

# SELECTING ADMINISTRATIVE SYSTEMS



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# SEVEN STEPS TO SUCCESSFUL SYSTEM IMPLEMENTATION

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## STEP 1: REVIEW

- Organize a team of stakeholders
- Review current processes and procedures:
  - What is working?
  - What needs to be improved?

## STEP 2: SET GOALS

- What does the system need to do?
- What could the system do?
- Establish the goals for the procedure & process updates
- Establish a general timeline for project
- Establish criteria for the solution
- Establish a budget

## STEP 3: INFORMATION GATHERING

- Contact vendors
- Research potential solutions
- Discuss with other districts for potential solutions
- Demonstrations of solutions

## STEP 4: PROPOSALS

- Narrow the search of solutions
- Get vendor proposals
- Evaluate proposals / solutions
  - Demonstrations
  - Evaluation Rubric

**FINANCIAL INFORMATION SYSTEM EVALUATION FORM**

**Name:** \_\_\_\_\_ **Department/Building:** \_\_\_\_\_

**System:** \_\_\_\_\_ **Overall Average Rating:** \_\_\_\_\_

**System Overview**

User Friendly Interface System-wide  
 Consistency of User Interface  
 Standard Reports in all Function Areas  
 State/Federal Reporting Compliant  
 Conversion – Amount of Historical Information  
 Integration of all Modules

**Information Technology**

Web Based  
 Standardized Database Engine  
 Employee Applicant Portals  
 Security (LDAP Compliant)  
 SIF Compliant  
 Longevity  
 Maintenance/Support  
 Volume Licensing  
 Custom Fields  
 Ad-hoc Report Writer  
 Conversion Function/Process

**Requisition/Purchase Orders**

Auto Deletion of Open PO's on BOY  
 Different Shipping Locations  
 Ability to integrate Vendors with Personnel  
 Interface with ASN's/Budgeting  
 PO Printing

**General Accounting**

Control Points  
 Budget Prep  
 Personnel/Fund Account Budgeting Sync  
 End of Year Procedures  
 Fixed Asset Capability  
 Capital Project Tracking

**Human Resources**

Certifications  
 Degrees  
 Attendance  
 Course Credits  
 Supplemental Position Tracking  
 Seniority Tracking  
 Auto Step Level  
 FTE Tracking  
 Cobra Billing/Tracking  
 Benefits Interface  
 Negotiations  
 Personnel Budgeting

**Accounts Payable**

Check Printing  
 Check Register  
 Manual Check Ability  
 Error Flags  
 1099 Printing

Rating System  
 1 - Unsatisfactory  
 2 - Below Average  
 3 - Average  
 4 - Good  
 5 - Excellent  
 N/A - Not Applicable

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## STEP 5: PROJECT PLANNING

- Timelines
- Communication!
  - Develop Communication Plan Early
- Pilot, Phasing or all at once?

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**Upcoming Tasks**

Description	Who	When	Where	Status	Notes
Power & Network Wiring for Safe Locations	Facilities	2/29-3/3	DMS & LMS Only	COMPLETED	
Camera Placement Identification	CM3	2/29-3/3	DMS, LMS, MC	COMPLETED	
Wiring Materials & Onsite Review	GT Telecom & DASD	Friday, March 4 <sup>th</sup>	DMS, LMS, MC	COMPLETED	
Wiring Installation – Mostly Interior	GT Telecom	March 29 <sup>th</sup> – March 30 <sup>th</sup>	MC	COMPLETED	
Wiring Installation – Mostly Interior	GT Telecom	March 9 <sup>th</sup> – March 17 <sup>th</sup>	DMS	COMPLETED	
Wiring Installation – Mostly Interior	GT Telecom	March 17/18 <sup>th</sup> – March 28 <sup>th</sup>	LMS	COMPLETED	
Wiring Installation – Exterior with drilling	GT Telecom	March 23 <sup>rd</sup> – March 28 <sup>th</sup>	DMS, LMS, MC	COMPLETED	
List of Users Delivered to IT	Tim Hubbard	April 20 <sup>th</sup>	CO	COMPLETED	
User Account Creation	Mike Balk	April 27 <sup>th</sup>	CO	COMPLETED	
Camera Installation – Interior	CM3	April 27 <sup>th</sup> – April 28 <sup>th</sup>	MC	THIS UPCOMING WEEK	
Camera Installation – Interior	CM3	April 29 <sup>th</sup> – May 4 <sup>th</sup>	DMS	THIS UPCOMING WEEK	
Camera Installation – Exterior	CM3	May 5 <sup>th</sup> – May 12 <sup>th</sup>	DMS		
Camera Installation – Interior	CM3	May 13 <sup>th</sup> – May 18 <sup>th</sup>	LMS		
Camera Installation – Exterior	CM3	May 19 <sup>th</sup> – May 25 <sup>th</sup>	LMS		
Punch List Items	CM3	May 27 <sup>th</sup> – May 31 <sup>st</sup>	MC, DMS & LMS		
Camera Training	Tim Hubbard	TBD	DMS & LMS		

Legend
Completed
Upcoming or In Progress
Unexpected Delay
Halted – See Notes

## STEP 6: IMPLEMENTATION

- Conversion
- Training
  - Acute
  - Re-Training
- Adjustments
- Documentation
  - Configuration
  - End User - Canned vs District Specific

## STEP 7: POST MORTEM

- Evaluate Program
- How did the implementation go?
- Is the solution meeting the needs / goals?
- What adjustments are needed?
- Ongoing Support/Maintenance

## QUESTIONS?

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