

# THE ENTERPRISE TRANSFORMATION

BPN UPDATE  
JUNE 28, 2017

CREATING THE NEXT®

# Agenda

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- Transformation Vision
  - Why? How? What?
- Enterprise Resource Planning (ERP) & Enterprise Data Management (EDM)
  - Partnership
  - Enterprise Initiatives
- Elevate the Dialogue

# Enterprise Transformation

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**“The significant problems we face today cannot be solved at the same level of thinking we were at when we created them.”**

– Albert Einstein

## 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...

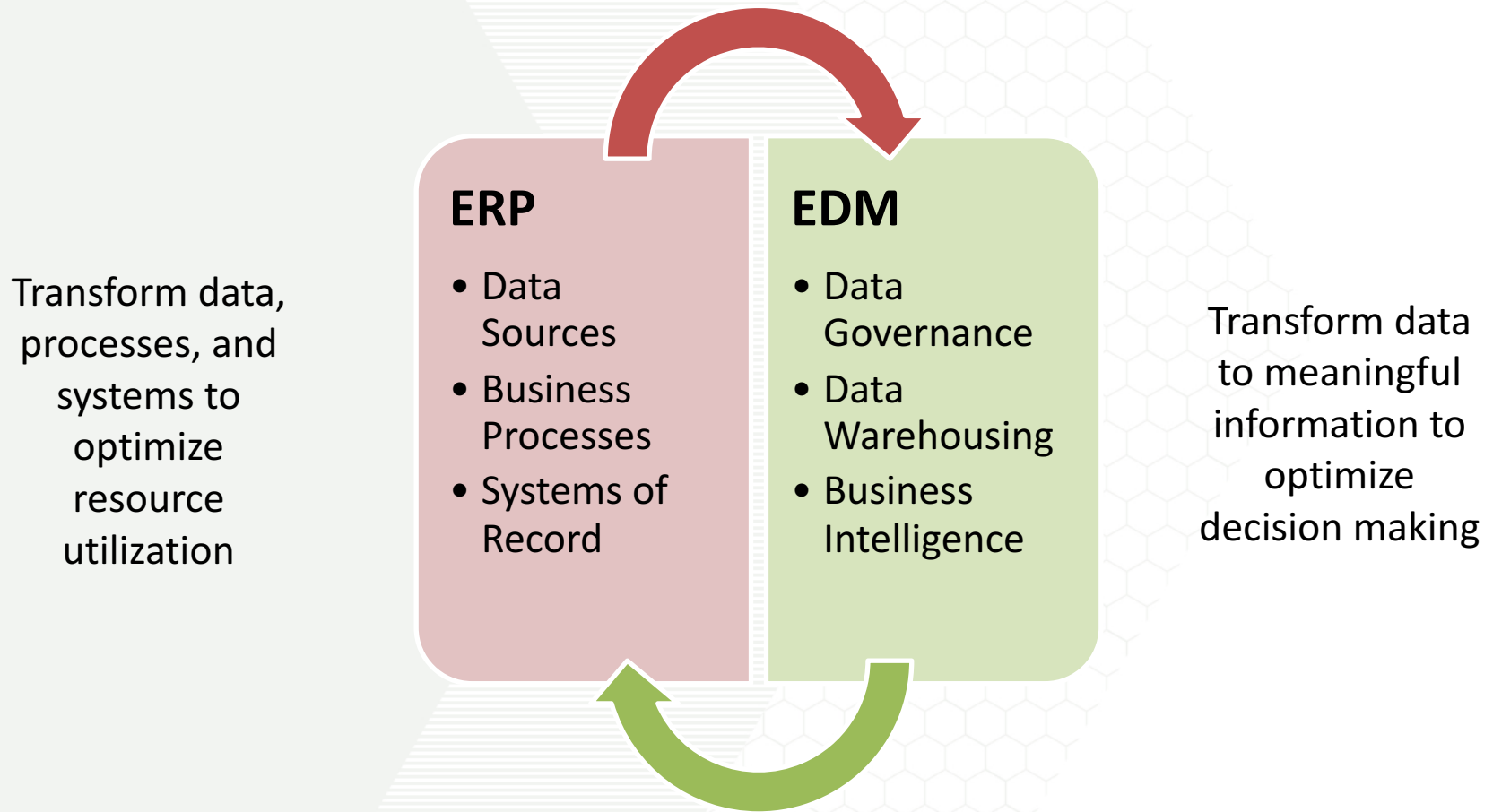
- Adopt streamlined, simplified, industry-leading business practices
- Foster an environment of collaboration and transparency
- Engage the Georgia Tech community through communication and outreach
- Be forward thinking and adapt to the iterative nature of implementing new technology

## 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



# Enterprise Transformation

## Key Activities

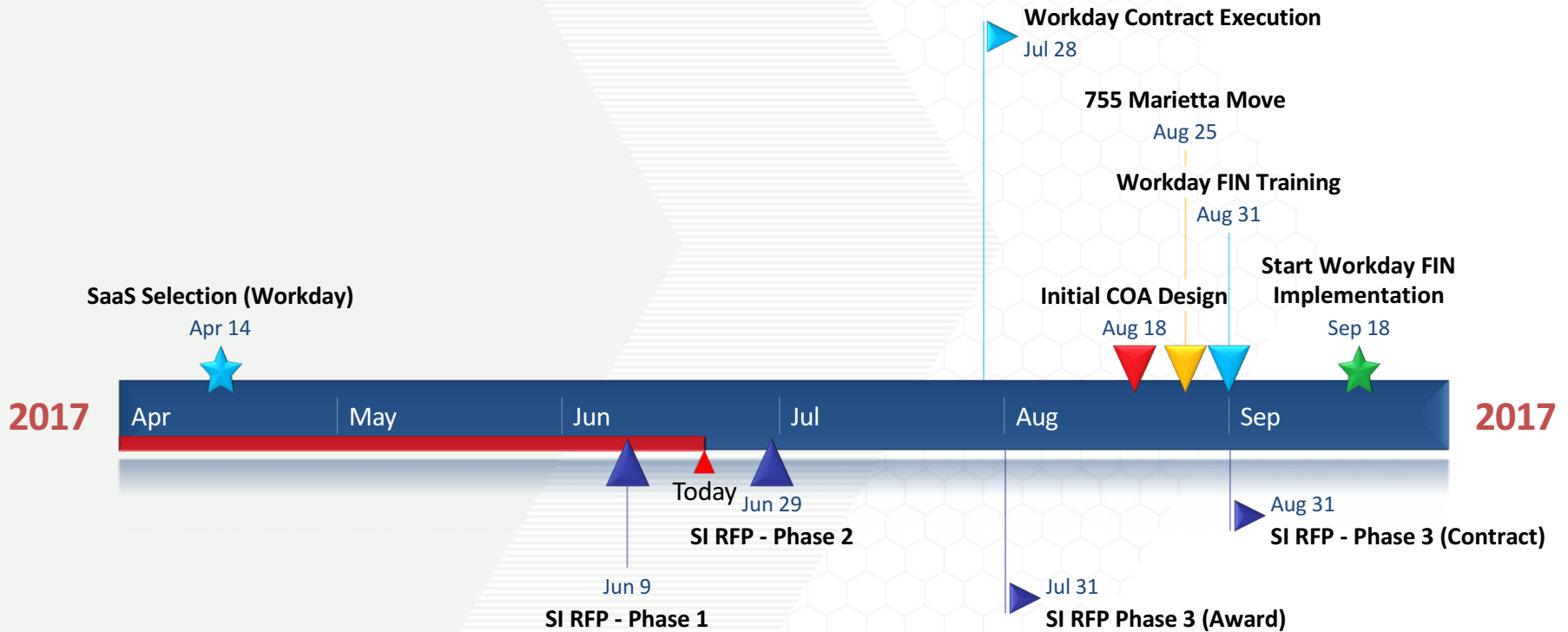
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- Select Financials System Software (Completed: Workday)
- Select Transformation Consulting Partner (In progress)
- Mobilize Georgia Tech Resources (In progress)
- Construct Project Team Workspace (In progress)
- Conduct Foundational Assessment (In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

# Enterprise Transformation

## Start Workday Implementation Timeline





# Enterprise Transformation Foundational Assessment

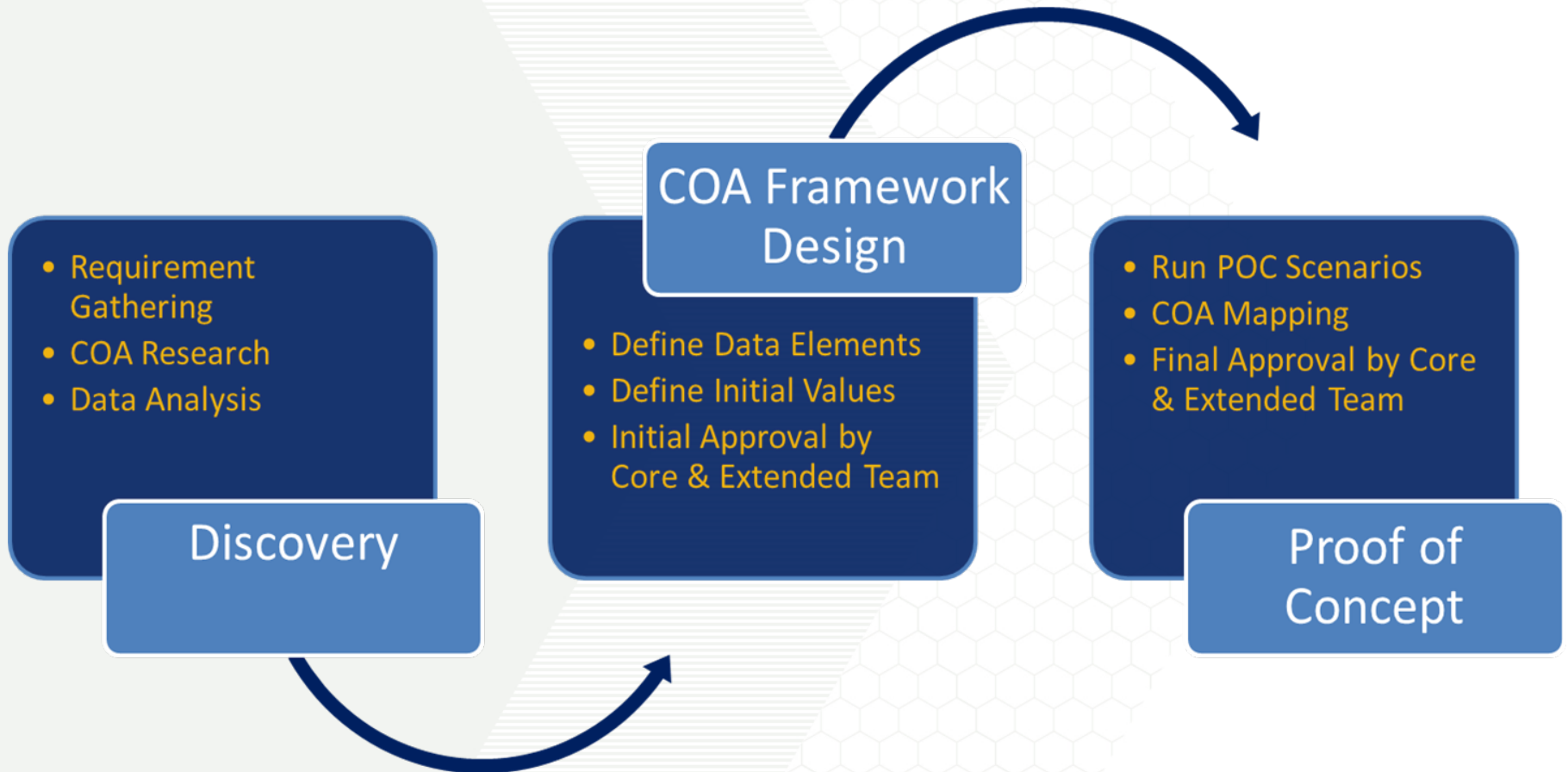
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ERP and EDM are leading discovery sessions (chart of accounts, integrating systems, and business processes) with key stakeholders across campus to understand current state

- 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



# 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.

# Enterprise Transformation

## Enterprise Data Governance & Reporting

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?

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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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