

Process Validation Workshops

Overview Session

Session Objectives:

- Prepare staff for participating in a “Process Validation Workshop”
- Clarify the Purpose of Process Validation Workshops
- Clarify Expected Outcomes of Process Validation Workshops

Session Agenda



- Brief History of OnePurdue
- Implementation Methodology & Timeline
- OnePurdue SCOPE
- Project Preparation Activities
- Approach to Business Process Review
- Outcomes of Business Process Review

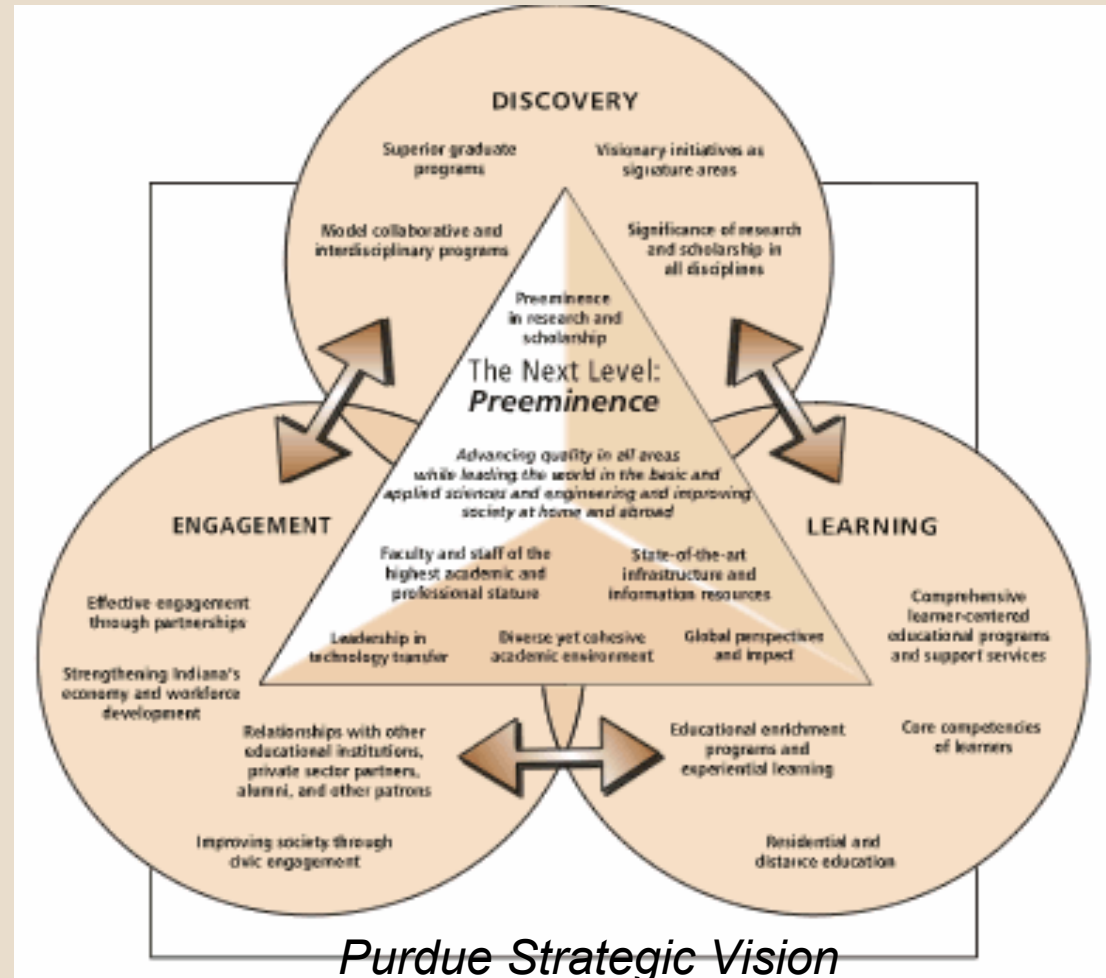


OnePurdue

A Brief History

The OnePurdue Initiative

- Old processes do not match up to new Strategic Vision (efficiency, effectiveness, competitiveness, etc.).
- Adopt “Best Practices” to enable the enterprise to meet new Strategic Vision.



OnePurdue Guiding Principles

1. ERP is an institutional-transformation project, not an information-technology project. Information technology merely provides the opportunity for, and enables, the business transformation.
2. **Create and enforce common business practices.**
3. All campuses will participate financially in the ERP implementation.
4. There will be a system-wide implementation of a single ERP product, a single operational database and a single warehouse.
5. **The ERP software and database will not be modified. This is often called a “vanilla” implementation.**
6. Ensure a timely (and on-schedule) implementation of the ERP system.
7. Any “bolt-ons” to the ERP software and database will not be implemented until the budget and schedule implications are understood, agreed upon and funded by the Executive Oversight Committee.
8. **All campuses will contribute knowledgeable and empowered personnel to the core implementation teams.**
9. **The project teams and all governing bodies will resolve issues quickly and decisively.**
10. The ERP management team will communicate, communicate and then communicate more in order to keep the University community informed.
11. The ERP software will be tested until exhaustion to ensure operations and regulatory and legal compliance.
12. Sufficient resources will be committed to ERP user-training prior to implementation.
13. The technical infrastructure and network will be sufficiently robust to support the ERP before it is implemented.

The OnePurdue Vision

To transform the University's way of doing business into a flexible and user-centric portfolio of applications that integrates all Purdue enterprise data, information and processes.





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Implementation Methodology and Project Timeline

ASAP Roadmap



- SAP Standard
- Single, Pragmatic, and Standardized Methodology
- Evolved Out of 20 Years of Experience
- Manageable Scope, Costs, and Common Expectations
- Common Language
- Pre-Configured Documentation and Tools

GRAPHIC often used 1/03



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|--|--|--|--|--|
| <ul style="list-style-type: none"> • Organize Team • Initial Planning • SAP Training • Kickoff | <ul style="list-style-type: none"> • Identify Organization Structures • Business Process Design • Install SAP • SAP Training | <ul style="list-style-type: none"> • Configure Business Processes • Design Validation • RICE Design • Testing • Develop End-User Training Materials | <ul style="list-style-type: none"> • Final testing • End User Training • System Cut Over • Establish Help Desk | <ul style="list-style-type: none"> • Support Users • Verify System |
|--|--|--|--|--|



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SCOPE

Scope - HR & Payroll

- e-Recruitment
- Organizational Mgmt
(Jobs/Positions)
- Personnel Administration
(Hire, Transfer, Leaves)
- Benefits
- Time Mgmt
- Payroll

Scope - Student Management

- Student Recruitment
- Admissions
- Registration and Scheduling
- Financial Aid
- Student Accounts

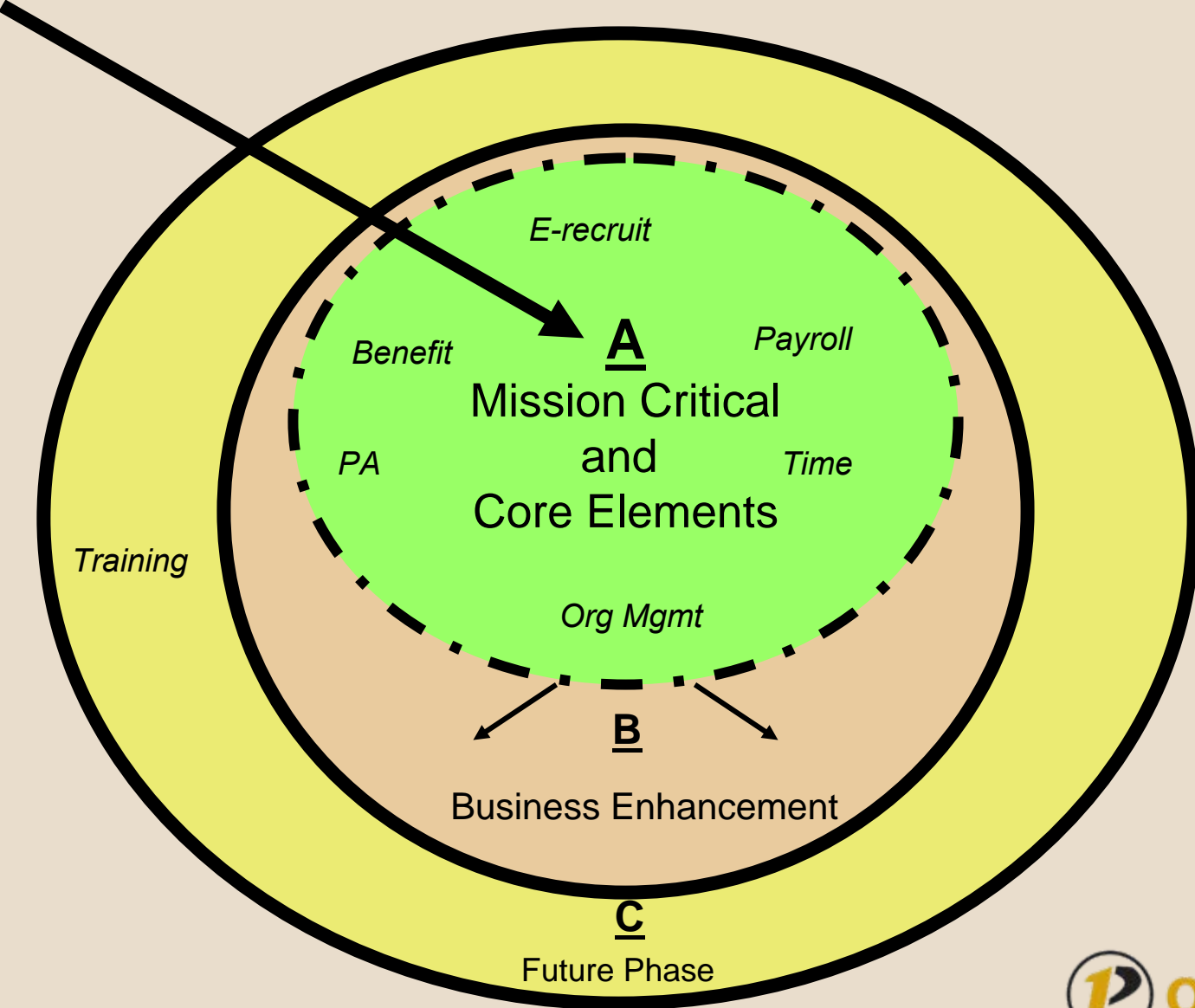
Scope - Finance

- Procurement
- Financial Accounting
- Cost Controlling
- Accounts Payable
- Accounts Receivable
- Fixed Assets
- Construction
- Funds Management (Budget)
- Endowment Accounting
- Bank and Cash Accounting
- Work Orders
- Pre and Post Awards Grants Management
- Travel

Cross Functional Scope

- Employee Self Service
- Manager Self Service
- Student Self Service
- Portal
- Business Warehouse
- Workflow

Scope Confirmation

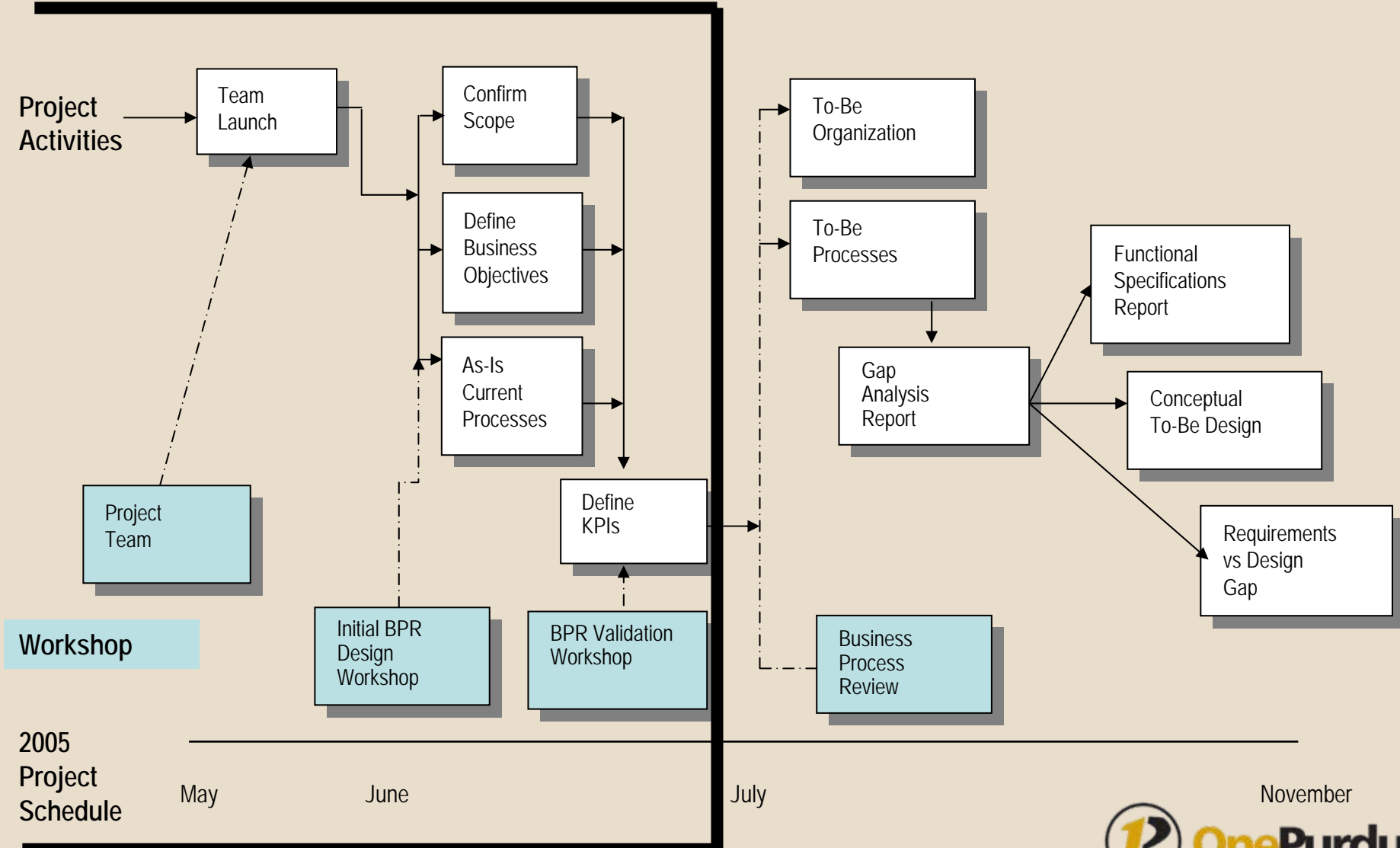




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Project Prep Activities

Preparation & Blueprint Roadmap

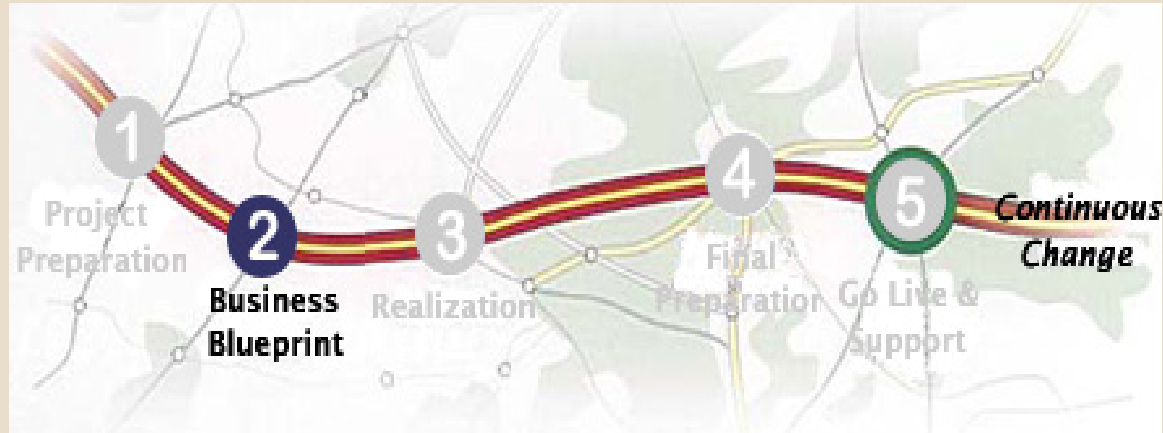




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Approach to Business Process Review

Business Blueprint

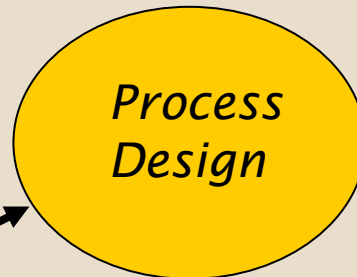


Purpose: This phase focuses on documenting the Business Process Requirements of the University and combining them with the SAP functionality in order to prepare a Business Blueprint. (Translate “As-Is” into “To-Be” Processes.)

Ensuring Best Practices



- *Subject-Matter Experts (SMEs)*
- *Steering & Advisory Committees*
- *Policies, Culture & Regulations*



- *SAP Implementation Experience*
- *Higher Education Knowledge*
- *Proven Course Methodology*



- *Best-Practices Focus*
- *User Groups (Higher Ed, etc.)*
- *ASAP Methodology*

Focus on Mission Critical Processes



OnePurdue BPR Guiding Principles

1. “OnePurdue Guiding Principles” will apply.
2. Scope: Critical business processes for HR, Finance and Campus Management.
3. Primary best-practice source = SAP and third-party bolt-on solutions (return-on-investment opportunity).
4. SMEs will be empowered by process owners to make key decisions regarding processes.
5. Enterprise processes will adhere to software best-practices – flexibility in implementation.
6. Disposition for exceptions to best practices:
 - a. Termination of process
 - b. Work-Around: “User Exit” w/o code modification
 - c. Off-the-shelf bolt-on
 - d. Offline operation
7. Process owners and key stakeholders “buy-in” validation required.
8. All best practices (5) and exceptions (6) must be integrated into the OnePurdue system.
9. Successful BPR also requires:
 - a. Executive commitment
 - b. Effective change agents to drive best practices and overcome resistance
 - c. Appropriate organization structure
 - d. Institutional willingness to consider radical change

Business Process Review Phases

- Discover
- Validate
- Communicate

Discovery

“FIT / GAP Analysis”

- Consultants are vehicle for SAP Discovery (of Best Practices)
- SME’s & Functional Leaders know ‘as-is’ & ‘preferred to-be’
 - *Accept Standard Solution “out-of-the-box”*
 - *Standard Solutions May Present Multiple Options*
 - *Exceptions to “out-of-the-box” Dispositioned per BPR principle #6*
- Consultants facilitate workshops to challenge every process with 7 “R’s” (Rethink, Reconfigure, Reassign, Resequence, Relocate, Reduce & Retool)

Reference BearingPoint ProvenCourse Technique “Improving a Current State Process”

Validation

Share Proposed “To Be”

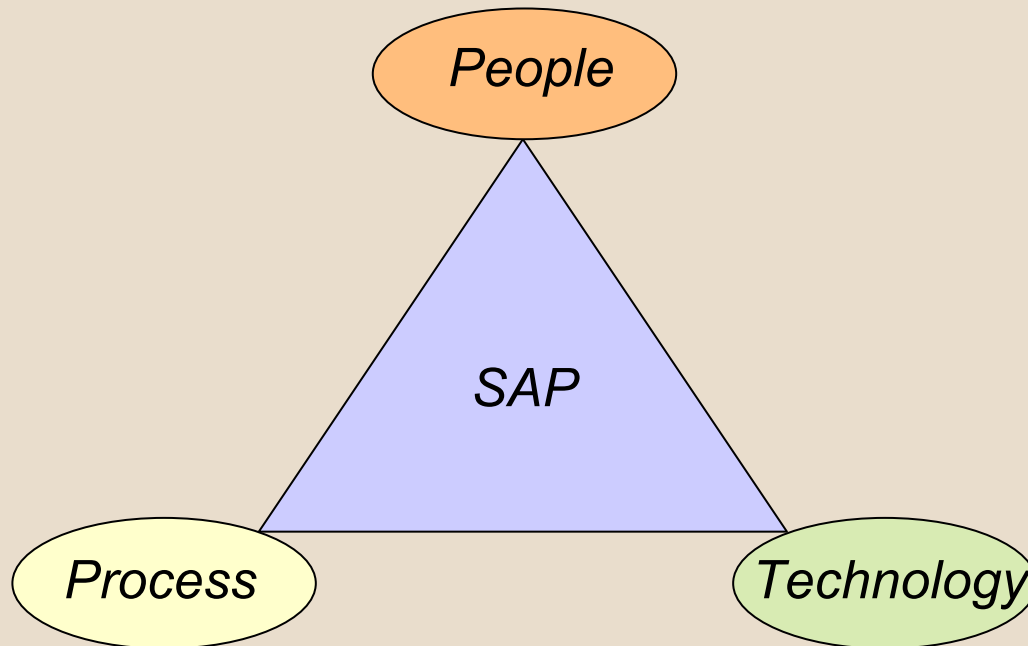
- “To Be” processes are proposed for validation by workshop participants
- Necessary policy changes are confirmed
- Organization impacts discussed
- Core process owner and advisory committee involvement
- University senior leadership involvement

Process Validation Workshops in the coming weeks and months address this phase of Business Process Review

Communication

Future Processes Shared

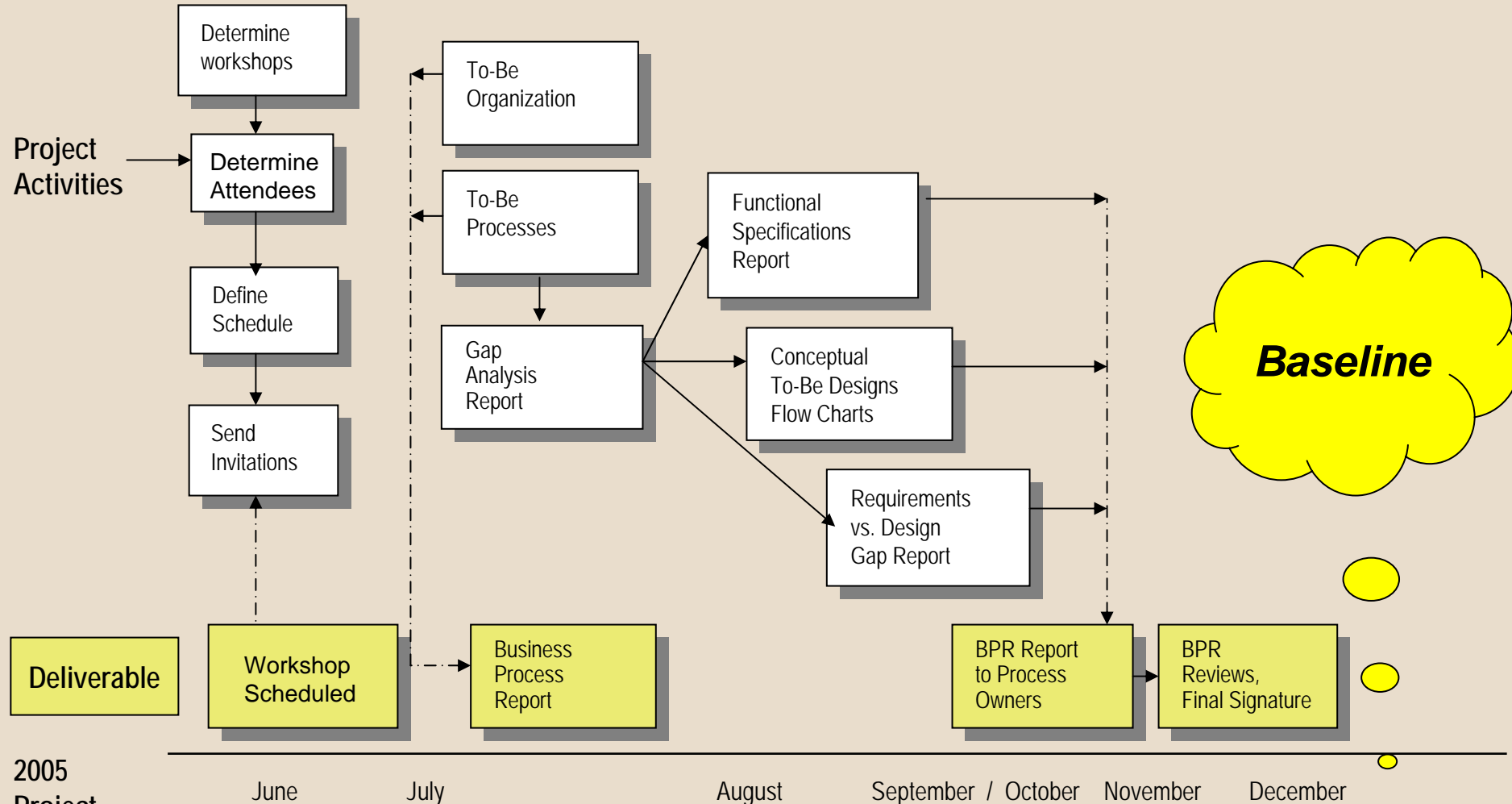
- Future state presented to University community
- Integration points identified for People, Process, Technology



Business Process Review Outcomes

- Business Process Review Report
- “To Be” Process Flowcharts
- Gap Analysis Report
- Functional Specifications

Blueprint Roadmap



2005
Project
Schedule

SAP Training for the OnePurdue Team





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Q&A