THE ENTERPRISE TRANSFORMATION

BPN UPDATE
JUNE 28, 2017

CREATING THE NEXT®

In partnership with the University System of Georgia
Agenda

• Transformation Vision

• Enterprise Resource Planning (ERP) & Enterprise Data Management (EDM)
  – Partnership
  – Enterprise Initiatives

• Elevate the Dialogue
Enterprise Transformation

“The significant problems we face today cannot be solved at the same level of thinking we were at when we created them.”
– Albert Einstein
Creating the Next

Transformation Vision

Build | By CREATING THE NEXT platform for service delivery

Transform | By designing data and processes for the digital age

Unify | By connecting user community experience

Empower | By optimizing decisions with intuitive analytics
Creating The Next

**WHY we are transforming...**
- Enable the Institute’s strategic plan and core academic, research, and service missions
- Support students, faculty, and staff through consistent, reliable, high-quality experiences
- Optimize decision making through consolidated, accessible, trusted data and intuitive analytics
- Prepare the Institute for the digital age

**HOW we are transforming...**
- Adopt streamlined, simplified, industry-leading business practices
- Foster an environment of collaboration and transparency
- Engage the Georgia Tech community through communication and outreach
- Be forward thinking and adapt to the iterative nature of implementing new technology

**WHAT we are transforming...**
- Review, update, standardize, and align business processes, policies, and service delivery models
- Replace PeopleSoft Financials with Workday
- Assess other Workday capabilities
- Modernize data warehouse to enhance analytic and reporting capabilities
- Retire or replace related applications and systems
ERP – EDM Partnership

Transform data, processes, and systems to optimize resource utilization

**ERP**
- Data Sources
- Business Processes
- Systems of Record

**EDM**
- Data Governance
- Data Warehousing
- Business Intelligence

Transform data to meaningful information to optimize decision making
Enterprise Transformation

Key Activities

☑ Select Financials System Software (Completed: Workday)
☐ Select Transformation Consulting Partner (In progress)
☐ Mobilize Georgia Tech Resources (In progress)
☐ Construct Project Team Workspace (In progress)
☐ Conduct Foundational Assessment (In progress)
☐ Implement Enterprise Data Governance & Reporting (In progress)
Enterprise Transformation
Start Workday Implementation Timeline

- SaaS Selection (Workday): Apr 14
- SI RFP - Phase 1: Jun 9
- SI RFP - Phase 2: Jun 29
- Workday Contract Execution: Jul 28
- 755 Marietta Move: Aug 25
- Workday FIN Training: Aug 31
- Initial COA Design: Aug 18
- Start Workday FIN Implementation: Sep 18
- SI RFP Phase 3 (Award): Jul 31
- SI RFP Phase 3 (Contract): Aug 31

2017
Apr | May | Jun | Jul | Aug | Sep | 2017

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Enterprise Transformation Foundational Assessment

ERP and EDM are leading discovery sessions (chart of accounts, integrating systems, and business processes) with key stakeholders across campus to understand current state

– What exists today?
– What requirements exist?
– What are our options?

• Next Steps
  – Identify and document requirements
  – Develop and test working model
  – Collaborate and partner across campus
COA Re-Design Phases

**Discovery**
- Requirement Gathering
- COA Research
- Data Analysis

**COA Framework Design**
- Define Data Elements
- Define Initial Values
- Initial Approval by Core & Extended Team

**Proof of Concept**
- Run POC Scenarios
- COA Mapping
- Final Approval by Core & Extended Team

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Guiding Principles

• The Institute has developed 5 “Guiding Principles” to provide a basis for decision making and to help define the parameters, design and future use of the chart.

#1
The chart of accounts should adhere to the standards set by the University System of Georgia.

#2
The chart of accounts should be easy to comprehend with each component having a single use and a clear and consistent definition, and it should be flexible enough to accommodate future growth.

#3
The chart of accounts should support the Institute’s information, reporting and accounting at all levels of management and should promote service capabilities unifying the unique needs across campus.

#4
The chart of accounts should leverage best practices and innovative approaches in design, structure, and implementation.

#5
The chart of accounts should promote strategic alignment and integration between the financial system of record and ancillary ledgers and systems.
EDM is currently building out processes and tools to improve access, security, and reporting of data

**Data Governance**
- Building Data Governance Committee
- Reviewing data access policies and procedures
- Partnering with ERP to assess current state systems and integrations

**Data Warehouse**
- Building a new data warehouse that assimilates data from critical systems
  - Phase I – Enrollment, Admissions, HR (Completed)
  - Phase II – Academic History, Class Schedules
  - Phase III – Financials

**Business Intelligence**
- Purchased and implemented Tableau
- Building enterprise reporting capabilities for release in FY18
- Partnering with campus units to distribute reports via Tableau
How do we elevate the dialogue?

1. How can the campus community contribute to “Creating the Next”?
2. How do we improve our communication and collaboration across the community?
3. How do we build partnerships across the community?
4. What are the major pain points in our current environment?
5. Where are our innovation opportunities?
6. What types of data and/or information can we provide to improve decision making?
Questions?

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