

SAP at the University of Tennessee

IR₃IS Administrative Support

June 23, 2004



Introductions

- **Neal Wormsley**
 - Associate Vice President for the University
 - Project Director
- **Sheila McNeil**
 - Team Lead, Iris Customer Support (formerly Change Management and Security teams)
- **Jonathan Ruth**
 - Security Contact, Iris Customer Support team
 - ...and a former MAcc student

Outline for Today

- **ERP systems**
- **Major ERP providers**
- **UT's evaluation criteria**
- **Project timeline at UT**
- **The “Project Team”**

Outline, cont.

- **SAP and UT**
- **SAP Security in Detail**
 - Users
 - Activity Groups / Roles
 - Challenges to Security
- **Keys to project success**
- **Current developments**
- **“So, what do I do with it?”**
- **Questions**

What is ERP?

- **What is an ERP solution**
 - ERP stands for, “Enterprise Resource Planning”
 - ERP is, “A software solution that addresses the enterprise needs, taking the process view of an organization to meet the organizational goals, tightly integrating *all functions* of an enterprise.” (emphasis added) - <http://erp.ittoolbox.com>
- **What does that mean**
 - Software that serves your business holistically...if you want it to (Financials, HR, Logistics, etc.)

Who are the Players?

- **SAP**

- Germany
- 1972 - 5 former IBM employees
- World's largest ERP provider (they say)
- 4th largest independent software supplier overall (they say)
- <http://www.searchsap.com>
- Clients: Microsoft, SI Corp, Eastman, Alcoa, Higher Ed Institutions, Ernie Els

Who are the Players?

- **Oracle**

- California
- Larry Ellison
- Revolutionized relational databases for commercial use (1st relational database to support SQL)
- Also provides ERP solutions
- \$2,000 investment = \$9.7 billion in annual revenue
- <http://www.searchsap.com>

*UT's SAP instance runs on an Oracle database



Who are the Players?

- **PeopleSoft**
- **JD Edwards**
- **Microsoft Business Solutions**
 - Great Plains, Microsoft bCentral, Navision a/s

Evaluation Criteria

(“borrowed” from another presentation)

- Background and qualifications – 500 pts.
- Technical architecture – 700 pts.
- References – 600 pts.
- Functionality – 1,200 pts.
- Scripted demos – 2,000 pts.
- Site visits – 2,500 pts.

Evaluation Criteria, cont.

(“borrowed” from another presentation)

- Cost, terms, and conditions – 2,500 pts.
- Experience – 3,000 pts.
- Technical approach – 1,000 pts.
- Proposed staffing – 2,500 pts.
- Price proposal – 3,500 pts.

*SAP won out over Oracle and PeopleSoft



Project Timeline at UT

- RFP committee started 11/1997
- Evaluations began 12/1998
- Corporate visits began 3/1999
- ERP bid awarded 6/1999



Project Timeline at UT

- Implementation partner chosen on 1/2000
- “IR₃IS Project” begins 2/2000
- Financial “Go Live” in 4/2001
- HR “Go Live” in 1/2002

*Truth is, it never really stops

- Ongoing support
- Upgrades
- new functionality/applications
- must “stay current”
- “Will I have a job this summer?”

What is the “Project Team”?

- **Customer Support Team**
 - Security & Change Management
 - Maintaining data-level security & training end users
- **Financial**
 - Funds management, controlling, asset management, materials management, A/P, A/R, Sales & Distribution
- **HR & Payroll**
 - Payroll, personnel administration, personnel development
- **Workflow**
 - Responsible for getting the right things to the right people
 - Is it really a team

What is the “Project Team”?

- **Basis**
 - System administration, technical upgrades, system-level security, patches, etc.
- **ABAP**
 - Programmers that support functional teams and develop new functionality
- **Business Warehouse**
 - Data storage or “warehouse” for management-level reporting

*Differences between “functional” and “support” teams

SAP at UT

- SAP was purchased to replace the legacy systems
 - Financial, HR, etc.
- Implementation was state-wide, encompassing all campuses
- Currently ~ 30 employees on the “project team”
- 2,730 “active” users as of 6/21/2004

SAP Security

- **We touch everything**
- **Our tasks:**
 - User creation and maintenance
 - Role/Activity Group creation and maintenance
 - Support for the “functional teams”
 - Involvement in new functional development
 - Involvement in our own development
 - Monitoring system activities
 - “Continuous auditing” & daily reports

SAP Security, cont.

- **Daily Reports**

- Automatic reports – 7:30 AM and 2:00 PM
- SM20
- Users with SAP_ALL
- Users with no user group
- Users created inappropriately
- Unlocked “terminated” users
- Validity date checks
- Transferred / terminated workflow

SAP Security, cont.

- **The user side of things**
 - User Master Records
 - The many ways to control access
 - Central User Administration (CUA)

SAP Security, cont.

- **The authorization side of things**
 - Activity groups / Roles
 - Composite activity groups
 - Where the real access comes from

SAP Security, cont.

- **Challenges to security**

- *Internal*

- Poor positive testing
- Poor negative testing
- No feedback
- “Honest mistakes”
- Complexity of the system
 - Termination dates, automatic workflow changes, etc.
- “Open” access needed for various tasks
- Wide, de-centralized user base
- Empowering our “user coordinators”

SAP Security, cont.

- **Challenges to security**
 - *External*
 - Hackers
 - Virus attacks
 - Information on SAP easily available
 - Pressures to stay current
 - Pressures to conform to policies & standards

SAP Security, cont.

- **Challenges to security**
 - ***General***
 - Constant security assessments
 - Constant exposure
 - Separation of duties harder to define in a paperless environment

Keys to Project Success

- Management support
- Be willing to change
- Work closely with consultants
 - But do not rely on them too much
- Work closely together between groups
 - Especially from a Security perspective
- Communicate
- Realize that (as a project team) you serve your users

Current Developments

- Upgrade to Enterprise in March, 2004
- Plan to roll-out BW reporting to management
- FM Extension Set upgrade in Dec/Jan
- Travel system
- SAP Enterprise Portal
 - ESS
 - MSS
 - E-Recruitment
 - Workflow on the Web

*Must be ready to change gears – what is most important right now?

What do I do with SAP?

- You will most likely audit a company running SAP
- Don't worry – an audit program will be available (step-by-step instructions)
- System parameters
 - Demo
- Evaluate the instance in light of the organization
 - UT is very different from Eastman



Thank You!

Questions?

- **Please, ask anything!**
 - What are the challenges of a big project?
 - How did I get started on the project?
 - Is all this teamwork we do during the MAcc useful?
 - Why did I come back?
 - What was life at a Big 4 like?
 - Anything else