



Business Process Configuration Schedule

Visit Description

During the Business Process Configuration (BPC) visit, RMS staff will build out items as specified during the BPR visit, with input from the client. Specific items built and modified will vary based on client needs and which processes are needed at the time of cutover. The outline below is a starting point and will be finalized as part of the BPR visit. This is not a training visit; this is a joint work session.

Attendees

It is essential that one or two staff member(s) with a deep knowledge of business needs and who have decision-making authority attend this entire session. Members of the project team (assignments, accounting, applications, cancellations, etc.) should be available, as needed.

Schedule

Each day will begin at 9am and end at 430pm. Lunch and breaks will be scheduled, accordingly. Below is an outline of possible configuration items – it is likely your list will be shorter based on which items are needed for your first three months. A more detailed outline of your configuration items will be provided after your BPR visit.

1. Design, Profile, and Application
 - a. Design elements – styles, labels, messages
 - b. Correspondence – senders, configured emails/SMS
 - c. Profile Items (lookup lists, flag types, etc.)
 - d. Housing/Accommodation Application
 - e. Contracts and Payments
2. Assignment Items
 - a. Self-Assign Existing Students
 - b. Intellassign New Students
 - c. Waitlists
 - d. Booking Management (Rooms and Plans, if applicable)
3. Inspections and Maintenance
 - a. Opening Processes (Room Inspection and Check-In)
 - b. End of Year Processes (Room Inspection and Check-Out)
 - c. Maintenance
4. Accounting and Other items
 - a. Miscellaneous Forms (animals, medical, etc.)
 - b. Fee Assessment
 - c. Charges and Credits
5. Navigation and User Access
 - a. Landing Page and student navigation
 - b. Home Menu and staff navigation
 - c. Roles and Positions

Preparation for Visit

- Reserve a room for BPC visit
- High resolution projector (1280x1024) or large screen television – ensure that staff sitting towards the rear of the room can read text on the screen.
- White board, smart board, or easel with newsprint.
- Identify which staff are attending and ensure their availability.
- Review and confirm proposed visit schedule – work with RMS staff member to make any necessary adjustments.