FROM HANDROLLED TO 3RD PARTY

Moving a client from a legacy in-house application to a complex and expensive commercial product
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INTRODUCTION

• At SMPH assist client groups with desktop applications, technical solutions, software development and maintenance

• A group at SMPH needed to move from a handrolled web application to a 3rd party application that provided some key functionality
Wisconsin Partnership Program

- Grant Proposal Application
- Proposal Review
- Grantmaking
- Tracking and Compliance
More complex software doing more jobs is more available

As a large university with lots of end user needs and finite resources, buying is more and more a choice to consider.
LEGACY

In-house, locally hosted
### Summary

**Proposal Title:** Richland FIT  
**Year:** 2012  
**Type:** CAPF: Full Implementation  
**Status:** Awarded

**Start Date:** 04-01-2013  
**End Date:** 03-31-2016  
**Duration:** 3 Years

**No Cost Ext Beg:** 04-01-2016  
**No Cost Ext End:** 03-31-2017

**Lead WPP Staff:** Dearlove, Andrea

**NOI/Prelim:** 2378: Richland FIT

**Web Description:** Richland County has the highest rate of overweight adults in Wisconsin and the seventh highest rate of children enrolled in the Women, Infants and Children (WIC) program. The County Health Rankings identified Richland County as an area with low access to healthy food. Project staff will work with businesses, health
BLACKBAUD GRANTMAKING

(formerly Microedge GiftsOnline)

vendor-hosted
KEY DECISIONS

1. What data to migrate
2. When and how to cutover to the new system
3. How to manage active grants started in the legacy app
SUCCESSES AND CHALLENGES

Successes
- Auditing
- Graphics and Charting
- ID’ing Grants

Challenges
- Migration Fields
- Training & Documentation
  - Customization

ISH
- Workflows
- Report Formats
- Business Factors
MITIGATIONS, OPPORTUNITIES

Ongoing
- Fulltime technical help
- In-house documentation
- One-on-one training
- Workflow analysis

Future
- Customization Controls
  - Auditing
- Data Analysis Capability
  - Application Interface

Occasional
- Interns
- Consultant

From Handrolled to 3rd Party - Julie Zachman
FULL TIME TECHNICAL DEVELOPER

- Hired two years after golive (January 2019)
- Experienced full-stack developer with wide experience
- Does one-on-one training
- Writes in-house documentation via Confluence
- Sits among stakeholders for part of the week
- Reporting structure is through SMPH-IT
TAKEAWAYS

and hindsight

1. Availability of technical support
2. Drill down on specific features you know will be important
3. Ensure written documentation is available
4. Check business plan at sec.gov
5. The more you understand the target db the better
6. Ask about Application Interface (API)
ROUNDTABLE QUESTIONS

Criteria in evaluating a 3rd party system to replace a legacy system?

Ideas/experiences on implementing 3rd party system that would not be what they have chosen?

Ideas/experiences moving people from something comfortable and tailored from them to something more generic?

Strategies helpful to involve stakeholders in the new workflows? Think about stakeholders with different roles.

Your own question, please write down