

Irving Independent School District, Texas

Munis Early Adoption Program Allows District to Use New Technology to Improve Business Processes

Industry: School District **Location:** Irving, Texas
Employees: 5,100+ **Years as a Tyler Client:** 6
Students: 34,000+ **Budget:** \$256 million
Schools: 36 Schools, 3 Learning Centers

Munis Modules Used: General Ledger, Budgeting, Accounts Payable, Contract Management, Requisitions, Purchase Orders, Project and Grant Accounting, Fixed Assets, Treasury Management, Work Orders: Fleet & Facilities, Payroll, Human Resources Management, Cash Receipting and Employee Self Service

Munis Productivity Tools Used: Role-Tailored Dashboard, Central Programs, Munis Office, TylerForms, and Tyler Content Manager Enterprise Edition

The Facts: Established in 1909, the Irving Independent School District has grown from a single-building wooden schoolhouse to a district that encompasses 48.5 square miles within the City of Irving, Texas. The district’s mission: produce engaged learners who are critical thinkers, leaders and contributors in a technologically diverse and competitive 21st century world. Students in the district represent 98 countries and 56 languages.

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Key Challenges

- Utilize and test new technology to influence the quality and feature value of the district’s enterprise resource planning (ERP) system
- Implement a new version of Munis without disruption to end user business processes
- Perform a complicated server upgrade to Microsoft® Windows® 2008 R2 operating system

Benefits: Financial and Beyond

- Gained access to new Munis technology, programs and tools before general release to clients
- Improved insight into district financial information for informed, strategic decision making
- Reduced time spent by staff preparing monthly reports
- Played an important role in shaping and testing new releases of Munis

Irving ISD Best Practices

- Worked closely with Munis Early Adoption Program and district staff to ensure minimal disruption to end users
- Provided valuable feedback on Munis Version 9.1 features to be incorporated in subsequent releases

Why Tyler?

- Tyler has more than 30 years of experience providing software and services to the public sector
- Tyler has an established, successful Early Adoption program for select clients to implement and test new releases of Munis prior to general release
- The Munis ERP suite is a fully-integrated software solution
- Tyler is the largest company solely dedicated to providing software and services to the public sector

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In Their Own Words:

“Our users have adapted to the new [Tyler Role-Tailored] Dashboard without hesitation. We have not loaded one stand-alone client or workflow assistant on a PC in our district. Even principals are using it to approve requisitions.”

- Bonnie Russell, Senior Programmer/Analyst

Munis Early Adoption Program Provides Access to New Technology

For Irving Independent School District (ISD) in Irving, Texas, maintaining their financial data and processes on the latest technology is important—and one of the main reasons the Business and Finance Office entered into the Munis Early Adoption (EA) program in 2011, moving from Version 7.5 to Version 9.1, a Microsoft Silverlight™ solution. In addition, the office was facing a complicated upgrade of their servers to the Microsoft Windows 2008 R2 operating system. By participating in the EA program Tyler staff would be available to help not just with the new software, but also with the server upgrade. “Help with the testing of our infrastructure as well as the new software was very important to us,” stressed Bonnie Russell, senior programmer/analyst. “During the EA program, not only did we get access to the newest Munis features and technology, we also received unparalleled support from Tyler staff. This attention was definitely an enticement to enter into the program.”

During the transition to Version 9.1, Tyler staff worked closely with Russell to minimize the impact it had on the end users, ensuring processes continued uninterrupted. “Tyler staff put in a lot of effort to get the system up and running as quickly as possible and address any issues,” explained Russell, leading to noticeable support for the upgrade, both in and outside of the department. Only a week after go-live, processes were running smoothly and users were already starting to see benefits.

Benefiting from Munis Version 9.1's Advanced Features

Munis Version 9.1 offers Irving ISD users access to the latest and greatest features for maintaining, analyzing and reporting on financial data in an easy-to-navigate system. Just a few of the new features Irving began using during the EA program are dashboard templates for the Tyler Role-Tailored Dashboard, business intelligence cubes, and new central programs for accessing high level overviews of key financial data such as Fixed Assets, Invoice and Purchase Orders centrals.

New dashboard templates for the Tyler Role-Tailored Dashboard—which provides easy access to comprehensive information and tools found in Munis for informed, strategic decision making—have helped the district see a significant improvement in user efficiency. These templates, created for each role in the organization, provide a basic framework from which customizations can be made to fit the unique needs of each user. By using these templates, Irving ISD's IT staff saved countless hours that would have gone to setting up and

customizing the dashboard for their users. Russell and her team were able to successfully move 400 users to the dashboard at once, and not one person questioned why they had to use it. “Our users have adapted to the new dashboard without hesitation,” emphasized Russell. “We have not loaded one stand-alone client or workflow assistant on a PC in our district. Even principals are using it to approve requisitions.” According to Russell, one Irving ISD user put it best: “I really want to use this—it helps me do my job faster.”

Irving ISD's use of the new dashboard templates isn't just providing benefits to the district—it will also provide benefits to other Munis users. Throughout the EA process, Russell provided important feedback in the hopes that other Tyler clients would have access to the best tools and features available. Her input has been instrumental in further developing the dashboard templates for subsequent releases. In fact, many of the changes to the dashboard templates in Munis Version 9.2 can be traced directly to her feedback.

In addition to the dashboard templates, Irving ISD was also one of the first clients to use Tyler's recently developed business intelligence cubes. Made up of pre-defined and organized sets of data fields, cubes offer a multi-dimensional look at the information contained in Munis. Using Microsoft Excel® PivotTables, Irving ISD staff can select, drill into, rearrange, summarize, report on and analyze their financial data in new, highly useful ways. Easy to use, Irving ISD staff was trained to use the new general ledger cubes in less than two hours. “We really saw the value in the cubes,” said Russell. “During our first training session our financials staff was like kids in a toy store. You could see they were already thinking about how to start using the cubes as soon as possible. Immediately they knew these would make processes and tasks, such as preparing monthly reports, faster and easier.”

A Successful Experience

With Tyler's Evergreen Development philosophy, the Munis system and its features are continually enhanced without additional fees, something that is extremely important to Russell and one of the deciding factors in whether she would become an early adopter again. “Now that I've gone through the EA program, I would absolutely participate again,” stressed Russell. “This was without a doubt the smoothest upgrade I have ever done with Munis. With all the technology changes, moving users to the dashboard, server updates, last minute configuration changes, it was the most complicated upgrade, but the most successful!”