

Integration Between Balance and School Finance Systems

Save Time. Spend Smarter.

In the world of K12 technology, integration often means substantial staff time, countless delays, and ongoing support. *Balance* was designed from the ground up to ensure accurate, timely data is available to our partners faster and with less effort than any past technology integrations they've experienced. Educators want technology solutions, not new problems.



Steps to Implement Balance

<h1>1</h1>	<h1>2</h1>	<h1>3</h1>	<h1>4</h1>	<h1>5</h1>	<h1>6</h1>
Financial Research <i>5-10 days</i>	Data Discussion <i>10 days</i>	Kickoff <i>1-2 days</i>	Configuration of Balance for the District <i>7-14 days</i>	Staging and Review <i>7 days</i>	Launch
<p>Prior to our kickoff, our data associates and district partners gather key information on the chart of accounts, budget books, the financial management system, and more. This allows us to begin our integration process with essentially no participation from technology or financial staff.</p>	<p>During a pre-kickoff meeting with technology and financial staff, Allovue goes over three different methods available to all of our partners for data transport. We discuss the merits of each method during pre-kickoff and decide what will work best.</p> <ul style="list-style-type: none"> • Virtual Private Network: VPN • Secure Shell: SSH • Secure File Transfer Protocol: SFTP 	<p>District technology staff work with Allovue data associates to make an initial data connection. Allovue launches with districts within 30-45 days of establishing this connection.</p>	<p>Allovue staff spend between 1 and 2 weeks developing queries, applying appropriate business rules, and building configurations to ensure our partner's chart of accounts is accurately reflected in <i>Balance</i>, that all account balances match existing district reporting methods, and that the transaction journal contains the most useful information for those partners (e.g. invoice numbers or vendor names as available).</p>	<p>With the data set properly established, Allovue releases a staging version of <i>Balance</i> to our partner prior to wider release for review. Our district partners and project sponsors work together to ensure the data is good to go prior to launch.</p>	<p>Once project sponsor gives the go-ahead, we are ready to launch and begin training district administrators.</p>

The average time for IT department in a district is 1-5 days.