CASE STUDY

The University of York implements Imprest to help improve project and programme management within the Estates Development Department

Imprest selected for improving management and control of project information

The objective for this implementation has been to embed the Imprest system as the Portfolio and Programme management tool for use by the Estates Development Department of the University of York. The project required the system to replace a number of existing Excel based systems with a single integrated solution. This has included putting in place an interface from the University's financial system, Agresso, to import details of orders, payments and accruals into Imprest. The Department has been in the process of writing new procedures for management of the project life-cycle including financial control and quality management. It was a requirement that Imprest be configured to reflect the new procedures and, where relevant, support adherence to them.

Imprest makes project information more visible, improves reporting and supports best practice

At the beginning of the project, a series of meetings were held to ensure the University's requirements were understood. This included production of a Project Brief containing the objectives, outcomes and deliverables of the implementation.

The following is a list of the outcomes that Scientia has worked with York to achieve.

- Helping to improve the level of project maturity by configuring Imprest to support best practice, based on the University's tailored RIBA method. This has included configuring Imprest to reflect requirements for project stage planning and gateway management.
- Providing a transparent view of projects across the Estates programme, making early corrective action possible.
- Improving the standard and efficiency of monthly highlight reporting for project managers by using Imprest to generate monthly highlight reports direct from the system.
- Improving the standard and efficiency of executive reporting by producing portfolio reports aggregated from projects.
- More efficient timesheet management by replacing an Excel based system with the Imprest timesheet module.
- Supporting the introduction and management of robust financial control and quality management procedures.

"The Imprest software provides us with a single solution for managing all project work and is integrated with our financial system, Agresso, enabling all project information to be monitored and reported from within a single system."

Gary Ashmore, Head of Estates Development at the University of York

CASE STUDY

Integrated implementation team to ensure a successful outcome

The implementation has been managed using the PRINCE2 method, enabling Scientia to understand York's working practices and aspirations for change and for the University to understand how Imprest can most effectively be used within its environment.

Imprest can be installed on an intranet or provided as a hosted service. For this implementation the system is hosted by Scientia. It includes a secure network and firewall, system backups and off-site storage. The University can provide secure access to the system to all members of a project team.

The following elements were included within the implementation:

- a requirements gathering exercise to gather basic static data and understand current working practices.
- a pilot system, hosted by Scientia, was made available to:
  - set-up the initial configuration of the system and demonstrate functionality.
  - build working practices into the system.
  - test the Agresso financial interface.
  - facilitate an on-going skills transfer during the system build.
- discussion and refinement of the processes including:
  - creation of project templates to manage the RIBA gateway process, incorporating transitions between gateways.
  - creation of a library of standard risks.
  - establishing user roles and security permissions.
  - defining template document folder structures.
  - defining report outputs and system alerts.
  - providing end user training sessions, workshops and tailored user manuals.

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