



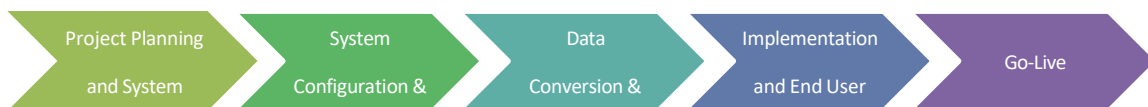
TO: Finance Commission
FROM: Stephanie Beauchaine, Consultant
SUBJECT: Tyler ERP Project implementation update

RECOMMENDATION:

Receive an update on the Financial Enterprise system implementation

Background

On December 29, 2022 the city contracted with Tyler Technologies, Inc. for the purchase of the Tyler Enterprise Resource Planning (ERP) software. Included in this purchase are products and services related to the design and implementation of software modules and features related to conversion, support and training services, as well as recurring licensing agreement costs. The elements of system design, data conversion, implementation serve as pillars that structure the project plan of which milestones, deliverables and deadlines are set and ultimately lay the foundation for the project timeline.



The Tyler ERP Project implementation process is ongoing. The implementation team includes SDI Presence, LLC serving as Project Manager, Geoff Thomas, Senior Project Accountant, and Beauchaine Consulting Group, LLC serving as technical lead, alongside KOA Hills who is performing data conversion services.

Implementation is ongoing with a planned “Go-live” date of July 1, 2025.

Discussion/Analysis

Project progress continues to move forward rapidly, and the team has made strides with current and future state analysis, data configuration, system configuration, power user training and process refinement, and RBAC/Roles and User Permissions has begun as follows:

FY2024-25 Q2

- Configuration refinement and power user training continues

- Process refinement is underway
- Data configuration: Financial Actuals for FY 21-23, and vendors are loaded
- RBAC Roles, Permissions, and Users design and build

FY2024-25 Q3

- RBAC, Roles, Permissions, and Users testing
- Chart of Accounts training for Finance and External departments
- Data configuration: Load Financial Actuals and Budget for FY24
- Process refinement and Power User Training will continue

ERP Project Schedule

