

Case Study: AIU

Client

The Allegheny Intermediate Unit (AIU) is part of Pennsylvania's public education system and is one of 29 intermediate units across the state. The organization provides specialized educational services to Allegheny County's 42 suburban school districts and five career technical centers. AIU employs approximately 1,500 educators at 420 sites and operates 11 family centers and three schools for exceptional children. They offer 130 programs and services for infants, young children, students, and adults.

Business Challenge

AIU wanted to replace their existing manual operational processes, which did not follow any workflow/accountability guidelines. Additionally, they wanted to improve the efficiencies of the existing financial and HCM operations. Some key activities of the transition were to a) migrate existing data to the new cloud-based solution, and b) implement integrations with inhouse and third-party systems. Ensuring a smooth transition to Oracle cloud through proper project management was another key objective, along with retiring existing applications, processes, and procedures.

Infolob's Contribution

Infolob implemented the chosen Oracle Cloud solution and streamlined finance, HCM, and procurement processes with best practice-based workflows. Infolob leveraged its end-to-end HCM & financial capabilities with a focus on process, people, and technology, along with tools and accelerators for all project stages. Project implementation was aligned to the AIU-expected timeline and organizational constraints. Implementation was done in Oracle Cloud Applications Release 13. Delivered, out-of-box functionality was to be used predominantly. The following Oracle Cloud modules were implemented:

- Financials
- Purchasing
- Planning and budgeting
- Invoice and document management
- Core HCM (along with absence management and benefits)
- Time entry
- Payroll
- Performance management
- Recruitment and onboarding (Taleo)

Salient features of AIU3 Cloud implementation:

- Efficient design of enterprise structure consisting of legal entity, business unit, chart of accounts with the licensed products (no projects and grants modules) that maximizes the benefits that the product offers
- Chart of accounts structure was designed while keeping the shared services model across AIUs in mind
- Trail balance by program with effective use of SLA
- Meeting reporting requirements by fund, project, program, function, and funding source
- A system AIU3 can use to offer shared services for the remaining 28 units.

Business Impact

AIU now has a unified HCM, finance, and procurement solution. It provides clear accountability with a single source of truth and workflow-based approvals. Business functions spanning across internal and external systems are seamlessly integrated. All finance, procurement, compensation, time entry, and payroll processes are automated. Effort is significantly reduced efficiency is improved due to elimination of manual/paper-based steps in the business processes. The decision making is now data-driven, leveraging the OTBI reporting available out-of-the-box in the solution.