

UMass ERP Activities

System-wide Information Session

ERP Roadmap Phase Kickoff

October 2024



University of Massachusetts

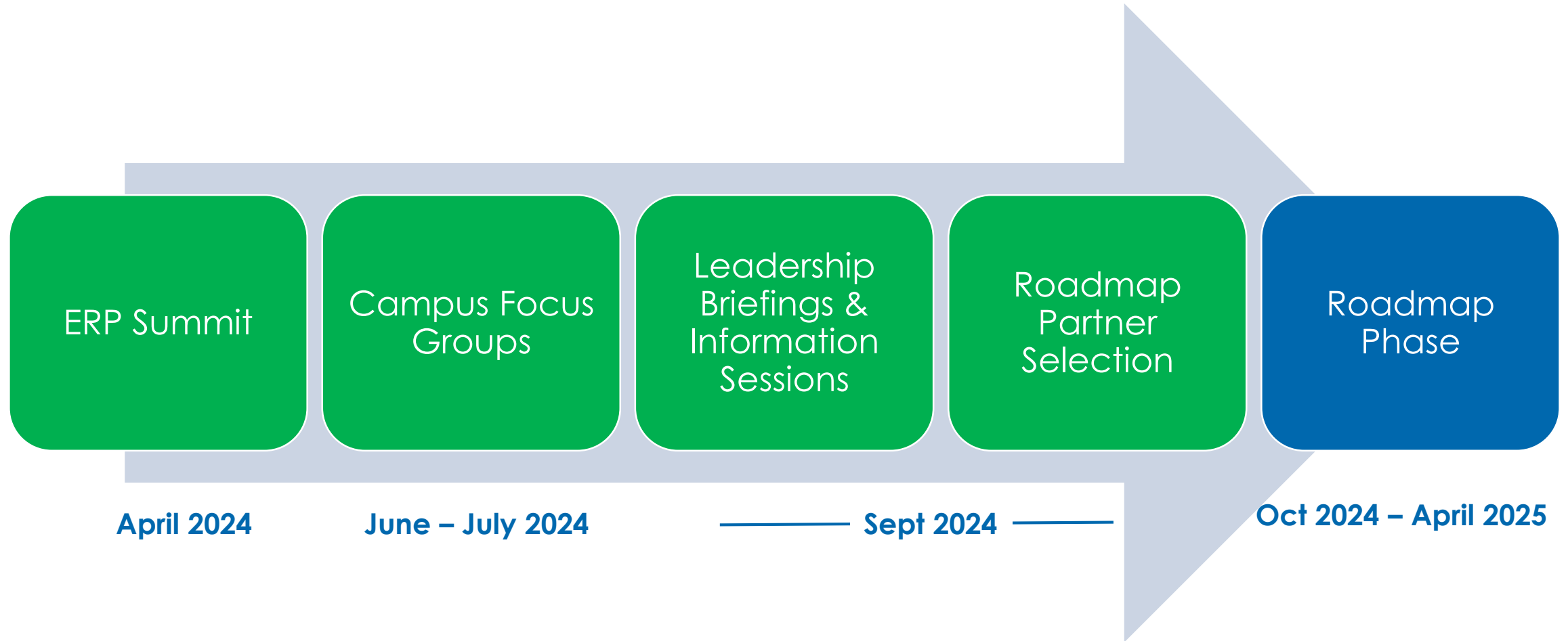
Amherst • Boston • Dartmouth • Lowell • Medical School • UMassOnline

Topics

- ERP Activities Update
- ERP Roadmap Phase
- Other ERP Activities
- Next Steps

Questions/comments in the chat please

ERP Activities Update



ERP Roadmap Phase

ERP Roadmap – What will be included?



Recommendations/options as it relates to future ERP focus and investments based on the UMass current state and on the ERP market/trends—potentially varied across the primary ERP functions



A **cost estimate and timeline** including resource needs associated with each recommendation



A **business case** to embark on a potential ERP transformation



Guidance related to enterprise system future state options and how each aligns/positions UMass to achieve goals moving forward



Identified gaps in functional use, risks, and unmet needs with the existing ERP products that could be met in an ERP modernization



Peer analysis of the University to other institutions of similar size and scope to understand best practices and challenges (informed by peer analysis already conducted by UMass)

Roadmap Phase Partner - Accenture

Accenture Core Team



Boston Based



Jessica Roy
Delivery Exec / HR



Justin Sterritt
Project Lead



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Project Consultant



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Higher Education IT



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Change and Exec

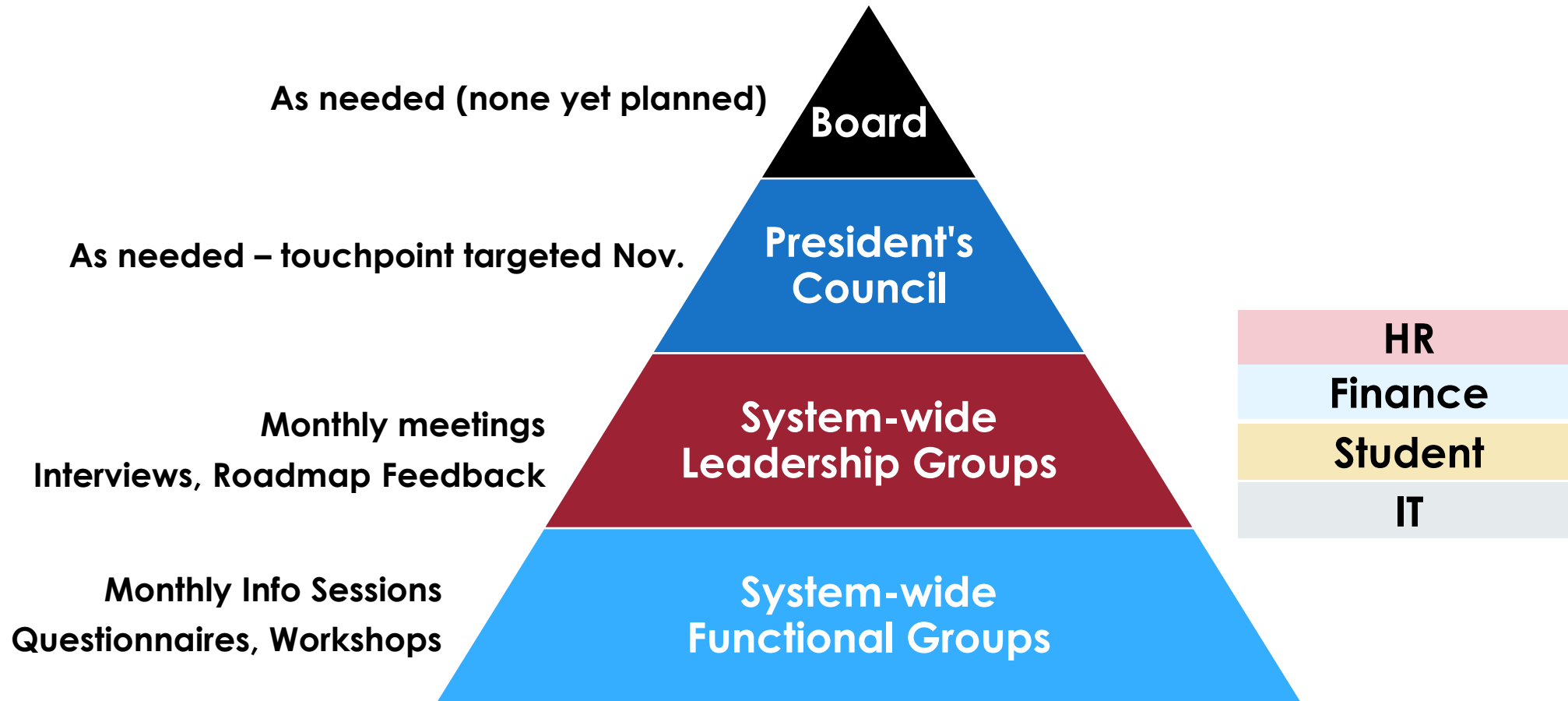


Samantha Fisher
Student Systems

Draft - Roadmap Phase Guiding Principles

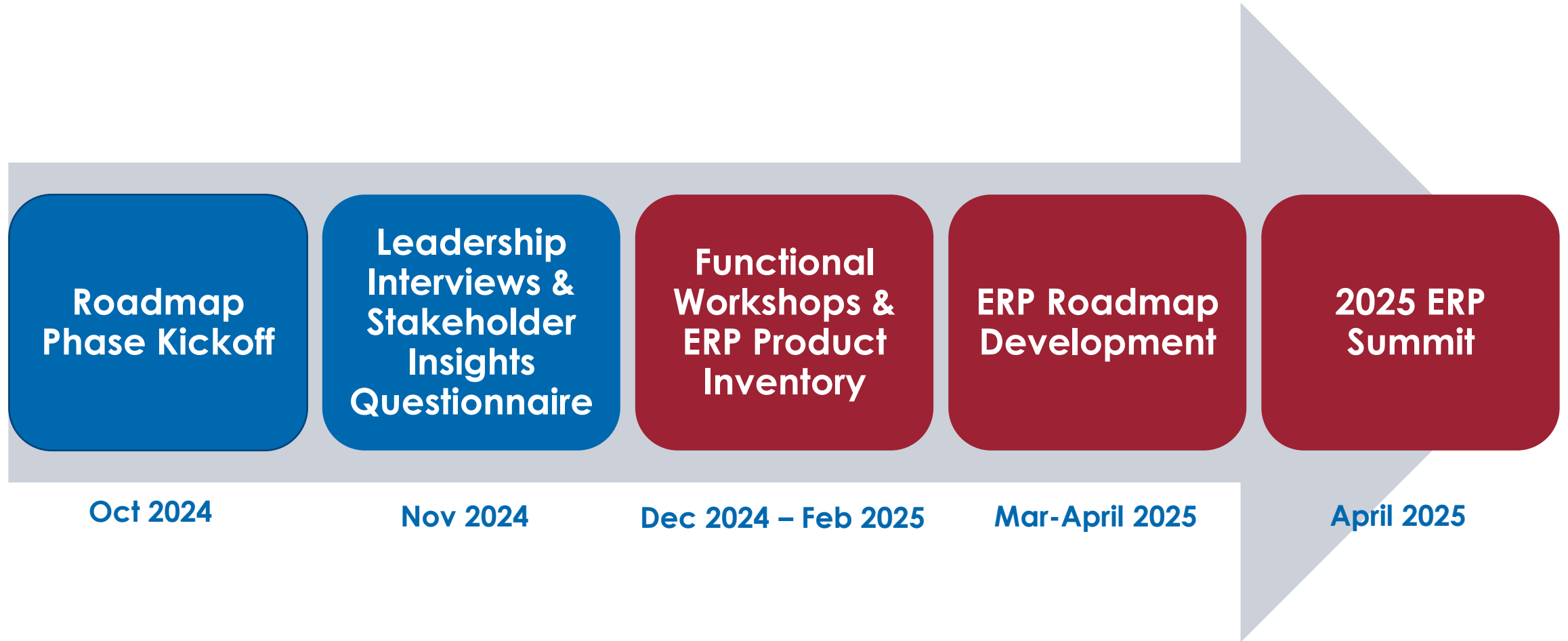
1. Strive to be inclusive yet targeted with campus engagement--find the right combination of stakeholders & decision makers
2. Continue the slow and steady approach--establish a Roadmap Phase timeline that's mindful of campus/system operational priorities
3. Encourage campus participants to think in multiple dimensions
 - Short and long term
 - Campus specific and system-wide
 - Functional area specific and across functional areas
4. Roadmap Phase is the opportunity to develop recommendations and options for the future across the 3 ERP areas
5. As we embark on the development of an ERP Roadmap, take a more strategic look at potential investments in the current and new ERP products
6. Acknowledge that any potential future shift in ERP would be a significant investment of time and effort. Details would come as part of the Roadmap.

System-wide Engagement



UMPO/Accenture Project Team & Campus Liaisons

ERP Roadmap High Level Timeline



System-wide Functional Groups - DRAFT

Category/Pillar	Functional Groups
HR	Talent/People Management Compensation, Benefits Operations, Time & Labor, Commitment Accounting
Finance	Accounting, Financial Reporting Budget, Planning (including Capital) Shared Services (Payroll, Procure to Pay, T&E, Treasury)
Research Administration	Grants Research
Student	Recruiting and Admissions Student Finance Advising Registration/Records
IT	Application Management, Configuration Application Development, Integration Data, Analytics Infrastructure, Security, User Access

Groupings to be refined

Workshops organized by functional groups

ERP Roadmap Phase - Campus Engagement Approach

Leadership Interviews

- November 2024
- Understand priorities and future vision for campuses/system across primary ERP pillars

Functional Questionnaire

- November 2024
- Gain insights into functional area goals, priorities, and opportunities

Functional Workshops

- Dec through Feb
- Functional group discussions about goals, priorities, and opportunities
- Draft business case and recommendations

ERP Roadmap

Other System-wide ERP Activities

- Modern ERP product demonstrations
 - Targeted for late winter/early spring 2025
 - Topic based
 - Recorded
 - Schedule/details coming in December Information Session
- Peer Analysis - ongoing
- UMass ERP product inventory
 - Gathering information about ERP products in use
 - Connecting with each campus for insight/validation

Next Steps (November)

- Leadership interviews
- Functional Insights Questionnaire
 - Estimated to send on 11/6 (open for 2 weeks)
 - 3-4 open ended questions
- Organizing Functional Workshops
 - December through February
 - Work around holidays/calendar year end, etc.
 - Work with campuses to ensure proper representation
 - Communication in mid-November

Communication

- Monthly report out to system-wide governance groups
- Monthly updates for system-wide affinity groups
- Monthly email status report to campus stakeholders (anyone who has participated in any of activities to date)
- Monthly Website updates
 - Status Report, Questions and Answers, various materials
<https://www.umassp.edu/innovation-and-operational-services/ERP-roadmap-project>
- Periodic Information Sessions

Questions