

Case Study: University of Bath

Recognised as one of our top ten universities the University of Bath sets high standards for its systems and chose Agresso as the replacement for their legacy finance systems.

When the University of Bath's incumbent finance system was identified for a version upgrade the University elected to review its options and consider the alternative products that were available in the market. From this early stage, in late 2005, the University was very committed to the selection process and ensuring that they retained the best solution for their specific needs.

The project was set-up to undertake a major review of the University's requirements and deployed a dozen specialist functional groups each establishing a well documented set of requirements to take to market.

The University then undertook a lengthy and detailed selection process with potential suppliers. As Howard Crowter-Jones recalls, ' we understood the scale of the investment we were making and wanted to ensure that we had a good understanding of the consultants and products in the HE market. We had the normal supplier presentations but

wanted to talk to real users and therefore visited a number of other universities with needs comparable to our own who were already using the products.'

The need for the solution to support the University in managing its research budgets of over £25 million and its extensive reporting requirements were an important part in the selection of the successful Agresso solution that includes core Financials, Sales Order Processing, Procurement including Web Requisitioning, Inventory and Project modules.

The project manager headed a team of four functional leaders for finance, procurement, accounts receivable and also projects; as well as departmental users and IT services staff. The University followed a comprehensive programme of work using the established functional streams to undertake training and workshops and complete a proof of concept. In addition, the scale of this project necessitated substantial requirements for interfaces, data migration and customised reports.

'Using an Integra project manager instilled a greater feeling of confidence and control in our project. He combined his strong leadership with a keen understanding of the challenges and issues that we faced. I believe his project management skills and knowledge of Agresso were critical in ensuring the smooth progress and success of our project. '

Howard Crowter-Jones
MARS Project Business
Co-ordination Manager
Finance Office
University of Bath

Integra Associates is an independent consultancy specialising in implementing financial business solutions and is made up of qualified accountants and IT professionals.

The interfacing includes links to payroll, student administration, the ePOS catering system operating in the restaurant and bars as well as the estate works order management system.

Data was successfully migrated from the old system for customers, suppliers and general ledger accounts with all open item transactions being loaded to the new system. The University's decision to migrate historical transactions against the detailed project budget categories has brought significant benefits in the quality of project information now available.

The areas of technical installation, data migration, development of interfaces, ARC reporting and issues arising from the testing and day to day running of the system were dealt with by the IT services team working closely with the Integra technical consultant who provided support as required.

The project manager kept tight control but as he observed their success in meeting the challenging schedule to go live in August 2007 was with 'the significant commitment and contribution from the whole project team.' The high level buy in and support of the project by the main board has always been most visible to users and has undoubtedly assisted in the overall commitment and drive for success. But the University of Bath's Agresso implementation has been more than a replacement for their legacy systems it has successfully paved the way for change and the adoption of more efficient business processes.

'This was a very significant transformation project - no one contemplating such a migration should underestimate the change impact such a project can have nor the need to invest thoroughly in the support, engagement and commitment of the users. Overall the project has been a huge challenge but with Integra's experience we felt assured and part of a well controlled project. As with any project we encountered problems but these were managed and efficiently dealt with.'

Howard Crowter-Jones

The University has over 10,000 students supported by 2,500 staff and the finance system already has an increased user base from 220 to over 800. The system is used by academic and administration staff and currently processes over 5,000 purchase orders and 2,500 accounts receivable invoices per month. The solution is realising the high standards set by the University with benefits showing as users are able to take ownership of stages of business processes, supported by the system and its powerful workflow capabilities. The users now work more on-line, with much reduced use of paper, having access to improved reporting and are able to interrogate the system themselves as appropriate.

MODULES

- Accounts Receivable
- Accounts Payable
- General Ledger
- Bank Reconciliation
- Procurement & Web Requisitioning
- Inventory
- Sales Order Processing
- Project

INTEGRA SERVICES

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- Technical Consultancy

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