Agilyx
Change Ready

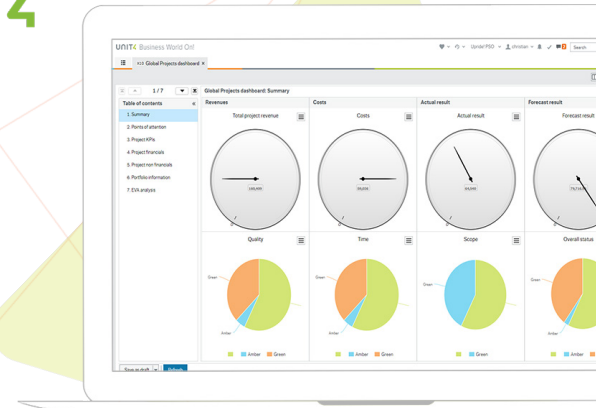# The British Museum

UNIT4

Customer success story:

The British Museum's Cloud Transformation: A Journey with Unit4 and Agilyx Group

The Customer

The British Museum, renowned for its extensive collection and commitment to preserving history, embarked on a transformative journey to modernise its financial and business operations. By partnering with Unit4 and Agilyx Group, the museum transitioned from an older desktop on-premise system to a state-of-the-art cloud-based SaaS platform. This move was driven by the need to mitigate risks associated with ageing technology, leverage modern reporting tools, and reduce maintenance burdens. Here's a closer look at The British Museum's cloud journey, insights gained, and the benefits realised.

The Importance of Moving to the Cloud

The British Museum's decision to move to the cloud was driven by several crucial factors. Operating on an unsupported on-premise platform would have posed significant risks, including security vulnerabilities and potential system failures. Transitioning to a cloud-based system ensured continuous support and updates, effectively mitigating these risks. Additionally, the reliance on a desktop solution was not sustainable for the future. The cloud offers scalability and flexibility, enabling the museum to seamlessly adapt to evolving technological needs.

By adopting a SaaS platform, The British Museum significantly reduced the burden of maintaining hardware and software, allowing the institution to focus on core activities and future-proof its operations. The museum also aimed to harness the advanced reporting capabilities and user-friendly interfaces provided by modern web applications.

Customer Name
British Museum

Industry
Museums, Historical Sites, and Zoos

Company Size
501-1,000

Headquarters
London, UK

Unit4 General Ledger

Accounts Payable

Accounts Receivable

Expenses

The Cloud Journey: Experiences and Insights

Mike Lloyd, Unit4 Systems Manager at The British Museum, shared his experiences and lessons learned during the cloud transition. One of the biggest challenges was managing a large number of users unfamiliar with the new system. "As a high-profile museum with multiple sources of funding, we have complex coding and approval requirements for transactions, which can be confusing for new users," Mike explained.

Reflecting on the process, Mike emphasised the importance of considering the user's perspective. "Their experience will entirely depend on how carefully we consider what they need to do and how to make that as straightforward as possible," he said.

One significant improvement was the ability to easily take a copy of the production system into a test environment. This monthly process allows the museum to log in as each user and see exactly what they see, enabling better guidance and support. "It's really important to understand the nuances of each process better than users," Mike noted. "Our user guides clearly show how to do a particular task correctly. However, we also need to know what happens when mistakes are made and how to correct them. Being able to test that in a version which truly reflects the production system has been a game changer."

However, being on SaaS has its challenges. "A system problem may be corrected by a hotfix before we have managed to get to the bottom of the issue. Not being able to recreate the problem can make you doubt your own sanity, but at the end of the day, what's most important is for the system to do what we want it to."

Mike also noted that upgrades can introduce unexpected results. Processes that were working well became problematic, and new error messages began to appear. "Often, these get resolved quickly. However, some require changes to our processes. Those issues need to be investigated and tested, which consumes time and resources."

A turning point in the transition was discovering the Information Browser tool within the Unit4 platform. "Knowing about the Information Browser tool has changed my perspective on making the move to web. Frankly, the built-in GL enquiry in web is not fit for purpose. However, it's not difficult to write your own using Information Browser," Mike explained. The customisation potential of the Information Browser makes it a powerful asset in the cloud environment.

Mike continued, "The Information Browser even has the potential to be an improvement on the desktop enquiry, though there are some aspects users will miss, such as being able to copy and paste into Excel. I hope Unit4 will address these minor shortcomings, as it would be much easier to get users to move to web if there weren't any downsides."

Additionally, Mike highlighted the importance of understanding where information is stored in backing tables for problem-solving. "There's a useful functionality in web where you can 'Export' what you see on a screen. In fact, this gives quite a lot more information than you can see and a good idea of where it is stored. It also tells you which screen you're looking at, which is helpful to know. I only found this out by chance and found it helpful on numerous occasions."

Reflecting on the project, Mike observed that many of these things seem small, but they can make a big difference both to the transition and for managing the system on a day-to-day basis. The more we know up-front, the better we can explain the benefits to users and make their experience a positive one.

Advice for Organisations Considering Cloud Migration

Mike offers the following advice for organisations planning to migrate to the cloud.

Invest Time in Understanding the System:
"It took me a while to realise the upsides of using the web," Mike reflected. "Now I find some tasks easier in the web, such as checking menu access or looking at transactions with documents. Presentation and customisation options can make a big difference. Plus, the web is where Unit4's development and future improvements will be focused."

Prioritise Training:
"User guides are great for explaining how the process should work, but that doesn't suit everyone's learning style. Tailored training, including video guides and some in-person coaching, was essential for user adoption," Mike said.

Emphasise Testing:
"Testing shouldn't be just about checking that the system works. It's also a way to understand what happens when users enter unexpected data or do things you hadn't planned for. Building in time to make improvements after initial testing will result in a more successful project and a much better user experience," Mike emphasised.

Consider a 'Soft Launch':
"Irrespective of how much testing you do, there will still be surprises," Mike said. "We found it helpful to do a 'soft launch,' where we restricted new functionality to a limited number of users or transactions. I strongly recommend adopting that approach whenever possible."

Join the Unit4 User Group:
"I've found the Unit4 User Group extremely helpful for learning more about the system and how other organisations get the most from it. Sharing experiences is a great way to learn and help others," Mike recommended.

Desired Improvements from Vendors and Partners

Mike identified several areas where support from vendors and partners could enhance the transition experience:

Support from SaaS Providers:

"With the SaaS solution, you automatically get customer support from Unit4. However, unless you opt for premium support with a customer success manager, the experience won't be the same as you'd get from a consultancy partner."

Value of Experienced Consultants:

"I've come to the conclusion that it's really helpful to have an experienced third-party consultant for the more difficult issues and for improving the system. The qualities I look for in a consultant are great problem-solving skills and knowledge-sharing, which results in good value for money."

Next Steps in the Cloud Journey

he British Museum is committed to further leveraging cloud capabilities through incremental improvement. The next steps include moving more users from desktop to web to fully utilise the cloud platform. "Our goal is to leverage the power of the web platform to make it better than desktop, as that would make the transition much easier," Mike shared. The museum also aims to improve collaboration across teams by fully utilising workspaces, knowlies, comments, and other web features. "We'll continue to follow Unit4's advancements and integrate them into our transformation roadmap to get the most from our system," Mike explained.

Conclusion

The British Museum's transition to the cloud, facilitated by Agilyx Group working alongside Unit4, has been a transformative journey with valuable lessons and significant benefits. By embracing modern technology, the museum has mitigated risks, reduced maintenance burdens, and paved the way for future growth and innovation. As the museum continues to explore and utilise the cloud platform, it remains committed to preserving history while embracing the future.

"The success of this project demonstrates the power of strategic partnerships and modern technology in transforming traditional institutions," said Harpal Mattu, Managing Director EMEA from Agilyx Group. "We look forward to continuing our support for The British Museum as they navigate their future endeavours."