TRANSFORMING PURDUE BUSINESS

Project Update
Streamline, Simplify, Organize, Automate
Transformation Update

Agenda – Progress Update

• Overview
• Enterprise Asset Management
  • Capital Projects
  • Maintenance
• Human Capital Management
• General Ledger (Finance)
Project Goal

To create a world-class administrative foundation worthy of a world-class institution
Four-Part Project

- Eliminate paper-based processes
- Redesign, automate and standardize workflow
- Dramatically reduce manual reconciliations
### Project Phases

**Building, Testing, Training**

<table>
<thead>
<tr>
<th>MONTH</th>
<th>August 1st</th>
<th>September 1st</th>
<th>October 1st</th>
<th>November 1st</th>
<th>December 1st</th>
<th>January 1st</th>
<th>February 1st</th>
<th>March 1st</th>
<th>April 1st</th>
<th>May 1st</th>
<th>June 1st</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEEK START</td>
<td>AUG</td>
<td>SEP</td>
<td>OCT</td>
<td>NOV</td>
<td>DEC</td>
<td>JAN</td>
<td>FEB</td>
<td>MAR</td>
<td>APR</td>
<td>MAY</td>
<td>JUN</td>
</tr>
<tr>
<td>1</td>
<td>29</td>
<td>30</td>
<td>31</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>9</td>
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<tr>
<td>2</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>17</td>
<td>18</td>
<td>19</td>
<td>20</td>
</tr>
<tr>
<td>3</td>
<td>21</td>
<td>22</td>
<td>23</td>
<td>24</td>
<td>25</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29</td>
<td>30</td>
<td>31</td>
</tr>
</tbody>
</table>

**Phase 2 (EAM on ECC)**
- Conversions
- Testing
- Training

**Phase 3 (HCM on SuccessFactors)**
- Conversions
- Testing
- Training

**Phase 4 (Financial EAM on SA)**
- Conversions
- Testing

---

- Enterprise Asset Management – Training and Reporting
- Human Capital Management – Testing
- General Ledger (Finance) – Building and Initial Testing
Enterprise Asset Management

Capital Projects and Maintenance Processes
Capital Projects: Key Wins

**Transparent**
- Visibility
  - all projects (approvals, schedule, costs, status, etc.)
  - all stakeholders (facility staff, clients, report writers)

**Streamlined**
- Reduced cycle time through electronic workflows, notifications, reduced business process steps
- Clear process and action steps
- Reduction of reporting fields

**Reliable Sources**
- Integrated SAP solution (PPM, PS, FM, PM)
- Customizable PPM dashboards to select key data
- Reduction of reports generated outside SAP and Data Warehouse
Today’s Problem: What’s going on with my project submission?

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

Progress communicated via:
emails, phone calls, meetings
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?
- Are you waiting on me? For what?
- How much will the project cost?
- What is the status of my request?
- What are the milestone dates?
- Who has the project paperwork?
- What deferred projects are still out there? Do I need to start all over again?
- What is the status of my request?
PPM Dashboards

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

Approval History and Status
PPM Dashboards

Intuitive financial project summaries

Collections for tracking multiple projects
Reporting

Central, Authoritative, Accessible Data Warehouse

Today’s questions and pain points:

• “My number’s don’t match!”

• “I can’t tie this to Finance, . . HR, . . Procurement, etc.”

• “How do I track my fiscal year plan?”
Maintenance
Simplified User Interfaces

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
Simplified User Interfaces

Current user interfaces

MAXIMO

SAP
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
Simplified User Interfaces

Transactions

Navigation Simplified:

- Layout: unnecessary fields hidden, Fields merged from multiple tabs on to one screen
- Quick reference of required tasks
- Required fields are highlighted
Mobility

- Receive work orders
- Review repair history
- Review schematics
- Utilize web content
- Search storeroom inventory
- Create repair notifications
- Update work order
Transparency

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...

Email update: Your request is now in progress by our staff...

Email update: Your request is waiting for parts to arrive

Email update: Your request is now considered complete.

Email update: Your request is now closed
Transparency – Capture Cost at the Equipment Level

- Understand total costs
- Data driven decisions
## 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>“Still not fixed. Who do I send this to?” - Customer</td>
<td>April 26th</td>
<td>June 8th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>“I haven’t heard from anyone” - Building deputy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>“a repair was completed 4 weeks ago” - Maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>“has been an on-going issue for years” - Maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>“sending someone right now” - Maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Process Solutions:

- Notification access
- Auto status updates
- Historical repair data
- Planning by data analysis
Questions / Contacts

Transform Purdue [www.purdue.edu/treasurer/transform](http://www.purdue.edu/treasurer/transform)

**EAM Project**
- John Higgins
- Ben Dispennett (Maintenance)
- Diane Windler (Capital)

**Capital**
- Asset Management Brad Bowen/Keith Moore
- Capital Program Management Jim Keefe

**Maintenance**
- Buildings & Grounds Ryan Gallagher
- Student Life Andy Robison
- Energy & Utilities Al Gilewicz
Human Capital Management
Transformation
## Human Capital Management

**Simplify – Streamline – Organize – Automate**

<table>
<thead>
<tr>
<th>Pain Point</th>
<th>Today</th>
<th>Future</th>
</tr>
</thead>
</table>
| Hiring Processes | • Paper forms  
                • Manual entry  
                • Duplicative approvals | • Integrated system – captures information once and pushes it forward  
                • Approvals at the beginning of the process |
| Recruitment    | • Multiple systems – duplicative data entry  
                • Paper routed for approvals | • Decommission Taleo  
                • Automated work and approval flow  
                • Recruitment integrated with onboarding |
| Onboarding     | • Multi-step process  
                • Acquire right access,  
                • List initial training  
                • Manual tracking and follow-up with new hire | • Organized and automated new hire steps  
                • Promote positive new hire experience |
| Time and Payroll | • 234,000 paper timecards annually | • Rules built in the system automate calculations  
                • Eliminate paper timecards and Kronos |
| Summer Pay/PARs | • Manual, complex, excel-reliant | • Online application  
                • Automated calculations |
Human Capital Management

SuccessFactors

Enablement through Engagement

Build a Foundation

- Employee Central
- EC Payroll
- EC Time
- Benefit Focus
Performance and Goals:
• Create and monitor goals

Onboarding:
• Automates new hire processes

Recruiting:
Replaces Taleo and other systems, offering a single source for recruiting
Human Capital Management

Success Factors

Learning
Streamlined Learning Management System (LMS):
• Registration
• Reporting and compliance tracking

Compensation
• Compensation analysis
• Merit planning
Demonstration:
- Goals
- Time off
- Updating information
Fundamentals

Structure: Human Resource and Finance Alignment

**Finance**
- Company Code
- Group of BA
- Group of BA
- Business Area (BA)
- Cost Center

**Human Resources**
- Company Code
- Business Unit
- Groups of divisions (Segment)
- Division
- Department

**Examples**
- Purdue University
- Campus (WL)
- Segment (Provost)
- College (Liberal Arts)
- Department (Anthropology)

- Location – physical office location
- Location Group – group multiple locations for reports
# Foundation Fundamentals

## Terminology Crosswalk

<table>
<thead>
<tr>
<th>SAP</th>
<th>SAP SuccessFactors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Unit</td>
<td>Department</td>
</tr>
<tr>
<td>Job</td>
<td>Job Classification</td>
</tr>
<tr>
<td>Personnel Area</td>
<td>Location</td>
</tr>
<tr>
<td>Company Code</td>
<td>Entity</td>
</tr>
<tr>
<td>Payroll Area</td>
<td>Pay Group</td>
</tr>
<tr>
<td>Wage Type</td>
<td>Pay Component</td>
</tr>
<tr>
<td>Employee Group</td>
<td>Employee Class</td>
</tr>
<tr>
<td>Employee Sub Group</td>
<td>Employee Type</td>
</tr>
</tbody>
</table>
Foundation Fundamentals
Job Family – Organized Structure

- 37,000 system-wide positions moving 1:1
- 8,500 Job Titles moving to ~1,400
Foundation Fundamentals

Job Family Enables Career Mapping

Current

- No Defined Career Path
- ~8,500 job titles
- No visibility for employee
- No logical basis for pay structure

My Career @ Purdue

Pay Structures by Career Stream

Visibility of career and pay path with clear promotion track

< 600 core jobs

Wide payroll bands create flexibility and use in processes

Job Family Enables Career Mapping

<table>
<thead>
<tr>
<th>Job Family Structure</th>
<th>Pay Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Function</td>
<td>Job</td>
</tr>
<tr>
<td>Technician</td>
<td>Technician – Telecom</td>
</tr>
<tr>
<td>Technician – Energy</td>
<td>Technician – High Voltage</td>
</tr>
<tr>
<td>Technician – High Voltage</td>
<td>Technician – Electronics</td>
</tr>
<tr>
<td>Technician – Electronics</td>
<td>4</td>
</tr>
</tbody>
</table>

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**Organization Fundamentals**

**Example Roles and Automated Workflows**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator</td>
<td>Responsible for initiating request; request routed for approval</td>
</tr>
<tr>
<td>HR Admin</td>
<td>Performs action</td>
</tr>
<tr>
<td>Budget Approver</td>
<td>Reviews/validates/completes funding source and dollars</td>
</tr>
<tr>
<td>Approver</td>
<td>Person responsible for area action impacts - Example: Direct supervisor or manager of initiator</td>
</tr>
</tbody>
</table>
Policies and Practices Alignment

Progress Update

Policy and practice review:
• Update or remove aged polices/practices no longer followed
• Consistency
• Opportunity for streamlined practices, eliminating manual processes with automation

Review process:
✓ Human Resource Leadership
✓ Advisory Council
✓ Executive Sponsors
Currently: Policy Committee Review
Next Steps: APSAC, CSSAC, Faculty
Automate Time

Building Logic in Payroll Processes

**Today**
- Employee records time
- Time Card
- Supervisor approves
- Time Processes:
  - Translates Situations into Codes (Schedules, In/Out Times, Etc.)
  - Calculates Overtime Manually
  - Manually Keys Data into SAP
  - Cost Distribution
- SAP Payroll

**Future**
- Employee records time
- Success Factors Time Management
  - Translates Situations Based on Data Points (Schedules, In/Out Times, Etc.)
  - Cost Distribution
  - Auto Calculates Premiums & Overtime
  - Determines if Exception Approvals Needed
- Supervisor exception approval
- Success Factors Payroll
- Time Administrator Exception Analytics

System logic vs. human translation
# Time and Pay Fundamentals

## Streamline - Automate

<table>
<thead>
<tr>
<th>Pay Scenario</th>
<th>Today</th>
<th>Tomorrow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday, Shift, Call Back Pay</td>
<td>Manually entered/manually calculated</td>
<td>Auto-populated and/or auto-calculated</td>
</tr>
<tr>
<td>Schedules</td>
<td>Currently in system</td>
<td>Fixed schedules auto-populate time sheets</td>
</tr>
<tr>
<td>Time Card</td>
<td>Electronic with Kronos &amp; paper (9000)</td>
<td>All electronic or mobile</td>
</tr>
<tr>
<td>Approvals</td>
<td>All timecards</td>
<td>Exception and ad-hoc only</td>
</tr>
</tbody>
</table>
Next Steps

Education/Data Conversion/Mapping

Training and Education opportunities:
• Change leads training (deeper-dive into processes)
• Review faculty recruitment with various academics for critical gaps
• Continued showcase-like events/HCM Fair

Data Conversion:
Over the next month(s) the following data-related tasks will be completed:
• Time conversion data (assigning employee group, time schedules, etc.)
• Review grouped positions
Questions / Contacts

Transform Purdue [www.purdue.edu/treasurer/transform](http://www.purdue.edu/treasurer/transform)

HCM Project
- Linda Baer
- John Lahrman
- Denny Darrow - Sponsor

Subject Areas:
- **Compensation**: Sasse Steele
- **HR/Core/Benefit**: Tammy Synesael
- **Onboarding**: Adedayo Adeniyi
- **Payroll/Time**: Tracy Sondgerath
- **Recruitment**: Sonia Hooker
- **Performance/Goals**: Adedayo Adeniyi and Amy Deitrich
General Ledger (Finance) Transformation
Fundamentals

Structure: Human Resource and Finance Alignment

Finance
- Company Code
- Group of BA
- Group of BA
- Business Area (BA)
- Cost Center

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- Department

Examples
- Purdue University
- Campus (WL)
- Segment (Provost)
- College (Liberal Arts)
- Department (Anthropology)
## Building the Structure

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Old Structure Definition</th>
<th>New Structure Definition</th>
<th>New Structure Benefits</th>
<th>Simplification Efforts</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Ledger</td>
<td>Unique master record for each asset, liability, equity, revenue and expense</td>
<td>Unique master record for each type of asset, liability, equity revenue and expense</td>
<td>Simplified account list for today’s business</td>
<td>Reduction from 2,556 to 1,201</td>
</tr>
<tr>
<td>Fund</td>
<td>Any combination of these accounts are used inconsistently across the campuses to account for operating activities</td>
<td>Represents a distinct financial resource(s) designated for a specific purpose and managed separately. They can also represent administrative or accounting units to segregate activities to facilitate analysis and reporting</td>
<td>Consistency; reporting</td>
<td>Reduction from 19,274 to 62</td>
</tr>
<tr>
<td>Cost Center</td>
<td>Used to track expenses for departments or facilitate grouping of other types of funding</td>
<td>• Represents a clearly delimited location where cost occurs&lt;br&gt; • 1:1 relationship with departments, sub-departments and programs</td>
<td>Consistency; Reporting</td>
<td>Reduction from 8075 to 857</td>
</tr>
</tbody>
</table>
# Finance Fundamentals

## Building the Structure

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Old Structure Definition</th>
<th>New Structure Definition</th>
<th>New Structure Benefits</th>
</tr>
</thead>
</table>
| Internal Orders                       | • Used to track multiple activities across campus  
• Main grouping is “Other”                                                                                                                                                                                                                                                                                                                                 | • Cost collection element normally used to plan, collect and settle costs of internal jobs and tasks  
• Can be organized in Types and Groups in order to categorize and create reporting                                                                                                                                                                                                         | Transaction and Reporting                                                       |
| Work Breakdown Structure (WBS)        | Used exclusively in Physical Facilities to track construction projects                                                                                                                                                                                                                                                                                  | • Hierarchical structure used to build a faculty portfolio that includes all faculty accounts                                                                                                                                                                                                  | Consolidation of faculty reporting; consistency                                  |
Additional Simplifications To Come:

- HCM project impact still being evaluated (S&W/Fringe accounts) — minor reductions
- Cost structure changes should also assist (i.e. multiple revenue lines for daycare)
- Continuous Improvement Opportunities
  - Point of Sale & Inventory Systems – 30-40 accounts
  - Continued analysis of usage & refinement of definitions

<table>
<thead>
<tr>
<th>GL Type</th>
<th>Start</th>
<th>Added</th>
<th>Deleted</th>
<th>Final Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets</td>
<td>434</td>
<td>-</td>
<td>(273)</td>
<td>161</td>
</tr>
<tr>
<td>Liabilities</td>
<td>207</td>
<td>-</td>
<td>(79)</td>
<td>128</td>
</tr>
<tr>
<td>Fund Balance</td>
<td>104</td>
<td>-</td>
<td>(78)</td>
<td>26</td>
</tr>
<tr>
<td>Revenue</td>
<td>826</td>
<td>44</td>
<td>(417)</td>
<td>453</td>
</tr>
<tr>
<td>Expenses</td>
<td>985</td>
<td>13</td>
<td>(565)</td>
<td>433</td>
</tr>
<tr>
<td>Total</td>
<td>2,556</td>
<td>57</td>
<td>(1,412)</td>
<td>1,201</td>
</tr>
</tbody>
</table>

*Does not include 168 secondary cost elements used for work orders*
Finance Fundamentals

Funds

Questions by Fund Group

• Are there balance sheet reporting requirements?
• Is this an organizational unit? If so, this should be a business area.
• Do the funds meet the criteria of a grant?
  - If so, this should be a grant
  - If not, a fund is required for internal or external reporting

<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>30</td>
<td>5</td>
<td>(2)</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Endowment</td>
<td>89</td>
<td>2</td>
<td>-</td>
<td>-</td>
<td>2</td>
</tr>
<tr>
<td>Agency</td>
<td>586</td>
<td>11</td>
<td>(10)</td>
<td>-</td>
<td>1</td>
</tr>
<tr>
<td>Internal Services</td>
<td>6,107</td>
<td>1</td>
<td>-</td>
<td>-</td>
<td>1</td>
</tr>
<tr>
<td>Auxiliary</td>
<td>451</td>
<td>14</td>
<td>(6)</td>
<td>(7)</td>
<td>1</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>
## Finance Fundamentals

### 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>
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<td>Auxiliary</td>
<td>451</td>
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<td><strong>Total</strong></td>
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<td><strong>118</strong></td>
<td>(88)</td>
<td>-</td>
<td><strong>30</strong></td>
</tr>
</tbody>
</table>

### Area

<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</td>
<td>10</td>
</tr>
<tr>
<td>Student Loans</td>
<td>Perkins, DHHS, Direct/Plus, Stafford, Purdue Student</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 Allocation/Restricted – Other</td>
<td>Cash</td>
<td>5</td>
</tr>
</tbody>
</table>
Aligning Cost Centers with Departments will:

- Influence consistent use of a cost elements
- Simplify yet flexible reporting capabilities
- Encourage governance and alignment with Human Resource structure
Financial Fundamentals

Cost Centers and Internal Orders

- Hierarchy of cost centers allows for further segmentation of departmental activities (i.e. sub-departments for graduate & undergraduate activities)

- Internal orders underneath the cost center allow for tracking of specific operating initiatives.
### Finance: The New Structure

**Revenue Increasing Budget Functionality Example**

<table>
<thead>
<tr>
<th>Step Description</th>
<th>Amount</th>
<th>Revenue Version 1</th>
<th>Consumable Budget Version 0</th>
<th>Commitments</th>
<th>Actuals</th>
<th>Available Balance</th>
<th>Annual Budget Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Users create annual budget estimates via Budget tool provided by FP&amp;A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount I expect to receive in Revenue this fiscal year</td>
<td>5,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amount I expect to spent this fiscal year</td>
<td>4,000,000.00</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>2) A gift is received from a donor</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debit Cash</td>
<td>1,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Revenue</td>
<td>1,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3) A gift is used to cover expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Debit Expense</td>
<td>500,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Credit Cash</td>
<td>500,000.00</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>4) A purchase order is created committing funds for future use</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Order Commitment Total</td>
<td>250,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• Faculty can see all available funds in one place
• Allows departments to identify and segregate resources allocated to faculty for their individual activities
NEW ACCOUNT NUMBER STRUCTURE

- Eleven to twelve total characters
- First nine characters are identical for all of a faculty's accounts

Benefits
- Enables access to all accounts (sponsored and non-sponsored) in one place
- Enables automated reporting and dashboarding
- Simpler account numbers
<table>
<thead>
<tr>
<th>Data Object</th>
<th>Activity Needed</th>
<th>Business Lead</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Partner</td>
<td>Identify active vendors, remove duplicates, assign proper roles, fill in all required fields</td>
<td>Jennifer Littlefield/Judy Ewbank/Julie Smith/Edie Doland/Nicholas Urcuioli</td>
<td>Scrub 100% of data by 12/31/17</td>
</tr>
<tr>
<td>Faculty Allocations</td>
<td>Map all faculty accounts to new structure; close any unneeded accounts</td>
<td>TBD</td>
<td>Map all Faculty accounts by 10/31/17</td>
</tr>
<tr>
<td>Funds/Cost Centers/Internal Orders</td>
<td>Map all accounts to new framework; close any unneeded accounts</td>
<td>TBD</td>
<td>Finalize cost center structure &amp; departmental funding structures 11/15/17</td>
</tr>
<tr>
<td>Grants</td>
<td>Close all inactive grants</td>
<td>TBD</td>
<td>100% of inactive grants closed by 12/31/17</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>Scrub all open accounts receivable balances and close inactive accounts</td>
<td>Edie Doland</td>
<td>100% of accounts cleansed by 12/31/17</td>
</tr>
<tr>
<td>Accounts Payable</td>
<td>Close Open PO line items, Open GR/IR, Open purchase requisitions, pending Concur transactions, outstanding checks, and prior year checks</td>
<td>Janessa Martin/Judy Ewbank</td>
<td>100% of accounts cleansed by 12/31/17</td>
</tr>
</tbody>
</table>
Questions / Contacts

Transform Purdue [www.purdue.edu/treasurer/transform](http://www.purdue.edu/treasurer/transform)

Finance
• Stacy Umlauf

Subject Areas:
**Accounts Payable / Sponsored Programs** – Allison Harris
**Accounts Receivables** – Edie Doland
**Reporting** – Tonya Yoder
**Treasury** – Terri Mimms
**Faculty Allocations/Departmental Structures** – Andrew Bean, Lynn Grimes, Whitney Beutel
Resources

Website/E-mail/Communications

• Website - https://www.purdue.edu/treasurer/transform/index.html
• Email questions to - bpr@purdue.edu
• Monthly Key messages - https://www.purdue.edu/treasurer/transform/Comm%20Tools/keymessages.html
• Communications - https://www.purdue.edu/treasurer/transform/Comm%20Tools/index.html
  • Transform@Purdue News - https://www.purdue.edu/treasurer/transform/Transform%20Newsletter/index.html
  • Change Network - https://www.purdue.edu/treasurer/transform/Roles/change_network.html
  • Frequently Asked Questions - https://www.purdue.edu/treasurer/transform/FAQ.html