

Below are the minutes of the annual ASM meetings.

EDUCAUSE 2004 ASM Lunch meeting, October 20

Eric Bird moderating, Kevin Shalla taking notes.

About 60 attendees were present.

After a round of introductions of where people were from and what their interests were (what they would like to discuss), we started the discussion.

Of those who used consultants for a software implementation, it was fairly divided between those who used them and those who didn't, and they would all do it again the same way if they had to do it over again.

One strategy for facilitating productive decision-making among diverse community of school interests is to give each functional area 100 points which the area attributes to each core requirement (not wish list item). Get discussion going regarding what the future is of each area and overall direction.

There is a three legged stool with legs from functional, technical, and vendor.

If gaps exist, how do they get resolved? This is where third party applications can come into play, however these often lead to integration problems.

Data flow diagrams can be useful to illustrate how data in one area affects

another.

Some schools select product without using an RFP process. This can be due to several factors:

- 1.requirement to select quickly
- 2.RFP can be a smoke-and-mirrors document
- 3.RFP process can scare off vendors

Perhaps it would be best to simply raise unusual issues for your school.

When doing demonstrations, the customer needs to lead. Get away from the vendor script, and identify the processes that must be demonstrated.

After narrowing down finalists, call other schools to check up on facts. Long-term relationship with vendor can be important, but how long does company exist as is (before it gets acquired)?

After demonstration, one-on-one hands on work can be very helpful.

Probe your vendor for availability of consultants.

Invite many users (faculty, staff, students) to help identify gaps.

Be open to vendor's suggestions of doing business differently.

Application Integration

How do you decide which modules to implement as part of ERP? Top-down decisions help. Define integration is that simply a batch feed, or is there more to it? During initial ERP selection, find out who the

integration partners are, as they are more likely to provide better integration support. Third-party consultants could open up possibility of finger-pointing.

#### Reporting

Perhaps vendors should only provide assistance with standardized requirements. Need to report from reporting database, not operational. Crystal Enterprise can provide good security and is good for power users. Complexity of data makes it hard for non-analysts to produce useful reports.

Senior management support is critical. They need to understand that new projects and modifications will slow down the project.

Funding. Project managers must be very assertive to not take on new features without deliberation. Get buy-in from top on preventing changes on old (those being replaced) systems.

EDUCAUSE 2004 ASM Constituent Group – meeting #2

10/20/04

Kevin Shalla moderated; Eric Bird taking notes

1. introductions and issues:

- build vs buy
- middleware

- reporting / business intelligence
- SSNs for keys
- web access for students
- change management
- communications
- documentation
- implementation benchmarking
- unification
- portals
- value after implementation
- integration strategies for best of breed
- costs
- what to do differently next time in selection / implementation

process

## 2. Moving away from SSNs for keys

- warning: systems you don't know about will be impacted
- could do it as part of ERP implementation
- if good business case exists for a particular system to continue

using SSN, it's ok (e.g., financial aid, human resources)

- caution where you store SSN, even if not key: could be queryable
- check with your legal counsel!

## 3. Before you sign a contract...interview implementation consultants

- BUT: that may or may not be successful; sometimes people

interview well but don't work out anyway

- Also, be forewarned, vendor resources may be very limited

4. Security: don't you think students are a threat to security

too? YES à but this is a better topic for the security constituent group.

5. Build vs. buy: when you buy, you risk losing the "legacy

people"the skillset, knowledge held by local programmers and analysts.

- local knowledge is key!

- how do you replace the core application when it runs everything?

- response: why replace core app? answer: more

agility/responsiveness, ability to find appropriate staff to support it

- don't forget about outsourcing (e.g., payroll) – gets IT out of

the business, for better or worse

- buy tends to work best when you are willing to follow the

vendor's business processes, using the system mostly "plain vanilla".