Project Update
Streamline, Simplify, Organize, Automate
Change Management
Managing our Change

Key Activities

- 2 Hour – Presentations/Q&A
- 3 Sessions complete (1 remaining)
  - 450+ attended (Live & WebEx)
- Next steps
  - Address feedback
  - Visit Regionals
  - Create next round of showcases

HCM Readiness Assessment (7/19)

- Site Readiness: Users can do their jobs
- Business Op Readiness: The organization is prepared to operate on the system
- Deployment: Project is able to execute
- IT Project is able to execute
- The system meets business needs

Failure Points
- Transparency of processes
- Understanding of impact
- Un-met business requirements
- Design is not complete

Get-to-Green
- Create project experts in units
- Cascade info. Deeper
- Provide answers to critical questions

“Feeding the Bear”

Project Showcases

PURDUE UNIVERSITY
Project Showcases

Positive Feedback

- Transparency and availability of information
- Faculty dashboards
- Kronos and paper timecard elimination
- Concept of exception based payroll approvals
- Automated onboarding
- User-interface improvements
Project Showcases

Engaged Stakeholders Need More...

- We must bring to life....
  - Financial design and accounting practices
  - Time reporting, approval and certification practices
  - Prototypes of dashboards and tools that can be shared

How are jobs changing?

How will we transition to new way?

How can we educate our community?
General Ledger
**Simplify**

**SAP Master Data - Our Foundation is Simpler**

### General Ledger Accounts

<table>
<thead>
<tr>
<th>Type</th>
<th>Begin</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets</td>
<td>434</td>
<td>161</td>
</tr>
<tr>
<td>Liabilities</td>
<td>207</td>
<td>128</td>
</tr>
<tr>
<td>Fund Balance</td>
<td>104</td>
<td>26</td>
</tr>
<tr>
<td>Revenue</td>
<td>826</td>
<td>453</td>
</tr>
<tr>
<td>Expenses</td>
<td>985</td>
<td>433</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>2,556</td>
<td>1,201</td>
</tr>
</tbody>
</table>

### Funds

<table>
<thead>
<tr>
<th>Type</th>
<th>Begin</th>
<th>Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted</td>
<td>9,666</td>
<td>30</td>
</tr>
<tr>
<td>Plant &amp; Debt Service</td>
<td>2,345</td>
<td>24</td>
</tr>
<tr>
<td>Unrestricted</td>
<td>30</td>
<td>3</td>
</tr>
<tr>
<td>Endowment</td>
<td>89</td>
<td>2</td>
</tr>
<tr>
<td>Agency</td>
<td>586</td>
<td>1</td>
</tr>
<tr>
<td>Internal Services</td>
<td>6,107</td>
<td>1</td>
</tr>
<tr>
<td>Auxiliary</td>
<td>451</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>19,274</td>
<td>62</td>
</tr>
</tbody>
</table>

### Cost Centers

<table>
<thead>
<tr>
<th>Type</th>
<th>Begin</th>
<th>Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Centers</td>
<td>8,075</td>
<td>857</td>
</tr>
</tbody>
</table>

We are not done but we have significantly simplified our Master Data Elements.
Restricted Fund Examples

<table>
<thead>
<tr>
<th>Fund Type</th>
<th>Starting Point</th>
<th>Current Design</th>
<th>PIP-C Decisions Required</th>
<th>Other Decisions Needed</th>
<th>Projected Final</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restricted</td>
<td>9,666</td>
<td>118</td>
<td>(88)</td>
<td>-</td>
<td>30</td>
</tr>
<tr>
<td>Plant &amp; Debt Service</td>
<td>2,345</td>
<td>25</td>
<td>(1)</td>
<td>-</td>
<td>24</td>
</tr>
<tr>
<td>Unrestricted</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Endowment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agency</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auxiliary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>19,274</td>
<td>176</td>
<td>(106)</td>
<td>(8)</td>
<td>62</td>
</tr>
</tbody>
</table>

Business requirements in areas dictate the use of specific funds...we heard you!

<table>
<thead>
<tr>
<th>Area</th>
<th>Funding Source</th>
<th>Number of Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture</td>
<td>Federal Appropriations &amp; State Line items</td>
<td>12</td>
</tr>
<tr>
<td>Student Loans</td>
<td>Perkins, DHHS, Direct/Plus, Stafford, Purdue Student Loans</td>
<td>6</td>
</tr>
<tr>
<td>Student Aid</td>
<td>SEOG/PELL and TEACH Grants</td>
<td>3</td>
</tr>
<tr>
<td>Work Study</td>
<td>Regular, Tutoring, Math Tutoring, Community Service</td>
<td>4</td>
</tr>
<tr>
<td>Gifts/Scholarships/Grants/PIP-C/Restricted – Other</td>
<td>Cash</td>
<td>5</td>
</tr>
</tbody>
</table>
Validate the Design

Mechanical Engineering - Prototype

41% reduction of “accounts” compared to Today

Today
- 212 Funds
- 58 Cost Centers
- 182 Internal Orders
- NA Faculty Accounts

Tomorrow
- 4 Funds
- 8 Cost Centers
- 108 Internal Orders
- 172 Faculty Accounts

Challenges….

86 exist in order to manage gifts with unique restrictions.

Additional work required to address the “WOW”
Validate the Design

Take the Design a Step Further

Today... we track each type

- Departmental Royalty (Fund)
- Departmental Conference Residual (Fund)
- Unrestricted Departmental Gift (Fund)

Tomorrow... one bucket to track all discretionary

- Discretionary Internal Order
- Discretionary Allocation – Sub IO

Outcomes/Challenges....

- Not just an account reduction exercise!
- Do we have the right accounts?
- How deeply should we go to track allocations?
Data Conversion

We need Business Office (Unit) Help

Faculty/Staff Dashboard

Easy to populate
Automated System Conversion

Industrial Residual Fund
Research Incentive RIO
2016 Conference Residual Funds
Salary Savings Funds or RIOs

Grant #1
Grant #2

Facility / Staff

Grants

Unrestricted Discretionary

Allocation #1
Allocation #2

Manual
Time-Consuming
Faculty by Faculty Compilation
Data Cleansing

Other Key Objects for Cleansing

<table>
<thead>
<tr>
<th></th>
<th>As of June 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Purchase Requisitions</td>
<td>400 Requisitions</td>
</tr>
<tr>
<td>Open Purchase Orders</td>
<td>12,700 lines</td>
</tr>
<tr>
<td>Goods Received/Invoices Received (GR/IR)</td>
<td>9,000 lines</td>
</tr>
<tr>
<td>Open Invoices</td>
<td>TBD</td>
</tr>
<tr>
<td>Outstanding Checks</td>
<td>5,168 checks</td>
</tr>
<tr>
<td>Travel</td>
<td>1,612 Travel Reports</td>
</tr>
</tbody>
</table>

Participants
- Business Office
- Central Procurement
- Central Accounting

Activities
- Close Open Purchase Requisitions
- Close Open Purchase Orders
- Resolve outstanding invoices & GR/IR
- Close out existing travel reports

Should occur now in every unit....don't wait.
Enterprise Asset Management
Today’s Problem: What’s going on with my project submission?

Progress communicated via: emails, phone calls, meetings

**College/Department**
- Idea
- Departmental approval
- Deferred Projects
- Funding
- College Approval
- Project Schedules
- Academic Schedules

**Physical Facilities**
- Estimating
- Project Schedules
- Campus Planning
- Approvals
- Project Monitoring
- Bid/Occupancy Dates
- Delivery Method

14
I have an idea for our department...

Our college needs this...

Here’s what you can expect your costs to be...

Here are the accounts to use...

Yes, we still want to pursue this..

We’re going to move forward on this..

Construction will begin on..
Transparency

Improved Ability to Manage Departmental Requests

- What is the most recent version of the request list?
- How much will the project cost?
- Who has the project paperwork?
- What is the status of my request?
- What are the milestone dates?
# PPM Dashboards

**Customizable dashboard with selected data (milestones, costs, status, health, etc.)**

## Approval History and Status

### Funding Approvals History

<table>
<thead>
<tr>
<th>User Name</th>
<th>Approver Role</th>
<th>Date</th>
<th>Timestamp</th>
<th>Approval Status</th>
<th>Approval Amount</th>
<th>Reason / Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td>MARCUSL</td>
<td>Administrator/COO</td>
<td>00:00:00</td>
<td></td>
<td>Pending</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

## Project Details

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Status</th>
<th>Bucket Name</th>
<th>Client Full Name</th>
<th>Client College/Org Unit</th>
<th>Total Funding Amount</th>
<th>Building Abbreviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forney Hall Room 999 Renovation</td>
<td>C.40.06245</td>
<td>Submitted for Pro...</td>
<td>Minor R&amp;R</td>
<td>Theresa</td>
<td>4CapProj</td>
<td>1,180,000</td>
<td>FRNY</td>
</tr>
<tr>
<td>Really Small Construction Project</td>
<td>C.40.06235</td>
<td>Submitted for Pro...</td>
<td>New Construction</td>
<td>Robert Barretl</td>
<td>Computer Co</td>
<td>300,000,00</td>
<td>FREH</td>
</tr>
<tr>
<td>Lisa's test for Defect 315</td>
<td>C.10.06296</td>
<td>Estimate Complete</td>
<td>Major Renovation</td>
<td>Lisa Marcus</td>
<td></td>
<td>100.00</td>
<td>8448</td>
</tr>
<tr>
<td>Test for Updating Cap Method</td>
<td>C.10.06231</td>
<td>Project Approved</td>
<td>Major Renovation</td>
<td></td>
<td></td>
<td>700,000.00</td>
<td>116</td>
</tr>
<tr>
<td>Training Estimate Request - Cancel</td>
<td>C.40.06242</td>
<td>Estimate / Study...</td>
<td>Major Renovation</td>
<td></td>
<td></td>
<td>0.00</td>
<td>117</td>
</tr>
</tbody>
</table>
Simplified User Interfaces

One Route for Work Request Submission

- Simple submission process
- Open to campus community
- Single site to submit facility, grounds, or vehicle requests
- Updates sent to requestor
- Requests directed to staff
- Mobile friendly

Where is the request?

What is the request action?
Simplified User Interfaces

User Launchpad

- Role Specific
  - Building Deputy
  - Store Keeper
  - Technician
  - Supervisor

- Direct Access to frequently used transactions and variants

- Visualize tasks from Launchpad
Automatic Status Update

- Request
- Reviewed
- Work In Progress
- Waiting for Parts
- Completed
- Closed

Email update:
- Your request has been approved or declined for following reason...
- Your request is now in progress by our staff...
- Your request is waiting for parts to arrive
- Your request is now considered complete.
- Your request is now closed
# Example of Process Re-Design in Action

## Process Problems:

<table>
<thead>
<tr>
<th>Issue</th>
<th>Submitted</th>
<th>Repaired</th>
<th>Considered complete</th>
<th>Rework initiated</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 26&lt;sup&gt;th&lt;/sup&gt;</td>
<td>June 8&lt;sup&gt;th&lt;/sup&gt;</td>
<td>July 13&lt;sup&gt;th&lt;/sup&gt;</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **“Still not fixed. Who do I send this to?”**
  - Customer

- **“I haven’t heard from anyone”**
  - Building deputy

- **“a repair was completed 4 weeks ago”**
  - Maintenance

- **“has been an on-going issue for years”**
  - Maintenance

- **“sending someone right now”**
  - Maintenance

## Process Solutions:

- ✔️ Notification access
- ✔️ Auto status updates
- ✔️ Historical repair data
- ✔️ Planning by data analysis
EAM Training

What to Expect – Timing and Schedule is Compressed

• Training Invitations
  • Target 8/15
  • Training schedule is compressing further:
    • Focus on volume/high risk processes 1st
    • Training will overlap with 10/1 Go-Live as needed.

<table>
<thead>
<tr>
<th>Courses Identified</th>
<th>Delivery Methods</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance</td>
<td>Online</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Classroom</td>
<td>10</td>
</tr>
<tr>
<td>Project &amp; Portfolio Management</td>
<td>Online</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Classroom</td>
<td>6</td>
</tr>
<tr>
<td>Overviews/Basics</td>
<td>Online</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Classroom</td>
<td>0</td>
</tr>
</tbody>
</table>
HUMAN CAPITAL MANAGEMENT
HCM Timeline

Go-Live is Fast Approaching – 5 months

First Test Cycle has begun

Progressively more complex parallel testing cycles

Compact/Intense Training Cycle

Go-Live

Condensed timeframe requires significant engagement over coming months
Simplify

Big Wins in Time Simplification

Today....

9,000 paper timecards
Overt approvals for all hourly employees
125 stationary time clocks
Time Administrators “chase” missed punches and approvals

Tomorrow....

Employee Scenario | Employee Group | Employee Impact | Supervisor Impact
--- | --- | --- | ---
I have a fixed work schedule | Office Clerical and Service | Employee records only their exceptions to schedule | Supervisor Approval – Exceptions only
I have a variable work schedule | Students – Academic units | Employee convenience improved – Mobile App | Supervisor Approval – Interface improves

Build accountability at both employee and supervisor levels.
Academic unit feedback has been very positive so far...
Summer Pay Changes

Use Summer Pay Prototype to Inform a New PARS Process

**Summer Pay – Mobile/Wed Application**

**Additional Opportunities for PARS Process**

- Automate the calculations on Quarterly PARS
- Provide Web/Mobile Portal - PARS
- Break linkage of time approval and time certification - simplify

**Next Steps**

- Test Summer Prototype
- Design PARS application and process
- Validate impact
Organize

Job Family Structure

• The next slides are an example of Career Planning a job family structure can provide
Your career is important to you and Purdue...

Using this tool, you can easily view career opportunities available to you, including additional information for each possible job in your career path. This site is intended to provide a clear line of sight so you can better plan and discuss with your manager.
Purdue’s Jobs Are Grouped by 4 Key Attributes

- Job Family
- Job Function
- Career Stream
- Level
Purdue’s jobs are grouped into 7 career streams:

- Student
- Support
- Professional
- Skilled Trades
- Management
- Executive
- Faculty
### Career Planning - Career Stream - Skilled Trades

<table>
<thead>
<tr>
<th>Job Function</th>
<th>SK1</th>
<th>SK2</th>
<th>SK3</th>
<th>SK4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carpenter</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Electrician</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Firefighter</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Locksmith</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Machinist</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Mason</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Mechanic</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Operator</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Painter</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td></td>
</tr>
<tr>
<td>Plumber</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Police</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Roofer</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steamfitter</td>
<td>●</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Technician</strong></td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Technician</td>
<td>SK1</td>
<td>SK2</td>
<td>SK3</td>
<td>SK4</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
</tr>
<tr>
<td>Technician - Aircraft Maintenance</td>
<td></td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Technician - Electronics</td>
<td>●</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Technician - Energy</td>
<td></td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Technician - High Voltage</td>
<td></td>
<td></td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Technician - Indoor Air Quality</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technician - Lighting</td>
<td></td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Technician - Multicraft</td>
<td></td>
<td></td>
<td></td>
<td>●</td>
</tr>
<tr>
<td>Technician - Telecommunication</td>
<td>●</td>
<td>●</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Career Planning - Career Stream - Skilled Trades - Technician - High Voltage

<table>
<thead>
<tr>
<th>Technician - High Voltage</th>
<th>Level</th>
<th>Job Code</th>
<th>Job Family</th>
<th>Minimum Salary</th>
<th>Maximum Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technician – High Voltage (2)</td>
<td>SK2</td>
<td>20000100</td>
<td>Facility &amp; Auxiliary Services</td>
<td>$30,000</td>
<td>$45,000</td>
</tr>
<tr>
<td>Technician – High Voltage (3)</td>
<td>SK3</td>
<td>20001829</td>
<td>Facility &amp; Auxiliary Services</td>
<td>$45,001</td>
<td>$60,000</td>
</tr>
<tr>
<td>Technician – High Voltage (4)</td>
<td>SK4</td>
<td>20000762</td>
<td>Facility &amp; Auxiliary Services</td>
<td>$60,001</td>
<td>$73,942</td>
</tr>
</tbody>
</table>

#### Technician - High Voltage (4)

**Job Description & Minimum Qualifications**

Serve as High Voltage Crew Chief. Coordinate activities of high voltage crew. Assign crews, determine priorities and serve as a resource. Assist in long range planning of high voltage activities. Determine parts and supplies needed and submit orders. Climb poles or use truck-mounted buckets to access equipment. Ensure conformance to the National Electric Code and University Electrical Standards. Ensure conformance to OSHA 1910.269 requirements. Ensure Conformance to approved Confined Space Procedures. Responsible for training all levels of HV employees as required. Assist department supervisor in performance evaluations of employees including, but not limited to recommendation of discipline, recommendations for salary adjustments, recommendations for High Voltage Apprenticeship Program Advancement and enforcement of University policy. Make recommendations with supporting documentation re: hiring, discipline, salary increases, termination, etc. Maintains and performs daily inspection of high voltage protective clothing and equipment. Operate a wide variety of vehicles, testing, repair and maintenance equipment. Requires high school diploma and five to seven years of related experience. Must have successfully completed levels 7, 8, 9 of the HV apprenticeship program. Strong oral and written communication skills necessary. Give full attention to what other people are saying, take time to understand the points being made, and ask questions as appropriate. Commercial Driver’s License required. Must maintain Commercial Driver’s License. Valid driver’s license required.

- **Job Code**: 20000762
- **Job Family**: Facility & Auxiliary Services
- **Career Stream**: Skilled Trades (SK4)
- **Pay Grade**: MP06
- **Salary Range**: $60,001 - $73,942 (Example)
Reporting
Reporting: Progress

• EAM (release 2)
  • Data Warehouse development complete
  • Report development ramping up

• Analysis of HCM and GL report inventories continues
  • Functional reviews to ensure identified reports are truly needed
  • Starting planning for post-project report governance
  • Separate workshops to identify management information needs
• Report Inventory Analysis
  • 217 reports initially identified as used by EAM staff
  • 147 reports remain to be developed after initial scrubbing

<table>
<thead>
<tr>
<th>Reports by Audience</th>
<th>PPM/PS</th>
<th>PM/MM</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive</td>
<td>27</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Non-Executive</td>
<td>54</td>
<td>64</td>
<td>118</td>
</tr>
<tr>
<td></td>
<td>81</td>
<td>66</td>
<td>147</td>
</tr>
</tbody>
</table>

Internal vetting will continue to ensure inventory of reports is appropriate
• Report performance
  • 90% of report executions were 2 min or less
  • Key reports in the 10% that ran much longer
  • 76% of executions were standard reports
  • Adding GM AIMS will have significant impact

• Improving report performance
  • Move data warehouse to SAP HANA?
    • Additional hosting cost
    • Benchmarking performance improvement
  • Also investigating other options

*Includes successful runs of HR and Finance reports in Cognos (Boiler Insight). Does not include query objects.