BEST PRACTICES FOR EXECUTING A SUCCESSFUL CLOUD IMPLEMENTATION June 13th, 2018

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BUSINESS PROCESS CLOUD CONFIGURATION

AGENDA

- 1. Introductions
- 2. Business Process Design Strategy
- 3. Configuration Strategy
- 4. Higher Ed and Cross-Functional Processes
- 5. Testing Strategy
- 6. Wrap-Up



INTRODUCTIONS





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Joshua Vincent is part of the process and system optimization team at Vanderbilt University and led the business process mapping work stream during the Oracle cloud implementation at Vanderbilt university. Prior to joining Vanderbilt, Mr. Vincent practiced business and employment law and was a corporate HR leader for a publicly traded multinational manufacturing company in the automotive industry.

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VIVEK CHERIAN Director Huron

Vivek has over 10 years of experience assisting academic institutions plan, design and implement ERP solutions across various business areas including grants, HCM and financials on Peoplesoft and Oracle cloud platforms. During his tenure at Huron, Vivek has successfully led projects with the top research institutions in the country and gained specialization in business process transformation, service delivery design and change management. Vivek is Oracle cloud certified as an implementation specialist and holds a bachelor's degree in engineering and IT from Mumbai University and an MS in management information systems from Texas A&M University.

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BUSINESS PROCESS DESIGN STRATEGY



Business Process-Centric Approach

Configuration and business process mapping occur in lockstep



CONFIGURATION

System transaction walk-throughs to discuss and identify values for all configurable fields



PROCESS DESIGN

Brainstorming and white-boarding of actors, steps, and decisions within each *future* business process

Functional Subject Matter Expert Participation



Business Process Mapping (BPM)

Business process mapping and configuration workshops build on one another

- Utilize **process inventory** to identify in-scope, relevant business processes
- Hold workshops to collect process input from functional leads and SMEs; identify gaps that may require process change or additional configuration
- Leverage workshops to determine **initial configuration values** for CRP1 testing and build basic, **transaction-focused maps**





Business Process Inventory

Foundation for configuration, training and adoption

- **150+ best practice** business processes are fundamental to all subsequent activities:
 - Business Process Mapping
 - Testing
 - Training
 - Security
 - Configuration
 - Change Management

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V.	Accoun	rin .	Capita	P2P P20		counts Payable counts Payable		AP.11 AP.12	Process Prepayments Create receipt accruals					
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N	Budget		Capita	P2P	Expenses		EX.01	Maintain Expense Policies and Rules						
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				P2P	Purchasing			PO.15 PO.16	Auto Sourcing Process					

• Leveraging this collection accelerates initiation and discovery phases.



Business Process Inventory

Best practices identified for higher education in the Cloud

- Pre-built inventory of proven higher education business processes
- **Preview** completed inventories for first round of reviews with **Functional Leads**. Set up initial meetings to:
 - + Walk through the inventory at a high level
 - + Gather feedback on the format/structure
 - + Confirm SMEs participating in detailed inventory review
- Share inventory with SME Core Team members. Gather SME feedback on inventory to identify any processes that are *missing* from the list and any delivered processes *not applicable*.

Process Areas

- General Ledger
- Planning & Budgeting
- Procurement & Strategic Sourcing
- Accounts Payable
- Expenses
- Accounts Receivable
- Asset Management
- Grants Management
- Treasury Management
- Tax Compliance
- Financial Analysis
- Reporting & Analytics

- Recruiting
- Onboarding
- Core HR
- Benefits
- Time Keeping
- Absence Management
- Payroll
- Labor Distribution
- Fringe Allocation
- Effort Reporting
- Student Payments



Business Process Maps Evolve

Business process mapping and configuration workshops build on one another

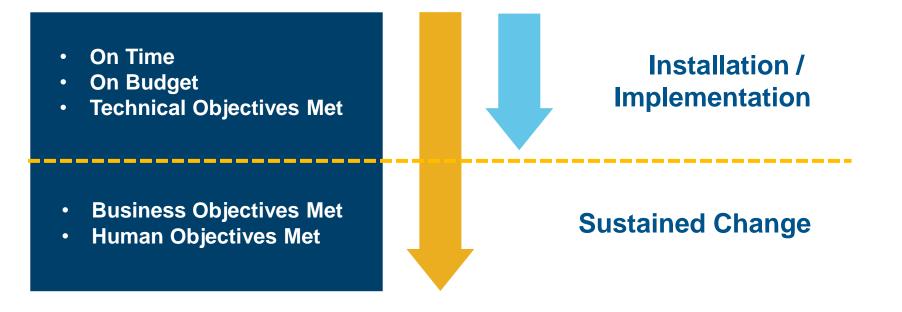
- Collect and incorporate feedback from functional lead and SME review as users evaluate system configuration
- Execute **configuration testing** based on updated processes to identify any gaps
- Address gaps through revised processes featuring new steps, actors, and decision points and updated system configuration





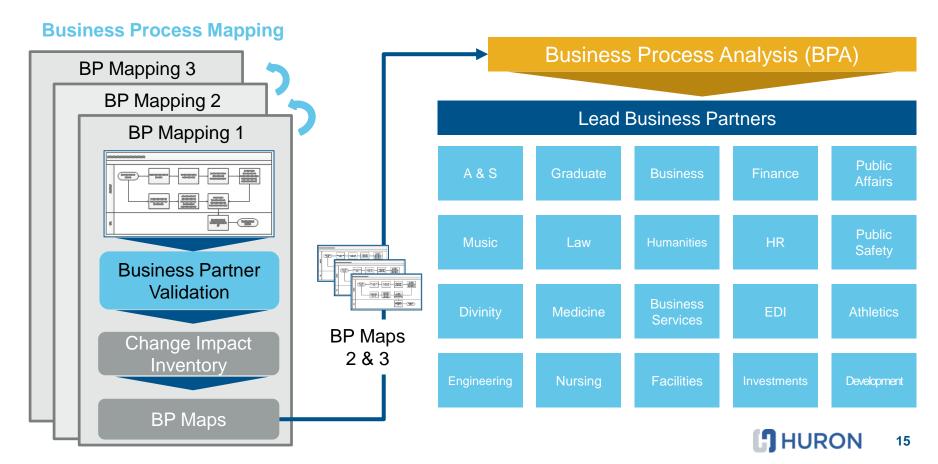
Drive Toward Sustainable Change

Sustained change pushes past technical objectives





Business Process Analysis



Redefine Roles to Suit New Processes

- Catalog and group **business activities** based on new business processes
- Define key actors to perform future-state activities
- Gain clearly defined, standardized duties across campus

"Redefining roles" is **not code for downsizing**! Transforming business requires flexibility, but does not require sacrificing people for efficiency.



Business Process Maps Finalize

Integrated testing confirms end-to-end configuration and business process maps

- Design end-to-end and integration testing scenarios based on refined maps to confirm system and process hand-offs
- Incorporate final process feedback, including all updates to address gaps and workarounds, and gain signoff from functional SMEs
- Document and publish **finalized processes and configuration**





CONFIGURATION STRATEGY



Configuration Strategy

Configuration Develops Iteratively: Gaps identified in early phases are addressed in later iterations

Configuration Workshops

- Demo delivered functionality for each business process
- Discuss configuration options; document decisions and key business needs
- Document "gaps" and review with project governance

Conference Room Pilots (CRP)

- Test business processes while refining configuration
- Repeat tests using increasingly complex scenarios and converted data
- Update configuration and documentation

System Integration Testing

- Test end-to-end flows using multiple business processes using latest configurations and converted data
- Incorporate external interfaces into testing

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Update configuration and documentation





Sample Configuration Documentation GL Configuration Workbook

	GL.18			Back			
Task	* Manage Primary Ledge	rs					
Navigation	Financials > * Define Co	mmon Applications Con	figuration for Financials >				
Path	ations > " Manage						
Information	Primaru Ledgers Review and update a self-contained accounting information set, and define new information						
mrormation	sets.	carried accounting information	set, and denne new information				
Setup Decision	NOTE :Primary Ledgers are generated as part of the Rapid Implementation for General Ledger spreadsheet. Please use this task to add new Primary						
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- Final deliverables include detailed process maps and a configuration workbook for each module
 - Configuration workbooks are comprehensive implementation documents that capture all configuration and design decisions
 - Workbooks are maintained throughout the iterative design and testing cycles
 - They also help facilitate knowledge transfer

Configuration Knowledge Transfer

Configuration "boot camps" aid the knowledge and ownership transition to future-state configuration owners



- Review configuration items related to key functionality
- Provide hands-on opportunities to reinforce configuration understanding
- Practice for production environment build
- Lay the groundwork for post go-live support



HIGHER ED AND CROSS-FUNCTIONAL PROCESSES



Establishing Cross-Functional Workgroups

Workgroups are teams established to define future state business needs related to complex cross modular functions

Form Workgroup

Develop Workgroup Scope Document

Document and Publish Business Needs for Sign-off

Develop Implementation Options to Satisfy Business Needs

Review Recommended Option with Project Governance

Begin Planning for Implementing Option



Sample Cross-Functional Workgroup Topics



TESTING STRATEGY



Iterative cycles increase in complexity

	Conference Room Pilots (Legacy: Unit Testing, System Testing)	System Integration Testing (Legacy: Interface Testing)	
	Validate configuration and begin to validate converted data		
Business Process	B		B
Config	X		
Conversion Validation			
Security and Workflow			
Interfaces			



Business processes drive testing

\rangle	В	PM 1	BPM 2	\rightarrow	BPM 3
>	Config	Workshops	Conference Room Pilot	s	System Integration Test
Bus	iness Process	 An interrelated series of syst that have a specific start (trig outcome 		• Examples: • Process a R • Issue a Supp	
	Scenarios	The various permutations of	a given business process		d blanket order requisition ded capital requisition e requisition
	Steps	 The discrete system steps th Transactions that a user will application 		Punch out to	ition header and distribution information the marketplace and fill cart uisition through workflow



Test scripts guide CRP testing

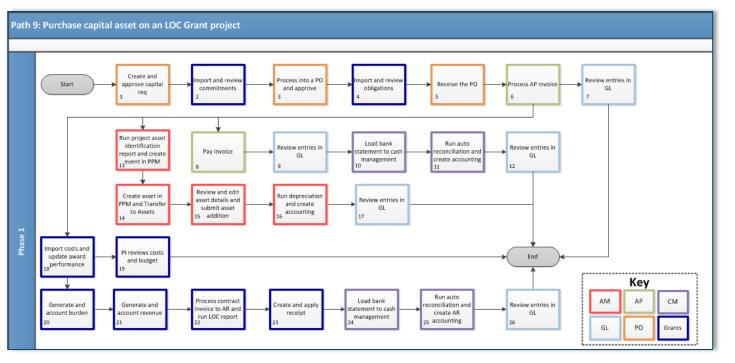
- Library of step-by-step test scripts based on higher-ed centric business process inventory
- Leverage detailed scripts heavily throughout CRP testing
- Test scripts facilitate effecting configuration testing, helping users evaluate functionality
- Training tool for the central teams

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	ERP-Procurement							
Labels:	PO.06.27							
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Description								
Step	Instructions	Expected Result						
	In this step, you will Login:							
1	1. Open URL:	User is logged in successfully.						
	2. Log in with username and password							
	In this step, you will Navigate to Catalog:							
2	1. Navigate to Procurement	Liess is to directed to supplier site/setalog						
2	2. Navigate to Procurement 2. Navigate to Purchase Requisitions	User is re-directed to supplier site/catalog.						
	3. Select a supplier catalog to shop							
	In this step, you will Add items to cart:							
3	1. Select items to purchase	User is re-directed to Oracle Cloud requisition cart.						
	2.Add to supplier's shopping cart and "checkout"							
	Note: cart total should be < \$10,000							
	In this step, you will Add lines to requisition:							
4	View cart and select "Edit and Submit"	Edit-able line is added to requisition.						
	In this step, you will Edit requisition and enter distribution:							
	Populate description and justification Populate delivery information under "Details"							
	-Requester (defaulted)							
	-Requested delivery date							
5	-Deliver-to-Location -Deliver-to-Address							
D	3. Fill in project information under Billing region:	Requisition fields are populated successfully.						
	-Project number (B_402710_GA)							
	Task Number							
	 Expenditure Type Expenditure Organization (select Cell and Developmental Biolog 							
	 Experiordine organization (select cell and Developmental bloog 4. Optional: Include a note to the supplier and/or an attachment in 							
	the header level.							
	In this step, you will Submit requisition:	Requisition is submitted and marked as "pending						
6	Select the "Submit" button	approval".						
	ociect the outfill bullon							



Process-based Integration Testing

Utilize **higher-level testing guides** in later phases of testing as users become more familiar and test scenarios cross a broader scope of modules.



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WRAP UP



Key Takeaways – Business Process Orientation



Solution-Driven Approach

Establish mindset of future-focused process design and openness to role and responsibility changes



Cross-Functional Design

Workgroups should be formed earlier rather than later and be inclusive rather than exclusive



Testing More than the Technology

Approach all aspects of configuration and testing with a business process angle



QUESTIONS

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INTERESTED IN LEARNING ABOUT HOW YOUR PEERS HAVE OVERCOME OR AVOIDED SETBACKS DURING A CLOUD IMPLEMENTATION?

Then be sure to register for the next webinar in this series,
 Overcoming Challenges During Coud Conversion.
 It will take place on Wednesday, June 20 at 1:00 pm CT.

https://www.heug.org/page/education-series-schedule