BCNET

Shared IT Services for Higher Education & Research

Conference 2018

ERP Office

Opportunities and Value

Agenda

- Brief History of ERP Office

- Sector ERP Landscape

- Services and Benefits

- Governance and Funding

- Assessing Opportunities

- Current Initiatives

History of ERP Office

- ✓ 2013 Deloitte Report
- ✓ 2016 Sector ERP Strategy
- ✓ 2017 Business Engagement Report (BER)

Key Recommendations

Recommendation to establish an ERP office to facilitate collaboration

ERP in Higher Education

Core ERP Functions

Finance and Accounting
Core Accounting
Accounts Payable
Accounts Receivable
Treasury
Budgeting
Grants & Fund Management
Project Accounting
Asset Management
Purchasing

Human Resources
Payroll
Benefit Management
Time & Attendance
Labour Relations
Health & Safety
Employee Development
Planning & Management
Budgeting

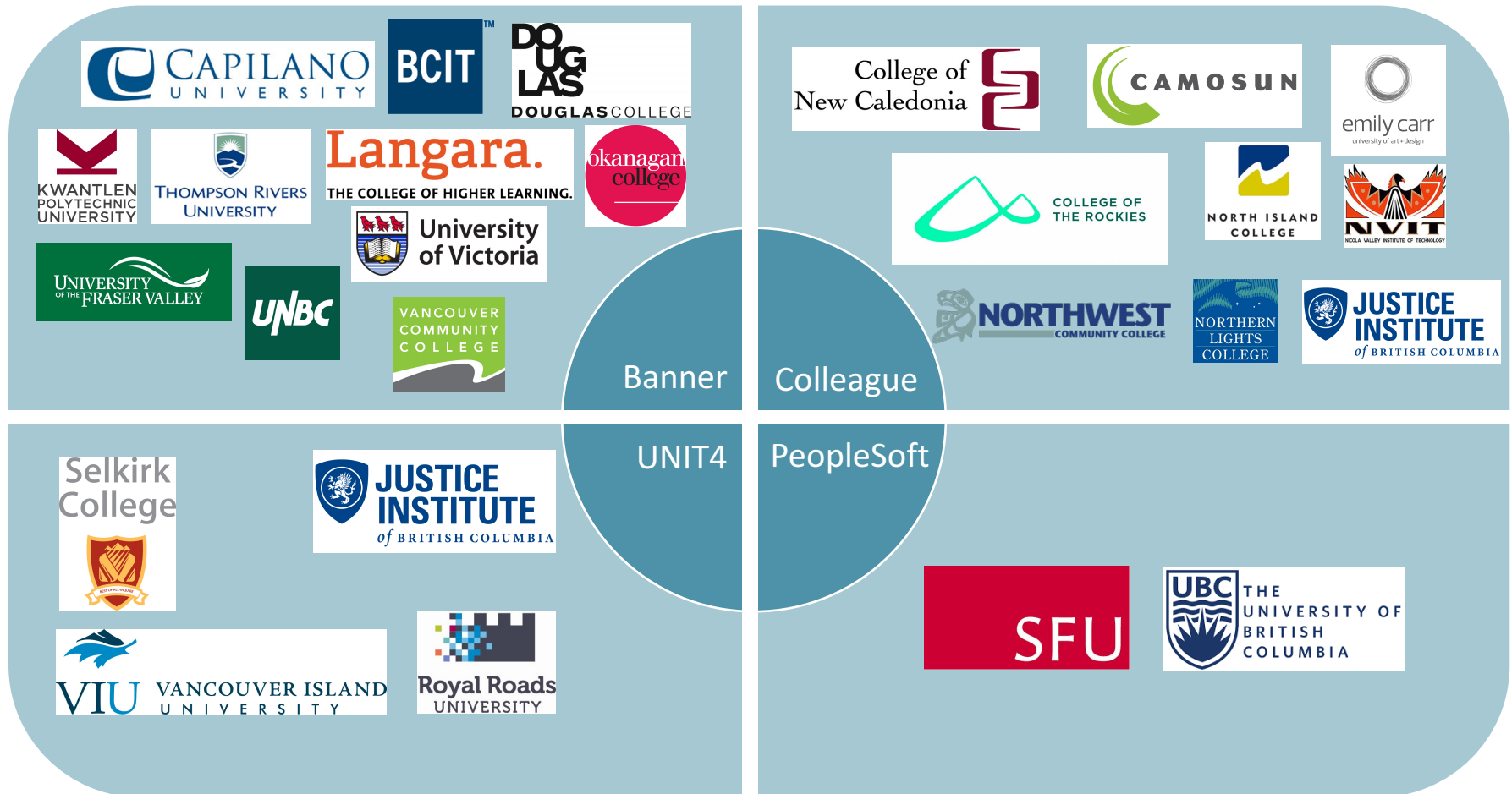### Student Information
Recruitment and Admissions
Records, Registration & Enrolment
Student Finance
Student Financial Aid
Learning Paths & Advising
Schedule Management
Assessment & Outcomes
Curriculum Management
Student Affairs & Support Services

Common Services
Workflow
Document Management
Operational Reporting
Analytics
Data Sharing
Portals
Mobile Access
Security & Audit

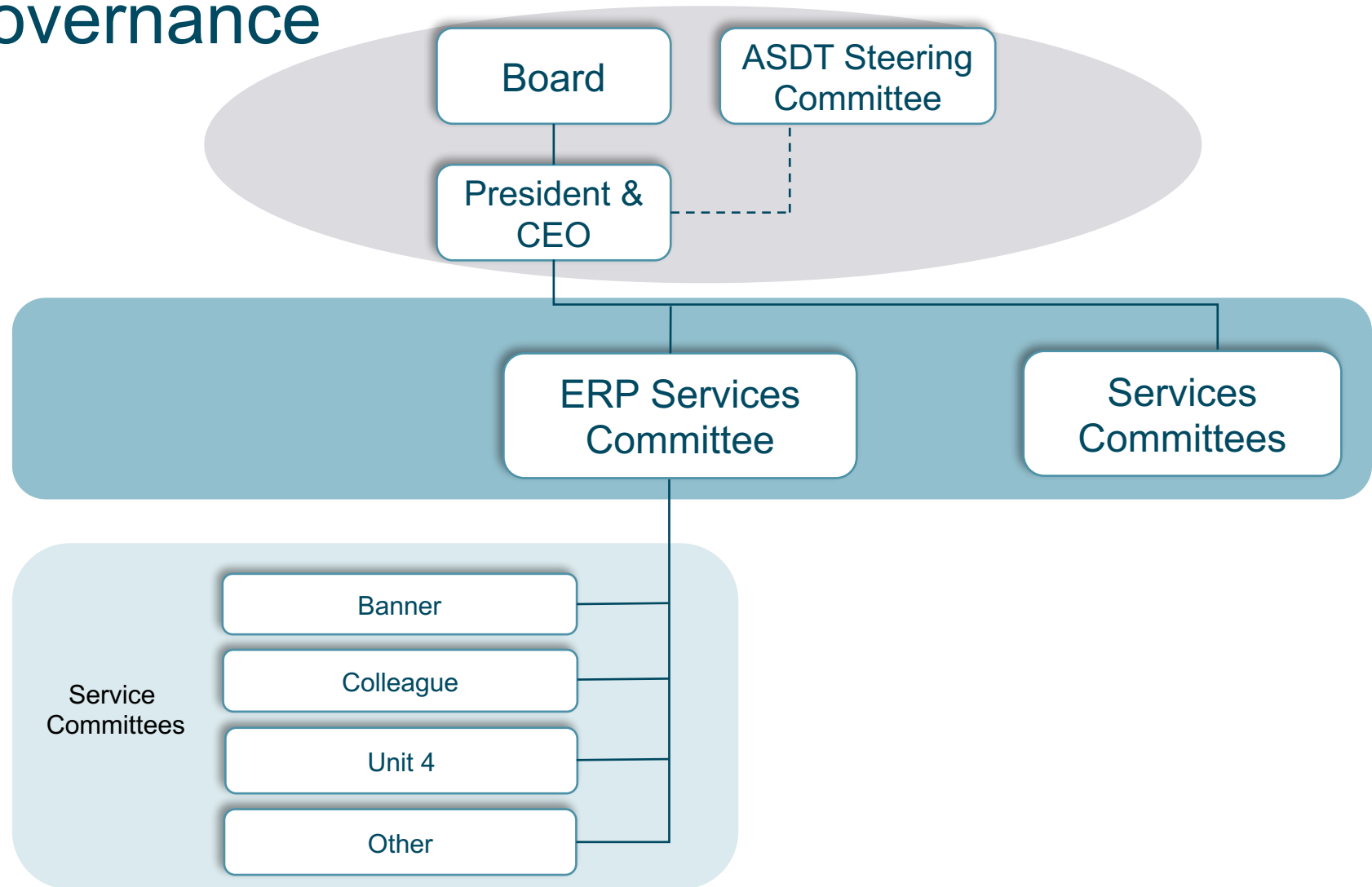# Sector ERP Landscape

Banner

Colleague

UNIT4

PeopleSoft

ERP Office Services

- High-level strategic consultation
- Online body of knowledge
- Sector-wide contract negotiation
- Simplified onboarding for common platforms
- Coordination and management of shared initiatives

ERP Office Benefits

Governance

Funding

Seed
- ASDT/Ministry

Ongoing
- Institutions
- ASDT/Ministry?
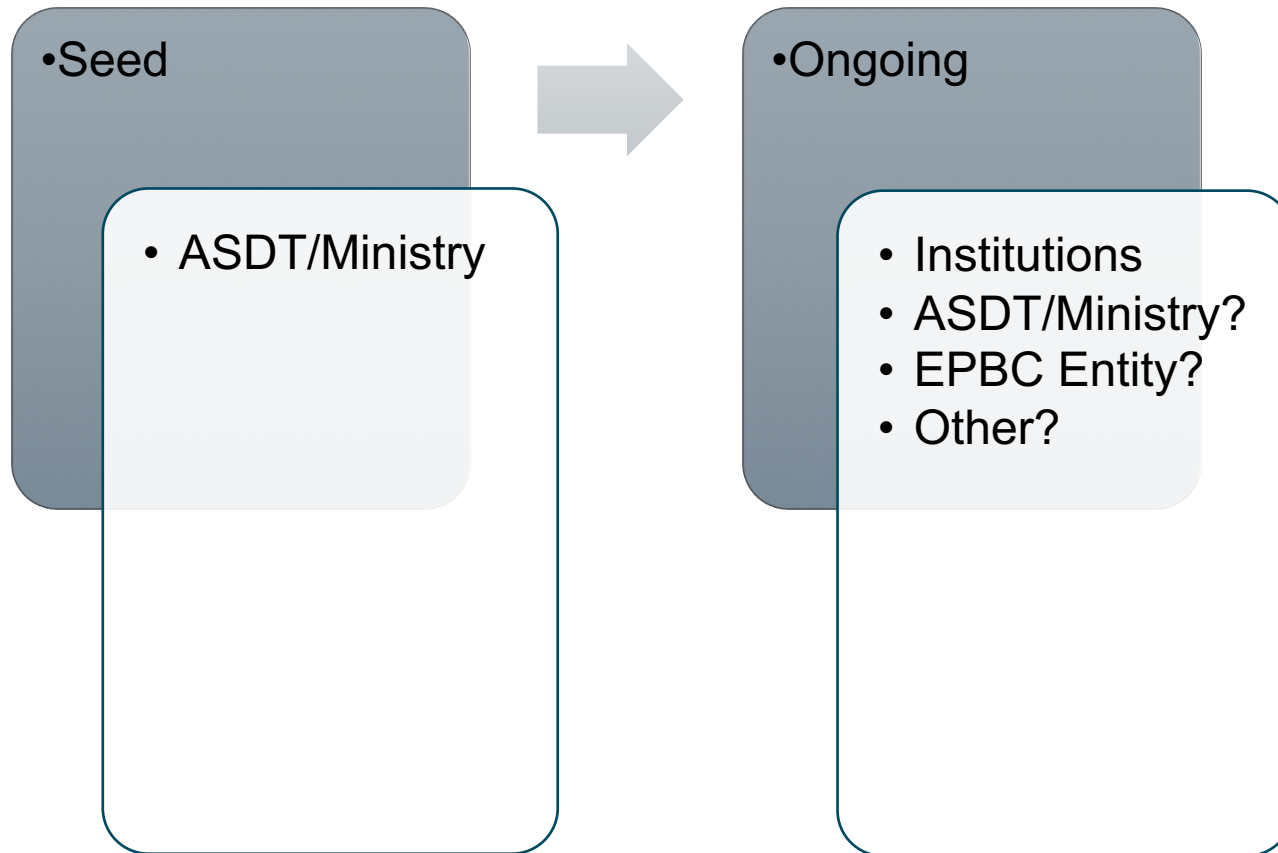- EPBC Entity?
- Other?

Assessing Opportunities

Met with
VPFO/CIO/Team
from 20/25 PSIs

- Provided background on ASDT/ERP Office

- Gathered current state and challenges

- Provided summary of findings to date

- Assessed interest in potential service options

Assessment Overview

ERP Platform

- Market evolving, emerging alternatives incomplete
- Relatively stable as-is, re-evaluate in 2-3 years
- Struggling to leverage baseline functions
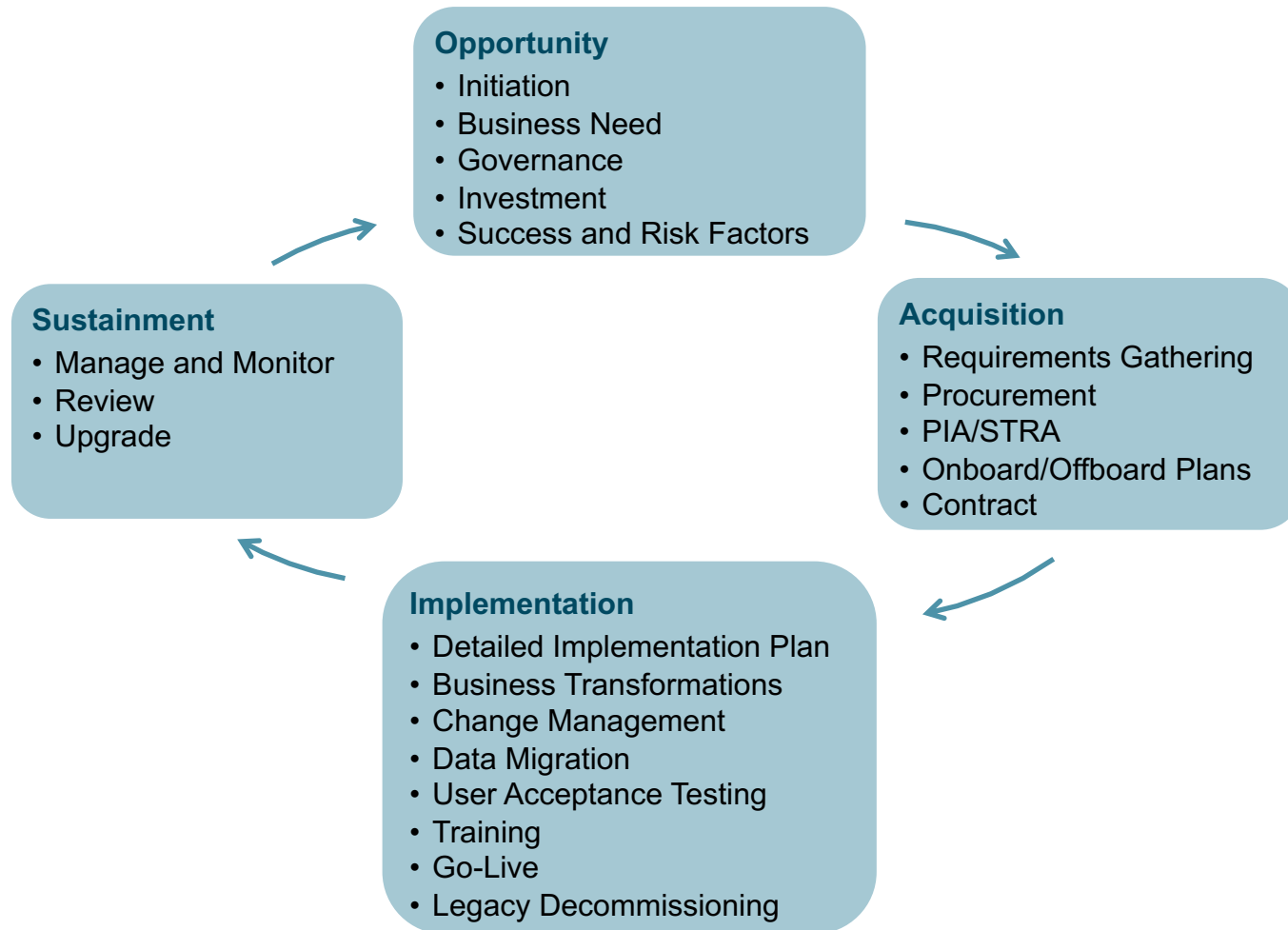- Cloud becoming more prevalent

Human Resources

- Recruitment and retention always a challenge
- Privacy & security demanding more resources
- Smaller institutions have distinct disadvantage

Initiatives
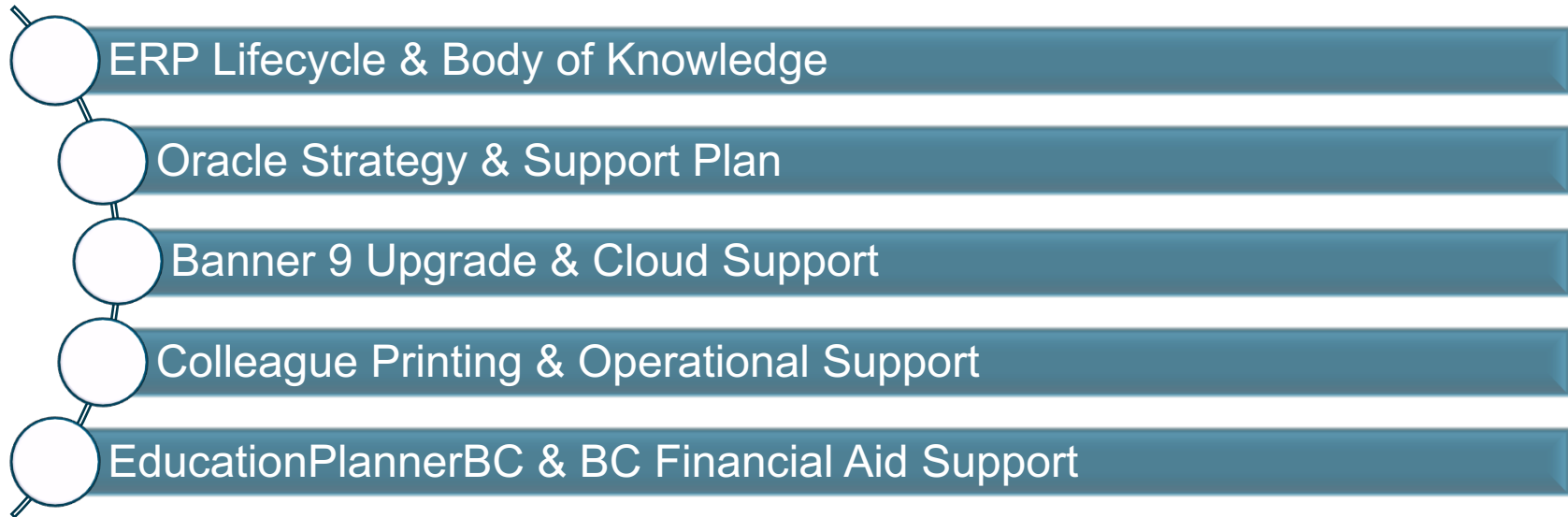
- ERP Lifecycle & Body of Knowledge
- Oracle Strategy & Support Plan
- Banner 9 Upgrade & Cloud Support
- Colleague Printing & Operational Support
- EducationPlannerBC & BC Financial Aid Support

ERP Lifecycle & Body of Knowledge

Opportunity
- Initiation
- Business Need
- Governance
- Investment
- Success and Risk Factors

Acquisition
- Requirements Gathering
- Procurement
- PIA/STRA
- Onboard/Offboard Plans
- Contract

Implementation
- Detailed Implementation Plan
- Business Transformations
- Change Management
- Data Migration
- User Acceptance Testing
- Training
- Go-Live
- Legacy Decommissioning

Sustainment
- Manage and Monitor
- Review
- Upgrade

Oracle Strategy & Support Plan

Banner 9 Upgrade Support

Background & Discussion

- Not "de-supported" but "sustaining support"
- Banner 9 primarily UI upgrade
- Banner 8 will run beyond December 2018

Upgrade Support

- Forms conversion guide & dev environment setup
- Skeleton forms
- Coordinated upgrade of bolt-on modules

Colleague Printing & Operational Support

- Process
- Compliance
- Consistency
- Service

Help Desk & Operations

Business Analysis & Project Mgmt

- Performance
- KPI's
- Planning
- Accountability

- Savings
- Value
- Effectiveness
- Performance

Strategic Opportunities

Software Development

- New Functionality
- "Voice of the Customer"
- Participation
- Improvement

EducationPlannerBC & BCFA Support

Questions & Support

BCNET Wiki

- https://wiki.bc.net/atl-conf/display/BCNETERP/BCNET+Enterprise+Resource+Planning+Home

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