Infinite Visions Implementation Overview and Project Highlights

TUCSON UNIFIED SCHOOL DISTRICT

June 24, 2014

Empowering people who serve the public™

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Project Experience

Highlights

- **K12 School Finance and Human Resource Management for over 30 Years**

- **197 (of 211) AZ Districts (93%)**
- **13 County School Superintendents**

- **Exceptional 99% customer retention**

- **Over 70,000 AZ school district employees funded and paid annually**

Infinite Visions ERP Suite

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FINANCE

ACCOUNTS PAYABLE

PURCHASING

HUMAN RESOURCES

PAYROLL

STATE REPORTING

ACCOUNTS RECEIVABLE

WAREHOUSE

FIXED ASSETS

EMPLOYEE SELF SERVICE

WORKFLOW

BENEFIT ENROLLMENT
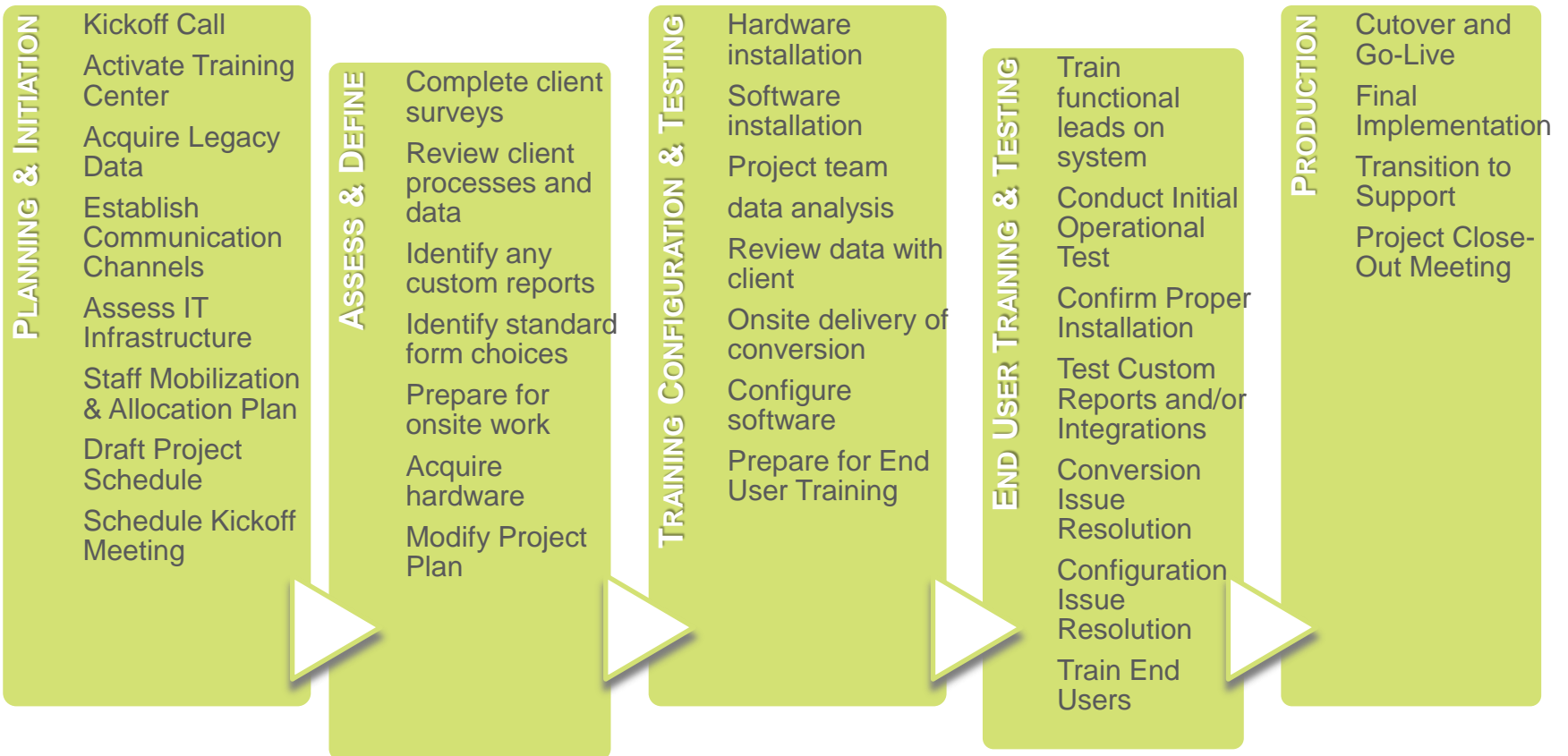
GRANTS & PROJECT TRACKING

One focus – one mission:

Help school districts and counties **optimize** and **manage resources** effectively by offering flexible and **proven** financial and human resource management solutions specifically designed for K-12 education.

Implementation Stages

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Tyler provides a well-defined multi-stage roadmap which can be applied to a single phase project or to projects with multiple phases.

PLANNING & INITIATION

- Kickoff Call
- Activate Training Center
- Acquire Legacy Data
- Establish Communication Channels
- Assess IT Infrastructure
- Staff Mobilization & Allocation Plan
- Draft Project Schedule
- Schedule Kickoff Meeting

ASSESS & DEFINE

- Complete client surveys
- Review client processes and data
- Identify any custom reports
- Identify standard form choices
- Prepare for onsite work
- Acquire hardware
- Modify Project Plan

TRAINING CONFIGURATION & TESTING

- Hardware installation
- Software installation
- Project team data analysis
- Review data with client
- Onsite delivery of conversion
- Configure software
- Prepare for End User Training

END USER TRAINING & TESTING

- Train functional leads on system
- Conduct Initial Operational Test
- Confirm Proper Installation
- Test Custom Reports and/or Integrations
- Conversion Issue Resolution
- Configuration Issue Resolution
- Train End Users

PRODUCTION

- Cutover and Go-Live
- Final Implementation
- Transition to Support
- Project Close-Out Meeting

Project Planning & Initiation

- Dedicated Tyler Project Manager:
  - Over 15 years of Infinite Visions project knowledge
  - Resume includes school district management
  - Experience with large and multi-district implementations

- Comprehensive Plan includes:
  - Key milestone dates
  - Required resources and preparation
  - Project management, scope/change control, status reporting, and issue tracking
  - Task duration inherently designed for district/school staff maintaining current responsibilities (ie, 8 hour duration for 1-2 hour tasks)

**100%
On-Time,
On-Budget**

Phase I Scope

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Federal
Reporting & Submissions

AZ State:
ASRS, SDER, AFR/Budget, Pima County

Student Activities / Auxiliary
Tracking & Reporting

Reporting:
Dashboards, Ad-hoc & Financial Statements

Project
Tracking & Reporting

Online Benefits Enrollment
(Insurance Tracking)

Interfaces:
Applicant, Substitute & Time Systems

Accounts Receivable
(Invoicing, Payments, Aging)

Warehouse Inventory
(Barcode Scanning)

Fixed Assets
(Barcode Scanning)

Personnel/Human Resources
and
Position Control

Employee Self-service
and
Workflow

Core Accounting:
General ledger, Budgeting, Procurement, Accounts Payable, Banking, Payroll, Reporting and Security

Key TUSD Milestones

300+ Years K-12 Experience

- Finance 'go-live' July 2015
  - ✔ Budget development, Spring 2015
  - ✔ Requisitions/purchasing available for sites, May 2015
  - ✔ Warehouse requisitions available for sites, May 2015
  - ✔ Fixed asset/purchasing integration, July 2015
  - ✔ First accounts payable processing, July 2015

- Personnel 'go-live' July 2015
  - ✔ Employee agreements, March-April 2015
  - ✔ Position inventory, May-June 2015
  - ✔ Electronic personnel action requests, June 2015
  - ✔ Online open enrollment, July 2015
  - ✔ First payroll processing, July 2015

Training Methodology

- ## Curriculum-based Training
  - Uses structured learning guides, with hands-on exercises
  - Tailored to user role (district/site) and department (HR/payroll/finance)
  - Training or 'sandbox' data for modeling multiple scenarios
  - Onsite setup and consulting immediately following training for maximum retention

- ## Process-improvement Consulting
  - Fully leverage the capabilities of the system
  - Streamline processes for more efficient workflow
  - Tailor software to meet district needs, policies and/or controls

Complementary Interfaces

INFINITE VISIONS
ERP
Applications

Time Tracking

Applicant Tracking

Substitute Tracking

➢ Online Applicant Systems
   Applitrack, Edjoin, EdZapp, Netchemia, SchoolSpring, WinOcular

➢ Substitute Tracking Systems
   CRS SubFinder, Frontline AESOP, eSchool SmartFind Express

➢ Time Tracking Systems
   TimeClock Plus, PrimeTime, Time America, TimeTrak, Kronos

➢ Barcode Scanning
   BMI Systems Group

➢ eProcurement
   ESM Solutions

Post-Implementation Support

- Software Support
  - Toll-free 'live' Infinite Visions hotline
  - Online 'chat' support
  - Integrated email hotline support
  - Enhancements & updates (regulatory changes, new features, and perpetual version upgrades)

- Technical Support
  - Systems monitoring, remote IT support, database administration & software updates
  - Business Continuity Assurance Program

- Additional Services
  - User guides & 'How To' videos
  - Online FAQ's, best practices & tips/techniques
  - 24/7/365 online peer-to-peer Tyler community, (including blogs, product forums & support)

Best Response Times

Arizona & National User Communities
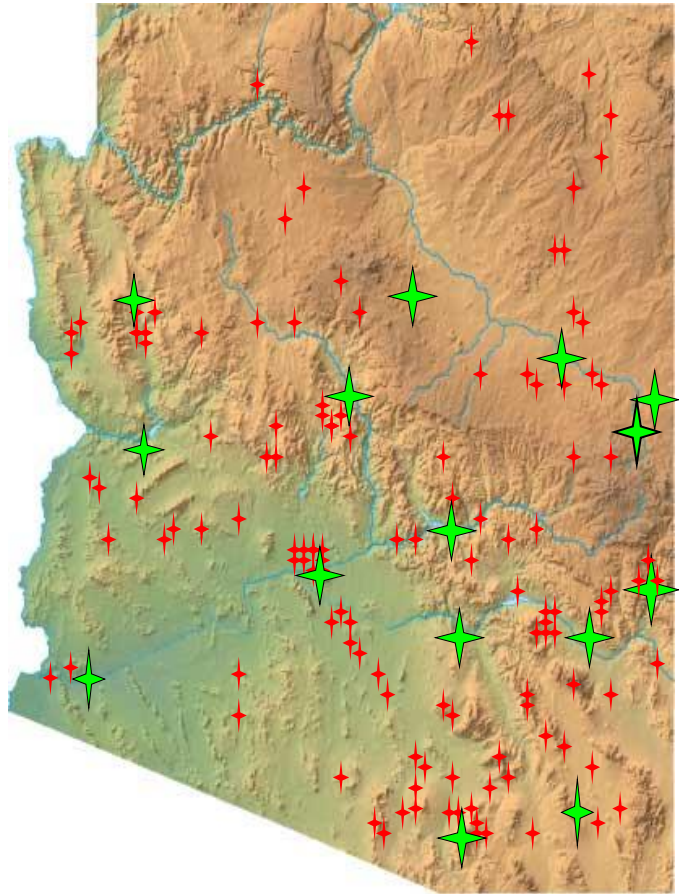
- Regional & State Associations
  - Southern Arizona Infinite Visions' users meetings
  - County-specific Infinite Visions users meetings
  - ADEConnect access & integration
  - Arizona ASBO meetings & conferences
  - Auditor General's Office integration
  - AZ Schools Computer User's Support

- National Users Conferences
  - Tyler Connect
    - Annually across all Tyler products
    - 3,000+ attendees
    - Provides continuing education credits
  - International ASBO
  - American Assoc. School Personnel Administrators

Next Steps for TUSD ...

- Initial Stakeholder Kick-off Meeting

- Finalize Project Team and Communication Plan

- Draft Project Schedule (driven from key milestones)

- Review Hardware Infrastructure

- Identify Legacy Data

- Finalize plan for System Setup sessions, including staff by department:
  - Core team introductions
  - Go through approved project plan
  - Review current processes
  - Discuss reporting and forms
  - Assess current data sources for import

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