



Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103005 What is your definition of a modern ERP System?

- 1 For a good definition, look at this document from EDUCAUSE...
11/26/2002 10:32:05AM Attachment: EQ - ERP Lessons Learned.pdf
- 2 Re #1, there are very good resources at EDUCAUSE's web site.
11/26/2002 10:34:05AM Link: <http://www.educause.edu>
- 3 1. User friendly. 2. To improve access to information as well as improve workflow and efficiency. 3. Ability to have cross functional integration with in various departments. 4. Easy to use web interfaces, having capability to send & receive documents securely & electronically. 5. Have flexibility in implementing & maintaining, and allowing custom mofications to make changes.
2/13/2003 12:29:10PM
- 4 I agree with the comments made by Sylvia Cuthbert
2/20/2003 2:31:01PM
- 5 I agree with all of the above comments but would like to add that it also needs to be user friendly with our customers also, not just employee's.
2/21/2003 7:18:03AM
- 6 A system that will provide all end users with the information that they need in a format that can be easily accessed and used. We also need a system that the initiator of documents can use easily, but provides online help if needed.
2/24/2003 9:37:35AM
- 7 We need a system that provides data for all the end users that they can understand. We need to have one system that works for the university and not several different systems that do not communicate well together. Exaple would be that the financial side terminated a BACC# and the HRS system still has it as an active number and when that number is used in the HR side it creates a problem.
2/24/2003 2:13:57PM
- 8 An improved administrative system(s) will gather, at the lowest level, the data that is needed to provide functional and end users the information they need in the manner they desire. Data elements must be defined in a manner such that users of the data can easily identify what they need and have confidence in what they retrieve. An acceptable system will store data elements only one time and have them available on a consistent basis that is understood by all users. A real time, 24X7, would be ideal but may not be practical. The addition of data from feeder systems must be consistent and known by all users.
2/25/2003 8:42:46AM
- 9 We all want great data in the system and a friendly way to get it out. We also need an efficient and effective manner to get the data in. Everything we ask for on a report or in a file has to be entered somehow. Hopefully, a new system will have multiple input methods - web, users, HR, from other systems, etc. The next step would be methods to insure accurate data.

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1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103005 What is your definition of a modern ERP System?

2/28/2003 5:28:03PM

10 A modern system is secure yet user friendly, and provides appropriate access (read only, read & edit, etc.) to needed areas within the system. It would also be able to track modifications to data within the system (who, when, what) to establish accountability for accuracy.

3/5/2003 8:29:16AM

11 Timely, accurate, user friendly, provides audit trails, data integrity, extraction of data by management should be easily accessible.

3/6/2003 8:28:32AM

12

1. To improve access to Faculty, Staff and Student information.
2. Make workflow easier
3. Increase efficiency
4. Reduce the amount of paper used
5. Provide user friendly Web-based interfaces
6. Streamline processes
7. Have underlying support for a new system so that we can establish a foundation for integrating our existing systems

3/6/2003 12:42:02PM

13 To make more consistency between the systems. Example: a student worked in our office and his name was spelled wrong on his paycheck but when we checked it in the student's records it was right. When we call for one area to update something there is a offline process that only gets updated on the weekend which it would be better to see the updated change on all systems at the same time.

3/12/2003 9:30:27AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103005 What is your definition of a modern ERP System?

- 14 DATA INTEGRITY – A modern student system allows entry of data in an increasing variety of ways including: direct student entry, staff entry using forms or phone, electronic files provided by outside groups, electronic files provided from other schools, electronic files provided by faculty, etc. The sources of data and the input techniques are increasing. This increase in data entry techniques demands increased data edit as the data enters the system. Erroneous data should be identified and corrected at time of entry. Audit trails of data should exist so that if erroneous data is identified then the source of the error can be identified. Many of the FOCUS programs I write are used to identify erroneous data elements and prepare reports that allow the errors to be corrected.
- CONVERSION – Does a modern student system mean that BGSU must do a massive conversion from the current student system including many conversion programs, conversion of data, integration of various systems, years of midnight oil, months of planning, etc? If so, does that mean we will need to do it all over again in another ten years? I believe a modern student system should have an integrated “data base” to provide many of the features described in previous comments. But, it also needs to have independent components that can be changed without conversion of the entire system.
- To my knowledge we now have four major “data bases”: SIS, Financial Aid, Housing and Alumni. We also have three or four address “data bases” at various places on campus. All of these should be consolidated into one.
- After the new system is running let’s assume a new system is needed for “grade processing” or “financial aid awards” or “billing”. I believe the modern system should be able to allow the installation of a component without converting the entire student system while keeping the common “data base”.

3/14/2003 8:44:37AM

- 15 A modern system would provide a secure, user-friendly environment that would streamline workflow. The new system needs to be comprehensive in nature (it would interact with all of the different systems we use - financial, student records, etc.) and be able to produce data that can easily be understood. A new system should have a more streamlined reporting system in place that easily generates reports and information.

3/18/2003 8:58:23AM

- 16 User friendly, web based, and easily adaptable to different requirements for different areas.

3/27/2003 7:51:56PM

- 17 A comprehensive, totally inter-related relational database that is both user and accessor/viewer friendly, with on-line help/pointers, and with highly flexible reporting tools to obtain the data in a variety of sorting patterns and formats. A system that is readily adaptable to web-based viewing of information and forms, input of data, and response to that input. All of the financial, student business, and student life, etc. modules need to be inter-related. Input of data in one area populates that same data field in all other areas; for example, something as simple as "date of birth" or "local communications address", or "permanent/legal address", should automatically replicate through the system, once the official "input entry" office or point has been determined.
- The ability to interface or directly conduct e-commerce also needs to be a reliable and dependable facet of this software. This software should facilitate web course students to file for financial aid, register for courses, pay the bill, access the needed books, pay for the books, and post grades (that were input directly by the faculty). At this point in the 21st century, it should have all the bells and whistles available in order to conduct secure, efficient, logistical university business in a user friendly environment which is also understood and usable by the customer.

3/31/2003 4:13:45PM

103006 What are the most significant issues that a successful ERP System would solve for your organization?

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1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103006 What are the most significant issues that a successful ERP System would solve for your organization?

1 1. Minimize traditional paper process. 2. Provide a data warehouse so each area could extract the data. 3. Ability to have a "program alert", for individual departments or campus wide use.

2/14/2003 11:18:36AM

2 The system should be able to reduce greatly, and nearly eliminate, data redundancy. The same data field should be stored only once and used throughout all systems. A student who is also staff who is also alumni should have demographic information stored only once and shared by all systems.

2/19/2003 1:10:37PM

3 It should provide data extraction so departments don't have to keep an additional database to manipulate data they need for reports.

2/21/2003 6:24:51AM

4 I would think that a system that every department could utilize would be very helpful

2/21/2003 7:23:16AM

5 1. Ease of input -- a new system should be more user-friendly. 2. Ease of output -- a new system should provide for the reporting needs of the end user.

2/25/2003 10:14:13AM

6 A system easy for user input, manager review, and for ad hoc reporting, complete enough to handle the load, adaptable to address future needs, that can archive records (and recall them), has good data integrity checking and security. And must have the ability to get meaningful data out of the system in a timely manner - EASILY!

2/26/2003 2:39:40PM

7 To more easily perform purchasing functions, to obtain the efficiency benefits of e-commerce, and to better effectively monitor University purchases activities. The ability to manage all contracts, bids, and requests for proposals to realize savings from effective purchasing management through the bid purchase functions.

2/26/2003 2:46:18PM Link: <http://chronicle.com/daily/2003/02/2003022601n.htm>

8 By solving our input and output issues, we could begin to change the way we do business in HR. We could concentrate on our employees, such as help those looking for another job to create a resume or update their interviewing skills. We could help both supervisors and employees develop achievable and measurable goals as well as help them track progress. A better skilled workforce will save us money in the long run.

3/2/2003 10:46:31AM

9 Allowing access to information so that we can make informed decisions regarding staffing, services, strategic direction; Managing data and records so that individuals have access to their own data - "no-stop shopping" to allow us to spend time with students and their real issues - not how to navigate the system.

3/3/2003 5:02:25PM

10 A system that operates on real time, is integrated, provides diversified reports, easy access to essential data, and user friendly.

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1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103006 What are the most significant issues that a successful ERP System would solve for your organization?

3/12/2003 6:14:53AM

11 Sherri White's comment (#3) is very important. It would be nice to have a way to customize the entering of data, such as listing course numbers or faculty initials on an entry, and be able to use that information to track expenditures and create reports.

3/14/2003 12:59:03PM

12 Output is critical. Being a former user of FOCUS, I never want to return to that arena. FOCUS is not a user friendly tool and you cannot depend on the results. When I created FOCUS reports, some obscure piece of information always seemed to leak in although it fit none of the criteria. Users should not have to possess the skills of a programmer to get info out of the system.

3/17/2003 2:41:16PM

13 Elimination of redundancy is required in these times of lean staffing. The financial staff should not have to re-key info previously provided (electronically) by the user dept.

3/17/2003 2:42:55PM

14 A system that would eliminate multiple entry of data but yet allow us the flexibility to personalize our contact with individuals to the point that we do not give the appearance of a system generated contact.

3/28/2003 10:56:42AM

15 A much better set of reporting tools is definitely needed.
Facilitation of input, elimination of duplicate, or triplicate data entry.
A successful software package that could integrate all the various needs of the various offices and departments throughout campus onto one system's software package for better data management and reporting.
A way to facilitate the viewing of their pertinent data to the customers via the web site.
A better way for the customers to use our web sites to conduct their necessary business, if they so choose, or are directed to do so.

3/31/2003 4:23:47PM

103007 What opportunities might a new ERP system create for the organization?

1 Elimination of double work for many departments and hopefully elimination of paper.

2/21/2003 7:25:08AM

2 A more efficient, flexible method to conduct all types of business on campus by interfacing the various offices' modules.
A way to present the information on the web and other "publications" in a user friendly format and process.
Facilitate BGSU e-commerce.
Facilitate the gathering, organizing, and formulation of data for statistical analyses.
Establish a system that all could work with and understand more readily.

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1) Strategic Drivers, Vision, Scope and Impact, Why a New ERP System?

103007 What opportunities might a new ERP system create for the organization?

2/24/2003 12:30:53PM

3 To establish better relations with vendors, be more effective and efficient in purchasing goods and services, and save the University money.

2/26/2003 2:48:01PM

4 Establish a module which utilizes the e-procurement process. This module could potentially save the University both time and money by the ease in which our internal customers do business with preferred Vendors.

3/6/2003 8:37:22AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Student System?

103008 Briefly describe the role of a modern Student system.

1 A relational database from which query statements can easily be posed to obtain reports using data from various student business offices such as Registration and Records, Student Financial Aid, and the Bursar's Offices. Standard reports as well as impromptu queries are easily run. The modern student system's screens can be easily understood, the bills have a variety of formats, and comments about the status of accounts can be shared amongst offices. The interface to the general ledger should also flow smoothly with the real time system.
Students should also be able to access certain customer-oriented screens in order for them to understand what their financial aid is and how it is or has not been applied to their account. Some screens should also be available for the bill-paying parent to view, given their student's permission.
Payments on the web, and over the phone should be able to post to the student's account in real time.

2/17/2003 1:44:27PM

2 I agree with Nancy Colzman's comments

2/20/2003 2:35:23PM

3 to have a system much easier to understand and access by students and staff. to have bursar info, financial aid and financial systems all on one system. I also agree with Nancy Colzman

3/6/2003 1:11:44PM

4 A modern student information system must be web capable and seamless. It must eliminate the need of constituent offices to maintain separate systems which cannot readily be accessed by all that require the information.

3/7/2003 2:45:29PM

5 Amen to Gary and Nancy's comments. I esp. underscore the need for screens that are "readable" by non-experts in the coding.

3/11/2003 9:31:35AM

Project Name : Admin System Selection
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Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Student System?

103008 Briefly describe the role of a modern Student system.

6 A student system: Key words: seamless, user friendly, data consolidation (enrollment hours, billing, paid status, financial aid recipient, employee, residency, etc...), readable format, web accessible by students and parents, secure, eliminates duplicative efforts between offices (sending a piece of paper to another office to handle a task), on-line / real-time transactions such as financial aid application to a student's account, adjustable, automated, flexible - capable of handling multiple refund schedules for multiple academic sessions. Information should flow into the system from all administrative offices on-line to ensure the timeliest updates for all respective users.

3/13/2003 9:38:41AM

7 I agree with Nancy and Tawn's comments. A new system should be able to bill charges according to academic terms instead of strictly a balance forward accounting practice which roles everything together. This makes it harder to explain to students why Spring term financial aid can create an overall credit balance but the student actually still owes from previous term. The system should be sophisticated enough to provide either scenerio depending on user defined requests. I also believe a new system should be able to provide better coding from the human resource,payroll side to allow receivable users to know if they are dealing with an employee and if yes, what kind of employee for purposes of processing fee waivers and or payroll deductions. The fee waiver process should be such that areas on campus like Continuing Education can participate in the process and it not be so cumbersome. Staff who have provided input state several key elements they want to see included in a new student receivable system are as follows:need note or memo area so staff dealing with a student or bill payer can know contents of telephone, counseling, or email contacts as well as what types of letters have been generated regarding the account;any system of placing holds on student account needs to be able to provide ability to also place charge holds such as the bookstore, dining, student telephone systems etc; need flag in receivable systems to identify when a student has or will graduate, possibly set when they apply for graduation, and lastly need more functionality for processing return checks and how those are displayed in a receivable system and why they were returned.I know these are many ideas rolled into one that indicate why a new student system is needed to create more functionality which creates an easier understanding of the system and ultimately better customer service

3/13/2003 1:09:25PM

8 a system has to be a one stop shop with the capabilities to expand its services as new technology and new information are introduced.

3/17/2003 2:06:26PM

9 The modern student system should have a more seemless approach to records management. I agree with Gary Swegan's comments.

3/18/2003 9:20:24AM

103009 How should a new Student System improve the operations of the organization?

1 It should enhance the efficiencies of the operations (no more duplicate or triplicate entry of the same data in various offices). Flexibility of data management given a secure site will enhance the use and integrity of the data. A new student system should integrate all the functions needed to perform the office's responsibilities in a user friendly environment.

2/17/2003 1:50:39PM

2 I agree with Nancy Colsman's comments.

2/20/2003 2:36:41PM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Student System?

103009 How should a new Student System improve the operations of the organization?

3 MAJOR – I believe all students should be required to declare a single “Primary Major”. This primary major would be used for statistical and reporting purposes. Our current system allows multiple major for each student. Sometimes, a student has a major in two different colleges. To avoid duplication a single major is normally arbitrarily selected. This would lead to more accurate reporting.

3/14/2003 8:47:30AM

103010 How would a new Student System improve the operations of your department?

1 I am hopeful a new student system could manage the difficult task of refunding the students, whether aided or not, for the various summer sessions correctly. Some of the overnight batch processings (not just the reports) would be replaced with real time adjustments or additions to the accounts. The right new system would better coordinate the various updates and inputs that we perform over and over again since some input's timing of "hitting" the system could be pre-programmed. A sophisticated "tickler" file for dunning of accounts would also aid in our collections efforts.

2/17/2003 1:59:43PM

2 My current actions within the student system are to track additional background information on the funding transactions that are posted from the student system in the finance system. These transactions come into the finance system, and the budget specifically, in very large pieces. One line of transaction can have 25 different transactions. None of this detail is provided to the budget administrator. My staff spends a great deal of time leafing through screens and dates to determine the detail of the transactions that are charged against our budget. There is no quick way to access the information. It would be extremely helpful if the student system provided more detail in some type of supplemental materials so budget administrators would not have to run additional focus reports or go into the student system to find the transactions.

2/25/2003 11:34:08AM

3 Have the student records system talk to the human resource system. We can't tell if an individual in the HR system is enrolled as a student, when a requirement to be on the student payroll is that the individual is here primarily for the purpose of taking classes. We have to either check for enrollment before loading the record into HR, or monitor for enrollment each payroll run.

3/3/2003 5:08:46PM

103011 How would a new Student System improve your job?

1 It would enable me to view the data in different ways (look at different populations of accounts) in an ad hoc basis. I would design, select the data I wanted to view, and then call for the report when I needed it.

2/17/2003 2:01:55PM

2 I would not have to retype the information already in the system into a personal database so that I could manipulate the data I want in the way I want.

2/21/2003 2:43:52PM

Project Name : Admin System Selection
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1) Strategic Drivers, Vision, Scope and Impact, Why a New Student System?

103011 How would a new Student System improve your job?

3 If a new student system can interface with the finance system and provide detailed information to budget officers (online would be sufficient), it would save many budget officers a great deal of time that is spent trying to verify transactions. This problem occurs with revenue (checks) that are posted by the Bursar's Office through the student system to the finance system. Additional focus reports or searching must be done to find the necessary details.

2/25/2003 11:37:07AM

4 It would also be an improvement if the student system could use table names, screen names and leaving keys that were more logical. My staff members are not in the student system daily and sometimes it is hard to remember what screens provide what information. The current student system uses "prev" if you want to go forward to a future date and "next" if you want to go backward to an earlier time. What logic is that?

2/25/2003 11:42:12AM

5 I agree with Linda's comment regarding navigation - no logic!
Having a system that allowed comment tables so that data and information could be understood without calling someone from the department for an interpretation. For example, built in help tables that provided definitions or descriptions.

3/3/2003 5:14:34PM

103012 How would a new Student System benefit students?

1 It would provide them with up to the minute account information. Perhaps it could also inform/prompt them via e-mail that they have forgotten to do an action required by the financial aid office or the bursar's in order to resolve the bill.

2/17/2003 2:04:51PM

2 Give them access to their own data; account, registration, courses completed, etc, so they do not have to have someone else interpret the data for them, or send them bouncing around campus to each department who "owns" that particular data set. Very inconvenient for students. It could prompt them at various key points - junior audit, financial aid reminders, etc.

3/3/2003 5:23:23PM

103013 How would a new Student System benefit faculty?

1 Although faculty are not really concerned with those students who may be financially aided in their class, I believe that information would be useful in counseling a student who may be thinking of quitting the course, or the university completely. Advisors who also become involved with the financial status of a student in addition to the academic portion of the student's life, would be able to serve the student in a more holistic way if the advisor had access to the student's account.

2/17/2003 2:09:32PM

2 Our department has a fairly large commitment to the evening program. For those of us who teach or advise in the evening, it would be most helpful to have all online services available (e.g. degree audit, registration, etc.).

2/27/2003 9:22:30AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Student System?

103014 How would a new Student System benefit administrative staff?

- 1 If the new system is correctly programmed, and set up to efficiently interface with the general ledger, it will lessen the amount of communications and manual adjustments to the accounts. The Treasurer's office could also call for reports regarding the database that connects various offices in order to help the Treasurer to better understand the events and transactions within whatever accounts he/she may be so interested. If the data's integrity is well kept, reports comparing one year to the next on certain key accounts could help the Administration find out how the finances are progressing. Are we in good fiscal shape? at any point in time could be answered.

2/17/2003 2:18:34PM

103015 Share a scenario that would illustrate the value of a new Student system.

- 1 It would be an advantage to focus in on certain populations of student issues, balances, statuses with "targeted" correspondence and communication. For example, in March of the Spring semester, sends notices to those graduating seniors to take care of their balance before such and such a date so that their transcripts would not be withheld pending payment; nor their diplomas.
Also to be able to quickly identify those students who are taking a summer session 1 class and drop their summer session 2 course, who are financially aided. To stay on top of the dynamics of student registration with its resulting accounting ramifications.
To send out e-mails to those students who are about to be de-registered due to lack of complete payment, or to generate a calling list to call the candidates for de-registration before it really happens.

2/19/2003 12:31:35PM

- 2 I agree with Nancy...if the system allows us to target specific populations, we can be proactive (and send emails to students) on a variety of issues. Now we write FOCUS reports which give us data after-the-fact.

2/19/2003 1:46:38PM

- 3 Major improvements in data integration is one of the biggest benefits I see. Right now, for example, we contract with an external vendor to handle online Bursar payments. That can require students to "log in" twice (once to get into myBGSU and again for the payment processor). We should be able to handle that service ourselves and have the accounts updated automatically once the authorization is received from the credit card company. Students making inquiries about admissions could automatically be logged in the system as a prospect. Students filling out admission forms will have the data automatically entered into our system without the need of an interfacing program. A very natural and efficient information would enable students to obtain up-to-date information on admission status, financial aid or housing request status, bursar bill, and class registration. Some of this can be provided now, but the data isn't always real-time since it depends on batch updates. For example, a student can find out if a particular section is open or closed as of the previous night, but not as of the current moment. That's a reasonable expectation for a new system.

2/27/2003 9:32:46AM

- 4 Students can view their transcripts on line to attend an advising session where the advisor can pull up the student's record which has listed courses completed toward the major, a template of requirements for the major, history of courses taken by semester and year, instructors, and grades. Student and advisor could plan different course selections and propose different course arrangements, including the effect of taking a co-op or internship for a semester.

3/3/2003 5:20:07PM

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1) Strategic Drivers, Vision, Scope and Impact, Why a New Finance System?

103016 Briefly describe the role of a modern Finance system.

1 The role of such a "modern" finance system would be one that interfaces with all of its subsystems, such as accounts receivable, in an accurate, timely and user friendly manner. A manager could easily generate reports encompassing data from several areas for a more complete picture of that facet of the business. Data could be sorted in many different ways. Data could be assembled in such a way to create spreadsheets that can convert the data into graphs very easily. And the "what if" question could be posed using existing data in a forward thinking managerial way to make better decisions. The system would have the ability to analyze and calculate Cash Flows, and various projections. It would be formatted in such a way that would be easy to read, use and maneuver through its system.

2/19/2003 12:42:53PM

2 To be able to get any report or information to prepare reports or statistic's in a timely matter.

2/21/2003 12:10:48PM

3 The current finance system provided us with important and vital aspects needed for the preparation of the annual financial report. It does not try to address issues that affect more end users. A method of reporting is essential. While this is not just for the finance segment of a new ERP, it will be the issue receiving the most comments. We have accumulated a significant amount of data but cannot access it to do comparison reports, projections, etc. It also has to be easier to handle the budgeting aspects of finance. It is difficult to make changes to approved budgets; overrides are not available to make budget loading easier; and, users cannot see their approved budgets - except online.
Another important aspect to me is the ability to generate quarterly financial reports for submission to our Board of Trustees. We have been requested to do this for several years and are unable to respond to their request.

2/24/2003 9:18:35AM

4 to have a system that is easier to understand and one that interfaces with the various departments. to be able to run reports for the many issues of balancing the various budgets and receivable items

3/6/2003 1:19:01PM

103017 How would a new Finance System improve the operations of the organization?

1 Perhaps various departments could better understand and proactively use their budgets compared to the actual numbers.

2/19/2003 12:45:47PM

2 Hopefully less paper, and not so much duplication of job duties.

2/21/2003 12:12:57PM

3 A more user-friendly system would encourage areas and departments to do more of their work online rather than relying on paper or phone calls. Wouldn't it be nice if the easiest way to order a box of paper were to use a simple web form, rather than the current SR document or a phone call?

2/21/2003 12:21:13PM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Finance System?

103017 How would a new Finance System improve the operations of the organization?

4 My hope is that the new system will enable us to transmit purchase orders to many vendors electronically, receive the invoice electronically, and then automatically process payment once the receipt of goods and services has been verified ("three-way match").

2/21/2003 12:22:24PM

5 If a new finance system can generate a quarterly financial statement, the Board of Trustees would be appreciative and I wouldn't have to manually come up with a compromise report. Too much time is spent by the financial users trying to determine the status of their budgets, re-entering data into computer spreadsheets for trend and projection analyses, and trying to identify the purpose for various transactions that hit their budgets. From a budget manager standpoint, I would like to see an easier method for approving final budget loads and modifying them during the first few months of the year. If it were possible to use an across-the-board percentage to increase all budgets and then an easy method for making further adjustments, that might make my office's budget loading process much easier. As it currently stands, this process takes months to arrive at the final approved budget. Finally, an easy way to generate reports would save all financial end users a lot of time. If monthly reports could be viewed online and only important portions printed, it would save significant dollars that currently are spent on paper purchase. We must have streamlined monthly reports and the ability to generate user-defined reports.

2/24/2003 9:26:27AM

6 I concur with Ron Lancaster that a new system should enable us to use electronic processing for most of our transactions. Anything that is currently being requested through a paper form should be able to be processed electronically. I hope the new system will facilitate more of these types of activities.

2/24/2003 9:30:25AM

7 I also agree with Ron on the a system that would enable us to transfer payroll vender \$'s directly to the vender with out going through the manual procedure. If we could get something set up for payroll vendors (annuity companies ect) it would sure please are employee's that are waiting on a posting. The funds could be posted the same day of the payroll.

2/24/2003 2:23:33PM

8 A new Finance system would improve the operations of the university if it were more end-user friendly. If it weren't so cumbersome for end-users to use they would use the system rather than paper documents, thus freeing up the Business office and also getting transactions completed faster. Also understanding the information better in order to get the necessary correct information out of the system. Also included with a new finance system is needed a new reporting tool one that is easier to use that more people can and will use.

2/28/2003 12:26:15PM

9 A system that operates on real time, is integrated, provides diversified reports, easy access to essential data, and user friendly.

3/12/2003 6:18:01AM

10 The BGSU Foundation, Inc., which exists solely for the advancement of the University, is a separate legal entity. For this reason, I don't believe we can integrate its system with the University's. However, too often vendor payments are returned to the Foundation because the invoice was already paid by the U. I'd like a way to double check the University's system to be sure an invoice is only paid once.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Finance System?

103017 How would a new Finance System improve the operations of the organization?

3/17/2003 3:05:29PM

11 To follow up on Judy Hagemann's comment, I use both the BGSU Foudation system (ASCEND) and the AFIN system and must tie both of those back to our own accounting system that we had to have created because we have reporting requirements for the Corporation for Public Broadcast. The only way to do this currently is to manually enter transactions into our system, then check all three systems to ensure they balance. There has got to be a better way in this age of technology!

3/27/2003 7:56:19PM

103018 How would a new Finance System improve the operations of your department?

1 To be able to obtain data and details for a particular time frame. Query the system about the details behind such and such account for a period to time, as compared to the year before, and possibly the year before that in order to give the manager a better idea of a broader scope of comparative financial history.

2/19/2003 12:50:08PM

2 Automation of many duties that must be manually done now, also the elimination of errors.

2/21/2003 12:18:18PM

3 I've already outlined several items in the previous discussion topic. The primary improvements for our department would be less time spent re-entering data from printed reports into a variety of excel spreadsheets to do analyses of trends and projections for future periods. Currently, there is no easy way to access these data and have a report produced that can be shared with central administration.
There is no easy method for loading and approving of annual budgets. Currently this process takes months. If the process were easier to use, the task could be distributed to more users so the budgets could be loaded at other locations across campus and not just permitted in the budgeting office.
Budget document processing is cumbersome. The current system requires us to check on the "current budget allocation" before we can modify the budget by object code. This is not a figure that most budget users think about so the system is causing us to do an additional check that it should be able to perform. This slows down processing of budget loads.
Our office staff members are on the system most of the day. Anything that would make the document processing quicker would be an enhancement and save time. I'm not sure what options might be available.
Another issue is the size of the screen and the print. It would be better for all of us if the screen and font sizes could be larger.

2/24/2003 9:37:54AM

4 To allow purchasing services to be a function of the purchasing operation and not managed and controlled by the financial function.

2/26/2003 2:54:26PM

103019 How would a new Finance System improve your job?

1 I would be able to obtain particular data, in a flexible format upon request.

2/19/2003 12:51:29PM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Finance System?

103019 How would a new Finance System improve your job?

2 If I could get reports out of the system on a short turnaround time, it would greatly improve my job. I spend most of my time generating trends and projections that I'm sure could be handled by a good report generator. It might even result in other departments not having to drop what they are doing and generate departmental reports that are forwarded to me so I can compile an institutional report. If I could get the data I needed in the format I needed, I believe other departments would not receive so many requests for additional reports.

2/24/2003 9:40:54AM

3 A new system would give me an accurate report of aging invoices. When data-entering invoicing information, it would allow entry of even dollar amounts without entering "decimal-zero-zero", saving key-strokes. It would produce a next-day or immediate invoice so I could mail it to the patron promptly. It would allow me to make timely corrections to an incorrect entry rather than the current system of needing to wait until another day to correct an error.

3/18/2003 11:34:24AM

103020 How would a new Finance System benefit employees, suppliers and others?

1 If a secure environment of reviewing data could be guaranteed, then employees ability to view their paycheck stubs, or W-s with some historical data would aid in investment, and income tax planning. Also provide access to this personal reference material on the system when the various BG offices are closed. As far as accessing BG account data, such as a particular department's budget. and current spending amounts, perhaps a more user friendly and formatted accounting report could be accomplished with a new system. Data that could downloaded into an Excel spreadsheet, for example, for the sake of comparative analyses.

2/22/2003 1:32:13PM

2 My previous comments already respond to the benefits budget users would experience. I think the additional streamlining of electronic processes will be a huge time saver for many employees, especially if approvals and tracking are part of the online process. If online reports are available, I think the institution will realize a large savings in paper costs.

2/24/2003 9:44:59AM

3 Easier tracking of payments to vendors on purchase orders.

2/26/2003 2:56:47PM

4 If we obtained a more user friendly finance system, employees would be more apt to enter their work on-line rather than on paper - thus saving themselves and the Business office time and effort. Hopefully incorporated in a new finance system would be a simpler reporting tool that more employees would access and gather their own reports and analysis. We could communicate with suppliers and vendors and vice versa for faster service and cheaper costs.

2/28/2003 12:36:45PM

5 Clear descriptive data on-line, and on monthly reports, would enable managers, end-users and functional users, do their jobs more efficiently. Currently, users depend greatly on their own knowledge of what individual AFIN transactions mean, and many interface transactions, coming from SIS and other campus service departments, come into AFIN without sufficient descriptions. The clearer the reports and on-line information, the less time would be spent making inquiry calls.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Finance System?

103020 How would a new Finance System benefit employees, suppliers and others?

3/4/2003 9:48:57AM

6 The availability for retrieving data such as vendor status, MBE vendor, etc. for accurate reporting to the State of Ohio.

3/6/2003 8:53:33AM

7 The availability of access to e-procurement would save time and money for the University as well as vendors while streamlining the purchasing and payment processes.

3/7/2003 2:13:22PM

103021 Share a scenario that would illustrate the value of a new Finance system.

1 When comparing overtime or comp time for my staff from year to year, a user-friendly way of obtaining this data, and then the capability of transferring this data to a spreadsheet for further analyses.

2/22/2003 1:34:08PM

2 A system generated quarterly financial report. The Board of Trustees receives the annual financial report in September following each fiscal year. During the fiscal year, they have requested a quarterly report so they can monitor where the fiscal status of the institution since that is their fiduciary responsibility. Currently we cannot do this. The Budgeting Office has had to develop an in-house budget report that attempts to provide a stop-gap measure. The preparation of this quarterly budget report involves mainframe generated reports, focus reports, and spreadsheet files showing historical data by all budgets. All of these data are re-entered into a spreadsheet each quarter and a report prepared. This is a completely manual system and requires about 3-4 weeks to complete all of the report generations and verifications. I think a system that can generate a year-end report should be able to generate a quarterly report.

2/24/2003 9:50:01AM

3 A new finance system should have the ability for the end user to enter negative invoice amounts (representing credits) so that net payments could be made. There should be a better way to break-down the orgs that would allow us to customize reports. Ex. There are only 99 sub-orgs and no way to sort by their expenditures. We could customize the way we break out our budget with course numbers, faculty initials, or maintenance on equipment based on serial numbers, and then extract the information on those expenditures in a detailed report.

3/14/2003 1:27:37PM

4 Since it has been three years since a major change, I guess it's time to change. Attached are some of my concerns and issues.

3/21/2003 1:45:02PM Attachment: Financial System Brainstorming.doc

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103022 Briefly describe the role of a modern Human Resources system.

6 The role of a modern HR system is to increase efficiencies, ease access to data, and improve daily operations for the organization.

2/12/2003 7:19:50AM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103022 Briefly describe the role of a modern Human Resources system.

7 I concur with Becca's comment. A new system must have easier data collection points and the ability for users to get reports out. Also, in this day and age or greater technology, more on-line processing and approvals should be available.

2/18/2003 7:43:52AM

8 The role is to provide a safe storage place for all data/information. It needs to be easy to input data, manipulate data, and extract data. Faith that the data is accurate and up to date for the end user.

2/19/2003 8:26:15AM

9 In general, the HR information needs to be integrated, timely, accurate, secure and easily accessible to all who need it.

2/23/2003 7:18:57AM

10 A system that would enable us to transfer payroll vender \$'s directly to the vender with out going through the manual procedure. If we could get something set up for payroll vendors (annuity companies ect) it would sure please are employee's that are waiting on a posting. The funds could be posted the same day of the payroll. We need to have the flexible of transferring funds and having them posted the same day.

2/24/2003 2:27:03PM

11 Data is secure, but accessible to appropriate parties. MY data is accessible to me via a web portal - so that I do not have to go to multiple sites to get my bursar info, etc. User reports are easy to write/request/interpret. I can get historical data - not just snapshots, and summary data based on YTD, FY, or range of dates. Data entry is through ONE screen after verifying that new hire is indeed a student.

2/26/2003 12:45:40PM

12 The role of a modern HR system is to collect useful and meaningful data that can be stored and then extracted easily. It needs to provide the end users a way to get information that can be used in planning, reports, for budgeting purposes, etc. It should eliminate many manual processes that take are labor intensive and open to errors.

3/3/2003 2:29:07PM

103023 How would a new Human Resource System improve the operations of the organization?

2 Where does someone begin to answer this question? From my perspective we have a good payroll system, now the folks in payroll may disagree with me – but what I see is people get paid. I do NOT see the current system meeting many HR needs beyond that very important function. A new system should give us the flexibility to allow easy data mining by the VPs, Deans and Directors. It should allow employees to access benefit information in an interactive manner. It should improve our efficiency and discontinue multiple data entry.

2/12/2003 7:20:24AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103023 How would a new Human Resource System improve the operations of the organization?

3 With states all over the nation facing budget shortfalls, it is even more important to create new ways to complete existing work more efficiently. It appears that many human resource reports at BGSU are completed manually. If these periodic reports could be generated from existing data within the HR data base, then employees could use their talents to enhance student life or generate income. It is my current understanding that we manually generate reports because our existing system cannot efficiently do so. Examples: Position Tracking, ability to generate a report that lists the individuals within an agency-org, along with their associated benefits (would be of tremendous benefit during budget development season); Vacancy Savings Tracking, probably also related to a Position Tracking capability; would love to have a HR system that would allow me to pose questions generating nonrecurring reports, such as, "Which employees are currently paid above the maximum dollar value for their salary range?" Generating a report that had: Names, Depts., Maximum Level, Current Salary.

2/15/2003 12:03:24PM

4 Again, I concur with Becca. Every division on campus must prepare reports in their individual offices because reports cannot be generated on a campus-wide basis. The reports then must be forwarded to another office that compiles them. An efficient HR system would enable us to respond quickly to requests from state agencies and executive management for use in their decision making. We continue to maintain individual "in-house" records so we can prepare reports on a divisional basis. All the necessary data is stored in the current system but data fields are unclear and no reporting mechanisms are readily available.

2/18/2003 7:48:12AM

5 It would allow the University to research and develop new initiatives, streamline data entering and other procedures, and save resources through more effective time management, more options as far as data collection, mining, and analysis, and finally as mentioned, more effecient processes.

2/19/2003 8:34:04AM

6 I see more emphasis being placed on the self-reporting of information by individuals and areas. The mundane day to day date entry effort that now occurs in our Payroll, Student Employment and Human Resources areas would decrease and free up personnel to more imprtant decision making functions.

2/23/2003 7:29:40AM

7 I agree with the comments already submitted. We need to have a place where everything can be compiled together and have an informational tool to be able to pull it all together.

2/24/2003 2:32:50PM

8 From a student employee standpoint, employers should have access to certain data items - what students are currently on their payrolls, current wages, longevities, etc? It should not take multiple screens to load one simple (student) record into the payroll system. Student data needs to be shared among student systems (enrollment status) financial aid (Federal Work Study), financial systems, and HRS - AND the timekeeping system, without having to create interfaces or maintain "human" interfaces. It should be more integrated, so that we can manage the data by exception, and spend time handling student issues such as job training, job seeking, and job development.

2/26/2003 12:32:57PM

9 To provide a feature to account for assigned versus authorized staff. To provide for automated notice to management when positions are either over-staff (possibly wasting funds) or under-staff (perhaps severely limiting the operational status of the department).

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103023 How would a new Human Resource System improve the operations of the organization?

2/26/2003 3:02:28PM

10 It should allow us to create, store and report data efficiently and accurately at a much lower cost to the institution. Cost savings would be created by less data entry (allow employees to enter some data, get data from the web, extrapolate data from what is entered), efficient storage mechanisms (raw data for payroll and other processing, summary data for quick reference, data warehouse for historical data and reports) and the report generator should be easy to use by anyone.

3/1/2003 6:16:18AM

11 I concur with Karen Woods comments and would add that it allows us with future opportunities that we may not even recognize today.

3/3/2003 2:31:39PM

103024 How would a new Human Resource System improve the operations of your department?

1 It would allow us to change how we do our work. Our ability to service our customers is very paper and labor intensive. In theory a new system will move us away from massive data entry and Xeroxing towards assessment of trends by division or department. This will allow us to anticipate divisional needs and act in a proactive manner rather than reactive. At a day to day level it should increase our efficiency. It should decrease data entry for our department. We, as others, are understaffed and under budget a new system should allow us to redirect the work there by restoring services that are suffering.

2/12/2003 7:21:09AM

2 As long as there was a query feature in the new system that allowed me to define ad hoc reports, I could free up a lot of time now spent manually pulling data from copies of contracts and department heads. I could have data I could rely on - a one-stop-shop, if you will, for official personnel information. I would have more confidence when submitting a report on vacancy savings that it was complete and accurate.

2/15/2003 12:09:14PM

3 Again, I agree with Becca's comment. The Budgeting Office would increase its ability to respond to central administration's requests if the important data on HR related items could be readily accessed. As mentioned in other items, I cannot produce reports quickly enough to be of use in the decision-making process. If my office were able to access the data directly from an HR system, there would be fewer demands on many other departments university-wide.

2/19/2003 6:37:25AM

4 It would allow us to streamline procedures, provide us new information options and analysis to departments, and support new initiatives by enabling us to gather new data to justify the initiatives.

2/19/2003 8:36:44AM

5 Certainly less time spent in IS attempting to solve problems, answer questions and generate reports.

2/23/2003 7:31:27AM

6 Hopefully more time to analyze and research new technology.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103024 How would a new Human Resource System improve the operations of your department?

2/24/2003 2:40:56PM

7 To provide a managed calendar system for supervisors to monitor employee service time.

2/26/2003 3:03:58PM

8 Fewer transactions and more service to the institution.

3/1/2003 6:21:09AM

9 It would eliminate many of the labor intensive data entry events as well as eliminate some of our secondary data bases created to track and report.... Thus allowing more time for actually helping with planning of HR needs with the departments and divisions and analysing trends and opportunities.

3/3/2003 2:35:06PM

103025 How would a new Human Resource System improve your job?

1 Allow me to develop delivery systems that meet the data need of BGSU. Allow me to develop processes that improve (change) the work load for the employees in my office. Allow me to develop processes that allow easy access for applicants to BGSU. Allow me to develop process that improve our employees' ability to access and if necessary change their benefits. Allow me to improve services to our end users.

2/12/2003 7:43:10AM

2 A feature that would be of tremendous use to me is the ability to download a generated report into my Excel for further analysis - especially if the download didn't lose header and footer information during the process.

2/15/2003 12:11:12PM

3 Allow the generation of reports that can access data. The collection of additional data by individuals, agency/orgs, divisions would eliminate the need for divisions to keep duplicate systems.

2/18/2003 7:51:10AM

4 An additional benefit would be the position control/management function of an HR system. It would enable central administration and others to get a better handle on the number of approved position lines that are funded within the university, how many are vacant at any time, how many have searches underway, etc. Currently any information of this nature has to be supplied by the individual contracting officers. All of this information could be recorded in the HR system and a monthly report distributed to those wanting the information. We need a better control on the number of positions we have and the ability to track the history of those positions. This would have been extremely valuable during the faculty early retirement program. We would have been able to track the costs associated with replacements for retiring positions. We were not able to get any reliable data on this part of the program.

2/19/2003 6:32:51AM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103025 How would a new Human Resource System improve your job?

5 It would allow me to access more information. I would be able to analyze more data for more projects/problems/issues. It would take me away from the time consuming task of manually gathering data. Also, it would ensure accurate and updated data to work from.

2/19/2003 8:39:01AM

6 We would spend less time providing information that is accessible to users, "feeding the machine" and more time working with students - moving from manipulating data to working with students and their job searches/training/development.

2/26/2003 12:37:02PM

7 I could concentrate on the accuracy and availability of data rather than its entry.

3/1/2003 6:25:22AM

8 I could get information quicker regarding our covered employees and dependents and their benefits. Currently need to get information from vendors. Also, would eliminate some of the separate data bases we use now. Also, may help significantly during an open enrollment time if ability to enroll in benefits could be on line.

3/3/2003 2:40:53PM

103026 How would a new Human Resource System benefit employees and others?

1 Decrease manual digging for information. Share relevant data to hiring departments. Decrease duplicate data entry. Supply reliable data on which to build decisions. Thoughtful decisions take into account current situations and anticipate future needs. In most cases the decision making process begins with data; the ability to get data out of our current system in a friendly manner does not exist.

2/12/2003 7:43:53AM

2 I've been here over 10 months and feel I'm a pretty quick learner. Yet when I'm looking at the AHRS screens - I'm never quite positive that I'm interpreting the information I see correctly. I would hope that the new system would not be so limited in the amount of space devoted to descriptions/templates. It would be great if you could double click on a bit of data and have a pop-up information box tell you more about what you're looking at. For instance, on one AHRS screen an employee is associated with one agency-org combination - on the AGYS screen another. It would be great to have a way to gently remind yourself which number represents where the salary is recorded in the financial system and which number points to a generic reporting department.

Having an easier screen would allow more people to correctly understand the data instead of calling HR everytime they have a question.

2/15/2003 12:16:41PM

3 Decrease duplicate data entry and maintaining of separate systems in each division and college. A new system, if expanded to include items we have mentioned, would enable the administration to share with employees more online and current data. Specifically, how much their total compensation is. Many employees have no idea of the great additional benefits they receive and the associated dollar value. Perhaps payroll stubs can be sent to employees on payday, eliminating the need for printing and mailing, while giving the employee immediate information online. All financial employees will benefit in increased efficiency if they do not have to recreate data and reports when we all know the reports should be obtainable from the mainframe.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103026 How would a new Human Resource System benefit employees and others?

2/18/2003 7:56:14AM

4 Allow for more time for staff and individuals to analyze and discuss issues/problems/initiatives versus manually gathering for information. Provides new opportunity to research problems/issues a different way or demonstrate other scenarios or issues.

2/19/2003 8:41:23AM

5 Allow time to analyze and discuss issues instead of justing doing because it has to be done on a timely bases. Be able to research information and provide exceptional services to employees, departments etc.

2/24/2003 2:38:03PM

6 Allow access to MY OWN data, such as accruals, pay check detail, direct deposit, etc. Reporting! I get requests for data - valid requests - that are beyond the scope of the system. I know that others have to deal with EXTERNAL requests that are far more complex. Various departments maintain duplicate databases because the current system does not meet their reporting and data collection needs.

2/26/2003 12:41:10PM

7 By taking us out of 'transaction mode' we could create programs to assist our employees in their development - interview training, goal setting training and tracking, etc.

3/2/2003 10:50:14AM

103027 Share a scenario that would illustrate the value of a new Human Resource system.

1 Automation of the hiring process, short version. The necessary paper would move on-line across campus. The position is advertised and an applicant is given the option to apply on-line. The beginning individual data is entered by the applicant (in most cases). The pool of applicants and their qualifications are transmitted to the hiring department on-line. After interviews are held the approval paper work is processed on-line. Once hired the original individual data that the applicant entered is transfer to another part of the system to get the employee paid. The employee receives a P# and information is transmitted to other departments for ID, Parking Permit, keys, access to blackboard , and so on. As we currently function most of this information is transmitted on a variety of paper forms with duplicate data entry into a variety of paper or electronic systems. The time we would save eliminating duplicate data entry would be measurable, just to mention one value.

2/12/2003 7:23:22AM

2 I agree with Rebecca. It would be of tremendous help to automate the hiring process.

2/15/2003 12:17:46PM

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103027 Share a scenario that would illustrate the value of a new Human Resource system.

3 Becca provides an excellent example. A smaller scale scenario would involve reports. I have been trying to get a report on the number of employees who have 25 years of service with BGSU. I would like this by agency/org and individual. I think this data will be important as we look at our future workforce and the number of retirees in the next 5 years. I have not received these data and I've been trying to get them for one year. How can administrators react to changing personnel issues when they cannot get the data out of the system?

Another example is a health care summary we've been working on. The system has data recorded on health care options and fee waiver usage. These data would be extremely valuable to budget administrators as they develop their annual budget requests. Again, it has taken a year so far and we are still not able to obtain the data for all agencies. The fields on the current system are not correct when it comes to budgeting by agency/orgs.

2/18/2003 8:12:18AM

4 OEDIS is looking for a system that will enable us to fulfill the EEO reporting obligations we are under. To the extent we can get more information about our employees, the better. The AA Plan guidelines now require that we be able to track internal PROMOTION opportunities (which we can't now do) and report on how folks actually move through the tracks based on gender, race and ethnicity. This would be a key improvement. Also, Becca's comments are instructive--we need to be able to see all of the things that she describes so the approval process is more efficient.

2/18/2003 8:46:59AM

5 A department asks for assistance with a personnel budget analysis for the next fiscal year. If the office had readily available information on salary, stipends, benefit costs, any outstanding leave balances/issues, etc., then we could accurately develop a forecast of a departmental personnel budget. This would allow them the budget more accurately in other areas of their operation, thus allowing more services to the university constituents, students, or the community.

2/19/2003 8:45:30AM

6 An employee is temporarily reassigned to a job at a higher pay grade. The supervisor now sends a memo to HR for approval. Someone manually calculates the increase in pay and enters it for the time period specified. That same person checks with the supervisor near the end of the time period (she knows because she keeps a 'follow-up' file). If the person is still reassigned, she enters the new dates and makes a note in the follow up file. This could go on for months. I'd like to see a place where the supervisor could enter the request (P00, old job, new job) that would be sent to HR electronically for approval. That approval would trigger a transaction in the system to enter a salary increase for the specified dates. The system would send notices to HR and the supervisor asking if the reassignment is still in effect. If so, the approval and transaction process would take place again. If not, the person would be reset to the previous rate of pay.

3/2/2003 11:00:41AM

7 If the budgeting officers would like to see the total cost of compensation and benefits for their area they could retrieve the information easily at any time. Therefore if they needed to calculate salary savings due to a resignation or retirement, it could be generated by the system versus done manually.

3/3/2003 2:48:55PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New HR System

103027 Share a scenario that would illustrate the value of a new Human Resource system.

8 Report generation for all entities seems to be the "hot" button. Our systems seem to be outdated to the extent that it's not feasible to have a query answered in a timely manner. With proper access to a new system, information could be available within minutes rather than days or weeks, thereby increasing productivity as supervisors are able to quickly react or take proactive measures before a crisis develops (manpower forecasts, budgetary concerns, to name two).

3/13/2003 2:08:17PM

103028 Share some examples of success that other organizations have had with a new Human Resource System.

1 Northwestern University was one of the first to create an intra-net that interfaced with their Human Resource information system. This allowed their employee to access their benefit information on-line. They could access what their personal deductions were (taxes, foundation, TDA, etc) and see what would happen to their take home pay if they changed one of their deductions. They started and still do, all of their benefit open enrollment on-line. These are just a few examples of how they have successfully utilized their HR system to add value for their employees.

2/12/2003 7:24:57AM

2 An organization has the ability to run the benefits open enrollment period entirely online. This is critical for an business with offices all over the United States. The benefits can be chosen, compared, and analyzed. All costs over and above the basic health care plan are added and shown on an individual paycheck basis. Also, individuals in this organizations can see paychecks online, highlighting all deductions, and yearly balances.

2/19/2003 8:52:48AM

3 MCO purchased a system that would update several screens with one entry. For example, when entering new hires or transfers, the personnel and payroll information created or changed an entry in the organization charts.

3/3/2003 11:20:37AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Advancement System?

103029 Briefly describe the role of a modern Advancement system.

1 The system should have the ability to track, manage, and encourage employee training, cross training, professional development, and personal development. The resources are available but participation, or availability to the employee is somewhat "shotgun" in approach. Those lacking in participation tend to have job boredom, reduced performance, and little potential for job advancement.

2/26/2003 3:11:16PM

2 A modern advancement system should have the ability to store a myriad of items on a donor/prospect such as giving history, personal/cultural interests, campus and community involvement while a student, address/phone/email (even if seasonal), family info, financial position, etc. with the ability to extract data based on any of these details. The ability to most effectively utilize our donor resources will enhance and strengthen Advancement's ability to help the University.

3/18/2003 8:54:12AM

1) Strategic Drivers, Vision, Scope and Impact, Why a New Advancement System?

103029 Briefly describe the role of a modern Advancement system.

3 I concur with all of Judy's comments and would like to add that a modern advancement system also needs to be accessible to development officers who are on the road or working at home. Our current system can be accessed by our users through the internet from any location with internet access, even overseas. The ability to utilize other electronic resources through the advancement system is also important. We can currently launch email, websites or even mapquest through hot buttons on our Ascend screens. We can also email files or PDF formatted reports directly from our report writer.

3/28/2003 6:56:38AM

4 If I were to describe a modern Advancement system, I'd be listing all the attributes we currently have in Ascend, our alumni/development relational database vended by Ruffalo Cody. Ascend is an extremely powerful database running on its own stand-alone system housed in the Miletic Alumni Center, an AS-400 which we just upgraded last year. Our AS-400 really operates as a mainframe for the Advancement Division of the University. There is so much potential in Ascend that we haven't even tapped into yet, as we just don't have enough data entry/other employees to utilize all the exciting features available to us. I would like to take a moment to express my opinion as to why we do NOT need a new Advancement System here at BGSU. The facts are these: In the late 90's, after sitting through and contributing to years of meetings on the AMS product that was to be installed University-wide, Advancement was suddenly told one day that AMS has unilaterally decided to drop their plan to CREATE an alumni-development component of the AMS product. Our Advancement area was left high and dry in the "campus-wide" conversion. Hence, it became necessary for us to strike out on our own. I chaired that undertaking in conjunction with an ITS colleague and after a thorough investigation of products available, on-site demonstrations, visits to other campuses to see the finalists' databases up-and-running, and the participation of ALL interested parties (51 individuals cast votes as their preferences and why), we arrived at Ascend as the top choice for our needs. Funding was the next issue. We were promised the remaining share of AMS monies which had been designated for Advancement (I believe that figure was \$83,300) but these funds were never received in our offices from the University. Our Foundation Board stepped in and gave us support following a direct request by our President to do so. The BGSU Foundation Board invested over \$200,000 initially, and in the past 3 years since going live, has continued to invest in Ascend upgrades and adaptations reflecting our specific Advancement needs. This major investment in a product that is running very effectively and serving our current needs (and is set to take us well into the future with Java-based plans) is the FIRST reason we should not change from Ascend. The SECOND reason is something any good fund-raising consultant would demand of his client. A college or university should NEVER change an alumni-development database while in a fund-raising campaign mode! We are currently in the quiet phase of a comprehensive campaign that will last approximately 7-8 years. The THIRD reason we don't need a new Advancement System is the fact that we simply don't need it. We currently have one of the best advancement systems available for our needs in place. Thanks for your consideration of my perspective.

3/28/2003 1:56:29PM

5 A modern Advancement system needs to be able to serve the needs of three critical groups in the advancement area including the fundraising team, the research and records team and the financial team. The current system provides for the first time at BGSU the ability to link these needs and have a common data base.

3/28/2003 2:04:11PM

6 I concur with Susan's comments. To transfer from a system that is modern and provides required information to another so-called modern system, would not be cost and time efficient, especially when the University is in the beginning stages of a comprehensive campaign. Moving data from one system to a different system can result in misplaced information. The Advancement area obtained the Ascend system (after reviewing many software programs as they were not able to be included in the Project 90 system conversion) thus I doubt if a more modern advancement system could be identified that would produce the same documentation as the Ascend system.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Advancement System?

103029 Briefly describe the role of a modern Advancement system.

3/28/2003 2:04:49PM

103030 How should a new Advancement System improve the operations of the organization?

1 The current software used by the Advancement area, Ascend, is a very comprehensive and dynamic tool enabling us to track the necessary pieces of data on each donor as well as a general ledger with reporting capabilities. Users have the ability to tailor the product for specific needs. My wish list for improvements to our operations would include the ability to electronically receive disbursement orders with no redundancy in effort; enhancements to the general ledger to provide on-line monthly balances and enhancements to the reporting capabilities; easier extraction of financial data into report formats to eliminate the need for spreadsheet accounting.

3/18/2003 11:23:21AM

103031 How would a new Advancement System improve the operations of your department?

1 With expected and anticipated enhancements to our current system, Ascend, financial reporting should be more automated, freeing staff time to devote to other projects.

3/20/2003 9:31:51AM

2 Our current system has the resources available to meet our needs. We are still learning more about our system and how it can better serve us. There are many components to the system that we have not fully explored, and yearly enhancements bring us new capabilities every year. It would be good to have more direct access to student, parent and employee information directly through our system rather than uploading it, but this ability is not critical to our daily operations. It would be a convenience to have the data accessible, but it would not improve our overall operations.

3/28/2003 7:25:03AM

3 The system that we currently have, Ascend, is a great system. It fully meets my daily needs and then some. I think that at this point in time, a new Advancement System would not improve the operations in our department. Rather it would set us back. We are comfortable with our system and converting to a new system at a time when we are entering into a campaign would not be good at all. Conversions take time and I do not think this is the appropriate time to be making one.

3/28/2003 8:04:37AM

4 Ascend currently meets all the needs of the Alumni Association. I don't feel that a new system is an issue and hope that we will maintain the excellent system already in place. Conversion to a new system could possibly cause downtime thus creating delays in mailings to our constituents. This detracts from serving our constituents as it relates to the mission of the Alumni Association.

3/28/2003 2:04:45PM

5 I have worked with a variety of different Advancement systems in my 22 years of higher education fundraising. Our current system, ASCEND is one of the best I have used and I continue to be impressed with the new features which we are still discovering.

3/28/2003 2:07:15PM

103032 How would a new Advancement System improve your job?

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Advancement System?

103032 How would a new Advancement System improve your job?

1 With more and more demands on staff time to better serve our donors and the University, we need to automate as many processes as possible. This is a little dangerous in the fund-raising arena as automation often makes it appear that the personal attention is no longer there. Donors expect, and deserve, personal attention.

3/20/2003 9:30:14AM

2 Since our current system is currently meeting our needs, converting to a new system would actually have a negative impact. CONversion would be a time consuming process and there would be time spent in training. Once everything is in place, it takes several months to get up to speed and deal with any conversion related problems. Our operations are running smoothly and I would see no need for this disruption.

3/28/2003 7:38:57AM

3 I concur with Judy and Susan. I think the training time to learn a new system would be so detrimental. This would cause us to be backed up on all of our updating of alumni and donor information. When we needed to send out mailings, etc. the data would not be current and this would cause added expenditures for postage, etc. that are unnecessary. Thinking about it, this will affect all daily tasks because if we did not know how to use the system like we do not, it would set us back.

3/28/2003 9:20:11AM

4 At this time a new Advancement system would create real problems with my job. The current system we have is one of the best I have used in my 20 plus year career in higher education fundraising. When I arrived at BGSU over 10 years ago we were going through this same exercise and many may recall that the Advancement system was the very tip of the tail on the dog and when it came time to move forward the company indicated it could not produce a product. However, during the waiting period we lost critical time and information and then were forced to go through our own independent search to find a system that would address our needs. We have that system now and we have the potential to lose ground in the name of progress if history repeats itself. Unless a new system is multiple times better than what we have we need to stay the course.

3/28/2003 2:18:01PM

103033 How would a new Advancement System benefit alumni?

1 At this point, I do not think that a new Advancement System would benefit our alumni very well because we would be behind on making updates that they send to us. This inturn would make mailings incorrect and the alumni would not find out about our events or receive our other mailings. Also, Ascend works so well with our Telefund system, Campus Call, which is also a RuffaloCODY product and I think that if there were to be another system to convert to, the data could potentially be messed up on teh transition and when the students call our alumni, they might think that we do not have our act together if we have the wrong data.

3/28/2003 9:23:15AM

103034 How would a new Advancement System benefit other benefactors?

1 The multiple constituent groups which are currently using the ASCEND Advancement system are benefiting greatly. These groups include alumni, friends, and employees and like many of the other systems the benefits may not be clear to the enduser because of the excellent process in place. With our current system our development team has been able to increase the annual private support at the University. Now we need to be able to continue with what we know and have and yet be prepared for the next super system that may be developed for the Advancement arena.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New Advancement System?

103034 How would a new Advancement System benefit other benefactors?

3/28/2003 2:34:39PM

103035 Share a scenario that would illustrate the value of a new Advancement system.

1 I'm not convinced that a "new" advancement system is needed. Our current software, Ascend, is a very flexible, comprehensive tool. We have the ability to tailor it to our specific needs as well as take advantage of other users' experience and needs.

3/20/2003 11:16:32AM

2 I agree with Judy, there is not one situation that I can think of that would illustrate the value of a new advancement system. I am fully satisfied with Ascend and know that it meets our needs. If there are new needs that we have in the future, it can be accommodated. Every year there is a new release of Ascend that provides us with new opportunities to use the database and it enhances the services that we already have.

3/28/2003 9:25:26AM

3 When we got the "new" advancement system, our current ASCEND system, we were able to consolidate information needed by development staff, by the Foundation staff, by the alumni team, and all parts of the advancement division. We have been able to handle our campaign efforts which we could not do on our earlier system and develop a comprehensive resource for our fundraising efforts. I can not think of a scenario where we could take the same quantum leap that we made from the old system to our current system in fact, we could potentially take a step backwards in time and possibly ability. Our needs now are to have the hardware and technology to take advantage of the excellent software we are using.

3/28/2003 2:27:29PM

1) Strategic Drivers, Vision, Scope and Impact, Why a New CRM System?

103036 Briefly describe the role of a modern CRM system.

1 CRM is "Customer Relationship Management." One dictionary describes it this way:

Enterprise-wide software applications that allow companies to manage every aspect of their relationship with a customer. The aim of these systems is to assist in building lasting customer relationships - to turn customer satisfaction into customer loyalty.

Customer information acquired from sales, marketing, customer service, and support is captured and stored in a centralised database. The system may provide data-mining facilities that support an opportunity management system. It may also be integrated with other systems such as accounting and manufacturing for a truly enterprise-wide system with thousands of users.

2/21/2003 12:25:06PM

103037 How should a new CRM System improve the operations of the organization?

1 A CRM approach would allow a consistent set of responses to various clientele (e.g. prospective students, alumni, contributors).

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Why a New CRM System?

103037 How should a new CRM System improve the operations of the organization?

3/13/2003 12:46:42PM

1) Strategic Drivers, Vision, Scope and Impact, Impact of a New ERP System

103044 How would a new ERP System impact the organization's culture?

1 How does one begin to assess the impact such a huge undertaking will cause?? There will be folks who decide that they just don't wish to go through another "upgrade" no matter how valuable it will be to the institution. Some will retire; some won't be ready and will move reluctantly through training and implementation. To the extent the reluctant learners can be identified and assisted without feeling as if they are being "put down", the negative impact will be minimized. This is just an observation; not brilliant by any means! I have heard some staff members nearing retirement express real concern about a new system coming into play.

2/18/2003 12:54:23PM

2 A new ERP system is both a challenge and an opportunity. As was the case with Project-90, a project of this magnitude will force us to reexamine and revise many of our current policies and procedures. If we're careful in doing this, the result can be more efficient and intelligible processes that will enable us to use the system effectively, and thereby improve the service to our various constituencies.

2/21/2003 12:27:55PM

3 With careful and considerate implementation (considerate of the time and stress it will take on employees), coupled with the plan that any "off-the-shelf" shelf will require customization (more ITS time), it could be a very positive influence on the workings of the whole underlying finance, student business, etc. reporting, and documentation structure.
From my experience at two other universities with two other systems (Datatel, and SCT Banner), the vanilla software will not cut it.

2/22/2003 1:39:52PM

4 Process by flow would have to go. Policies would have to be more directing and less suggestive. I will require not just support of upper management but their commitment to the process. Change would have to be complete without exception, consistently supported, and managed by the right leaders to sell the program. The personal interaction to be maintained for efficient flow, but with moderate managed change. From the book "Eagle and the Monk."

3/3/2003 11:54:41AM

5 I agree with Ron...the ERP system will be both a challenge and an opportunity. Change is not always easy but we've all learned ways we think can enhance the services we perform to our internal customers as well as our external customers. I do agree with Anonymous, however, we do need support from management to enable us to perform at our respective responsibilities and meet our mandates.

3/6/2003 9:09:15AM

6 Support from upper management is critical for the implementation of a new system. Ongoing training must be available for all users and participation would be required.

3/7/2003 2:02:43PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Impact of a New ERP System

103045 How would a new ERP System impact the organization's image?

1 I think it could only make BGSU appear more impressive to those we serve. The lack of ability to access what often seems to be obvious information is difficult to explain to external agencies who need what information we hold.

2/18/2003 12:56:13PM

2 Most other Ohio public universities are already working on the implementation of new ERP systems. These systems will allow their publics access to data in a convenient, web-style interface. It will allow them to offer services to the public (such as registration, checking on admission or financial aid status, paying a Bursar bill, etc.) on a 24-hour basis. We've made some good progress in this area, but have almost reached the limit for what we can do with current systems. Other Ohio universities will soon be able to offer a better, more integrated set of online services, and we need to be able to do that as well.

2/21/2003 12:31:29PM

3 It may largely depend on how the employees who will be the prime users talk about it. The perception they leave on others (other Ohio people, etc.) will be important.

2/22/2003 1:45:54PM

4 An image becoming the premier learning institution and the best in Ohio, by not following the pack, but being a leader in efficient innovative interactions with our publics; students, parents, faculty, vendors, partners, governmental units and agencies, and the employees on campus. It should allow us to be more efficient and effective in what we do and in a more timely manner. The processes should be more intuitive and to allow for more accountable transaction processing. It should be driven by the teaching using technology, not the technology controlling teaching.

3/3/2003 12:07:58PM

103046 How would a new ERP System further differentiate the organization from its competitors?

1 At this time, NOT introducing a new ERP system would distinguish us even more. Other Ohio universities, except for BGSU and one other, are already in implementation mode for new ERP systems. They will have this functionality in the near future, and we don't want to be left behind.

2/19/2003 1:17:17PM

2 Hard to say what impact software will make. Perhaps with the right software we would facilitate more efficiencies throughout the campus. Perhaps with the right software, we could better judge how we are doing compared to our competitors and also be a part of the 21st century of more web-enabled processes.

2/22/2003 1:43:08PM

103047 When all is said and done, what would you like to be able to say about your organization's decision to proceed with a new ERP System?

1 The powers that be (the key decision makers) listened to the users, and the keepers (ITS) of the system. These key people wisely and judiciously discovered how any of the "new" systems worked. They did not listen to the various companies' marketing and advertising staffs, nor did BGSU opt for the most inexpensive method for the sake of economy only, at the time----not a bandaid approach. When it came right down to signing the contract, we were confident that we were doing the best for the current and future needs.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Vision, Scope and Impact, Impact of a New ERP System

103047 When all is said and done, what would you like to be able to say about your organization's decision to proceed with a new ERP System?

2/22/2003 1:55:21PM

2 BGSU is preparing the student for the path of life. Not preparing the path for the student.

3/3/2003 12:10:11PM

1) Strategic Drivers, Goals and Measurable Results, Results of a New ERP System

103048 ERP Systems produce financial results. Positive financial results are measured in cost reductions and revenue increases. Cost reductions are also hard to come by but there are ways to make that happen. What positive financial results will you look for with a new ERP System?

1 I am hoping to find a system that is easier to us by the end-user and the office of primary responsibility (OPR). The monetary benefit should be realized in more efficient purchasing requests, and increased utilization of bids, requests for proposal data gathering resulting in more effective purchasing contracts providing a 5% savings in purchases of goods and services. Approximately a \$2 million dollar savings if supported.

3/3/2003 11:09:18AM

103049 ERP Systems can improve customer satisfaction in a variety of areas such as streamlined processes for customers, employees and partners, as well as new and improved services for all three. What kinds of measurable improvements in customer satisfaction will you look for?

1 Possibly the biggest problem we have with our current system is the difficulty of getting information OUT of it in an understandable fashion. If people can get ready access to the information they need, our overall efficiency will improve. Getting data and information INTO the system isn't as easy as it needs to be either, and we can help our people to improve their efficiency and reduce frustration.

2/21/2003 12:33:39PM

2 For our student and bill-paying parent customers, ease of access to a much more understandable bill, with any of its financial aid status displayed. As far as the internal customers, such as the Bursar staff members, ease of input, audit controls, security measures, and readily obtainable reports based on selected criteria.

How to measure the level of satisfaction, conduct another customer survey, compare to survey prior to latest system.

As far as the Bursar's Call Center goes, less repeated explanations regarding the bursar bills, or less letters being sent out due to delinquent accounts.

2/24/2003 12:43:10PM

3 A more simple and user-friendly system will cause more members to use the new system and the features that it has to offer. This will better support the financial/purchasing system resulting in more efficient purchasing and realized savings on those purchases.

3/3/2003 11:11:32AM

4 A new system should streamline business procedures for employees by eliminating the redundant data entry across systems. For example demographic data for graduate students/graduate assistants is currently entered in the SIS system, re-entered in the HRS system and also maintained on multiple desktop databases. Application and course data is on the mainframe in SIS, contract data is on desktops in File maker Pro, Payroll data is in HRS, non-course related academic milestones and graduation information are tracked in separate desk databases.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Goals and Measurable Results, Results of a New ERP System

103049 ERP Systems can improve customer satisfaction in a variety of areas such as streamlined processes for customers, employees and partners, as well as new and improved services for all three. What kinds of measurable improvements in customer satisfaction will you look for?

3/28/2003 1:15:07PM

1) Strategic Drivers, Goals and Measurable Results, Student System Results

103050 What is the most important and measurable goal you would establish for a new Student System? How would you measure it?

1 To be able to view a certain population of students or a student with more complete data from various offices simultaneously by using the same methods of access in every module. Once you knew how to "move around" a module, it would be the same for Registration and Records, Financial Aid, Bursar, General Ledger etc.
Measuring it: ease of use for the majority of employees whether old or new to BGSU.

2/19/2003 12:57:26PM

2 Underlying it all must be timely, accurate data with good audit trails.

2/19/2003 1:09:43PM

3 From the financial side of the house, the new student system should interface with the finance system on as close to real time as we can get. The details of Bursar transactions must be provided in some manner to the budget officers. Ideally I would like to be able to click on the transaction ID in the finance area and have it jump over to the student system and show me the detail. If I want to print it off, I have that option and if I only want to view it, I have that option also. The two systems should be able to interface seamlessly. How would I measure it? I don't know that it can be done quantitatively but budget officers will certainly see an immediate benefit of such a change.

2/25/2003 11:51:04AM

4 The capture of meaningful, useful data, in a timely manner that is usable in future planning of student functions and services. Measurable would be the responses from the student body.

3/3/2003 11:13:35AM

5 The information must be available in a timely and up-to-date fashion. For example, when a student checks to see if a class is open, the data should be accurate as of now and not as of last night.

3/14/2003 8:52:14AM

103051 What other measurable goals would you establish for a new Student system?

1 students and parents could understand students' accounts pages. Formatting it on the web in a secure fashion.

2/19/2003 12:59:44PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Goals and Measurable Results, Student System Results

103051 What other measurable goals would you establish for a new Student system?

- 2 To add to the above comment made by Nancy C, whereby students & parents who have access to the student accounts could more easily understand the statements generated as to their balances. Currently no balance per transaction is shown, only charges and payments and therefore questions are generated by this. Also the ability to change our billing procedure with different software to allow the possibility of separating fall semester charges with spring semester as students/parents are always confused when we are asking for a payment from fall semester to try to comply with the government guidelines of carryover balances but their account shows a credit balance due to spring semester excess in financial aid that covers more than spring charges. Possibly even giving students the opportunity for being on a payment plan by the billing generating a \$ amount on the bill for which a student can pay to be on the payment plan thus not having to have separate paperwork for being on the payment plan. The student/parent can print off the bill and sign the bottom and mail in with the dollar amount given to be put on the payment plan. I believe this is being done at Ohio State.

2/21/2003 9:58:14AM

- 3 The new system must be flexible and have the capacity to react to changes. Currently, if we want to have a fee structure that is different for a specific group of students, it is very difficult and time consuming for the systems administrator to enter a whole new fee structure. With the current state funding situation and new programming initiatives, e.g., web courses, I think the new system will have to be flexible enough to accommodate any number of different fee and billing models that may not even be thought of today.

2/25/2003 11:46:58AM

1) Strategic Drivers, Goals and Measurable Results, Finance System Results

103052 What is the most important and measurable goal you would establish for a new Finance System? How would you measure it?

- 1 The most important and measurable goal would be the ease of modifying budget allocations. I would measure it by the amount of time saved in completing the annual and monthly processing of these types of transactions. If the process can be one that is clear and unambiguous, then more people can process documents and save time for all of us.

2/24/2003 9:53:47AM

- 2 The system would interface easily with all the various components, such as payroll, general ledger, accounts receivable=Bursar, student financial aid, and all the various entities whose budgets are input, massaged, and displayed on this grand system. It must have a good audit trail, be user friendly, and have the capability of calling for reports on an as-needed basis. Some of the reports would of course need to be standard; but a multitude of variations, and sorting patterns would also be at our disposal. This would include queries for particular projects, and to see any financial patterns, and to use for projections. To do these types of on-line analyses would require a relational database. All of these financial management tools would need to be accessible more hours than is the current time frame---a faster processing time.

3/7/2003 8:34:16AM

103053 What other measurable goals would you establish for a new Finance system?

- 1 The generation of a quarterly finance report will be an easy goal to measure. There should be a way for the system to generate this report. End users will no longer complain about how they dislike our current financial system. If the complaints are fewer, then we will have a system that is meeting the majority of the requirements of our users.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Goals and Measurable Results, Finance System Results

103053 What other measurable goals would you establish for a new Finance system?

2/24/2003 9:56:21AM

- 2 How accurate all the information transfer over from one system to the next.
How long the implementation and the data transfer takes.
When will be the first payroll, monthly financial reports completely on the new system be accomplished?
Will the user-friendly formatted version of all the various department and divisional budgets, with the actual numbers be available on the web for viewing.
How and when will all the various interfacing modules, such as Accounts Receivable, be tied in?
Will the personnel who have to implement and test all of this still have a "life" during the implementation year and the next? Will they be burned out?
And after 3 to 4 years of having the new system in place, will we say it was worth it?

2/24/2003 1:26:51PM

- 3 We still have a few cumbersome paper process that I would hope could be automated, such as appropriation transfers and expense transfers. Such transfers, if entered online with proper approvals, should be effective immediately, shouldn't they?

2/28/2003 9:08:05AM

- 4 I agree with Ron's comment (#3). Travel forms are still typed up too. We should be able to type those online for tracking purposes (Have TVL's as well as PO1's).

3/14/2003 1:38:30PM

1) Strategic Drivers, Goals and Measurable Results, HR System Results

103054 What is the most important and measurable goal you would establish for a new Human Resource System? How would you measure it?

- 1 The ability to generate reports, both standard and ad hoc. When a VP, Dean or Department head calls and thanks me for the information they were able to place into a report that allowed them to I know this might seem like a flip answer, but the successful measurement for me will be when we meet the data needs of our end users

2/12/2003 7:57:17AM

- 2 I concur with Becca. The most important measure that most of us will see is going to be the ability to generate reports. Our current system may be wonderful but with no ability to get the data, it is worthless to most of us.

2/19/2003 6:40:01AM

- 3 I completely second Becca's comment . . . more information, more reliable, more user-friendly, and faster is the goal.

2/19/2003 9:26:35AM

- 4 Meeting the data needs of our users quickly, accurately and easily. Until we can do this, little else will happen.

3/2/2003 11:59:09AM

Project Name : Admin System Selection
 Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Goals and Measurable Results, HR System Results

103054 What is the most important and measurable goal you would establish for a new Human Resource System? How would you measure it?

5 The most important goal would be a HRS system that would account for and control vacant positions, via position control. I would measure the success in purely knowing the total number of positions authorized and staffed in the each department, office, and vp area.

3/3/2003 11:18:35AM

6 If it has the ability to treat student employees with the same level of detail as other employees, plus incorporate the some of the characteristics that make them different; enrollment, part-time and seasonal work, multiple jobs in multiple departments, different status from one job to the next, etc.

3/3/2003 5:28:50PM

7 Not sure if this is the right topic for my comment: Summer graduate student contracts are a problem for me because I'm required to process an Appropriation transfer to cover the contracts. I have to call Payroll to find out who is really set-up. I do not have access to names V.S. encumbered amounts.

3/14/2003 1:43:56PM

103055 What other measurable goals would you establish for a new Human Resource system?

1 I want to spend some more time thinking about this question, but off the top of my head:
 *Improve work processes. Less steps, less data entry duplication.
 *Decrease duplicate data entry.
 *Ability for employees to access the system via web. For example, change of address on-line with out the system being up. This could cue and hit the system when it comes back up.

2/12/2003 7:58:16AM

2 When at least 75% of our time in HR is spent providing service to the employee, both current and prospective.

3/2/2003 12:09:51PM

3 Tracking student work performance and documenting certifications, formal training, etc.
 Automatic notification of when certifications and eligibilities (I-9 status, etc.) need review.

3/3/2003 5:31:10PM

4 Eliminate duplicate data entry between SIS and HRS for student employees/graduate assisants. All student demographic information is available in SIS -- it should not have to be completely re-entered in HRS.

3/28/2003 1:20:30PM

1) Strategic Drivers, Goals and Measurable Results, Advancement System Results

103056 What is the most important and measurable goal you would establish for a new Advancement System? How would you measure it?

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

1) Strategic Drivers, Goals and Measurable Results, Advancement System Results

103056 What is the most important and measurable goal you would establish for a new Advancement System? How would you measure it?

1 To establish an advancement monitoring system, indicating positions held, training received and increased responsibilities. Too often a staff member is hired and remains in that same role or position until quitting or retirement. We are losing valuable staff from job stagnation.

3/3/2003 11:22:53AM

103057 What other measurable goals would you establish for a new Advancement system?

1 The measurable goals I would establish for a new Advancement system would be if the system can do everything our current system does and multiple times more. We have an excellent system which is constantly being upgraded by our vendor. It is keeping excellent pace with our needs.

3/28/2003 2:54:44PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Executive Understanding and Support

103060 Does the executive management team of your organization understand the issues (benefits, costs, and challenges) related to a new ERP System?

1 Yes, I think the executive management team understands the issues. There is clearly a balance between all these issues and it will be up to the exec team to determine what we can afford and whether it will afford us the greatest benefits.

2/25/2003 12:54:49PM

2 I think our executive management team understands the issues because they listen to those who work for them. It is our job to make sure each of them has the information they need to make the decisions.

3/2/2003 12:20:37PM

3 I totally agree with Linda and Karen, our Executive Teams are well seasoned veterans of the current AMS systems, have valuable knowledge of the end-users needs and the indepth knowledge of the policies that are to drive the application of these policies in the development of the functionality of the application system's controls and accountability. this knowledge is essential for helping to develop controls withing the new application system.

3/6/2003 11:04:33AM

4 For the most part, I would say yes. However, the cost is a critical componenet at this point in time with the state budget situation. I am already concerned because of the comments that are being made re spending this much money at this time. The effort is enormous, and it is always more than is expected. I hope that all factors are taken into consideration and all options are pursued.

3/10/2003 12:22:42PM

103061 Is it important that the executive team support a project of this type? Why or why not?

1 I think it probably goes without saying that if the exec team doesn't support this type of project it will not get the necessary funding commitment and will not come to pass.

2/25/2003 12:55:45PM

2 I agree with Linda 100%.

3/2/2003 12:21:32PM

3 In order to actually have any new system purchased, implemented, used, judged, tweaked, and used successfully requires the full support of the executive team.

3/3/2003 8:40:54AM

4 I agree with Karen, Linda, and Nancy; however, it goes beyond support. For the project to be successful will require leadership committment.

3/3/2003 12:17:08PM

5 It is beyond important, it is ESSENTIAL. The E.T. drive the acceptance of the new application system to end users and to the Liasions. The Liaisons implement and test the new functionalities within the new application system as established by the University's operational policies via the Executive Team.

3/6/2003 11:09:50AM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Executive Understanding and Support

103062 In what ways has the executive management team voiced their support for a new ERP System?

1 The exec management team has voiced their support through this effort. If they were not supportive of a new system, they would not be encouraging staff to devote the significant amount of time required to complete this survey. The exec team realizes it may be time to move to a newer system with more flexibility and capabilities. That is the reason they want as many people as possible to be involved in providing feedback on this project.

2/25/2003 12:58:52PM

2 I see an ERP system as the next step in BGSU's Infrastructure project. Our executive management supported that piece and they are now promoting this piece through this survey.

3/2/2003 12:27:20PM

3 By purchasing this survey, encouraging people to attend the training sessions, and gather this vast amount of input conveys an interest on the part of the executive management team. To state anything further would be premature. Let us see what this survey indicates first.

3/3/2003 8:43:58AM

103063 What questions or concerns about a new ERP System do you believe exist in the minds of executive management?

1 I think the overriding concerns about a new system will be 1) the cost, can we afford what we really need; 2) is there a new system out there that will be better than what we currently have; 3) will one system be able to meet all our needs; 4) if one system is not available, will we have 4 differen systems; and 5) will the benefits of what a new system brings be worth the staff hours that will be required to bring it all to pass.

2/25/2003 1:00:55PM

2 I agree with Linda's summary.

3/2/2003 12:28:44PM

3 Will it be worth it? What is actually needed over the next 10 years?

3/3/2003 8:45:39AM

4 An additional possible concern. Will the expense, total expense, of this new system provide management information that will make the new system cost justifiable.

3/3/2003 12:20:43PM

5 Will the selection of a new ERP module provide more or less features than currently available in our area? Will the selection of a new ERP be better for the University environment and possibly less desireable for our particular area of responsibility?

3/6/2003 11:16:50AM

103064 How would you address executive management concerns?

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Executive Understanding and Support

103064 How would you address executive management concerns?

1 By allowing so many of us to provide input, I feel we can choose a system that will benefit BGSU. This is something we are all taking very seriously and we plan to do our best at each stage of the process. We are just beginning and this survey will show what our needs are and whether a new system will take care of that.

3/2/2003 12:52:13PM

2 Hopefully a critical mass of input will lead the way to the needs, wants, and desires for a new system, as compared to what we now have, and what we could really do with what we have.

3/3/2003 8:47:41AM

3 I believe that the current Executive Team and Liaisons Teams are an appropriate style of managing the selection of features and application of policies to the New ERP. A good style used in the previous implementation was devised by Ron Lancaster. Perhaps a more formalized structure to minutes and submission to upper management may allow for more active management involvement. Possibly the use of a web page for each Executive Team for publishing minutes and agendas may provide valuable information campus wide in the more efficient and timely manor.

A critical component to the success of any new ERP would be the creation of a DATA ADMINISTRATOR to define the data elements of the new system. This person would establish the OPR or the data element, define the data structure, reporting requirements, why collected, primary purpose for the collection, authority for the collection, and consistency of description of the data element, etc. Currently there is available very little data element description.

3/6/2003 11:43:12AM

2) Critical Factors, Budget

103065 What costs do you anticipate incurring with the new ERP system from this point forward?

1 There will be significant costs once the decision is made to purchase a new system. 1) the actual cost of the system; 2) the costs of implementation, including ITS personnel time; and 3) the opportunity costs for training everyone. Just about every staff person on the campus works with one of the subsystems. While they are being trained, less work will be accomplished until the learning curve is finished. I assume there will be no hardware costs.

2/25/2003 1:06:17PM

2 In addition to the direct costs accruing to system implementation, this kind of process typically involves a review and possible modification of long-standing policies and procedures to take maximum advantage of the capabilities of the new system. Such discussions are necessary, but take time to develop.

2/27/2003 11:45:15AM

3 The costs are huge, so the benefits will have to be clearly laid out and explained up front. There will be many concerns from staff that will need to be addressed. There will need to be some staff buildup because we are currently having trouble keeping up with the work (have tried to cut back where we could), and if some people need to devote time to the project, they will need to be replaced. The costs for the product are a given, though I am sure that certain systems costs less than others. I have a concern about the time and effort that will be needed for new releases.

3/10/2003 12:28:19PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Budget

103066 In addition to money, what other resources will your organization require in order to successfully acquire and implement a new ERP System?

- 1 I already mentioned the investment in training. The productivity level will decrease for a while but eventually the expectation would be that the system will enable staff members to be more productive in the long run.
Many staff members will be called upon to become trainers to others within the organization. This will take personnel time away from other asks.
I guess, bottom line, I see the intangible personnel costs that have to be shifted to this project until it is operational.

2/25/2003 1:08:56PM

- 2 The current hiring freeze, which will presumably be a fact of life for a while, will present special challenges for us. Even if we were at full staffing levels, a project of this magnitude is a significant undertaking. Trying to implement major systems when the involved functional areas are operating at reduced staffing levels will be a significant challenge.

2/27/2003 11:47:29AM

- 3 The unmeasurable level of stress placed on staff and management that may cause increased staff turn-over and earlier than anticipated retirements of our most productive staff and managers. Also, there will be a loss of current productivity of staff doing their daily jobs in addition to implementing a new system.

3/3/2003 12:25:15PM

103067 Is there a budget established for the implementation of the new ERP System?

- 1 There is no formal budget established at this time. As with all major undertakings of this type, I would venture that we will look within existing technology budgets to see what can be handled by current resources but the majority will have to be funded by through the issuance of a bond. This method was used for the purpose of the current system back in the early 1990's. I suspect this will be the same route we use in this.
Once the decision on a new system is made and it is purchased, a budget will be established to fund the repayment of the bond. There may also need to be an operating portion to the budget, if we cannot reallocate funds within our existing budgets.

2/25/2003 1:13:07PM

103068 What are the financial risks associated with an ERP project and how would they affect the organization?

- 1 Since there is not a bottomless bucket of money setting around, what is spent on this project will come at the expenses of other projects. And in these times of budgetary restraints by both federal and state, there may not be sufficient resources or bond structures to support this project.

3/3/2003 12:27:50PM

103069 What controls should be put into place to ensure that the ERP budget is not overrun?

- 1 The budget staff of the Offices of Finance & Administration and the Executive Vice President will be monitoring the budget closely. The major cost will be the actual system purchase. It is not anticipated that this budget would be any different than other projects. Any deviations from the project plan or unforeseen items would have to be approved by the Senior Vice President for Finance & Administration upon recommendation of the Executive Vice President. These controls should be sufficient.

2/25/2003 1:17:22PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Planning and Implementation

103070 What is the mission statement of the team charged with the responsibility of planning for or acquiring a new ERP System at your organization?

1 I have not heard of one.

3/3/2003 12:29:06PM

103071 Does your organization have a focused and documented plan for adopting a new ERP System?

1 We have goals and objectives. But, I do not believe any are available on this scale of this ERP plan. We have planned more within the "Box."

3/3/2003 12:31:20PM

103072 Is your organization capable of implementing a new ERP System? In other words, do you have enough of the right people with the right skills and the necessary technical infrastructure and functional expertise to bring about change successfully?

1 We have the right people in IS, but we do not have the proper skills at this point to maintain, develop and support any client-server based administrative systems. Much training will be required.

2/25/2003 12:12:02PM

2 I agree with Mike's comments. The right people are in IT and in the functional areas to handle the functional changes that would be required. We work well together in that capacity now. However, the IT area will need lots of training to go to client-server based systems. So I hope training is included in the package to obtain any new systems

2/28/2003 7:36:49AM

3 The short answer is 'Yes!!'. However, I agree with the others that training must be done at all levels. In addition, those who work on the implementation must get some relief from their regular workload or they will burn out and not be productive in any area. Let's consider health care claims as part of the cost of doing this project. That may make hiring additional people or providing more training cost effective.

3/2/2003 1:22:09PM

4 We have IT staff who have challenged themselves over the years with new endeavors, working with their ever demanding clients. Given the time and training, it will happen. Transitional staff will be needed at the IT level as well as in the office trenches, without that the low morale generated by overworked people will become a major factor in the project's success short term as well as long term.

3/3/2003 8:53:32AM

5 I am not reserved about the talents of the ITS staff and their capabilities. I have no reserve about the abilities of most staff in their current positions. However, there is a concern about the abilities of the current staff being able to, one) sustain the rigors of current job performance and two) also obtain the necessary training needed for the new system and three) implement that system and test data, while still performing their current jobs. There may be departments that are currently not at or near one-hundred percent staffing levels that may impede and jeopardize the success of the new ERP.

3/3/2003 12:40:04PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Planning and Implementation

103072 Is your organization capable of implementing a new ERP System? In other words, do you have enough of the right people with the right skills and the necessary technical infrastructure and functional expertise to bring about change successfully?

6 There is no doubt we have the right people, it has been proven in the past when faced with a difficult challenge everyone pulls together to work as a collective team. As for the technical skills, training will be the key issue and must be a high priority. The number of staff could be a critical issue, since the ITS Administrative System Support area has lost talented staff without having them replaced due to the hiring freeze. During the conversion if the current system could be frozen, with no modifications except mandates and the new system could initially be installed in the vanilla version would be a benefit. Another asset would be to survey systems of other area intuitions, then maybe collaborate with them during the installation. I agree with Nancy that morale will be a key factor, but if we have the leadership that is empowered to make decisions and be supported from the executive level we will be successful in implementing a new ERP system.

3/6/2003 6:45:56AM

103073 What is the plan to address staffing needs such a new skills and backfill of existing positions?

1 Very good question. What IS the plan? Who will be responsible for carrying the plan out? In the Administrative Systems Development and Support area of IS at BGSU there are approximately two dozen (24) positions. Of these 24 positions, I can easily say that more than half, 13 to 14 of them, are dedicated to MAINFRAME IBM/COBOL and CICS/CROSPLEX development and support. If the decision is made to migrate away from the mainframe, it can't be emphasized enough the training that will be required.

2/25/2003 12:05:09PM

2 I would hope there will no be a need for a lot of new people. When we went with the new system years ago we added many, many new positions. I agree with Mike that there will have to be training provided for our technical staff and I know we will make plans for that. The tricky part will be determining the cost will be for "enough."

2/25/2003 1:41:56PM

3 With a hiring freeze in effect, I would think it would be hard to address hiring new people. I would stress again the training of the existing staff to get the technical skills.

2/28/2003 7:43:51AM

4 We are not yet at the stage where we could or should have such a plan. But, this will be one of the most critical needs of the project.

3/2/2003 1:26:50PM

5 I agree, it is a matter of resources, or lack of. Either we hire people to perform the tasks required, via full or parttime or temporary staff; with the hiring freeze taking a back-seat to the project. OR, some staff may have to be reassigned or moved to more critically involved areas.

3/3/2003 12:46:13PM

103074 What is the tentative timetable for implementing the new ERP System?

1 Best Guess, 2006?

3/3/2003 12:48:29PM

103075 List any barriers to an effective and efficient implementation of a new ERP Systems at your organization.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Planning and Implementation

103075 List any barriers to an effective and efficient implementation of a new ERP Systems at your organization.

- 1 The biggest barrier will be (as it is with any such project) will be resistance to change. We all dislike certain aspects of the current system but whether we dislike them enough to want to learn all the new ways to do things, may not be apparent to everyone in the beginning. Some of this resistance comes from the fact that we are already overworked due to a hiring freeze and now our staff members will be required to maintain their current workloads while trying to find the time to support the implementation of a new system. It would also not surprise me if the faculty are resistant to this change since they will not see a direct benefit to them but a new expensive item for the administration.

2/25/2003 1:26:37PM

- 2 I could not find another place for this comment. Please remember that the finance people at our institution are in the MAC environment. Also, most of the academic users are MAC users. Whatever system we choose must support MAC and PC platforms. If it does not, we need to know that upfront. I would also caution that any report generation capabilities be available on the MAC and PC platforms. A lot of our early report generation problems were due to our hardware configurations that were not what AMS thought we had.

2/25/2003 2:11:23PM

- 3 I hope we have the financial resources to provide all the other resources necessary to complete this. We should not cut corners on the implementation. We will just end up spending more time and money later to do it over.

3/2/2003 1:34:20PM

- 4 Management committment, restricted funding to complete on schedule, lack of sufficient staff to perform the functions required. Then things that we cannot control from outside the university, economic recession, war, further loss of financial support for higher education, unanticipated reduction in student applications. May be more barriers exist?

3/3/2003 12:54:07PM

2) Critical Factors, Roles and Responsibilities, Project Management

103077 Who will be responsible for the creation of the new ERP Project Plan (people, tasks, calendar)?

- 1 Shortly after we know that funding is available for the project, we will be putting together an Executive Committee that's responsible for approval of overall policies related to the project. The precise configuration of this group is now under discussion so, if anyone has a suggestion, this would be a good forum for that. I will be developing several policies for consideration by this group at their first few meetings. Included would be such things as the overall project plan (people and their responsibilities), the project calendar, process for approval of customizations, documentation guidelines for ERP software, etc. Once these policies are approved, we can begin the process of forming groups and teams responsible for each individual project (HR, Financial, Student, Advancement).

2/27/2003 12:07:33PM

103078 How will the specific project scope be determined and who will be responsible for making sure this happens?

- 1 At the most basic level, the scope of the project is determined by the funding available. Once this is known, the question becomes how much can be done within the budgetary constraints.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Roles and Responsibilities, Project Management

103078 How will the specific project scope be determined and who will be responsible for making sure this happens?

2/27/2003 12:09:16PM

103080 Who will manage the new ERP implementation?

1 Even though I've been appointed ERP Project Manager, many people will have supervisory responsibility for portions of this project. I plan to propose an organizational structure, but the Executive Committee will be the final determiner of the precise configuration of the project team.

2/27/2003 12:11:21PM

103081 Will you need the assistance of an outside consultant to facilitate detailed planning and implementation?

1 It's hard to imagine how we could have a successful implementation without the advice and counsel of the vendor providing the software. What other consultants will be needed, if any, aren't clear at this point. To some extent, that will depend on the vendor selected for this project.

2/27/2003 12:12:41PM

2 With current staffing levels, I believe that we will need to rely more on outside consultants than we would otherwise have done. I can see this in the areas of analyzing and recommending changes in procedures that we currently have in place and in giving direction on the implementation phase of the project.

3/10/2003 12:34:55PM

2) Critical Factors, Roles and Responsibilities, Policies, Procedures, and Promotion

103082 Who will be responsible for the creation of new ERP Policies and Procedures?

1 I plan to propose a number of policies and procedures to the Executive Committee that I hope will guide the implementation of all phases. Included would be policies on customization approval and documentation format as well as the overall structure of the project team. In addition to these overall ERP policies and procedures, other policies and procedures related to specific systems (such as HR or Finance) will be proposed by those working on those implementations. Approval of these policies will be through a process yet to be determined, but would certainly include the approval of the offices most directly responsible for the functions of that system.

2/27/2003 12:16:27PM

103083 Who will be responsible for the creation of Marketing and Communications Plan for the new ERP system (image, promotion, acceptance, use)?

1 This question sounds like something we should consider if we are not doing so already. This sort of marketing and communications plan could be used to help gain acceptance for the new system(s). It could help with buy-in from the end-users, get them excited for a new system, get them to use it etc. This could be effective from the very beginning of the project to get buy-in early on. Explain how the system can save time, ease of use, etc...

2/28/2003 7:51:07AM

2 This is a two part question. Marketing and Communication should be responsible for the Image and formalized project announcements. However, I believe that Upper Management of ITS should be responsible for new and continuing project updates and announcements to the campus users.

3/3/2003 12:59:46PM

2) Critical Factors, Roles and Responsibilities, Integration of New System

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Roles and Responsibilities, Integration of New System

103084 Who will be responsible for ensuring a smooth transition from the legacy systems that are currently in use to the new ERP system?

- 1 Collaboration between IT and various user areas on campus.
2/23/2003 7:39:04AM
- 2 ITS and the user areas. Especially in the administrative area and functional areas - we work together as partners now.
2/28/2003 7:53:46AM
- 3 As mentioned before, it will be a team effort between ITS and the administrative areas, with the support and leadership of management being a key factor. This has been successful in the past and is currently successful.
3/6/2003 6:56:43AM

103085 Who will be responsible for the integration of the new ERP with the remaining legacy systems and databases?

- 1 Again, IT with the various user groups.
2/25/2003 12:13:40PM
- 2 ITS and the functional areas.. we know the systems the best
2/28/2003 7:54:41AM

2) Critical Factors, Roles and Responsibilities, Evaluation of New System

103086 Who will be responsible for the ongoing evaluation of the impact of the new ERP system on the services the organization provides to students, faculty and staff?

- 1 Possibly a task force working with the CIO.
3/3/2003 8:57:48AM
- 2 just make sure the team has enough levels to include lower management who have more hands on experience in day to day functions
3/13/2003 1:18:53PM

103087 Who will be responsible for the ongoing evaluation of the financial impact of the new ERP system?

- 1 The Offices of Finance and Administration in conjunction with the IT administrators is one possibility.
3/3/2003 9:03:04AM

103088 Who will be responsible for the ongoing evaluation of the impact of the new ERP system on organization operations?

- 1 Combination of IT people, functional office users, and the critique of the student body, as well as various third parties who receive reports/output from the system. From the opinions expressed by these groups, the Cabinet will also formulate their opinions, and any resultant actions.

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Roles and Responsibilities, Evaluation of New System

103088 Who will be responsible for the ongoing evaluation of the impact of the new ERP system on organization operations?

3/3/2003 9:01:06AM

2) Critical Factors, Concerns, Stakeholder Acceptance

103090 Share any concerns you may have regarding employee acceptance and use of a new ERP System

1 It goes without saying that whatever system is brought in will need to be whole-heartedly accepted and understood from executive management on down though the very end user. The last HR system was not understood by executive management at the time it was brought in and it was left to be set up by personnel who were less than enthusiastic about the task ahead of them. Needless to say structures were put into place that had meaning to one area and actually hurt other areas. Rumors about why things didn't work began to fly, new management came in, and all of a sudden the system wasn't very good. The current system is actually a whole lot better than people give it credit to be.
I guess my point here is that management needs to support which ever system is brought in, whole heartedly, with strict oversight, training, and tough decision making when heads butt. And they will.

2/25/2003 1:25:01PM

2 I agree with Mike. We cannot let the systems be designed for the benefit of one group. All of these systems will interface with each other and everyone must fully understand how a decision will impact all systems. If it has to be that way, fine. But let's be sure we collaborate on the policies and issues and make a decision that is best for the majority of the users.
I think staff members are going to be concerned about the cost of a new system in times of financial problems. Staff members may be slow to accept this change when they are already working harder because of a hiring freeze.

2/25/2003 1:51:14PM

3 I support the views of Mike and Linda. Employees need to be involved from the very beginning. Their support is essential to a successful system implementation and future proper use. I further recommend that all system modules need to be implemented to prevent the very concept Mike discussed about "to the benefit of one are to the detriment of another." If data is essential to department A but must be captured by Department B, then it must not be to the election of Dept B if they want to do it or not, they must capture the data.

3/3/2003 1:13:11PM

4 The previous comments are excellent. One additional point I would like to add is the moral of the staff. If the employees are not supported by positive attitudes of management the acceptance and support of a new system will be negatively hampered. If we have strong positive leadership that can make decisions to keep the entire project in perspective, I feel staff will be excited about the new opportunities a new system will bring.

3/6/2003 7:15:14AM

2) Critical Factors, Concerns, Stakeholder Acceptance

103090 Share any concerns you may have regarding employee acceptance and use of a new ERP System

5 I agree with Linda and Mike about the systems benefiting only one or several groups. As I have said in other areas on this survey, we have federal reporting requirements for Public Broadcasting that we must do to receive funding. We use both AFIN and ASCEND but we have had to create our own accounting system (which is way out of date) which requires us to manually enter all of our financial transactions into it, so that we can get the reporting that we need. On top of that, we have had to purchase a membership system, because we need more flexibility in tracking our members than the Advancement system has. Hopefully this is the first step in ensuring that all areas have some input into a new system, which will then create more buy in.

3/27/2003 8:17:56PM

6 Although I definitely agree a new ERP system is desirable for the University, I'm not convinced that Advancement needs to be an integral part of the system. Although other departments need information from our system, there are few staff outside of Advancement that should be updating information on our system. We have provided easy access to the system to any department that has made a request and we also routinely provide reports, as well as datafiles to departments for their mail merge needs. Various departments and colleges do receive information on Alumni, but we prefer to review that information before it is entered on the system. We also need to manage our information on alumni in different ways than student information is handled. Privacy and release of information issues are also different from those that apply to enrolled students. The timing of this possible change to a new system would also be a great hardship for our the advancement team. We are beginning to enter a comprehensive campaign that will extend beyond the projected dates for implementing a new system. The conversion process would have a definite negative impact on the productivity of staff during this critical fund-raising period.

3/28/2003 8:26:37AM

103091 Share any concerns you have regarding customer acceptance and use of a new ERP System.

1 Like any new, purchased system there will need to be an acceptance of what the system will do. The vendor is trying to make as many customers happy as possible and some of the system features will be accepted by BGSU and some will not. The ones that will not are of concern to me. Will we be attempting to modify the system through custom coding? Hopefully, we will not need to do much of this. If executive management decides that it is in BGSU's best interest to modify code within the new system, then IT Administrative support will need a large amount of training. Within the current systems, the IT staff can research a question or hunt down a problem without too much difficulty. We will not be able to do that with a new client-server based system unless much training and hands-on experience is gained. Word to the wise: "expect a big learning curve".

2/25/2003 1:36:16PM

2 People don't like change. We will not get a new system that will give everyone what they want. It will be necessary to have a lot of communication on what we tried to get versus what we can actually purchase. I think if staff members know this is the best available system for us, it will help them accept the changes. I agree there will be a big learning curve.

2/25/2003 1:54:13PM

3 Remember, the finance office is on a MAC platform and most of the academic department users are on the MAC. If customers are going to be able to use the new system, it has to support the platform they have.

2/25/2003 2:13:06PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Concerns, Stakeholder Acceptance

103091 Share any concerns you have regarding customer acceptance and use of a new ERP System.

4 My concern is that the business conducted by the Foundation and Development areas is worlds apart from the business of the University. Much of the financial forums in DecisionDirector address the needs of fund accounting (Foundation needs [has] a system for corporate accounting), the needs to support fund raising, etc. Also the Foundation is a separate legal entity from the University. It has separate assets. You cannot merge the two into one ERP system. I am very fearful that the Foundation/Development areas will lose the ability to properly steward donors and account for the finances. We have come a long way and have a system that meets our needs; a system that allows users to tailor it to specific needs; a system that speaks to our type of business.

3/21/2003 2:43:47PM

5 Advancement has invested a great deal of time and resources to obtain a system that is currently meeting our needs and will continue to grow and change to keep up with newly identified needs in the advancement field. Our requests for changes have been incorporated into new releases of the product, a long with recommendation changes from the other Universities using this product. A new ERP system that provided any less than what we currently have would not be acceptable.

3/28/2003 8:39:35AM

6 During the last ERP system review the Advancement team was a good partner at the table and when all was said and done we were left with nothing except a great deal of lost time. We have had to invest a great deal of resources to get the system we were promised during Project 90 but did not receive. Once again we are trying to be good partners at the table and be a part of the process because this is important. However, we are not in a position to compromise and get less than what we have in terms of flexibility, service and software. To reach the fundraising challenges we have before us we need to concentrate on the business at hand, raising money to support the students and programs at BGSU.

3/28/2003 3:02:30PM

103092 Share any concerns you have regarding partner acceptance and use of a new ERP System.

1 What is partner acceptance?

2/25/2003 1:37:50PM

2) Critical Factors, Concerns, Financial Concerns

103093 What financial concerns do you have regarding the acquisition of a new ERP System?

1 Frankly, I have concerns about how we will pay for a new system. The dollar amounts I've heard are substantial. However, if the decision is made by the exec management team that this is the best possible option for the university, we will find the revenue stream necessary to pay for the acquisition. I know that we will not enter into any decision lightly and that the necessary funding stream will be clearly identified before we sign the acquisition papers.

2/25/2003 1:57:13PM

2 In light of the SuperNet project costs, is there any funding left for future locally funded projects for awhile? Let us not forget the wages of the common employee in the future that will be here to make the system work.

3/3/2003 1:16:43PM

Project Name : Admin System Selection
Reporting Group : All Users

Forum Name : 1) Brainstorming

2) Critical Factors, Concerns, Financial Concerns

103093 What financial concerns do you have regarding the acquisition of a new ERP System?

3 I think that an investment into a system that eases the burden of our staff would be a wise investment. With the budget woes, our staff is shrinking and we need a way to automate, as much as possible, to free up staff time to tackle those projects and duties that have been left undone - or get half done - because of staffing shortages. We must think of it as an investment and not just an expense.

3/21/2003 2:47:03PM

4 I would hate to see the University spend money to "improve" the advancement system when we are currently satisfied with the product. We have made an investment of time and money in this system and want to be able to benefit from this investment, rather than waste it.

3/28/2003 9:47:27AM

103094 What financial concerns do you have regarding the implementation of a new ERP System?

1 We will have increased costs for training. When Project 90 was done, key staff were pulled from their regular appointments to work on implementing a new system for their respective areas. They were replaced with a temporary workforce. I believe that this approach made the transition much easier as well as provided key areas staff who knew the product inside and out. This is a definite benefit to the units. Proper and complete training will make or break this transition. If the University cannot devote any \$\$ to training, they should not invest in a new ERP system.

3/21/2003 2:50:42PM

2) Critical Factors, Concerns, Operational and Other Concerns

103096 What concerns do you have regarding the on-going operations and management of a new ERP System?

1 What and how will the ITS "implementation" team ? be assigned after the formal implementation phase be over? Will there be a project manager?
Who will do the troubleshooting? What can we expect for the response time?
Will ITS or a committee of ITS and users be the overseers for a period of time?
After 2? years, will an audit of where we are, and where we still have to go be conducted?
When can users ask for custom programming?
How and when will the training be conducted?

2/24/2003 1:42:35PM

2 I believe we have to seriously look at the number and frequency of modifications that are required of a new system. These future costs somehow never get much attention, but can have a substantial impact on the institution.

3/10/2003 12:39:57PM

3 Who will fund needed or required custom programming? Departmental operating accounts could not absorb these costs. Should they be held liable for expenses to meet any required regulations or laws, especially if the current system delivers what they need and a new system doesn't?

3/21/2003 2:53:26PM

2) Critical Factors, Concerns, Operational and Other Concerns

103096 What concerns do you have regarding the on-going operations and management of a new ERP System?

4 I don't feel that units will get satisfactory service from the IT staff. This is in no way a slam to ITS. They do a great job for the size of staff they have to the size of operation they are to support. There just aren't enough of them to properly serve the entire campus. I remember too well the days of UCC and ACC and fighting for programming time so that we could keep compliant with the changing laws. I feel that our area made "enemies" during these times because we were forced to mandate programming hours in order to fulfill IRS requirements and other laws that constantly change. We cannot be left waiting for customizations to be done or fixes to be made and still provide good customer service and remain compliant with laws and regulations.

3/21/2003 2:59:22PM

5 Currently, when we need to have a fix or improvement made to our system, we can expect a timely implementation of our request. I'm afraid if we went back to a system maintained by IT, that our requests for needed changes would have to wait in line with all the other departments and not get implemented in the needed time frame. Although you always hope a new system will need little customization, the reality is all institutions have individual needs that are different from other institutions. We need to be able to adapt our system relatively quickly to changing needs and situations.

3/28/2003 9:57:05AM

103097 What concerns do you have regarding the security of a new ERP System?

1 Can it withstand various e-commerce pursuits with guaranteed security?
Will bill-paying parents be able to have/establish a password to view their dependent students' critical info. and accounts?
Will access to the e-mail be available from an off-campus computer---to work from home?
Will secure access be in place to download certain financial documents (like the department's budget) from home?
Will all payments made on line be secure on our web site as well as on our outsourced vendors? like Sallie Mae's? or Verisign's?

2/24/2003 1:47:19PM

2 This should be of major concern to everyone. Security is very tight on our current, mainframe, administrative systems. Kent can comment much better on this, but the mainframe is easier to watch. With client server technology in play, security concerns are certainly elevated. Hackers find it much easier to get at information of PC servers than the mainframe.

2/25/2003 1:44:00PM

3 Certainly, we need to be able to guarantee the integrity of the data stored in our systems. In addition to that, I think it's importance that the security setup of whatever system we acquire will be sufficient to allow us to give everyone on campus direct access to the data they need to do their job. We've made great strides forward here in decentralizing data entry in numerous areas. We use fully all of the features that AMS provided in their security profiles and thereby allow, for example, academic departments to override registration restrictions for their courses only, and only those kinds of overrides that the registrar authorizes for them. We've decentralized a lot in the financial area as well, giving different users various kinds of authority for entering documents up to some dollar limit. We need these kinds of features in any future system, and more. If we had field-level security in the current system, many of the approved customizations for the system would have been unnecessary. The flexibility of the security structure is important if we are to give people the access they need to do their jobs.

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2) Critical Factors, Concerns, Operational and Other Concerns

103097 What concerns do you have regarding the security of a new ERP System?

2/27/2003 12:25:23PM

4 The Security vs Functionality scale should be balanced. To have a new car that you cannot drive is of less value than a five-year old Chevy that gets you to town. That is, a new ERP should have security, data integrity, and a dependable audit trail system with archive system to track and recover the data. However, there will always be risk, we just need to manage it. A totally secure system is one that is never on nor shares data.

3/3/2003 1:23:57PM

103098 Are there any legislative or regulatory concerns that will need to be considered in this project?

1 FERPA just to start and many other state of Ohio and Federal data protection and release of data concerns. In addition to data release there are many reports that must be prepared throughout the year.

3/3/2003 1:26:12PM

2 Apparently, universities that participate in making federal loans are financial institutions and must comply with security and privacy provisions of the Gramm-Leach-Bliley Act (GLB Act of 2000), as it pertains to safeguarding customer information. Related to FERPA. Effective May 23, 2003. See attachment.

3/13/2003 2:33:59PM Attachment: NACUBO Advisory Report - GLB Act.pdf

3 HIPAA, related to protecting health care information. See Link.

3/13/2003 2:43:15PM Link: <http://www.hipaa.org/>

4 Any new system would need to be able to deal with all the new tax and contribution regulations of the IRS and US government. These rules are constantly changing.

3/28/2003 3:05:23PM

103099 What other concerns do you have?

2) Critical Factors, Concerns, Operational and Other Concerns

103099 What other concerns do you have?

- 1 A group of financial system users within Student Affairs has produced an informal wish list for a new system's abilities. They are:
 1. Ability to automatically generate a yes/no question about closing an Auxiliary Improvement Project (AIP) account when it begins to generate all zeroes.
 2. Continue to have the ability to generate paper versions of the information contained in current monthly reports.
 3. Ability to generate a list of open AIP accounts upon request.
 4. Ability to print portions of a report rather than the report in its entirety.
 5. Some method to discontinue receipt of reports – rather than contacting a particular person
 6. Eliminate the paper production of reports that contain all zeroes.
 7. Ability to see all vendor information on one screen rather than clicking to several screens
 8. Eliminate the need for paper budget transfers (appropriation, revenue, expense) – if not, a prenumbered system to reduce possibility of duplication
 9. Notification of when transfers are completed, or a report or table that would generate a list of transfers only
 10. Ability to look for a financial transaction by dollar amount (e.g., between \$100 and \$150 – all transactions within the Ice Arena)
 11. A set description field for revenue transactions – not the date nor the description of the revenue object code (don't need to repeat something that's apparent from the object code), but something that would identify to the report reader what the revenue source was
 12. A note field or longer description field
 13. Ability to run mid-month reports
 14. Ability to customize report (e.g., grouping by defined object codes)
 15. Ability to generate reports based on calendar year, grant year, or federal fiscal year rather than state fiscal year.
 16. Ability to define year (e.g., September 1- August 31)
 17. Option to not receive a report if there's no activity that month
 18. Take opportunity to develop a revised set of object codes in order to minimize the transactions recorded as 8090 (miscellaneous) – e.g., medical supplies

2/15/2003 12:36:59PM

- 2 That the project will be delayed too long allowing other institutions to move forwards and BGSU loses it window of opportunity. Change is essential to keep up, to become better, to be the best for a while.

3/3/2003 1:31:48PM

- 3 My concern is that the Advancement system will not be the major product of the selected vendor and that we will get a blended system that does not serve the needs which we identified and which, for the Advancement division, are being met by our present system.

3/28/2003 3:25:36PM

- 4 I currently order mailing labels for BGSU Magazine from several different sources: on campus from Human Resources, alumni/friends from Univeristy Advancement and first-year parents from Admissions. Because these systems do not function together, we are unable to avoid duplicate mailings which costs the University in resources. We are unable to know if employees are also alumni unless they have provided that information to Advancement. We are unable to know if first-year parents are alumni or employees because to my knowledge they segment the listing. To our many constituents we are sending a message that we are unclear of who we are mailing to and that we are wasting University resources by sending duplicate copies. I feel it's important to have a coordinated effort when approaching our constituents.

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2) Critical Factors, Concerns, Operational and Other Concerns

103099 What other concerns do you have?

3/28/2003 7:52:57PM

2) Critical Factors, Concerns, Keys to Success

103100 What are the keys to a successful ERP project for the organization?

1 The possibility of having a 95% satisfaction rate among all users, and viewers.

2/24/2003 1:52:34PM

2 Communication, defined direction, training, positive attitudes, collaboration and did I mention TRAINING, I feel are key factors to make this project successful.

3/6/2003 7:22:25AM

3 Joyce is right about TRAINING and lots of it. People need to feel comfortable with what they are doing and that means training (even if they complain about it, which they will)

3/27/2003 8:19:28PM

103101 What will *you* do to help the ERP project succeed?

1 Work with the finance people to identify the funding sources.
Will be involved in all necessary project teams and offer constructive suggestions and help in whatever way I can.

2/25/2003 2:06:25PM

2 Be an active participant, learn the sytem, what it has to offer, use it and then see what additional help it may need to work more effectively. Make well thought out suggestions to help this system become adopted in a more successful manner.

3/3/2003 9:12:59AM

3 Give my total committment to the success of my department and the University. Present and maintain a positive attitude and encourage fellow workers to support the project and our future.

3/3/2003 1:36:44PM

4 Be supportive and excited to be part of this great opportunity. I plan to be as active as possible and look forward to learning new technology.

3/6/2003 7:31:32AM