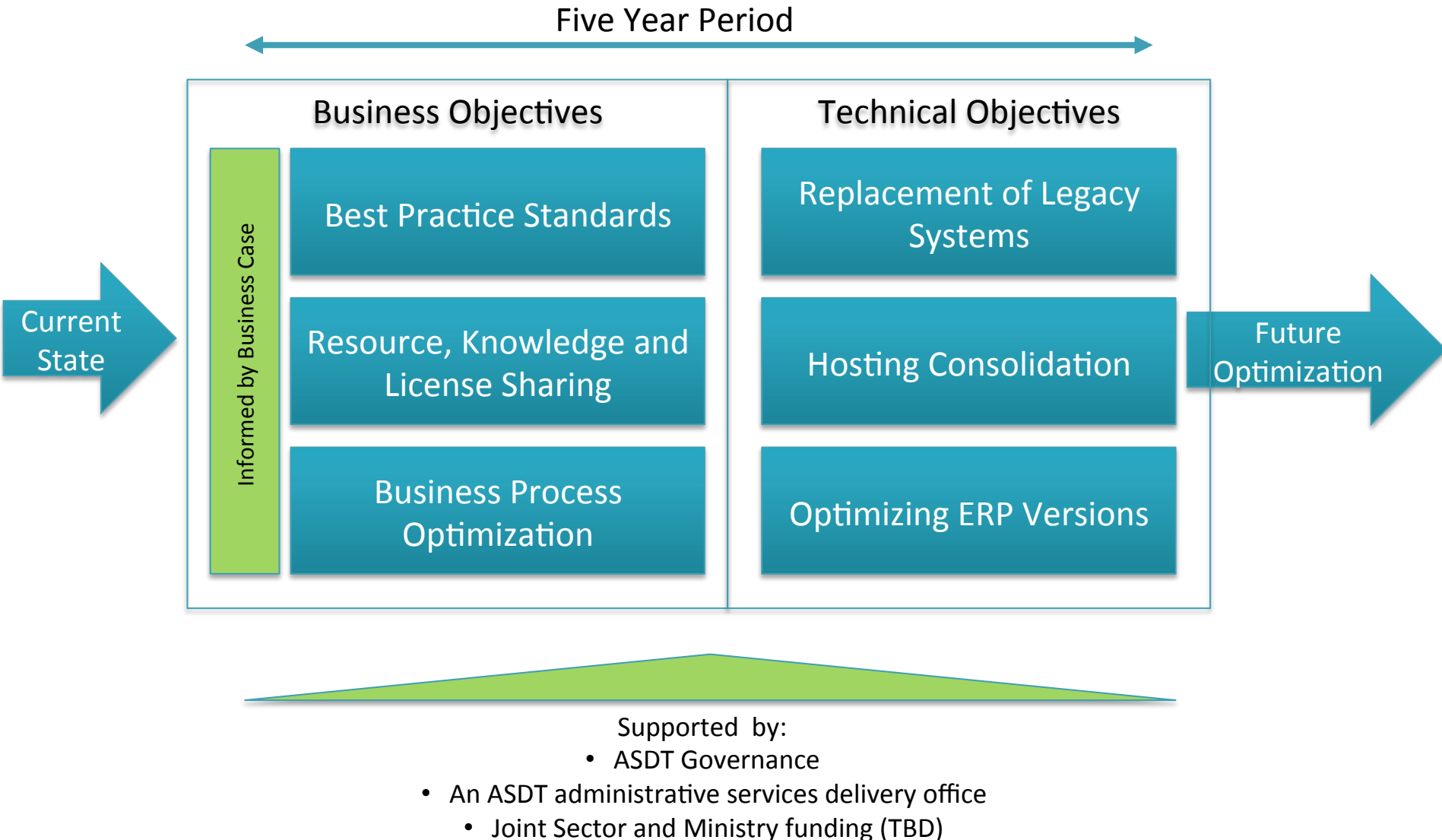
From a Sector perspective a strategic roadmap that outlines progress towards increased collaboration and optimization is beneficial. The rate of progress for an individual institution, however, will be tempered by:

- Institutional and Government investment plans.
- The need for flexibility to enable differentiation and allow Institutions to support specific program offerings.
- The different capabilities to absorb change within the Sector.
- Available funding and the institutional cost and benefits of incremental change.
- An institution's sense of urgency to change.

# Five Year Goal & Objectives

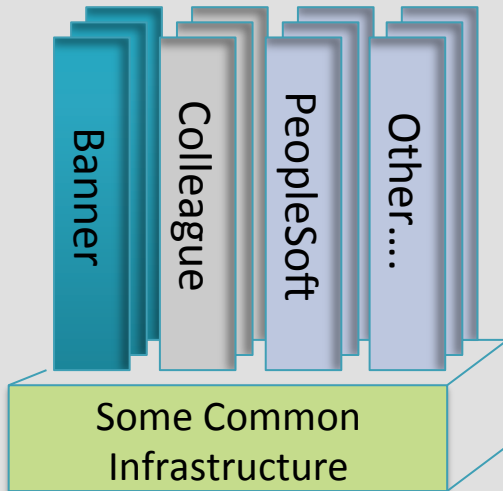
BUSINESS	TECHNICAL
GOAL	
<i>Align ERP-related business processes across the Sector where reasonable and feasible</i>	<i>Optimize ERP infrastructure and platform solutions</i>
OBJECTIVES	
<ul style="list-style-type: none"><li>• Increase resource, knowledge and license sharing</li><li>• Establish best practices and standards</li><li>• Optimize business processes</li></ul>	<ul style="list-style-type: none"><li>• Replace legacy systems</li><li>• Consolidate hosting</li><li>• Optimize ERP versions (and data linkages where applicable)</li></ul>

# ERP Strategy: Objectives



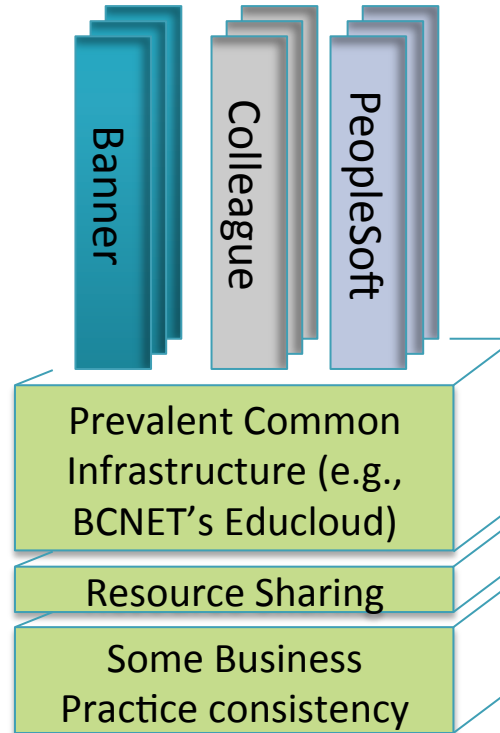
# ERP Strategy: *Proposed* Continuum Framework

(A) Multiple ERP platforms with separate instances, some common infrastructure



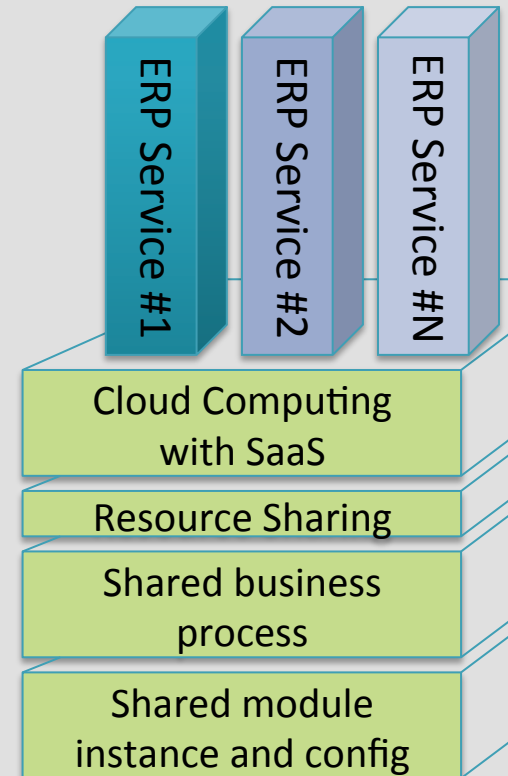
Current

(B) Multiple ERP platforms with separate instances, but common infrastructure, formalized resource sharing and consistency in business practice



Each institution determines its optimal 5yr end-state

(C) Strategy Goal: A rationalized 'optimal' number of ERP platforms with shared business processes and module instances



Future (beyond 5 yrs)

(A) And (C) can be considered as bookends of the continuum of possible end-states, (B) is an example of an end state. There are multiple possible end states

# ERP Strategic Timeline

2016

2017

2018

2019

2020



Individual PSI Participation

ERP Strategy

Implementation Plan

Feasibility & Business Case (for each objective)

Project Services

SUPPORTS AND INFORMS

Determine best practice standards

Optimize ERP Version

Est. a vendor mgmt service

Optimize business process

Est. a resource sharing service

Migrate PSIs to Educloud

Establish BCNET Educloud

Replace Legacy systems with a common ERP (VIU, Selkirk)

Upgrade Banner Systems to XE

Replace SIS (UBC)

Upgrade People Soft (UBC)

Upgrade People Soft (SFU)

## Legend



Sector planned or in-flight activities



Activities TBD by ERP Strategy & Implementation plan

## ➤ Next Steps

# Next Steps

- Finalize ERP Strategy through sector input
- Submit ERP Strategy to ASDT Steering Committee for approval
- Confirm funding for ongoing project activities:
  - Confirm Governance and identify Roles and Responsibilities between stakeholder organizations (ASDT, BCNET, PSIs)
  - Develop a high-level project plan (in partnership with the Sector and BCNET)
  - Develop business case for each objective

## ➤ Additional Information

# Some Definitions

**Platform** – an ERP ‘type’ e.g., Banner, Colleague and database type e.g., Oracle, SQL Server

**Instance** – a single occurrence of an ERP system and its database (two institutions can have the same platform and software/database version but different instances)

**Version** – a vendor determined version of a product e.g., Banner XE, PeopleSoft v 9.2 and Oracle 12c

**Module** – A set of functions within an ERP dedicated to support a particular business area (e.g., Colleague HR)

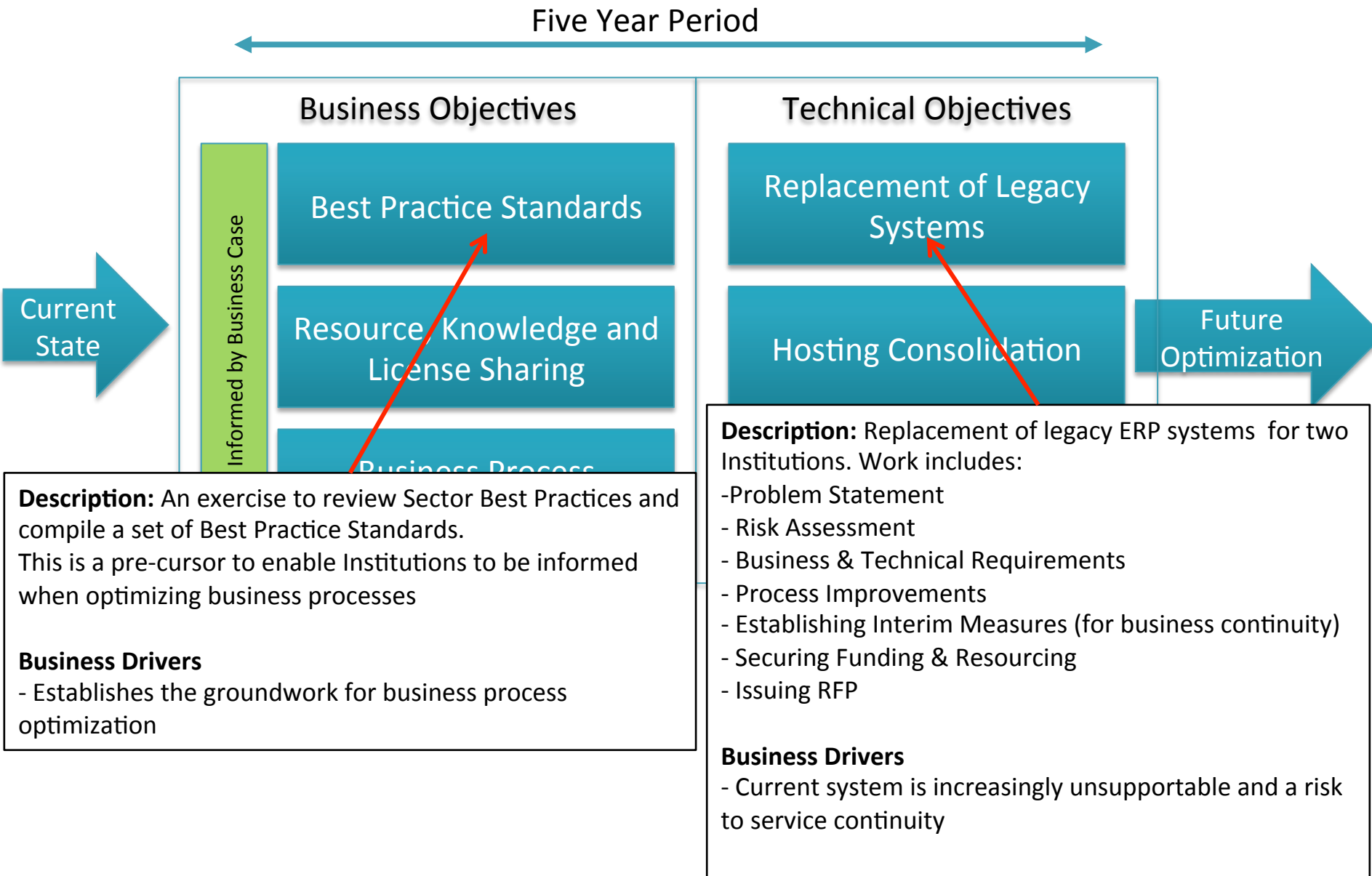
**Cloud Computing** - Cloud computing solutions provide users and enterprises with various capabilities to store and process their data via the internet in third-party data centres

**SaaS** – Software as a Service: is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted.

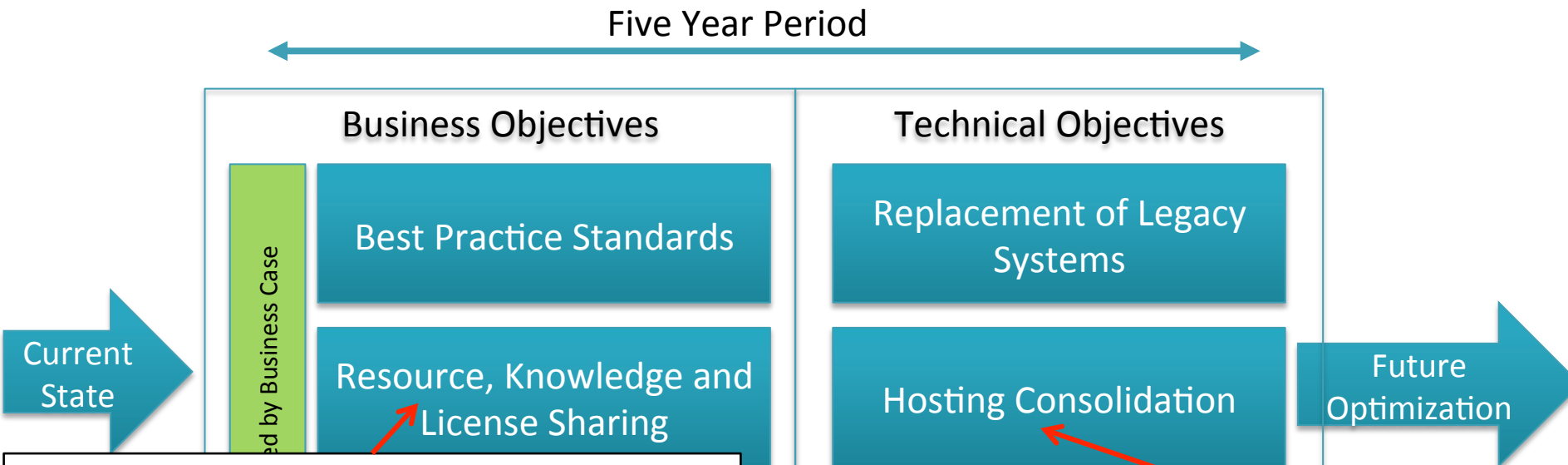
**Software Licensing** - is a legal instrument (usually by way of a contract) governing terms and conditions for the use or redistribution of software.

**Upgrade** - is generally a replacement of hardware or software with a newer or better version, in order to bring the system up to date or to improve its characteristics.

# ERP Strategy: Objectives



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**Description:** Institutions collaborate to share:

- Knowledge
- Licensing Costs and Vendor management

## Business Drivers

- Reduce costs and risks; Better vendor access
- Increase effectiveness due to shared knowledge
- Increased capacity for application support and changes
- Improved quality; Increased Sector standardization
- Increased staff retention

## Notes:

- Some investment will be required to support cross team communication
- shared resourcing will require an alignment and/or coordination of priorities
- governance may be a challenge

**Description:** Institutions migrate their ERP systems to common hosting services potentially leveraging cloud technology

## Business Drivers:

- Enables system alignment
- Enables enhanced resource sharing (e.g., DBAs, )
- Less system/service risk for the institution
- Increased scalability and availability
- A shared TCO

## Notes:

- There maybe multi-tenancy contention, governance will be a challenge
- There will need to be an upfront investment including an architecture effort

# ERP Strategy: Objectives

