



IT Exchange

What's Up With EBSP?

October 24, 2008

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Agenda

- EBSP Scope
- EBSP Status
- EBSP Project Lifecycle
- Project Considerations
- College/Unit Participation
- What Units Can Do to Prepare
- Questions



EBSP Scope

- HR/Payroll - SAP
- Finance - Quali Financial System (KFS)
- Research Administration - Quali Coeus
Research Administration (KCRA)
- Business Intelligence - Cognos
- Budgeting - Cognos
- New key identifiers
 - CUC
 - Account Number



EBSP Status

- We've selected the key software
 - SAP, KFS, KCRA
 - Cognos
 - IBM Information Server (ETL)
- We've selected our consultants
 - BearingPoint – Project Mgmt, Technical
 - Exeter - HR
 - IBM – Finance, BI, EIS, Change
- We're starting Blueprinting
 - Runs until February
- Staffing
 - Tech staffing continues to be a challenge
 - Otherwise, we're where we need to be



EBSP Methodology

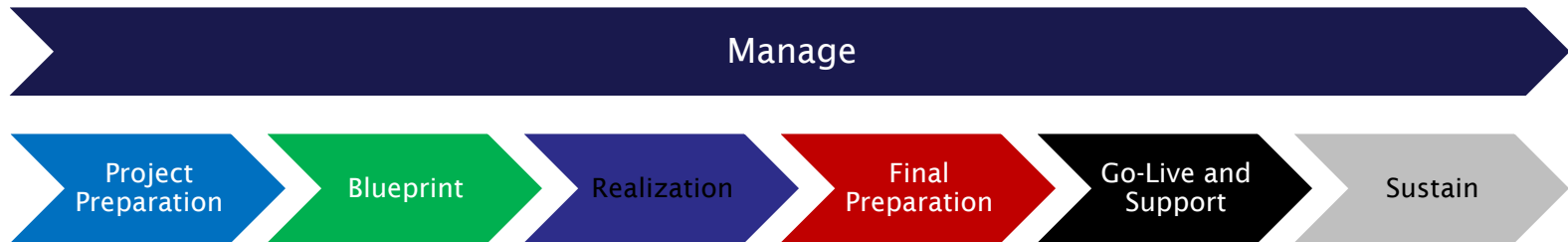
Methodology - a working definition:

- Sequence of activities/tasks designed to achieve a specific goal
- Logically broken down into phases
- Contains
 - tasks specific to a project
 - tasks common across all projects
- Introduces a common language and framework to the project team



EBSP Project Methodology

EBSP Project Methodology





Manage the Project

- Plan and manage project
- Manage risks –
 - things that threaten the Project
- Manage issues –
 - things that have be decided
- Perform quality control and assurance
 - for Project activities and deliverables
- Manage the assigned staff
- Manage the budget



Project Preparation

- Develop project plan
- Create initial strategies and approaches
- Build sandbox environments for each application
- Develop common templates, tools and project policies and procedures
- Initiate stakeholder management
- Develop communications strategy and plan

***Getting everyone on the same page =
a substantial learning curve***



Blueprint

- Identify system enhancements/configuration
 - HR and Finance workshop sessions now underway
 - Document future business processes and procedures
- Gather Business Intelligence Requirements
 - Define the Data Warehouse
- Document Conversions and Interfaces
- Build and support application environments
- Develop the training strategy
- Establish the change network

Design the solution, and define the policies and new business procedures.



Realization

- Configure the systems
- Finalize conversion and deployment strategies
- Create test scripts
- Perform development and unit testing
- Perform role mapping for security
- Perform integration, conversion and security testing
- Develop training materials

***Build and test,
Plan for Go-Live.***



Final Preparation

- Perform user acceptance and stress testing
- Conduct final readiness assessment
- Finalize and perform cut-over plan
- Transition the workforce
- Deliver training
- Obtain Steering Committee approval for Go-Live

Perform final testing, conversions and training, and implement the support system.



Go-Live

- Go-Live with production
- Provide help desk responses
- Provide production support

***Turn it all on, and
Support the end-user community.***



Sustain

- Provide for and conduct ongoing training
- Develop, test and deliver enhancement requests
- Perform database tuning
- Apply application and environment patches and fixes

Transition to the on-going support organizations.



EBSP Project Considerations

- Project scope
- Project team composition
- University calendar
 - No single “good” date to go live
- Software release schedule
- Faculty and staff transition effort
 - The new processes will look very different
- Project team implementation experience
 - We haven’t done a project of this magnitude in a long time
- “Consensus” vs. “Command and Control”



College/Unit Participation

- Participate in Blueprint and requirements gathering sessions
- Review of new processes and procedures
- Participate in defining the needed interfaces
- Participate in creating new Chart of Accounts
- Conduct user acceptance testing
- Determine security access for end users
- Attend forums, workshops, and training
- Provide feedback



What Units Can Do to Prepare

- Visualize your organization's structure
 - Create current organizational chart starting with MAU and including jointly administered and unique CUCs
 - Include any cost centers, divisions or functional areas

- Determine your reporting or analytical needs
 - Reports required by internal and external parties
 - Reports needed to inform business processes (budgeting, promotion, tenure reviews, etc.)
 - Data necessary for each of these (HR, finance, space, SIS, etc.)



What We've Covered Today

- EBSP Scope
- EBSP Status
- Project Lifecycle
- Project Considerations
- College/Unit Participation
- What Units Can Do to Prepare



Thank you for your time!

Questions?

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