

# INFO330 – Applied Information Systems Project

Anna Jones  
University of Canterbury  
Christchurch, New Zealand

Trevor Nesbit  
University of Canterbury  
Christchurch, New Zealand  
trevor.nesbit@canterbury.ac.nz

## ABSTRACT

This poster presents a summary of a 3<sup>rd</sup> year Information Systems internship that was completed at a Chartered Accountants firm that was in the process of converting their client management systems to a cloud based solutions. The student who completed the internship was completing a double major in Information Systems and Accounting. The poster presents an outline of the project that was worked on as part of the internship, a summary of the new system that was implemented and other work that was completed, along with the skills developed from past courses and the new skills learnt as part of the process

## Keywords

System Conversion, Internship

management system CCH iFirm. This switchover meant that they had a system that was more adaptive, updated regularly and took strain off their servers by utilising cloud technology. The other part of this project involved detecting errors in a client job management system called simPro Enterprise which was not producing accurate reports. As well as these two projects other tasks were completed using MYOB and Xero with the aim of exposing me to a wider variety of accounting information systems and to help Smith McCoy Alford in the day to day running of their company. Skills learnt from previous courses (see Table 1) were able to be applied to real-life tasks enabling these tasks to be completed more efficiently and to a higher standard. A range of new skills were also developed (see Table 2).

**INFO330 Applied Information Systems Project**  
By Anna Jones, Lecturer: Trevor Nesbit, Company: Smith McCoy Alford

**The Project**  
As part of an Information Systems paper at the University of Canterbury tasks were completed for Smith McCoy Alford to assist them during the implementation phase of their new practice management system CCH iFirm. This switchover meant that they had a system that was more adaptive, updated regularly and took strain off their servers by utilising cloud technology. The other part of this project involved detecting errors in a clients job management system called simPro Enterprise which was not producing accurate reports. As well as these two projects other tasks were completed using MYOB and Xero with the aim of exposing me to a wider variety of accounting information systems and to help Smith McCoy Alford in the day to day running of their company. Skills learnt from previous courses were able to be applied to real-life tasks enabling these tasks to be completed more efficiently and to a higher standard.



**CCH iFirm**

A direct system conversion method was used one morning in February to convert all the necessary data from MYOB AD to CCH iFirm.

**Outcomes:**

- The conversion was overall successful with little disruption caused and showed the benefits of good analysis and planning.
- Client contact details needed to be verified and updated.
- Clients annual return dates needed to be inputted which was lost during conversion.
- Job allocation and costing information was entered to make use of the improved job costing tools.
- Weekly webinars were held to help staff understand all aspects of the new system.
- A recommendation was made that the data in the old system should have been validated better as some information was wrong meaning some tax work needed to be re-done.

**simPRO Enterprise**

SimPro Enterprise is a job management system designed specifically for the trade and service industry.

A client of Smith McCoy Alford has been using this system but the Work in Process reports were not coming to the correct total for the necessary dates. So testing of a sample of jobs within the reports was completed. The testing revealed that there was a timing difference between when a job is receipted and invoiced. These findings were presented to the client with a recommendation on how to fix this problem.

Billing reports up to the 31<sup>st</sup> of a month were also producing an incorrect total but these reports were not affected by the same problem as above. So testing on big jobs within the report was completed. It was found that the report was including transactions within jobs dated after the 31<sup>st</sup>. We gave this information to SimPro who now have developers trying to solve this problem.

Skills Developed from Past Courses	New Skills I Have Learnt
MYOB technical skills e.g updating general ledger	Professionalism
Xero technical skills e.g setting up recurring invoices	Account Reconciliation within MYOB systems on Excel
Written communication skills through drafting letters to clients	CCH iFirm technical skills
Conversion Methodologies put to practice	Client File Management
IS Project Management Theories put to practice	Organisation Culture Management
Accounting Knowledge e.g budgeting skills	Job/Task Allocation Management
Problem-Solving/Analysis Skills used to solve real-life problems	Sampling Techniques
Organisation/Time Management Skills	simPro Enterprise technical skills

MYOB technical skills e.g updating general ledger
Xero technical skills e.g setting up recurring invoices
Written communication skills through drafting letters to clients
Conversion Methodologies put to practice
IS Project Management Theories put to practice
Accounting Knowledge e.g budgeting skills
Problem Solving/Analysis Skills used to solve real-life problems
Organisation/Time Management Skills

**Table 1 – Skills Developed From Previous Courses**

Professionalism
Account Reconciliation within MYOB systems on Excel
CCH iFirm technical skills
Client File Management
Organisation Culture Management
Job/Task Allocation Management
Sampling Techniques
simPro Enterprise technical skills

**Table 2 – New Skills Developed**

## 1. THE PROJECT

As part of an Information Systems paper at the University of Canterbury tasks were completed for Smith McCoy Alford to assist them during the implementation phase of their new practice

## 2. CONCLUSIONS

The internship was a valuable experience and enabled the student to develop existing skills and learn new skills. While the course was an Information Systems course, the placement in an Accounting firm enabled to the students to gain experience relating to both majors (Information Systems and Accounting).

This poster paper appeared at the 4<sup>th</sup> annual conference of Computing and Information Technology Research and Education New Zealand (CITRENZ2013) incorporating the 26<sup>th</sup> Annual Conference of the National Advisory Committee on Computing Qualifications, Hamilton, New Zealand, October 6-9, 2013. Mike Lopez and Michael Verhaart, (Eds).