

5 KEY CONSIDERATIONS *for* ACCOUNTING SYSTEM TRANSITIONS



IT'S A BIG CHANGE - BE PREPARED FOR:



Terminology differences



Daily, weekly and monthly processing differences, with the same end results



Report formats may be different - remember to be open to change

MANAGE YOUR EXPECTATIONS - KNOW THAT:

Command of the system will take time

Active participation will require an investment of your time

The earlier and more hands on you are, the easier the transition phase will be. Frustration is inevitable

TRAINING IS KEY - UNDERSTAND:

Company personnel needs to take ownership of learning the new system

Independent learning is critical - consider taking self-paced classes, webinars, or virtual classes

Notes taken during the entire implementation are essential

Instructions make more sense when they are in your own words

End-users must document each process, step-by-step

Including screen shots make review of notes easier to understand

HISTORY - MIGRATIONS REQUIRE:

Weighing the pros and cons of migrating summary versus detail data by transaction type

Impact on Decision: Cost of migration and complexity of mapping Files

Your time and effort to reconcile results to legacy system

Requirement and cost of archiving historical data

TESTING - SO MUCH DEPENDS ON THIS!

Users become familiar with the system and learn the new job processes

Test cases should be based on variations to each process

Mitigates risk, and insures the system will operate as anticipated

