WHITEPAPER

Things to consider when implementing EPM for Higher Education

Oracle Enterprise Performance Management (EPM) is essentially a tool for collaboration that pulls together data from different systems for different uses across different departments. This means it can be even more complex to design and implement than the systems it connects.

Whether it's being used by your Strategic Planning team for student forecasting, your Finance team for budgeting, or your Management Reports team for statutory returns, here are some of the key things to keep in mind when you implement EPM in Higher Education.

1 Adopt don't adapt

When moving from on-premises software to a cloud application, one of the biggest cultural shifts is adopting new ways of working rather than adapting the application to the way you work. This can be really tempting with EPM as much of it looks like the Excel spreadsheets you already know and love. So it's critical to remember that you're moving to EPM to improve your business processes, not just automate what you already do.

While customizations are doable, they come at a cost. EPM software updates happen monthly and if you have customizations, they need testing each time. So you're creating a lot of work for yourself. When scoping your project, avoid customizations unless they're essential or a real differentiator.

As an Oracle customer, you can also log requests for Oracle to add functionality to their standard solutions. And this is something we, as Oracle partners, can help move along. If Oracle sees that your request would be useful to other customers, there's a good chance they'll add it to the application. Yes, you may need to wait for it for a few months, but then you get it as a free part of your license. And you won't need to pay consultants like us to decommission customizations you had to pay us to create in the first place.

> **Avoid complex customizations that will be costly to manage unless you really need them. Rather look at changing your internal processes.**

2 Be ready to be hands on with your data

These days, many tasks can be automated and performed at the push of a button. Unfortunately, data still often needs hands-on attention. When implementing EPM, your data moves between very different applications and environments. Indeed, the ability to pull together data from different back office systems like ERP, HCM and Student Information is a key benefit. But this often reveals issues with data quality and misalignment of the hierarchies that drive these systems. So you need to think about your review and quality control processes in advance to ensure your data is accurate and fit for purpose.

As an example, consider the academic hierarchies in the student system related to program and module ownership. Business with French may be owned by the Business School in the Student System. But ownership of individual modules in the program is split between the Business School and the Modern Languages Department. When the data is pulled into EPM, you'll need to make specific, and ideally consistent, decisions about how revenue and expenses are allocated to that program. Are they allocated to the single owner indicated on the program? Or multiple owners, as indicated by the courses from which they are constructed?

> **Ensure your data is clean, and prepare the business for the need to agree how the different university systems will be aligned for data input and reporting out of EPM.**

3 Get your teams on board

EPM projects need a collaborative project team with diverse skills. Many of them will come from within your university and it's vital to have the right people on board and ready to jump in when they're needed.

To start, you need your internal subject matter experts (SMEs) or process champions to inform the process and tell the project delivery team what the solution needs to do. Then there's the project sponsor who owns the business case, ensures it's viable and champions it with decision makers.

You of course need functional expertise. This can just be a team of two. One, provided by your implementer, is an expert in the configuration possibilities, ideally with experience in common Higher Education planning, forecasting and allocation processes. This person is paired with a university resource who thoroughly understands how you execute all those processes. These two are the main drivers of the design and build of the EPM solution, and this collaboration ensures robust knowledge transfer to the university resource, who then owns the solution and its continuous development after go-live.

This team is complemented by supporting disciplines to ensure successful delivery, including technical resources to support integrations and reporting, testers, trainers, and change and communication experts.

When it comes to User Acceptance Testing (UAT), you need people to test processes to make sure everything is working as expected. This needs to happen all the way through the implementation, not just at the end. This means your test plan and all user stories need to be developed at the start of the project, during requirements gathering and scoping. You need engaged team members to help with UAT, and your SMEs and process champions are ideal since they helped develop the vision for the solution.

> **Make sure you have an engaged internal team to help keep things moving throughout the project—from requirements gathering to UAT.**

4 Keep testing samples small

When we're developing interfaces and systems, there are test cycles all the way through the project that require university data to execute. If we find issues with the data during testing, we'll perform that test multiple times—loading the file, fixing the data, reloading the file and running another test.

Test with a small dataset first to allow for fast issue identification and resolution, and then scale up to the larger dataset. This will help you build your solution a lot faster.

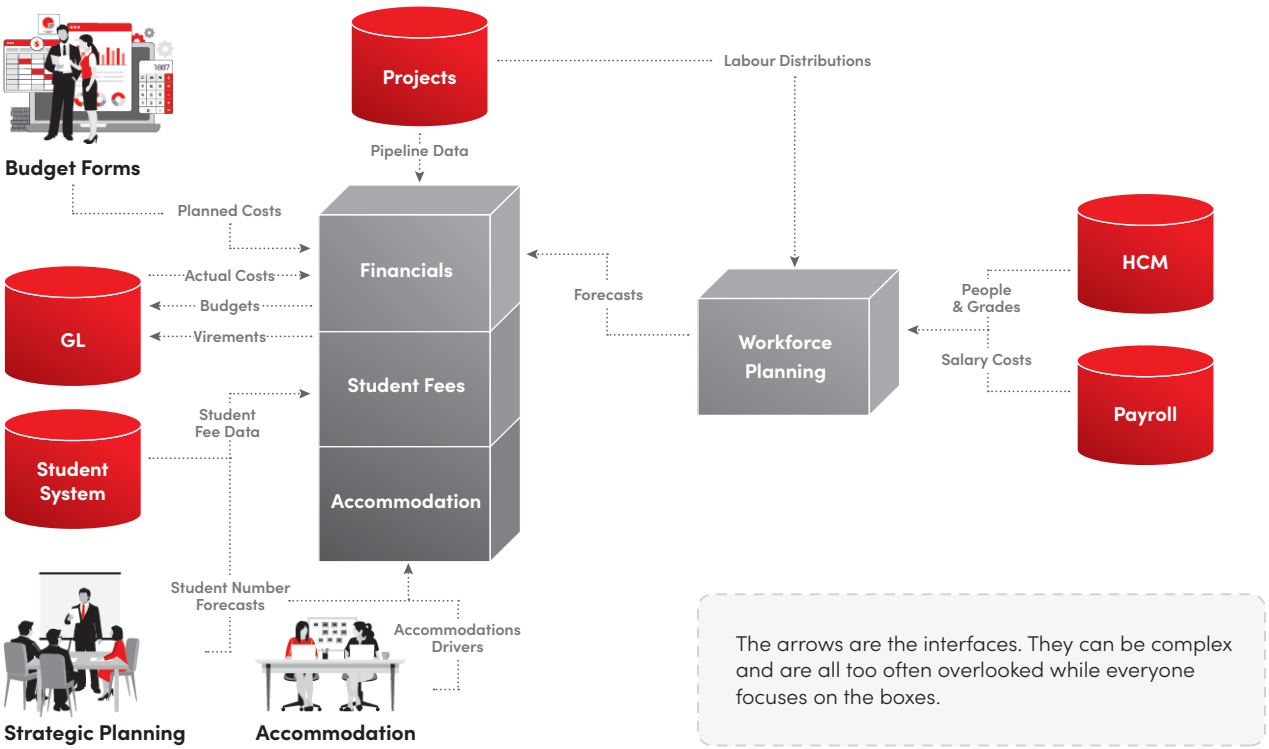
To make this testing as efficient as possible, it's best to use datasets that are small enough to complete rapid cycles. If you have a massive dataset, the test can take hours to run, but if you limit it to a sampling of, say, a single cost center with ten employees in it, it can happen in seconds. This doesn't mean you shouldn't test multiple cost centers to ensure a broad range of business scenarios are covered, but you should test each as an isolated sample.

5 Don't forget about the interfaces

When scoping an implementation, your starting point is usually to consider the configuration and build of the component parts of the project. And often this thinking happens in isolation—in boxes. There's the EPM box. And there's the Financials box. And inside the Financials box, you have General Ledger, Expenses, Accounts Payable, and so on.

When you draw your project flowchart, it's important to consider how the boxes connect, and the directions the data needs to flow, both back and forth. This can be complex and is all too often overlooked while everyone focuses on the boxes.

At the very least, look at creating a diagram like this:



There's also a tendency to focus in on what the successful integration looks like, and much less thinking into the various ways it can fail and how to identify and correct that failure. This is a critical part of interface design, and these monitoring and error resolution processes should be designed and tested from the outset. This should include a responsibility matrix to avoid later confusion about who owns and is responsible for each of the interfaces, which can seriously delay issue resolution.

When scoping environments, don't forget they need to interface with each other and talk to each other. The interfaces are an entity unto themselves that need ownership and management, so make sure to establish who owns them.

6 Document the processes

It's important to document the steps needed to perform tasks as processes can be easily forgotten, especially in the early days of using a new system. Some tasks only happen once a month and take time to become second nature. Documentation is also invaluable when onboarding new team members. And having the business process clearly laid out helps with activities like testing, training and change management.

Documentation doesn't need to be onerous, and it's actually best to avoid too much description, or instructions become difficult to use. Rather lay out the processes as a simple, clear click-by-click sequence and record process requirements and business scenarios using bullet points.

We find that sometimes our customers prefer to do the documentation themselves, as they know the level of detail their teams need. Universities often do their own training, and process documentation usually comes as part of this. At other times, we create the documentation, particularly when it comes to administrator functions that aren't usually part of a training course.

However you choose to do it, make sure your documentation gets done before you start using your system. And make sure you keep it up after implementation, especially as new EPM features get released.

Ensure you have solid documentation to refer back to rather than trying to work from memory. Keep it simple and lay out the processes you need to follow step-by-step.

If you're ready to use Oracle EPM to turn your data into intelligence, why not contact us at **askinoapps@inoapps.com** for a free conversation about EPM planning best practice.

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