



BEST PRACTICES FOR EXECUTING A SUCCESSFUL CLOUD IMPLEMENTATION

June 13th, 2018



A blue-tinted photograph of a business meeting. Several people are gathered around a table with multiple laptops. One person in the foreground is typing on a laptop. The background shows other people looking at screens. The overall atmosphere is professional and collaborative.

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





JOSHUA VINCENT

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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.





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.





A man in a dark jacket and pants is walking on a snow-covered path in a wooded area. The scene is overlaid with a blue tint. A yellow horizontal bar is positioned above the text.

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**



Process Inventory

Workshops

Draft Maps and Configuration

Workshops

Conference Room Pilot

System Integration Test

BPM 1

BPM 2

BPM 3

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

- | | |
|---|---|
| <ul style="list-style-type: none">• General Ledger• Planning & Budgeting• Procurement & Strategic Sourcing• Accounts Payable• Expenses• Accounts Receivable• Asset Management• Grants Management• Treasury Management• Tax Compliance• Financial Analysis• Reporting & Analytics | <ul style="list-style-type: none">• 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**



Feedback

Testing

Refined Maps and Configuration

Workshops

Conference Room Pilot

System Integration Test

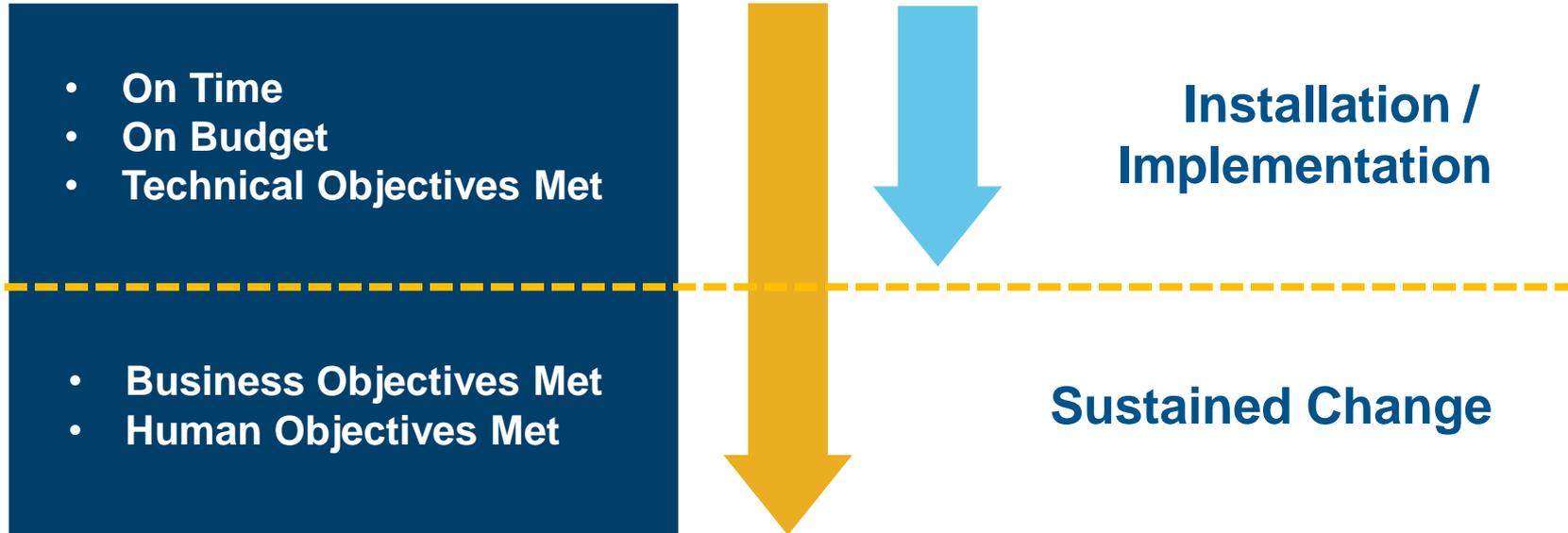
BPM 1

BPM 2

BPM 3

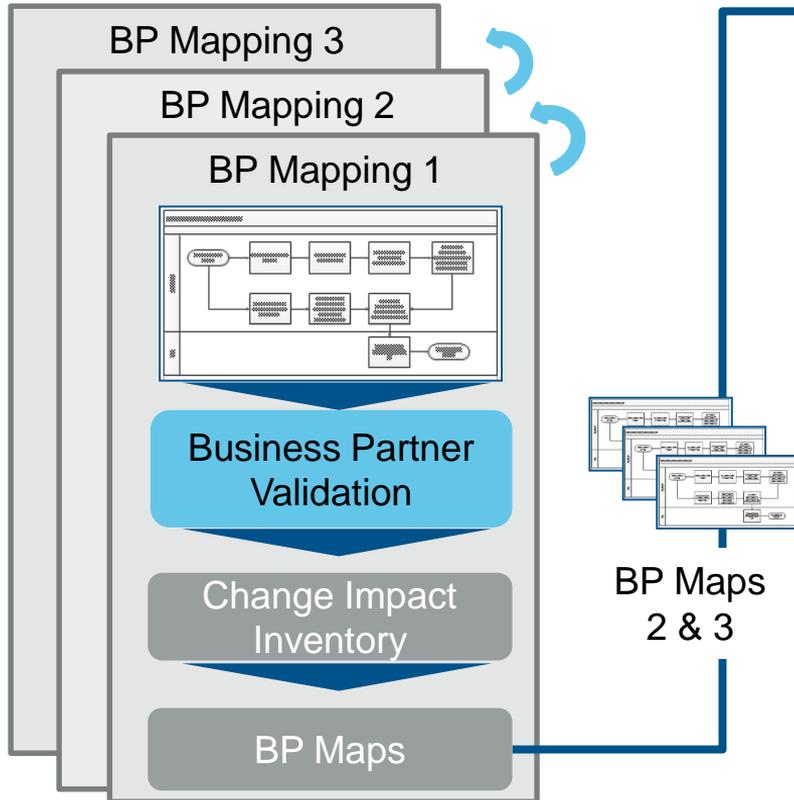
Drive Toward Sustainable Change

Sustained change pushes past technical objectives



Business Process Analysis

Business Process Mapping



Business Process Analysis (BPA)

Lead Business Partners

A & S	Graduate	Business	Finance	Public Affairs
Music	Law	Humanities	HR	Public Safety
Divinity	Medicine	Business Services	EDI	Athletics
Engineering	Nursing	Facilities	Investments	Development

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**



End-to-End Integration Testing

Process Signoff

Finalized Maps and Configuration

Workshops

Conference Room Pilot

System Integration Test

BPM 1

BPM 2

BPM 3



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

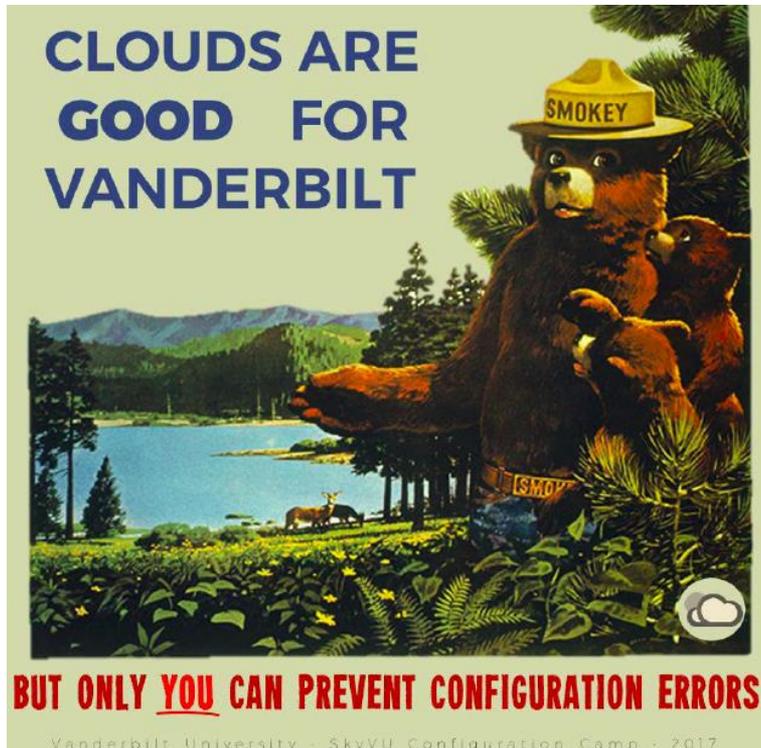
System Integration Testing

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

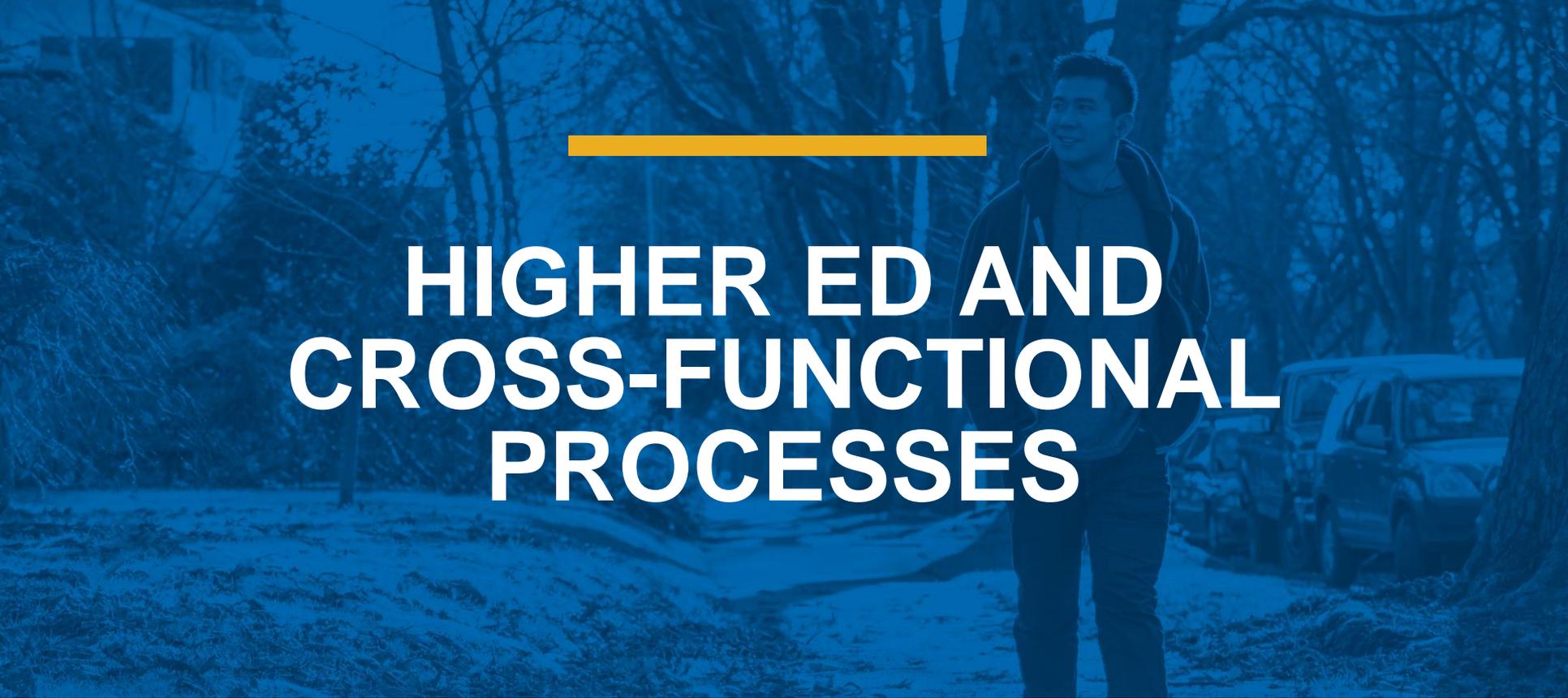


Configuration Knowledge Transfer

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



Sample Cross-Functional Workgroup Topics



CHART OF ACCOUNTS



SECURITY AND WORKFLOW



REPORTING



STUDENT SYSTEM INTEGRATION



RESEARCH & GRANTS



HCM/PAYROLL INTEGRATION

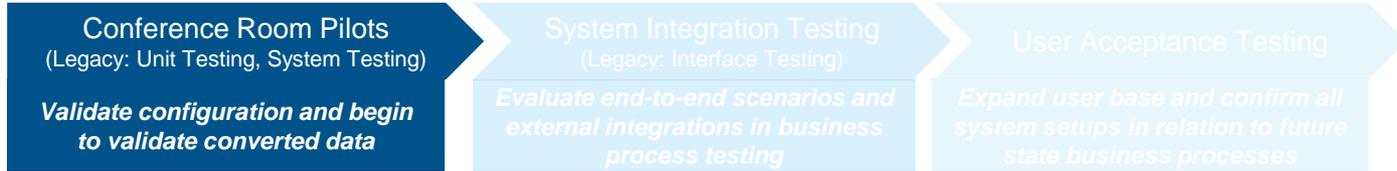


TESTING STRATEGY



Testing Approach

Iterative cycles increase in complexity



Business Process			
Config			
Conversion Validation			
Security and Workflow			
Interfaces			

Testing Approach

Business processes drive testing

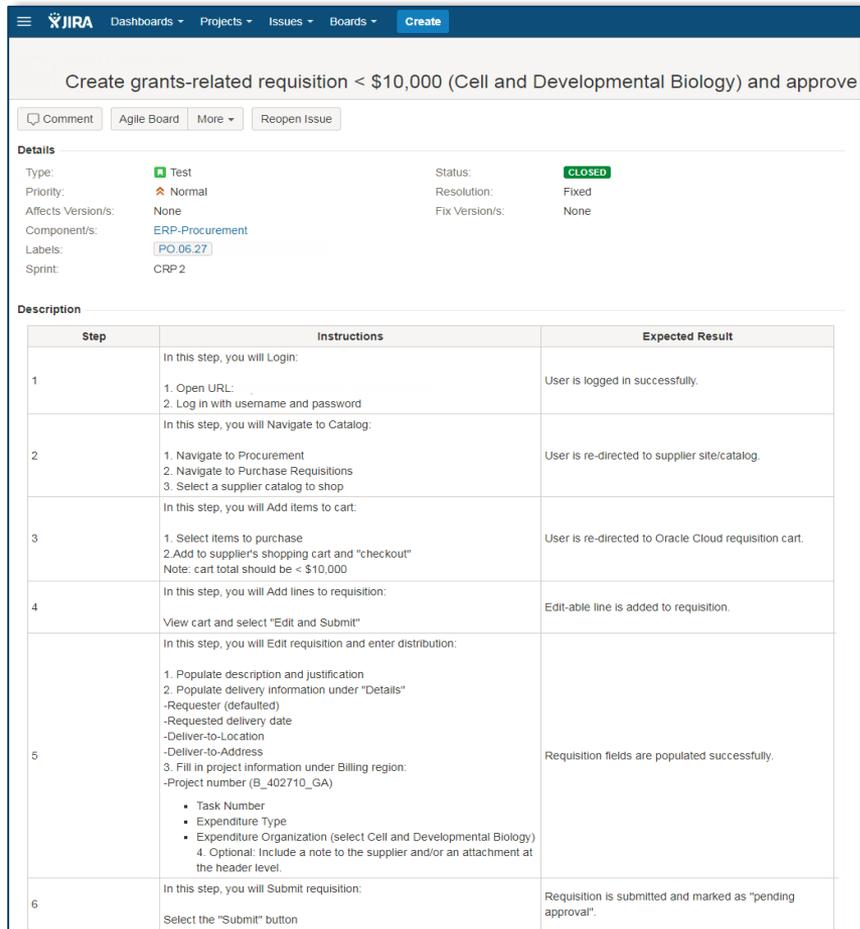


Business Process	<ul style="list-style-type: none">• An interrelated series of system and non-system activities that have a specific start (trigger) and lead to a specific outcome	<ul style="list-style-type: none">• Examples:<ul style="list-style-type: none">• Process a Requisition• Issue a Supplier Payment
Scenarios	<ul style="list-style-type: none">• The various permutations of a given business process	<ul style="list-style-type: none">• Examples:<ul style="list-style-type: none">• COA-funded blanket order requisition• Project-funded capital requisition• Marketplace requisition
Steps	<ul style="list-style-type: none">• The discrete system steps that comprise a scenario• Transactions that a user will execute within the application	<ul style="list-style-type: none">• Examples:<ul style="list-style-type: none">• Enter requisition header and distribution information• Punch out to the marketplace and fill cart• Process requisition through workflow

Testing Approach

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



The screenshot shows a JIRA issue titled "Create grants-related requisition < \$10,000 (Cell and Developmental Biology) and approve". The issue is in the "CLOSED" state. The details section shows the following information:

- Type: Test
- Priority: Normal
- Affects Version/s: None
- Component/s: ERP-Procurement
- Labels: PO 06 27
- Sprint: CRP 2
- Status: CLOSED
- Resolution: Fixed
- Fix Version/s: None

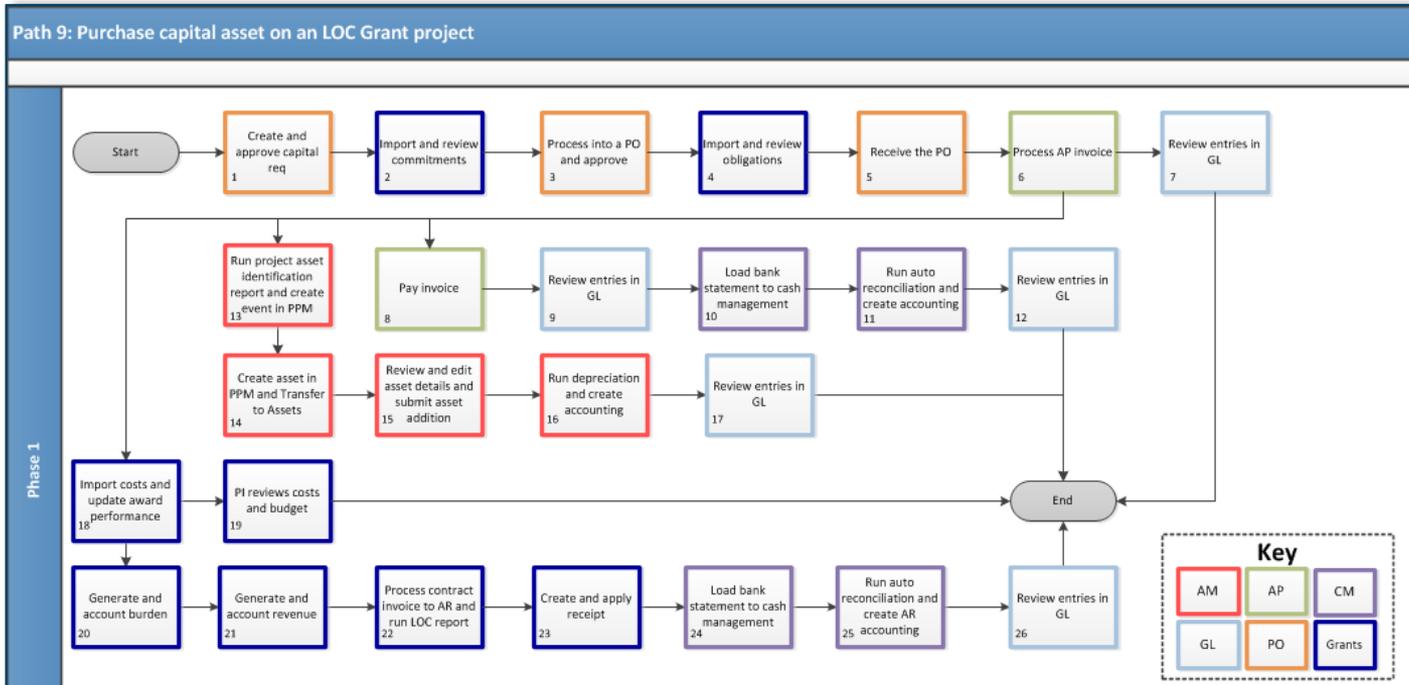
The description section contains a table with 6 steps, detailing the process from login to submission.

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

Testing Approach

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.





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



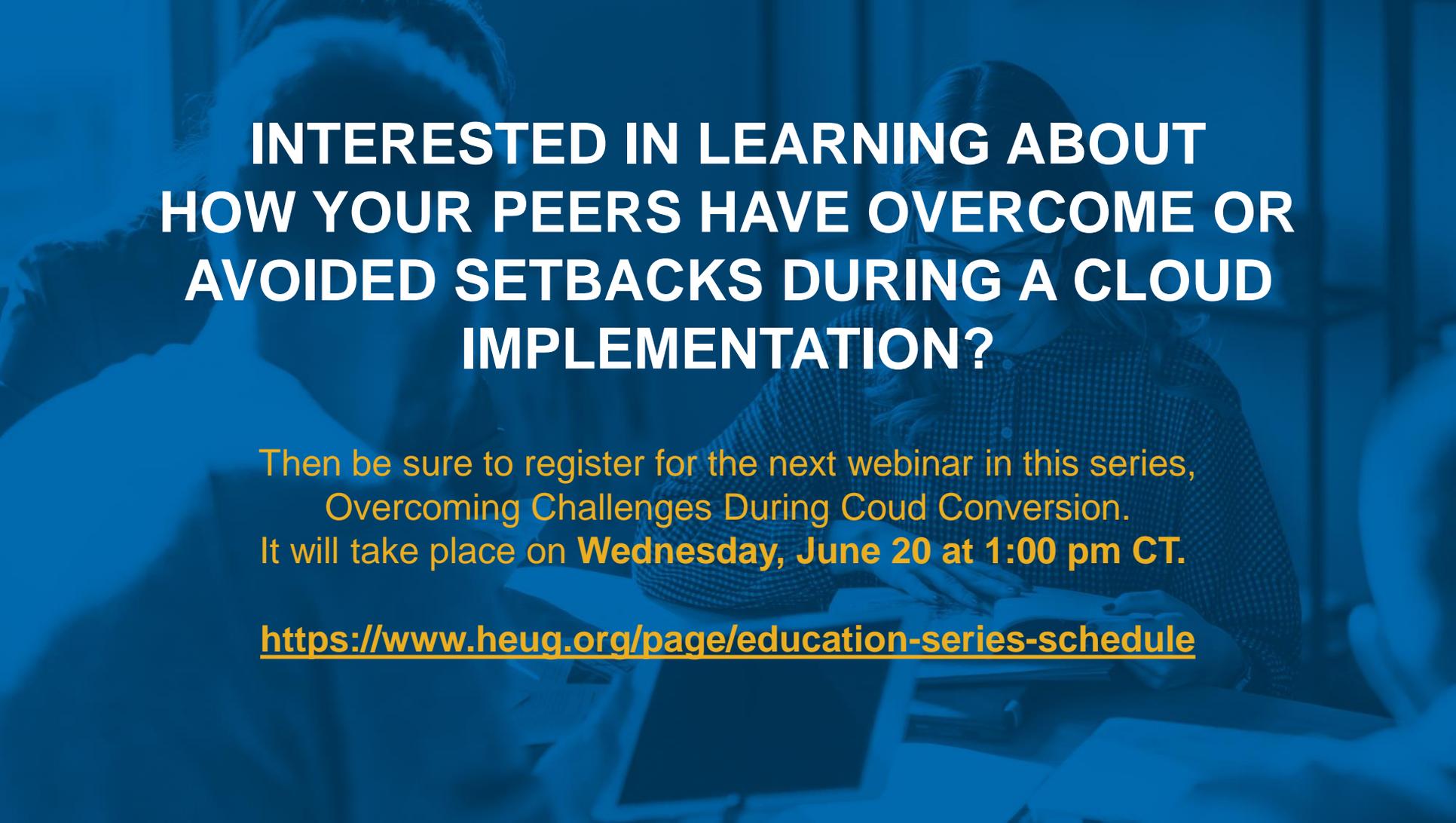
Testing More than the Technology

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

QUESTIONS



 HURON



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 Cloud Conversion.
It will take place on **Wednesday, June 20 at 1:00 pm CT.**

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