eFinancePlus Upgrade Process

Suzan Andrews, Product Manager, eFinancePlus

March 4, 2019
Agenda

• Why Upgrade?
• The eFinancePlus Customers
• Types of Upgrades
• Upgrade Options
• Upgrade Process
• What Does an Upgrade Look Like?
• Frequently Asked Questions
• Question / Answer
Why Upgrade?

Benefits of Upgrading:
- Better Support: We support the current version and 2 prior versions
- Stay Current: Easier to adopt new releases and enhancements
- New Functionality: Top 3 below

<table>
<thead>
<tr>
<th>eFinancePLUS 19.4 and Above</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Enhancements</td>
</tr>
<tr>
<td>Purchasing Enhancements</td>
</tr>
<tr>
<td>Forms Printing Enhancement</td>
</tr>
</tbody>
</table>
## eFinancePLUS Customers' Current Versions

<table>
<thead>
<tr>
<th>eFinancePlus Version</th>
<th>eFinancePlus Customers</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.0</td>
<td>15 Districts / Consortiums</td>
<td>6%</td>
</tr>
<tr>
<td>5.0 SP1</td>
<td>21 Districts / Consortiums</td>
<td>8%</td>
</tr>
<tr>
<td>5.1</td>
<td>126 Districts / Consortiums</td>
<td>51%</td>
</tr>
<tr>
<td>5.2.X</td>
<td>87 Districts/Consortiums *38 customers testing</td>
<td>35%</td>
</tr>
</tbody>
</table>
Types of Upgrades

• Feature Release - Full Upgrades (5.0 / 5.1 / 5.2.x to 19.4.0.0)
  • A full upgrade has extensive Feature enhancements provided to customers.
  • Release Notes are provided to customers outlining enhancements.
  • TechNotes are provided to customers outlining release details.
  • Training is recommended
  • Webinars are offered

• Maintenance Release Upgrades (5.2 to 5.2.6 / 5.2.7 / 5.2.8 etc...)
  • Compliance / Maintenance Release
  • Release Notes are provided to customers outlining feature changes.
  • TechNotes are provided to customers outlining release details.
  • No Training is required.
Feature Release Training Options

• **Standard Upgrade Package**
  • One to One Training
  • Training days with a dedicated consultant
  • Project Management Time Coordinating the Upgrade.

• **New Low Cost**
  • One to Many Webinar Style Education Sessions – Consultant Led
    • Reviewing new features and functionality
    • Review Setups
    • Provide End User and Administrative Trainings
    • Ensure you are able to get the value out of your software solutions upon upgrading.

• **No Cost options for Upgrade Services**
  • Recorded Seminars – Self Led
    • Reviewing new features and functionality via recorded seminars.
    • Review Setups following recorded seminars.
    • Ensure you are able to get the value out of your software solutions upon upgrading.
What’s the Process to Start my Upgrade?

- Determine which method you would like to use for your upgrade.
- Reach out to your Sales Rep and let them know you want to Upgrade.
- Your Sales Rep will loop in the Install, Services, and Tailoring teams:
  - Custom Retrofitting
  - Installation and/or Hardware fees for On-premise customers
  - Training and Project Management
- Based on Option Selected:
  - Your Sales Rep pulls together your Quote and sends to you
  - You Review, Sign, and Return
  - Your Sales Rep ‘Closes’ the Deal in our System
What Does a Traditional Upgrade Look Like?

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>eFinancePLUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td>4 hours</td>
</tr>
<tr>
<td>Training</td>
<td>2 days</td>
</tr>
<tr>
<td>Custom Retrofits</td>
<td>Needs to be quoted</td>
</tr>
<tr>
<td>On Premise Installs</td>
<td>Needs to be quoted</td>
</tr>
<tr>
<td>Cloud Installs</td>
<td>No Cost</td>
</tr>
</tbody>
</table>
What Does a Traditional Upgrade Look Like?

• Your Project Manager will send you a welcome email
• You have a Kickoff call with your PM to identify target go live date
• The Tailoring Team will begin working on your Custom Retrofits
• The Tailoring Team will deliver the Custom to the Install Team
• The Install Team will perform the Install (including Custom) in TEST
• The Services Team will complete a Smoke Test
• The Services Team will perform your Training
• Your District will test and submit Support cases for any issues
• The Install Team will create a parallel payroll database for testing
• Your District will run a payroll parallel
• The Install Team will perform the Install (including Custom) in PROD
What Does an Upgrade Look Like?

Month 1
- Sales Process

Month 2
- Custom Retrofit

Month 3
- Install TEST
- Training
- Client Testing

Month 4
- Install PROD

Month 5
- Go Live

PowerSchool
Frequently Asked Questions

Q: Why do I need to test? Didn’t you have a beta group?

A: Yes! We have a Beta for every feature release with 2-4 customers BUT Every Site uses eFinancePlus a little differently. You might have a setting that’s specific to your State or District. It’s Important to test to identify any issues before Go Live. All Issues should be submitted as support tickets. Any critical Items for Go Live should be clearly identified to your Project Manager so they can ensure it gets resolved in time.
Frequently Asked Questions

Q: What is the Custom Retrofitting Fee?

A: If you have had any Custom software developed, the Tailoring team needs to:
   • Review that Custom
   • Make adjustments (if needed) for the Custom to work on the new Version
   • Package that Custom up for your new Install

The fee covers the cost of making any needed adjustments to a custom feature
   • Ensures the custom works in the upgraded version
   • Covers the custom’s operability for the custom’s current version as well as two future versions
Frequently Asked Questions

Q: Why Couldn’t I Upgrade Immediately after a new Release was Available?

A: The Compliance Team needs to update the software for every state for each release. These updates are not complete for all states at the time of General Availability.
Frequently Asked Questions

Q: Why do I need a Project Manager? What am I paying for?

A: For a traditional upgrade your Project Manager will coordinate, schedule, and maintain:

- The overall Project Plan
- The overall Project Budget
- Custom retrofit dates
- Install and/or hardware dates
- Training dates
- Any cases you need to escalate
- Goal: Keep everything on time and within budget!
Frequently Asked Questions

Q: Why do I Need Training? We’ve been live on the software since 2002.

A: Your Software Consultant will provide training on:
   • The new features included in this release
   • Any Tips and Tricks as you’re navigating the software
   • And can help identify gaps in functionality you’re not using or are misusing

You have the option of attending the No Cost or Low Cost Upgrade Trainings.
Frequently Asked Questions

Q: Can we get Additional Training, we’ve been live on the Software since 2002?

A: Yes! We have a number of other Training options:
  • Boot Camps
  • Training
  • Seminar Sessions
  • PowerSchool University
  • SNUG Pre-Conference Sessions
  • Keys to Ownership (KTO)s

Also, if you suspect your District isn’t utilizing functionality to it’s fullest...
  • Is your organization spending too much time on mundane and repetitive tasks? Ask about a Business Process Review for your District.
Business Process Reviews (BPR)

How a BPR Helps Districts:
• Identify pain points and inefficiencies
• Re-evaluate decisions and configuration
• Enhance software use promoting efficiency

Appropriate when the client has:
• Been live on the software for a long time
• Had recent turnover
• Says things like “I don’t know if we’re using the software correctly”
Questions?