



STUDENT
SYSTEM
SOLUTIONS



UNIVERSITY OF
PORTSMOUTH

SAM Finance Reimplementation Project



SITS CONFIGURED SOLUTION



FINANCE - FEES, FUNDING & SAM



STU3 COLLABORATIVE PROJECT

- ▶ Multi-year project to reimplement the Fees and SAM Finance modules of the SITS system to resolve critical issues with the original implementation.

“It’s now the system we wanted from the start and was promised to us by the supplier, so we are now really happy. Student experience is amazing. They can register quicker and we are getting less queries. The staff are happier, content and have confidence in the system.”

Vicky Bruce, University of Portsmouth, Deputy Director of Finance

Stu3 Case Study

www.stu3.co.uk

The Challenge

Prior to Stu3 being engaged by Portsmouth University, the Tribal SITS Finance workstream implementation was one of the first to go-live, with significant issues and errors being identified almost immediately that only escalated over the coming months.

“The way that SAM was originally delivered was very inflexible. By the time we started using SAM it was almost irrelevant - nothing that was built worked in reality!”

Andrew Young, University of Portsmouth, Fees and Funding



Vicky Bruce

“I came onto the project team when finance was going live. Immediately we found that balances weren’t matching between the E5 finance system and the SITS SAM debtor ledger. Colleagues were reporting screens not working. The team was under so much stress and I kept telling them it would get better, but it never got any better. There were so many complaints from students trying to register. We had 7000 emails in our inbox and the trouble was that when students couldn’t complete their registration, an email was sent to the ‘hold’ inbox, joining over 7000 other outstanding emails.” **Vicky Bruce, University of Portsmouth, Deputy Director of Finance**

Things got so bad that the Portsmouth Finance team were questioning whether to pull the plug completely on the SAM Finance module.

“The only way I can describe the pain was that we finally filed our financial figures in November when it should have been in August. We had to do so much manually, I had to lock myself away for 2 weeks just to get it done” **Jim Hesbrook, University of Portsmouth, Head of Credit Control**

“The list of issues went on and on and on and after 2 weeks of relaying these to the Finance Director, they decided we couldn’t carry on like this and involved the IS Director and SITS Programme Manager as the university was still in its implementation of SITS. The Programme Manager escalated the issues to the supplier but the turnaround was slow, even though we had daily meetings. So much went wrong with the first implementation that I had written SITS and the SAM module off completely at this stage. We decided there were three options available to us:

1. Pull SAM module and revert back to pre SITS
2. Leave as is and fix
3. Pull out temporarily and rewrite from scratch”

Vicky Bruce, University of Portsmouth, Deputy Director of Finance

The Solution

It was at this point that the expert Stu3 finance team was engaged by Portsmouth to undertake a detailed review of the original Tribal SITS Finance implementation and provide a report detailing how the extensive issues could be resolved.

“One of the challenges with the original SITS finance implementation was that too little consideration was given to best-practice and what the system was designed to do. Instead they had tried to fit existing finance processes into SITS with improvements, which prevented SITS being used to the best of its ability. Because SITS is so configurable, there is a real risk that without an experienced SITS Finance consultant providing guidance, and a customer who has no real SITS experience, that poor process design decisions are made which can be catastrophic. What the original finance consultant team should have done was take a step back and consider the current finance processes and whether they were still needed, and then provide best-practice advice to the Portsmouth Finance team on how SITS could be used to carry out those refined requirements.” **Dave Chamberlain, Stu3, Lead Consultant**

The Stu3 finance report was delivered, and after being convinced that the Stu3 finance team could indeed fix the critical issues, Portsmouth gave the go-ahead for Stu3 to reimplement the Fees and SAM Finance modules of the SITS system.

“Stu3 were engaged to carry out a health check of SITS Finance. I could finally see that if SITS could do what Stu3 said could be done on the report, there was hope. Year end reconciliation for the auditors was first and then immediate fixes improved the integrity of the data. The biggest piece was designing a new student financial registration process. We worked with Dave and designed it together. Dave asked us what we wanted it to do, went away for a couple of weeks and came back with exactly what we had hoped for. It felt amazing. It was exactly what we always wanted and the feeling was sheer joy and relief!” **Vicky Bruce, University of Portsmouth, Deputy Director of Finance**

The Stu3 Fees and SAM Finance Re-implementation Project's first focus was on the most critical financial compliance issues - fixing the processes that could be redeemed, and doing a full re-design of other critical processes. The Stu3 team added new features to improve financial controls, to streamline finance business processes and to enhance the overall student finance experience.



The key areas of focus were:

- ▶ Fix the core SAM debtor ledger integrity issues
 - ▷ Resolved the SAM to e5 Finance system reconciliation imbalance to enable full finance audit compliance
 - ▷ Creation of a new data integrity dashboard available 24/7 to finance managers to identify any imbalances or finance data integrity errors
 - ▷ Creation of a new daily finance reconciliation report to ensure the two systems remained in balance once the extensive initial errors were rectified.
- ▶ New eVision finance account view screen for staff, enabling a 360 view of all of the relevant information relating to the student and sponsor accounts.
- ▶ Review and reconfigure the direct debit notification process and amend direct debit setup tasks in the MyFinance page.
- ▶ Provide a pre-payment option on the MyFinance page to prevent overpayment.
- ▶ Rewrite the entire student Financial Registration task
 - ▷ The re-design of the financial registration task was needed to simplify the existing task and split online payment, DDM (Direct Debit Mandate) and RCP (Recurring Card Payment) processes into sub-tasks which can be re-used for setting up ad-hoc payments/payment plans as well as addressing , the current DDM setup issues within online registration.
 - ▷ The fee calculation, minimum payment required and balance to pay was built into a single calculation and into a single step where it is also displayed to the student.
 - ▷ The fee calculation was amended to include pending payments (LTEs with awaiting import status) so that online payments made by the student can be immediately recognised if they leave the process and start again.
 - ▷ Payments made outside of the system can also now be recognised more quickly.
 - ▷ The payment amount selection (full/minimum) and payment method and payment plan was updated so that the student had less steps to follow and the process made simpler.

- ▷ Show the breakdown and payment options more clearly for the amount to pay now, and the amounts/instalments to pay after registration.
- ▷ Prevents students from setting up a direct debit if an RCP is already in place and vice versa.
- ▷ Built-in validation check to the 'ID check' to ensure international students have paid 50%
- ▷ Invoice posting process has been moved from the end of financial registration to the end of the full registration process. This has made it easier to roll back fee transactions if required.

“Stu3 were brought in to fix a broken implementation and the most urgent fix was to get e5 and SITS reconciling. The biggest challenge was convincing them to buy into the system and not scrap it! Once we fixed the reconciling issue, we provided a report to run daily that proved it was reconciling with lots of ticks! We had gained their trust then to allow us to move on and continue improving other areas”

Dave Chamberlain, Stu3, Lead Consultant

“Discounts were the worst - so messy and you needed a lot of client knowledge to hunt around for the discount. Dave from Stu3 came in and was like, ‘I can build a task to do that for you.’ It’s now one screen and one button! We can also amend discounts easily with one button and the most common discounts have been built into fee profiles. The sponsorship and rejection process is now built into the registration process and students can query fees during registration, which now generates emails for the fees and funding team.” **Andrew Young, University of Portsmouth,**

Fees and Funding

“The financial registration is oceans apart from what we had before. Dave and the Stu3 team looked at the whole process and fixed it! As part of that, they saved us hours of time and gave the students a much much better service.” **Jim Hesbrook,**

University of Portsmouth, Head of Credit Control

The Benefits

“It’s now the system we wanted from the start and was promised to us by the supplier, so we are now really happy. Student experience is amazing. They can register quicker and we are getting less queries. The staff are happier, content and have confidence in the system. On top of that, the additional staff we brought in to help with the bad registration and emails, have now been reduced as they are no longer needed.” **Vicky Bruce, University of Portsmouth, Deputy Director of Finance**

“Sponsor management is out of this world! It’s now viable to use. Notifications are now going to the right place with better messaging, telling you what info you need at the time it was sent through, which has saved us so much time as we are not having to investigate from scratch every time. We’ve also saved time from having to look into individual students for discounts and overrides.”

Andrew Young, University of Portsmouth, Fees and Funding

“This year because of the new registration process, we have only made 13 manual overrides compared to around 2600 last year! The workflows are better so students can flow through the process instead of coming to dead-ends, which we had to override to allow them to get to the next stage. Just my team alone had 1000 emails a day last year, with 2000 at any one time. This year, it has barely gone above 500. Morale in the team is better for it too.”

Jim Hesbrook, University of Portsmouth, Head of Credit Control

Portsmouth carried out a student survey after the new Stu3 designed finance registration task had been implemented:

- ▶ 84% of respondents found the registration process easy to follow
 - ▶ 79% found it was clear what they needed to do next.
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Working on the project

“Stu3 listen, challenge and write specs. You can’t ask for more than that. There’s also a robust test process before it even gets to us. Documentation is always amazing. Dave sends a manual and it’s done - we only have to put them online. No issues working remotely and can’t suggest any improvements. Stu3 are trustworthy and deliver what they say they will deliver.”

Vicky Bruce, University of Portsmouth Deputy Director of Finance

“The whole approach is very professional and structured. They have expert experience and use best practices from other universities. Rather than say, ‘we can’t do that,’ they say ‘here are some options.’ I’ve worked on other implementations and I can honestly say that the level of detail Stu3 put in, is like nothing I’ve experienced before. A good demonstration of how good Stu3 are, is when we were testing something that was going to happen in the future. Dave set it up so that we could move data onto the next steps like real time testing to move through the complete cycle. It was very comprehensive testing.”

Jim Hesbrook, University of Portsmouth, Head of Credit Control

“I’m not ready to let them go and I don’t want anyone else near the system! I’m usually a harsh critic but I have nothing negative to say. Everyone at Stu3 comes across like they want to work there so I would always go back to Stu3.”

Vicky Bruce, University of Portsmouth, Deputy Director of Finance

“Stu3 feel like part of the team” **Jim Hesbrook, University of Portsmouth, Head of Credit Control**

“I am amazed at how well the partnership works - I message Dave and he responds! Stu3 are great at coming back and seem to have it built or tweaked in no time. Almost ridiculously quick! I’m yet to find a task that’s too big. Even if we think it’s big, Stu3 seems to turn it around really quick and if it is big, there is always a solution.

It’s been really fun! The meetings are enjoyable, they have purpose, I never want to miss them!” **Andrew Young, University of Portsmouth, Fees and Funding**

Background on Client



“We exist to be a world-class university; one that makes a difference to the world, through transformational education, research and innovation. But to do great things, it takes more than good intentions.”

*Three things tie together **our plan for the future**: our ambitious mission, our vision for bringing it to life, and the values that define the way we work, collaborate and behave.*

*We’ve already made giant leaps towards our goals – we’re **developing our campus** and becoming a **more sustainable** university, and the strategies and plans we have in place are ready to be explored below.”*

Portsmouth University is closely involved with the local community and takes ideas into the global marketplace. They partner with business, industry and government to set the course for a better future. And they educate and transform the lives of their students to help them achieve their potential.

Let's chat.

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STU3 CASE STUDY

Multi-year project to reimplement the Fees and SAM Finance modules of the SITS system to resolve critical issues with the original implementation.