

NASCIO State IT Recognition Awards Submission

STATE: State of Kansas

AGENCY: Office of Information Technology Services

AWARD CATEGORY: Enterprise IT Management Initiatives

PROJECT TITLE: Show Us the Money: Digitizing Financial Management

PROJECT DATES: August 2020 – January 2021

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Idea

The Apptio financial management tool was bought to help the Office of Information Technology Services (OITS) house its IT finance services.

OITS provides many of the back-office IT services across the various state agencies. These services include but are not limited to network (WAN/LAN), telecommunications, security, support services, consulting, policies and standards, and more. Services are funded through fees that are established based on the cost to provide the services. The objective is to be the service provider for the State of Kansas (SoK) creating a center of excellence for services needed by the various state agencies

Apptio was purchased and installed to manage the OITS finances for IT budgeting and planning. OITS processes approximately 2,000 transactions monthly to invoice and collect fees for their services. These transactions were being managed via Excel spreadsheets which requires a team of six. Invoicing and collecting fees took 60-90 days to complete. In addition, agencies had no visibility into their spending with OITS. Any requests for spending information were made by agencies through an email or phone call to OITS.

Revamping their existing financial system Apptio was needed to streamline and better manage these processes.

Implementation and Impact

The implementation was the biggest challenge. Apptio was originally purchased three years ago in 2018. However, the project of migrating OITS financials to Apptio didn't begin until 2020. Once it was purchased, it was never utilized to manage the OITS finances.

In 2020, a new Chief Information Technology Officer (CITO) was appointed and recognized the need to move away from spreadsheets and relaunch the Apptio product to manage OITS finances. Equally important was the need to capitalize on the investment with Apptio by bringing the value of automated data ingestion and modeling, insights, and self-service reporting to make data-driven decisions faster. In layman terms, work smarter, faster, and more effectively.

In August of 2020, the CITO engaged with Apptio leadership to reestablish the partnership and "jumpstart" the IT financial management foundation to manage OITS finances. This partnership with Apptio resulted in an 8-weeks engagement to completely rebuild the tool and reload FY18, 19, 20 finances.

Agencies in the near future will have access to their OITS budgets online and available to them at any time. Currently, agencies submit requests for their information through phone

calls and email. The outcomes from this engagement provided the following operational processes:

Automate Planning Process

- Budget (OpEx and CapEx)
- Cost Center/Department Hierarchy
- Chart of Accounts
- Labor roles, rates, and allocations
- Contract Types
- Vendor Lists
- Fixed Asset Depreciation Schedule
- Fixed Asset Classification

Spend and Labor Management

- General Ledger (OpEx and CapEx)
- Labor Roster

Today, with the implementation of Apptio, OITS is reaping the benefits of the application resulting in less than 30 days to invoice and collect service fees from agencies. Previously, it took anywhere between 60-90 days. Additionally, budget managers have self-service capabilities to view their operational spending in real-time, and instead of mailing spreadsheets, all budget information is now on-line.

The success of the Apptio launch has provided OITS with the art of the possible. By streamlining its processes, staff is now able to focus on and improve other areas like automating billing for the network and telecom costs.