



# **HERUG: Solution Roadmap**

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**Berlin, May 2007**



## Release Strategy

HER Solution Update 2007

HER Solution Direction

SAP Ecosystem Co-Innovation

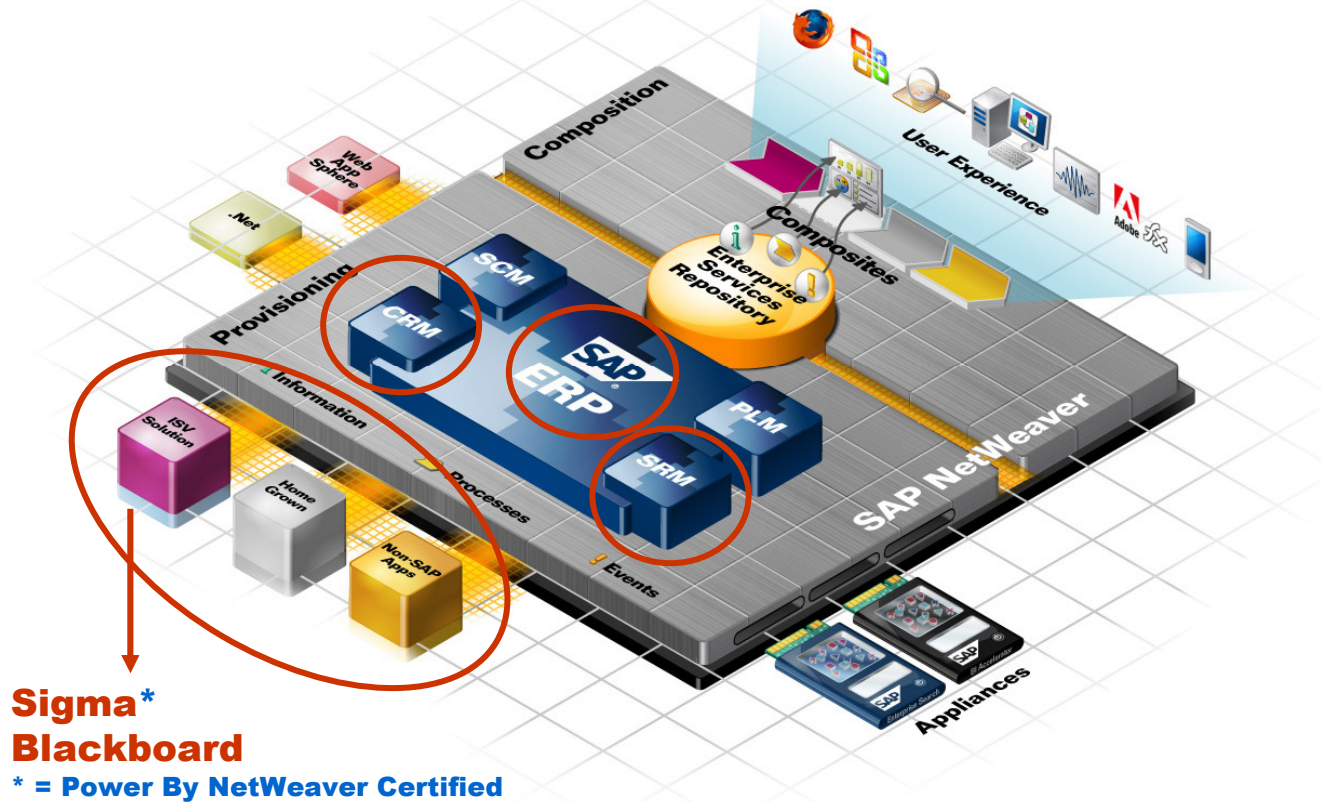
THE BEST-RUN BUSINESSES RUN SAP™



# A Stable Business Process Platform

With SAP ERP application, NetWeaver and Enhancement Packages

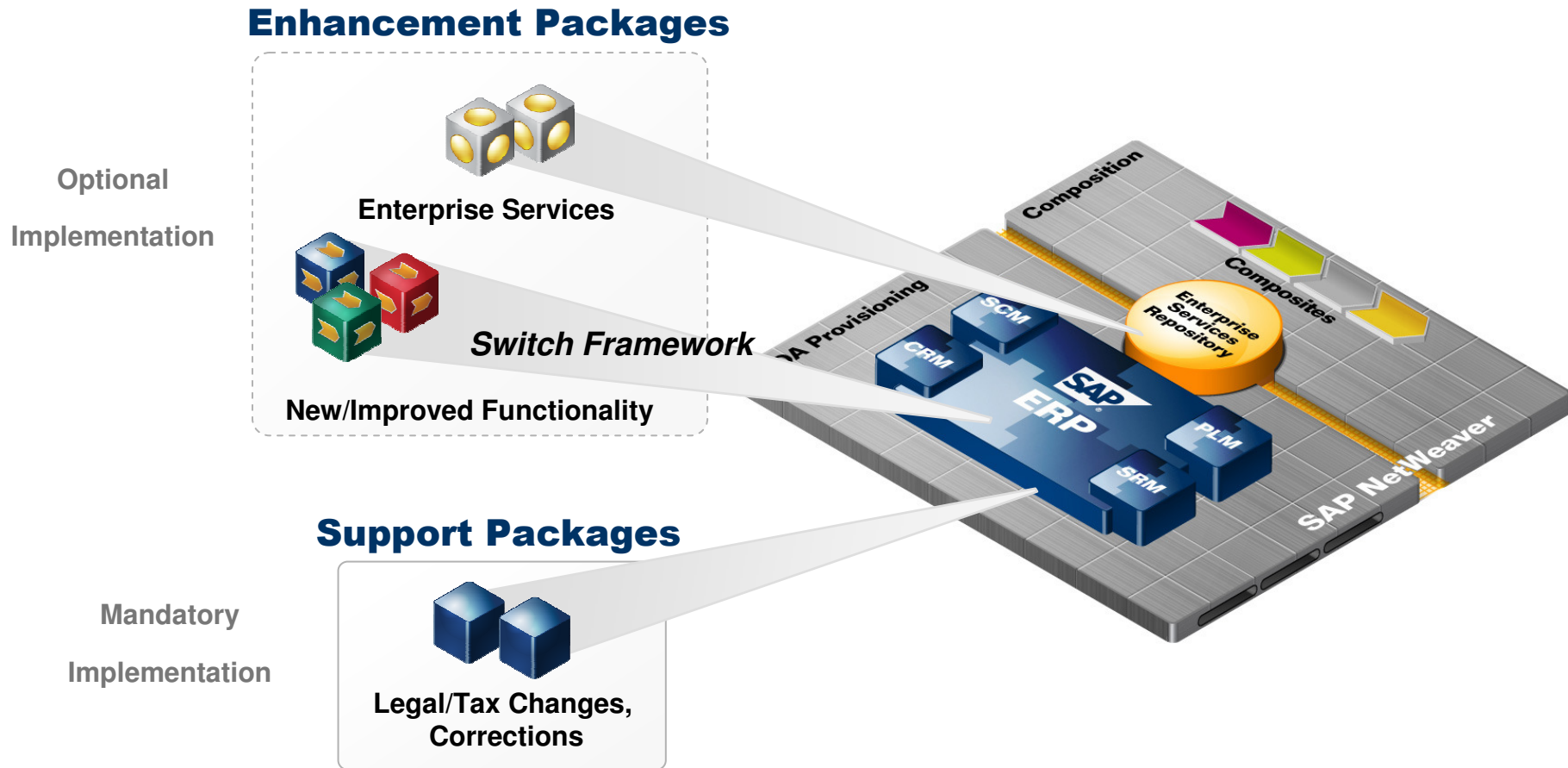
## Higher Education & Research



- Evolutionary path to Enterprise SOA
- Continuous innovation without disruption
- Proven upgrade path for SAP R/3 Customers

# Enhancement Packages

Enabling customer to adopt innovation at their pace



# Introducing: Enhancement Packages

More innovation, more often, delivered in a more accessible way



## Simplification

- Provide choice in UI for a broad business user community
- Reduce upgrade, implementation, administration, and training effort



## Enterprise SOA

- Enable innovation without disruption
- Deliver service-enablement by end to end process



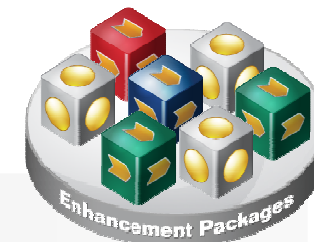
## Functionality

- Address market and customer priorities
- Extend competitiveness and addressable market



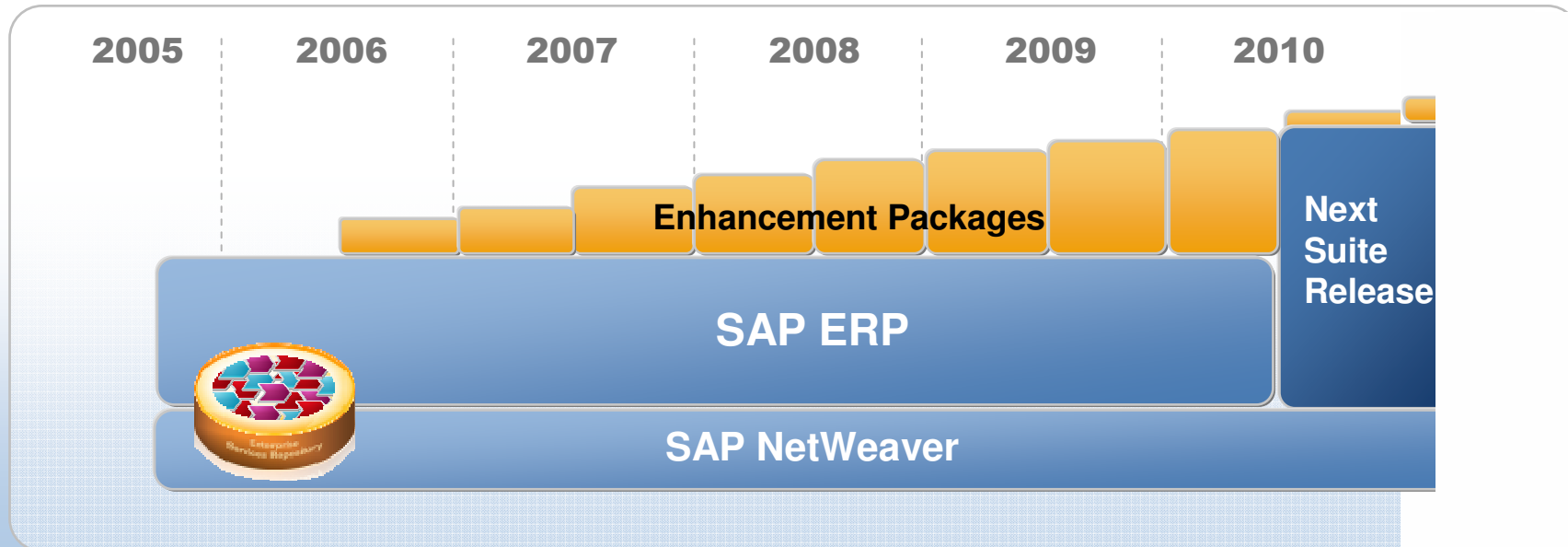
## Industries

- Deliver industry-specific capabilities more quickly
- Innovation in each industry sector



# New SAP ERP application Release Strategy

Delivering predictability and innovation without disruption



## Customers Adopt Innovation at their Pace



Process and User Interface Simplification



Industry-Specific Enhancements

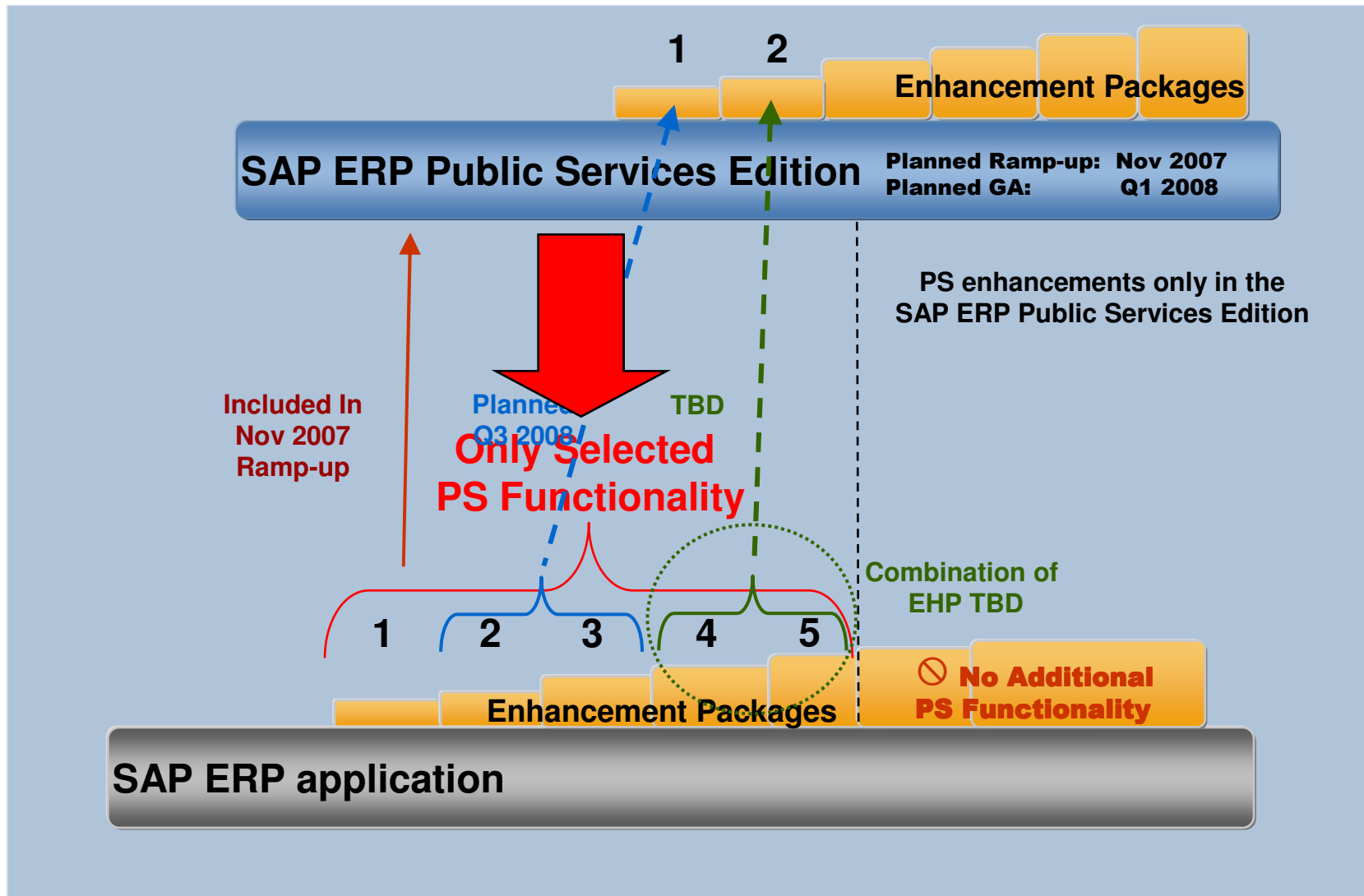


New Enterprise Services



Cross-Industry Functional Enhancements

# SAP ERP Public Services Edition



Maintenance follows 5 – 1 – 2 rule

### SAP ERP Public Services Edition includes SAP Campus Management & SAP Grants Management with

- The actual developed functionality planned with the initial release in November 2007 („GM 7“ & „CM 7“)
- Additional planned functionalities for release until 2010. First release in first enhancement package planned in 2nd half of 2008.

### SAP ERP includes SAP Campus Management & SAP Grants Management with

- a limited set of selected new functionalities
- a pilot release with strictly restricted shipment as CDP of the Implementation Accelerator Packages for CM





Release Strategy

**HER Solution Update 2007**

HER Solution Direction

SAP Ecosystem Co-Innovation

THE BEST-RUN BUSINESSES RUN SAP™

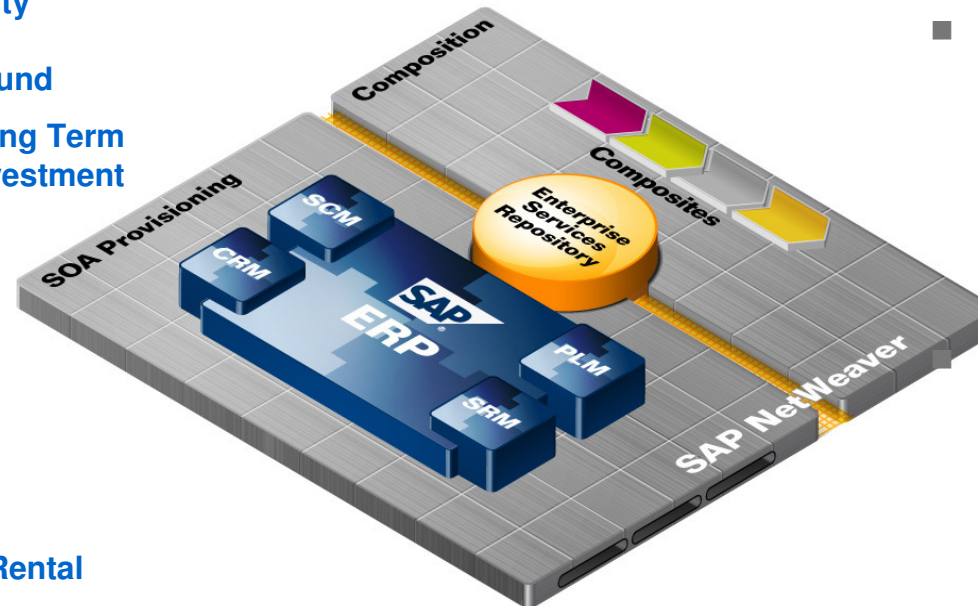


# SAP ERP Public Services Edition

## Enhancement Overview

### Treasury Integration

- Visibility Of Liquidity Status In Cash Management Per Fund
- Management Of Long Term and Short Term Investment Pools



### Real Estate & FM Integration

- Commitments on Rental Agreements
- Required Budget Amounts Calculated and Transferred in BCS

### Grants Management

- Grantee Enhancements
  - Budgeting
  - Overhead Calculation
- Expenditure Certification

### Financial Enhancements

- BCS Hierarchical Budgeting
- Enhanced General Ledger
  - New Cash Based G/L
  - Cash Based Availability Control
  - Support For Transition From A Cash Based To An Accrual Base Environment

### Enhanced Payment Functionality

- Payment By Budgetary Entity – Partial Payments Of Liabilities In A/P
- Payment Release List – Organize Payments In Complex Environment & Approval And Release Functionality For Invoices Planned For Final Payment
- Budget Account Assignment Derivation – Direct Value Based Account Assignment Derivations
- PS Collection & Disbursement (FI-CA) enhancements

# SAP ERP Public Services Edition

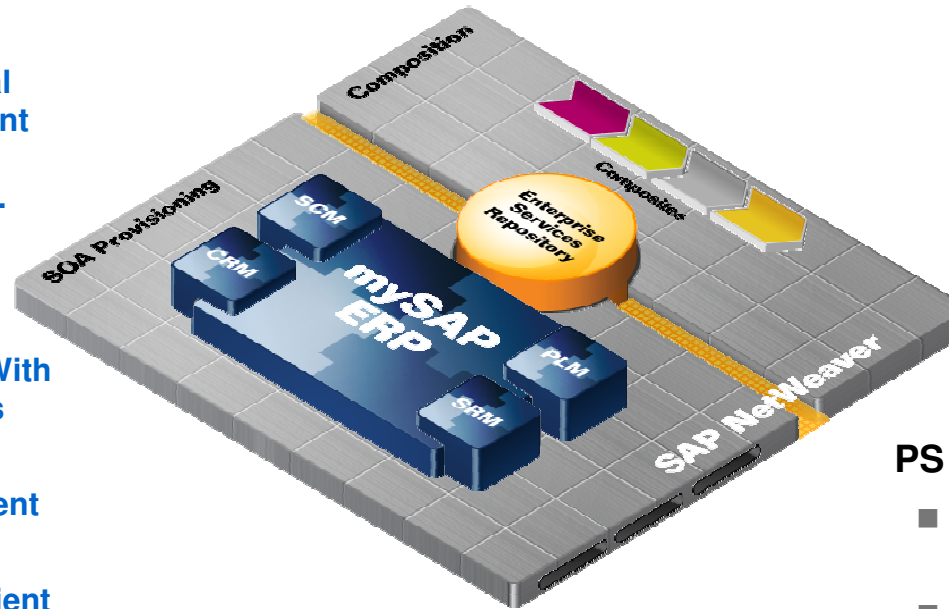
## Enhancement Overview - Continued

### Healthcare

- Workflow Based Clinical Solution And SAP Patient Management Integrated Into One Solution (a.k.a. Global Health Alliance With Siemens)
- Ability To Link Patient / Physician Information With CRM Market Campaigns
- Ability To Use Organization Management Single Point Of Entry
- Ability To Link SAP Patient Management To Non-SAP Systems Using Healthcare Industry Standards
- Outpatient Management Capabilities (a.k.a. SAP ACM) For Physicians

### Accessibility

- Enhanced Accessibility Functionality



### Higher Education & Research

- Campus Management
  - Student Advisor Workbench
  - Enhancements For Implementation Simplification
  - Enhanced BI Content And Extractors
  - Framework For Event Triggered Process Integration

### Human Resources\*

- Enhancements to Concurrent Employment
  - Functionality
  - User Experience

\* Dependent upon localization

### PS Procurement\*

- Hierarchical Line Items in Purchasing Documents
- Complex Pricing
- Mixed Contract Types
- PR Enhancements – SRM Shopping Cart Commits Funds in FM
- Incremental funding on PRs
- Options

\* Dependent upon SRM 6.0



## Student Life Cycle Management

Research

Enterprise Management & Support

Institutional Development & Relationship Management

# Academic Advising

## Student Advisor Workcenter

### Products: SAP Campus Management, SAP Enterprise Portal

#### Benefits:

- **User-friendly:** The Advisor UI has been designed in a “User Centric Design” process together with advisors at their workplace
- **Advisors can access all the required functions and services, some of which might be from different back-end systems, with a single entry into the portal**
- **Advisors can fetch the most up-to-date student information in real time, and provide a highly efficient advising service for students**
- **The Advisor UI can be easily configured, customized and enhanced to meet the individual institutions and users needs**

**Student (Saeys, Victor)**

Name: Saeys, Victor; \*20.10.2003; Male  
 Principal Org. Unit: Department of Biology, Wiskout  
 Status: Student(2); Attending; Adm. Appl.; Resident Student  
 Program: AT\_T\_SClstage; AT Testing stage dep. special

Refresh You Can Also: [dropdown]

Overview Personal Info Academic History Status Program Data Activity Record Audit

Indicators  
 Account Balance: [green dot]  
 Academic Hold: [red dot]

Communication  
 Address: Nieuw standaard adres / B-2000 Belgium  
 Telephone:  
 Mobile Phone: +4 475-123456  
 E-Mail Address: Victor.Saeys@hotmail.com

Current Program Type Progression

**Graduate**

Progression Category	Progression result	Result Status	Acad. Year	Acad. Session
Academic Standing	good standing	Final	Ac. year 2005-06	Fall
Progress Classification for Financial Aid	Graduate	Final	Ac. year 2005-06	Fall

**Undergraduate**

Progression Category	Progression result	Result Status	Acad. Year	Acad. Session
Academic Standing	good standing	Final	Ac. year 2005-06	Fall
Progress Classification for Financial Aid	No Distinction	Final	Ac. year 2005-06	Fall
Academic Honors	Dismissed	Final	Ac. year 2005-06	Fall
Academic Standing	Dismissed	Final	Ac. year 2005-06	Fall
Academic Standing for Financial Aid	On Probation 1.6 GPA required	Final	Ac. year 2005-06	Fall
Progress Classification	Freshman	Final	Ac. year 2005-06	Fall
Progress Classification for Financial Aid	Senior	Final	Ac. year 2005-06	Fall

Performance Indices for Current Session(s)

**Student (Saeys, Victor)**

Name: Saeys, Victor; \*20.10.2003; Male  
 Principal Org. Unit: Department of Biology, Wiskout  
 Status: Student(2); Attending; Adm. Appl.; Resident Student  
 Program: AT\_T\_SClstage; AT Testing stage dep. special

Refresh You Can Also: [dropdown]

Overview Personal Info Academic History Status Program Data Activity Record Audit

Academic Work Examination Qualification Equivalency Determination External Transcript

**Performance Indices**

Perform. Index	Grade/Value	Scale/Unit
Total GPA	A	Udo A-F
Attempted credits	6.00	CRH
Earned credits	6.00	CRH
Graded credits	3.00	CRH
Sessional attempted credits	6.00	CRH
Sessional earned credits	3.00	CRH
Sessional graded credits	3.00	CRH
Sessional GPA	4.00	US grade values
Transfer GPA	4.00	US grade values
GPA in Math		US grade values

Sicht: [dropdown] Druckversion Export CM Update Performance Index

Acad Work	Academic Year	Academic Session	Booking Status	Transferred	Event Package	Grade	Attempted credits	Earned Credits
Math_101			Completed with Success	<input checked="" type="checkbox"/>		B	3.00	3.00
SM 4 Dec	Ac. year 2006-07	Fall	Booked	<input type="checkbox"/>			0.00	0.00
Accty 201	Ac. year 2006-07	Fall	Completed with Success	<input type="checkbox"/>		A	3.00	3.00
Accty 202	Ac. year 2006-07		Booked	<input type="checkbox"/>			3.00	0.00



# Advisor Work Center

The screenshot displays the SAP Advisor Work Center interface. At the top, a navigation bar includes 'Home', 'Appraisal', and 'Advisor Services'. Below this, a 'Work Overview' section contains a 'Detailed Navigation' menu with 'Work Overview' selected, and 'Services' and 'Customer's service' sections. A large blue 'Services Panel' label is overlaid on the left-hand navigation area. The main content area is titled 'Advisor Work List' and features a table of 'My Advisees'. The table has columns for Last name, First name, Student Number, ID number, Phone number, Email, Changed on, and Title. A large blue 'Work List' label is overlaid on the table. Below the table is a 'Student Quick Search' box with a text input field and a search button, with a large blue 'Quick Search' label overlaid on it. The interface also includes a search bar at the top, a 'Portal Favorites' section, and a 'Last Refresh' timestamp at the bottom right.

Last name	First name	Student Number	ID number	Phone number	Email	Changed on	Title
<a href="#">Haldo</a>	Antonio	002000001598	123IDENT4				
<a href="#">Longdistance</a>	Runner	00200000764					
<a href="#">dfsdfsa</a>	dfdsafaannnnnnn	00200000154					
<a href="#">Offenloch</a>	Andreas	002000051493		+491726477499	<a href="#">Send Email</a>		
<a href="#">test</a>	r	003000000501					
<a href="#">Fee</a>	Test	002000015727					
<a href="#">Malhotra</a>	Rishabh	003000002700		+499341041758	<a href="#">Send Email</a>		
<a href="#">Kumar</a>	Aditya	003000002400		+49984512572			
<a href="#">Aamir</a>	Khan	003000000402					
<a href="#">Audit</a>	Kathy	002000035686	36899	+91657228182811	<a href="#">Send Email</a>		

# Degree Audit in Academic Advising

## Degree Audit: Program of Study (DA471 Bachelor of Modern Latinum)

**Student Number** 002000035686      **Profile Type** To be approved      **Requirement Profile** VA 002      **Execution Mode** Official Run  
**Name** Audit, Kathy; \*1979.05.17; Female      **Audit Result** Not Fulfilled      **Released**       **Created On** 2004.01.05  
**Created by** Yingzhi Liu

You Can Also:

**Audit Details**

To Be Booked

Academic Work Usage | Calculation Details | All Details

**Requirements**

- Overall Result ⬆️⬆️
- DA Gen.Education Requirements
  - Credits for Req = 10
  - DA: Take ENG202
  - DA: 1 Course in Arts
- DA Gen.Graduation Requirements
  - 4 Courses for Req.
  - DA: all mandatory courses
  - DA: GPA >= 2.0
- DA Program requirements
  - DA: 3 credits in Writing
  - DA: 1x of Fac.of Nat.Sc
- DA Major requirements
  - DA: 2x / 6 CP in Soc.Scie
  - DA: 6 CP Senior Seminar

**DA Major requirements**

⊗ Not Fulfilled

**DA: 2x / 6 CP in Soc.Scie**

■ Fulfilled

**Academic Work Used**

Academic Work	Academic Year	Academic Session	Event Package	Status	Grade symbol	Attm. credits	Earned Credits
DA-PSY001	Acad.year 2003	Spring	Section 1	Completed with Success	A	3,00	3,00
DA-PSY003	Acad.year 2003	Spring	Section 1	Completed with Success	A	3,00	3,00
DA-PSY002	Acad.year 2003	Spring	Section 1	Completed with Success	A	3,00	3,00

⏪ ⏩ Column 1 of 26 ⏪ ⏩

**DA: 6 CP Senior Seminar**

⊗ Not Fulfilled



# Course Module Registration

## Booking Plan

Products: SAP Campus Management

### Benefits:

- Allows students and advisors to better plan for successful program completion
- Flexible search capabilities allow users to find the courses that fit their needs (e.g. Credits, Day/time, Instructor)
- Seamless integration with Degree Audit and Advisor UI
- Reduces the time it takes for students to register for courses

The screenshot shows the 'Module Plan' search interface. It includes a search form with the following fields and values:

- Academic Session: Acad\_year 2007/2008/Winter semester
- Search By: Module
- Campus: (empty)
- Min. Credits: 0.00000
- Max. Credits: 0.00000
- Weekday: (empty)
- Start time: 00:00:00
- End time: 00:00:00
- Instructor: (empty)
- Modules with Free Capacity:

Buttons: Search, Clear, Add to Module Plan and Close, Cancel.

Section: Offerings found

Details	Academic Work	Booking Status	Event Package	Schedule	Category	Optimum Credits	Scale	Ref.Module	Check Resu

The screenshot shows the 'Display Module Plan : Program ( Program of Mathematics )' page. It includes the following information:

Student Number: 002000035686  
Name: Audit, Kathy Helen; \*17.05.1979; Female  
Principal Org. Unit: Inst. of the Phil. of Natural Sciences, Stone - City  
Status: Student(3); De-regist(3); Attending, Non-attdg; Adm. Appl.; Alumnus; Student Group A (Ex. Entry)  
Program: (empty)

Buttons: Display/Change, Save, Add Module, Add Offer, Edit, Delete, Test Booking

Section: Performance Indexes

Perform. Index	Grade/Value	Scale/Unit
All Earned Credits	294.00	Credit Hours
GPA	0	1-6
Transferred Credits	86.00	Credit Hours
Transferred work percentage	<>	<>

Section: Academic Work

Acad. Work	Academic Year	Academic Session	Booking Status	Transferred	Event Package	Grade	Attempted credits	Earned Credits
DA-ENGL202	Acad_year 2003	Spring	Booking Cancelled	<input type="checkbox"/>	Section 1		2.00	0.00
DA-ENGL202	Acad_year 2003	Spring	Booking Cancelled	<input type="checkbox"/>	Section 1		2.00	0.00
DA-PSY001	Acad_year 2003	Spring	Completed with Success	<input type="checkbox"/>	Section 1	A	3.00	3.00
DA-PSY002	Acad_year 2003	Spring	Completed with Success	<input type="checkbox"/>	Section 1	A	3.00	3.00
DA-PSY003	Acad_year 2003	Spring	Completed with Success	<input type="checkbox"/>	Section 1	A	3.00	3.00
DA-PHY001	Acad_year 2003	Spring	Completed with Success	<input type="checkbox"/>	Section 1	D	3.00	3.00
DA ENGL311	Acad_year 2003	Spring	Booking Cancelled	<input type="checkbox"/>	Section 1		3.00	0.00
DA-ARTS200	Acad_year 2003	Spring	Booked	<input type="checkbox"/>			3.00	0.00





# Student Self-Services

## Transfer Equivalency Self-Service

### Products: SAP Campus Management

#### Benefits:

- User-friendly: Web-based user interface allows prospective transfer students to easily see what credit they will receive at a University
- Allows admissions officers to focus on exception cases only, not routine inquiries
- Fully-delivered, ready-to-run application provides a “quick win” for implementation projects
- Anonymous web interface for transfer equivalencies is becoming a mandate for higher education institutions in more and more jurisdictions

**CM:Simulate Equivalency Determination**

1 CM:Select External Organization    2 **CM:Enter Subject**    3 CM:Review and Simulate

CM. In this step, you should select all the subjects taken by the student. Grade and period info are optional, but they might influence the simulation result. When a subject is duplicatedly entered, only the one with best grade can be transferred.

Year: 2006    Session: Winter session

CM:All Offered Subjects		CM:Taken Subjects					
Subject	Name	Subject	Name	Grade	Scale	Year	Session
BIO 1114	Principles of Biology I	ACCY 1151	Introduction to Taxation	B	Scale A-F	2006	Winter session
ACCY 1114	Introduction to Accounting	BIO 1114	Principles of Biology I	C	Scale A-F	2006	Winter session
ACCY 1151	Introduction to Taxation	ACCY 1114	Introduction to Accounting	B	Scale A-F	2006	Winter session
Hist 1045	American History	Bus 1112	General Business Concepts	A	Scale A-F	2006	Winter session
Hist 1047	American History Overview						
Bus 1111	General Business						
Bus 1112	General Business Concepts						
SCI 099	Fauna Studies in Canines and Amphibians						

**CM:Simulate Equivalency Determination**

1 CM:Select External Organization    2 CM:Enter Subject    3 **CM:Review and Simulate**

CM. Please review your input data here. If everything is valid, you can click simulate button to see the temporary simulation result. The final simulation result can be shown when you click the 'Complete' button.

**CM: Input Review**

CM:Transfer Agreements		CM:External Acad. Achievements		CM:Internal Acad. Achievements		
Regulation	Ext. Achievement Name	Int. Achievement Name	Grade	Earned Credits	Program Type	
ACCY 1114 - Introduction to Accounting	ACCY 1114 Introduction to Accounting	Phys. 402 Experimental Physics II		3.00	Undergraduate	
BIO 1114 - Introduction to Biology	BIO 1114 Principles of Biology I	BIOL 1XX Generic 100 Level Biology		3.00	Undergraduate	
ACCY 1151 - Introduction to Taxation	ACCY 1151 Introduction to Taxation	Phys. 402 Experimental Physics II		3.00	Undergraduate	
Bus 1112 - General Business Concepts	Bus 1112 General Business Concepts	Accy. 309 Cost Control		3.00	Undergraduate	

Column 1 of 8

**Performance Indices**

Performance Index	Grade/Value	Scale/Unit
Earned credits	12.00	CRH
Transfer GPA		US grade values

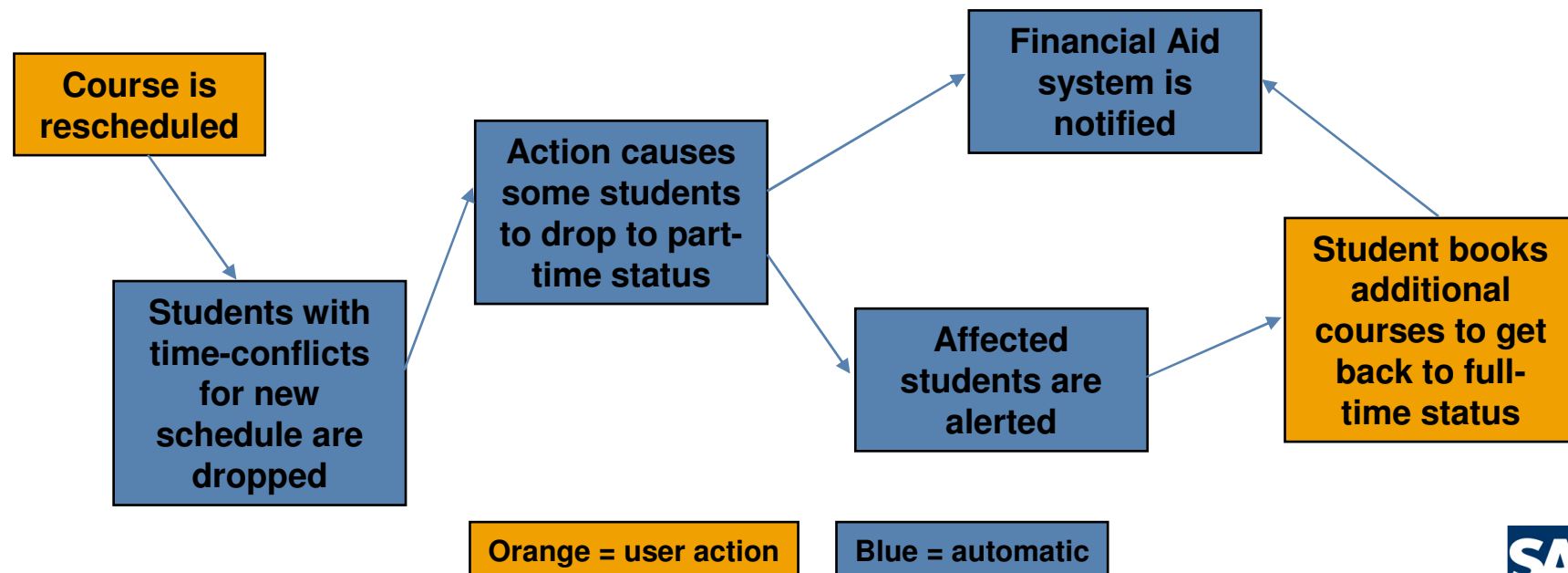
# Enterprise SOA by Evolution

## Academic Post-Processing Framework

Products: SAP Campus Management, SAP Exchange Infrastructure

### Benefits:

- Flexible framework allows for intelligent 'daisy-chaining' of activities
- Automatic follow-up actions to academic events provides for a truly automated Student Lifecycle
- Paper processes, report-based processing, and time lags of 'handoffs' can be largely eliminated for the most efficient academic processes
- Integration with SAP XI allows integrated processes to include non-SAP applications



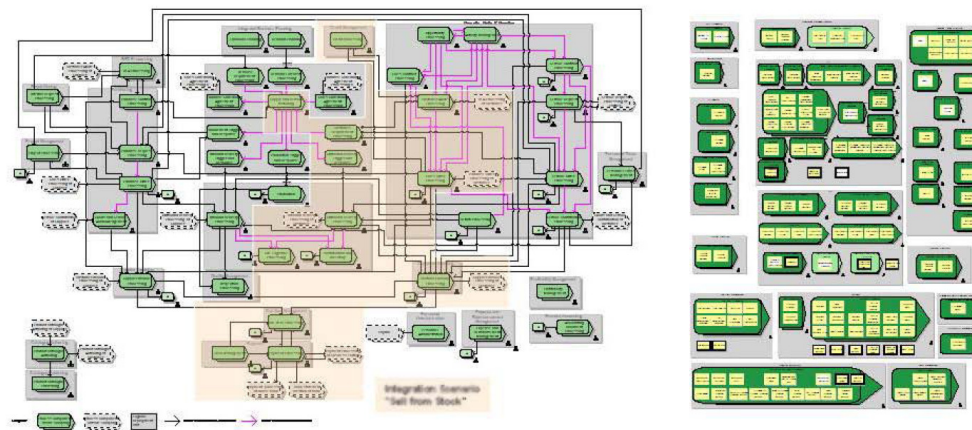
# Enterprise SOA by Evolution

First Enterprise Services for Course Approval Process (also in CM 6.00) & Learning Management System Integration

Products: SAP Campus Management, SAP Exchange Infrastructure

Benefits:

- Allows „Composition“ of approval processes for new academic course modules
- Re-useable web-services
- Event-triggered integration of students registrations to learning activities
- Standardized Integration scenario based on web-services

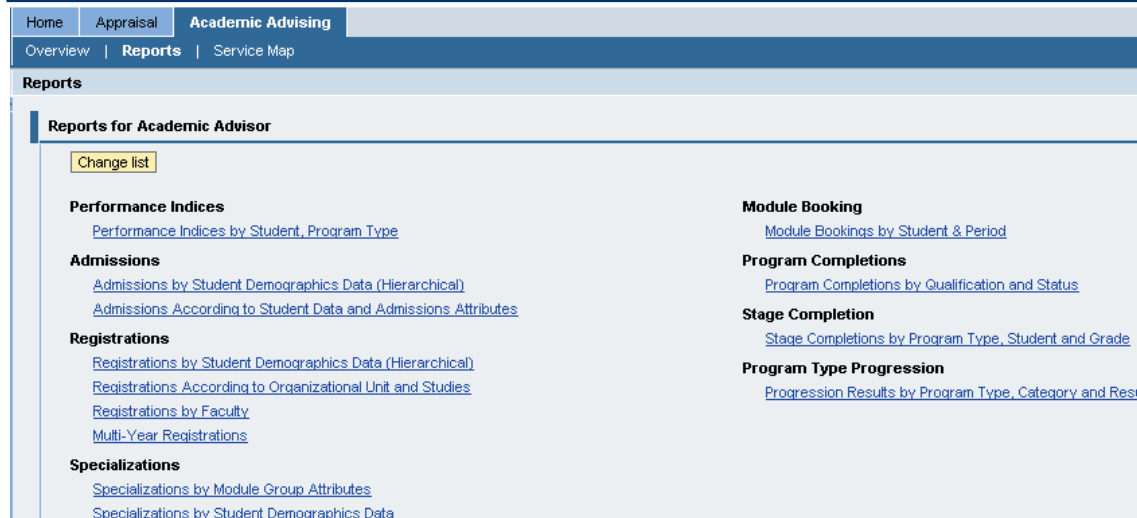


## Campus Management BI Content & Extractors

Products: Campus Management, SAP Business Intelligence, SAP Enterprise Portal

### Benefits:

- New extractors/content for CM data speed implementation of analytical reports:
  - Module bookings
  - Event offerings
  - Program and Stage completions
  - Progression
  - Performance Indices (requires ERP Public Services Edition)
- Extractors (except Performance Indicators) are backwards-compatible to CM 6.0 provide for immediate use and adoption by current customers (via CM6.0 SP8)
- New Netweaver framework tools such as Visual Composer provide for dynamic, user-friendly UI for analytics



Home | Appraisal | Academic Advising

Overview | Reports | Service Map

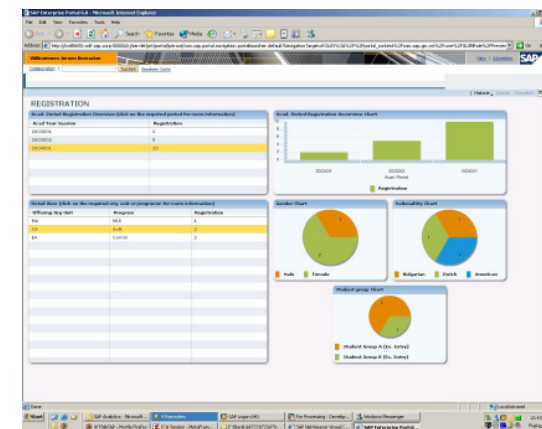
### Reports

#### Reports for Academic Advisor

[Change list](#)

- Performance Indices**
  - [Performance Indices by Student, Program Type](#)
- Admissions**
  - [Admissions by Student Demographics Data \(Hierarchical\)](#)
  - [Admissions According to Student Data and Admissions Attributes](#)
- Registrations**
  - [Registrations by Student Demographics Data \(Hierarchical\)](#)
  - [Registrations According to Organizational Unit and Studies](#)
  - [Registrations by Faculty](#)
  - [Multi-Year Registrations](#)
- Specializations**
  - [Specializations by Module Group Attributes](#)
  - [Specializations by Student Demographics Data](#)

- Module Booking**
  - [Module Bookings by Student & Period](#)
- Program Completions**
  - [Program Completions by Qualification and Status](#)
- Stage Completion**
  - [Stage Completions by Program Type, Student and Grade](#)
- Program Type Progression**
  - [Progression Results by Program Type, Category and Result](#)



### Student Accounting Continuous Enhancements

#### Details:

- Enhanced revenue distribution capabilities allow for precise allocation of tuition and fee revenue to various academic units and cost centers
- Enhanced Financial Aid capabilities provide for Estimated/Anticipated aid that can be easily viewed by students on Biller Direct, along with providing historical tracking
- Services for real time integration with Financial Aid Systems
- Ease of use & implementation
  - Fee Calculation to pick up period rather than key date
  - Grant Evaluation to pick up period rather than key date
  - Customizing which credit value should be used in pricing and mapping of booking status for pricing
  - Default templates for Grant Details of internally-managed aid greatly speeds data entry for scholarship/grant administrators
- General Enhancements in FI-CA/ PSCD such as
  - New Mass-Activity Framework from FI-CA
  - FI-CA document management

## Other Campus Management Enhancements

### Other Campus Management Enhancements

#### Details:

- **Multiple Advisors:** Context-sensitive advisors (e.g. Overall, Program-specific, Athletic) can be assigned, allowing for better advising of students
- **Enhanced Functionality & Usability in Event Planning UI:** Provides better ease-of-use for scheduling of classes
- **Mass-booking:** Enables efficient and consistent course registrations for student cohorts
- **Module-based correspondence:** Allows for better student service when a module is completed, booked, re-scheduled, completed etc.
- **Continuous Enhancements for Cohorts**
- **Highest Composite Test Scores:** streamlines admissions processes by automatically calculating and storing the highest combined scores (and individual sub-scores) for tests
- **Stored performance indices:** Provides ease-of-reporting vs. dynamic-only performance indices
- **Registration to specializations per stage**
- **Grading of modules taking into account grades of other modules**
- **Technical Enhancements:**
  - Completion of Student BAPIs
  - RFCs for Equivalency Determination
  - Data Migration for Transfer Agreements
  - Scale enhanced to 4 decimal places
  - Completion of Archiving roadmap



Student Life Cycle Management

**Research**

Enterprise Management & Support

Institutional Development & Relationship Management

## GM – Grantee solution

- Usability enhancement for Grant Master Data and Budget Workbench
- Budget entry on total Project Costs or Direct Cost basis
- Indirect Cost calculation
- Automated Accrual/Deferral calculation and posting for Sponsor receivables
- Currency Revaluation enhancements
- Service Enablement of Grant Master Data

## Effort Certification & Reporting

- Bundling functionality
- Wage Type assignment and grouping
- Tolerance checking
- Usability updates:
  - MSS transaction
  - BAdI for determining alternate Workflow Approver
  - Cost Assignment valid from/to dates

Employee Name: Josephine Chance  
From Date: 1/1/2005  
To Date: 1/15/2005

Personnel Number	Position	Cost Distribution %	Total Salary	Currency
00051025	50008074	100	6,000	USD

Row 1 of 1

Position	Company Code	Cost Center	WBS Element	Order	Grant	Functional Area	Fund	Amount	Currency	Old Cost Distribution
50008074	US01 (IDES US INC)	0000010102						0	USD	
50008074	US01 (IDES US INC)	0000010103						0	USD	





Student Life Cycle Management

Research

**Enterprise Management & Support**

Institutional Development & Relationship Management

# Enterprise Management & Support Update (Highlights)

## SRM

- Accessibility enhancements
- HealthCare procurement services
- Procurement for Public Services (PPS)
  - complex procurement processes
  - Line Item Hierarchies
  - Mixed Contract Types
  - Incremental funding of Line Items

## Position Budget Control

- Enhanced integration with GM-Grantee – multi-year commitment processing

## Funds Management & Treasury Integration

- Basis of Endowment functionality
- Enhancements to Transaction Manager, Cash Management and Average Daily Cash balance

## Materials Management

- Multiple Account Assignments with Valuated Goods Receipt
- Amount Based Distribution of Account Assignments

Change Purchase Order

FPDS-NO | Records Management | Order | Hold | Check | Change | Display | Kopieren | Delete | Complete | Refresh

Output Preview | Download | Upload

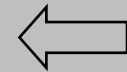
Purchase Order Name: SP0300-07-M-0865 | Number: 8500001875

Header Data | Item Data

Add Shopping Cart Item: Number of Shopping Cart: [ ] Start Search | Item: [ ] Add

Add Catalog Items: Find in Catalog: BUSSEYE 4.0 | Start

External Item Number	Item Cat.	Description	Product	Product Category	Quantity	
0001	Outline	Heating System			2 EA each	
000101	Outline	Gas Heating System			2 EA each	
000101AA	Outline	Materials			2 EA each	
000101AA0001	Material	Filter	143224614	2810	2 EA each	10,000,00
	Material	Standard				
	Material	Standard				
	Material	Standard				
	Material	Standard				
	Material	Standard				
	Material	Standard				



## SAP Government Procurement Capabilities

### Public Tendering

- Bidder Prequalification
- Multi-Round Bidding / Tendering
- Bid Evaluation
- Electronic File Creation

### Contract Management & Administration

- Versioning (Changes)
- Complex Document Generation (RFx / contracts)
- Contract Development, Execution & Monitoring

### Operational Procurement

- Requisitioning
- Order Management
- Receiving
- Financial Settlement

### Procurement Services

- Processing of External Requirements
- Third Party Processing
- Inventory Management and Delivery from Stock

### Supplier Enablement

- Supplier Self-Service / Portal
- Document Exchange
- Supplier Collaboration

### Sourcing

- Category Management
- Supplier Qualification
- Supplier Negotiation
- Live Auction

### Catalog Content Management

## Benefits Delivered

- Improve compliance and spend control
- Reduce sourcing cycle times 5% - 15%
- Leverage cross-agency demand consolidation to lower unit prices and increase negotiating power
- Support varied procurement categories, across assets, maintenance and projects
- Reduce off-contract spending up to 20%
- Accelerate cycle times and reduce costs through event-driven workflow
- Lower bidding process costs through electronic collaboration
- Reduce administrative costs and improve accuracy through vendor self-registration
- Optimize supply base through qualification and scorecarding
- Increase supply availability
- Support end-to-end procurement lifecycle
- Link procurement and funds management
- Integrate records management to fulfill auditing



Student Life Cycle Management

Research

Enterprise Management & Support

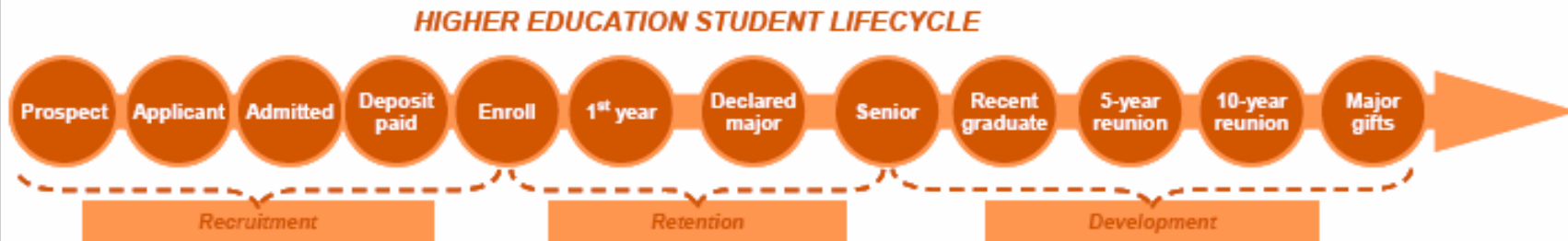
**Institutional Development & Relationship Management**

THE BEST-RUN BUSINESSES RUN SAP™



# DATAMONITOR – 2007 Trends

Figure 2: The most effective CRM solutions will support the entire student lifecycle



Source: Datamonitor

DATAMONITOR

# Streamlining Duke's Communications



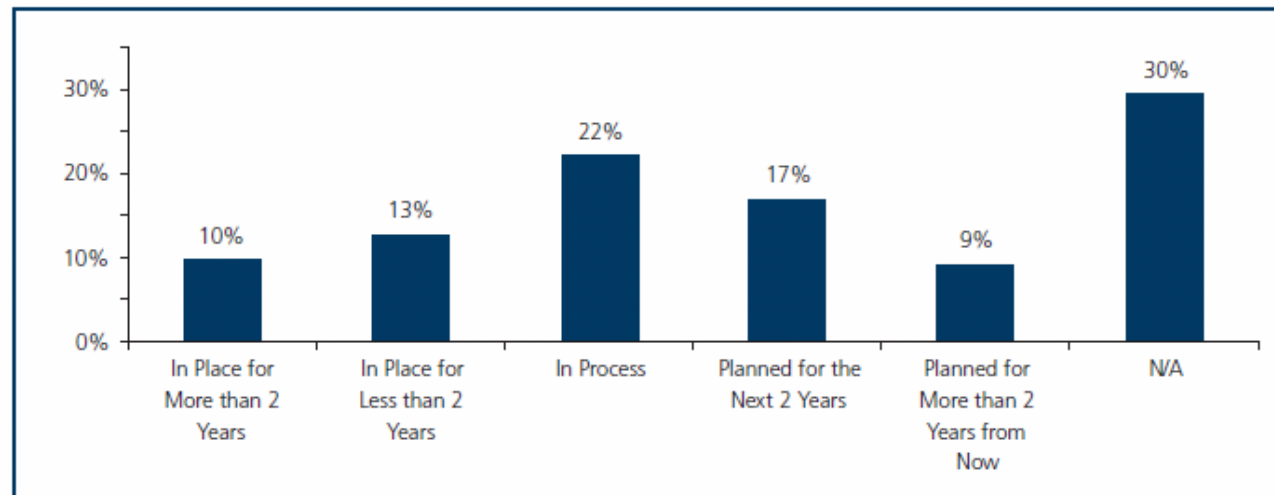
EDUVENTURES

*Constituent Relationship  
Management Makes  
Inroads in Higher  
Education*

*By Catherine Burdt, Senior Analyst*

*February 2006*

FIGURE 1. CRM PLANS, ALL INSTITUTIONS FROM *HIGHER EDUCATION SURVEY ON LEADERSHIP, INNOVATION, AND TECHNOLOGY 2005* (N=308)



Dr. Richard Staelin of Duke University's Fuqua School of Business points out that CRM offers value both to institutions and their constituents, with a focus on streamlining and improving institution-constituent communications and reducing costs to the institution.



EDUVENTURES

## *Constituent Relationship Management Makes Inroads in Higher Education*

*By Catherine Burdt, Senior Analyst*

*February 2006*

Often dependent on alumni contributions to help balance budget shortfalls, institutions use CRM applications to build alumni relationships. Contributions to colleges and universities in the United States increased by 3.4% in 2004, with nearly half of the \$24.4 billion raised that year originating from individuals, including alumni and non-alumni donors.<sup>3</sup> As a result, alumni relations departments are increasingly looking to CRM for process-optimization support.

<sup>2</sup> Eduventures, *Higher Education Survey on Leadership, Innovation, and Technology 2005*

<sup>3</sup> Council for Aid to Education, 2005

# Institutional Development

*Managing Gifts & The Final Component Of The Student Life Cycle*

## Solution Overview

- Portal Roles
- Constituent Management
- Prospect Management
- Gift & Pledge Processing
- Campaign Management
- Event Management
- Memberships & Dues Processing
- Alumni Portal
- University Calling Center
- Analytics & Reporting
  
- Integration To SAP CM

The screenshot displays the SAP Institutional Development interface for a prospect named Lee Majors. The main header shows the prospect's name and total value: "Lee Majors - \$6M Major Prospect, Majors, Lee, 6,000,000.00, USD (24)". Below this, there are various action buttons like "Go To", "New", "Save", "Delete", "Copy", "Fact Sheet", "Follow-Up Activity", "Send E-Mail", "Distribute", "Create Document", "Remove from Favorites", and "Schedule Actions".

The interface includes several tabs: "Attachments", "Document Flow", "Phase History", "Gift Processing", "Scheduled Actions", and "Change History". The "Document Flow" tab is active, showing a table of document items:

Description/Number	Status	Document Date
Doc. Flow		
* Major Gift 24	Open	06/30/2006
Constituent Activity 127	Open	03/25/2006
Task 128	Open	
Gift 5000056	In process	03/24/2006
Company Match 5000057	Open	03/25/2006
Invoice 90000014		

Below the document flow, there is an "Item Relationships" section with a table showing relationships between items:

Item	Number	Item	Product	Quantity
000000010	5000056	000000010	DONATION_PRES	3,000,000.000
000000020	5000056	000000020	DONATION_ENG	3,000,000



# Analytics & Reporting

*Delivering Insight Through The Entire Prospect & Student Lifecycle*

## Role-Based Analytics & Interactive Dashboards

- President's Dashboard & KPI Radar
- VP Of Admissions Dashboard & KPI Radar
- Recruiter Dashboard & KPI Radar
- Actionable Interactive Analytics

## Enrollment Analytics

- Enrollment Goal Versus Actual Monitoring
- Enrollment Likelihood Analysis
- Analysis By Status (Prospect, Inquiry, Applicant, Admit, Enroll)

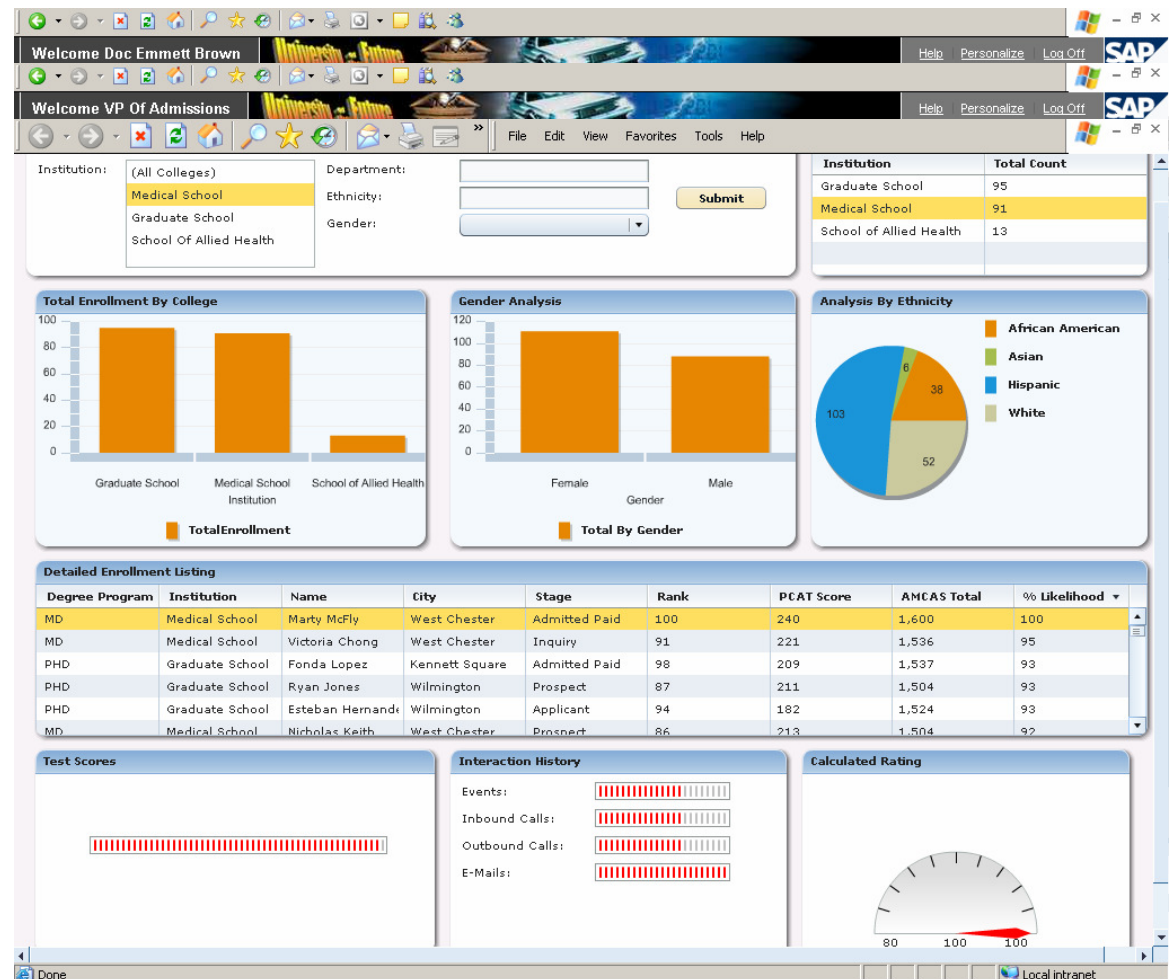
## Recruitment Analytics

- Recruitment Funnel
- Recruitment Campaign Response Analysis
- Recruiter Efficiency & Effectiveness

## Prospect Analytics

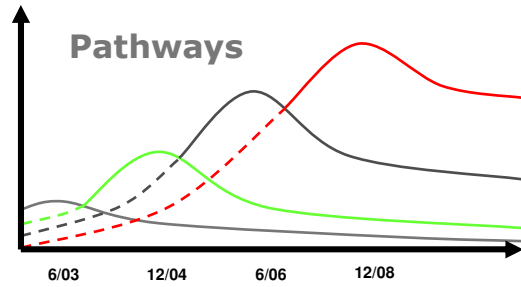
- Prospect Inquires By Channel
- Prospect Pool By Ethnicity, Gender, Scores
- Prospect To Inquiry Analysis

## EASY-TO-USE Browser-Based Portal

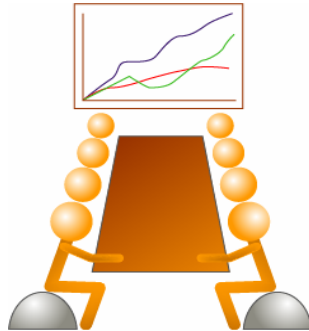


# Bridge between Strategy and Execution

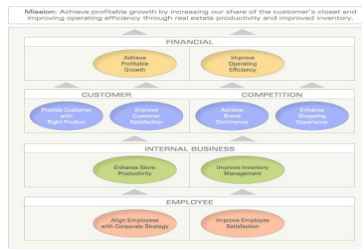
## Strategy



Executive Meetings



Goal Diagrams



## Execution

### Measures & Targets

Deployment Time	Initiatives	Owner	Status	Start Date	End Date
100%	Collision Experiments	Craig	Started	6/1/2003	6/1/2004
75%	Create information portals for customers	Sam	Not Started	1/1/2004	12/31/2004
50%	Dealer excellence program	Nathan	Started	4/1/2003	6/1/2004
25%	Dealer rewards program	Cindy	Started	6/1/2003	6/1/2004
0%	Introduce EDI infrastructure	Craig	Started	10/1/2003	6/1/2004
	Market research on urban dwellers	Sam	Started	1/1/2003	6/1/2004
	Provide online support to customers and dealers	Rob	Finished	1/1/2003	6/30/2003
	Research cost structure	Nathan	Started	1/1/2003	12/31/2003
	Targeted Marketing Campaigns to promote brand and usage	Maria	Started	7/1/2003	7/1/2004
	Understand customer requirements	Sam	Started	1/1/2003	12/31/2008
	Understand technical vehicle customizability requirements	Maria	Started	1/1/2003	12/31/2008

### Supporting Initiatives



### Organization-wide Collaboration



# Prospect Data Management

*Multi-Channel Prospect Data Management - Anytime, Anywhere*

## Prospective Student Management

- Prospective Student Profile
  - Multiple Address Management
  - Interaction History – 360 Degree View
  - Many-To-Many Relationships
    - Attended High School, Parents, Friend, Etc.
  - Notes & Attachments
  - Profile Sets & Attributes
    - Prospect & Program Interests
    - Likelihood To Enroll, Etc.
  - Multi-Channel Creation & Management
    - Flat-File Import (ACT, SAT)
    - Web Site
    - Portal
    - Phone
    - Mobile/PDA
    - Adobe/PDF
    - SAPGUI
  - Synchronized With SAP CM
- EASY-TO-USE Browser-Based Portal**

The screenshot displays the SAP Prospect Data Management web portal. The interface is browser-based and features a navigation menu with options like 'Home', 'Dashboards & Reports', 'Prospects', 'Applicants', 'Recruiting', 'Imports', and 'Admin'. The main content area is titled 'Prospective Students' and includes a search bar with 'Prospect Id' set to '600000300'. Below the search bar, there are tabs for 'Interaction History', 'Contacts', 'Attachments', 'Sales Areas', and 'Marketing Attributes'. The 'Marketing Attributes' tab is active, showing a table of attribute sets and their descriptions. The 'Attributes' section below shows a table of prospect attributes and their values.

Attribute Set	Description
ADMISSION_TESTS	Admission Test Scores
APPLICANT_PROFILE	Applicant Profile
PROSPECT_INTERESTS	Prospect Interests
PROSPECT_PROFILE	Prospect Profile

Description	Value	Description
Prospect Interest Level	02	Interested
Prospect Source	02	Campus Visit
Prospect Level	02	Graduate
Account Stage	01	Prospect
Ethnicity	5	Hispanic
High School Class Of	2006	2006
High School GPA		
% Likelihood of Enrollment	80 %	80 %
Interest Level In Prospect	02	Interested
State Residency Status		

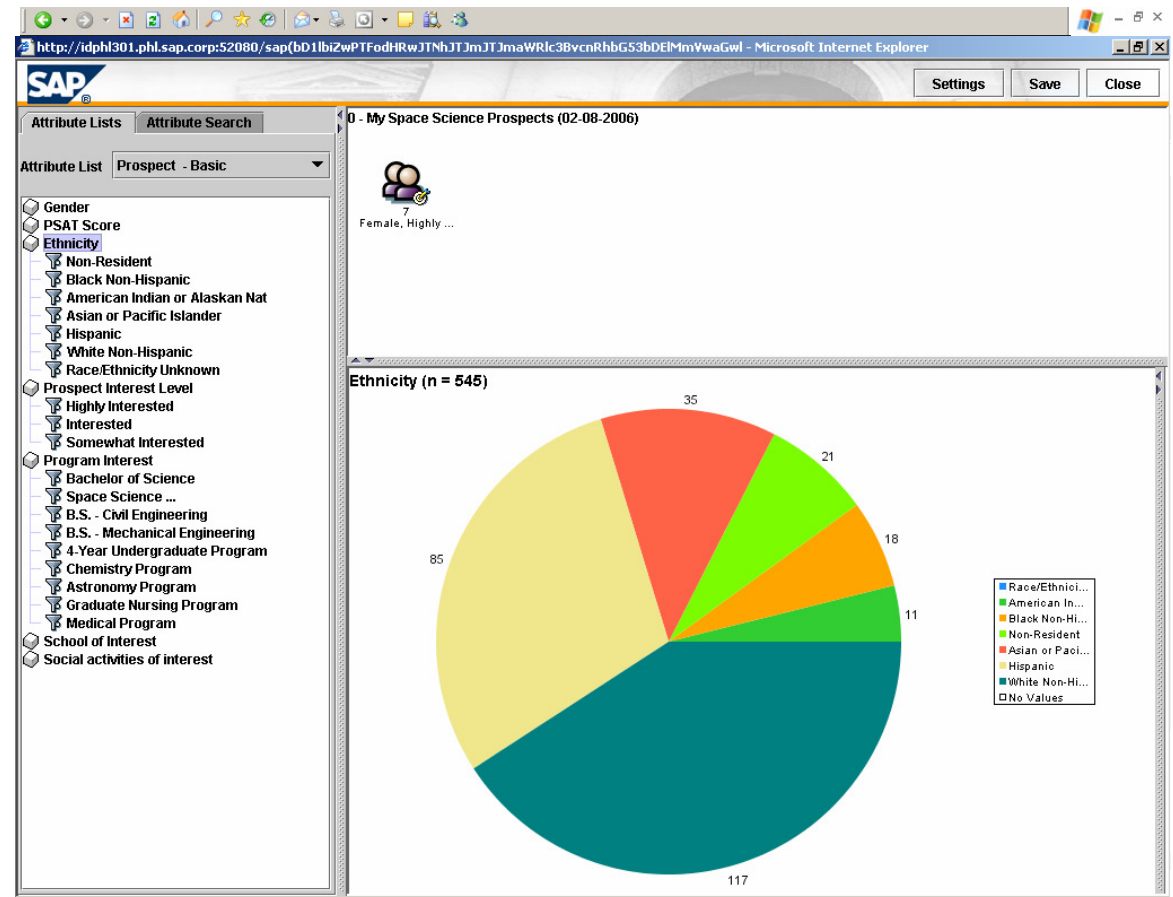
# Recruitment Planning

*Multi-Channel Recruitment Planning & Execution To Drive Enrollment*

## Recruitment Planning & Execution

- Multi-Channel Communication
- Recruitment Planning & Execution
- Recruitment Calendar
- Recruitment Budget Planning
- Campaign Automation
- Personalized E-Mail Surveys
- Prospect Profiling & Segmentation
- Direct Mail & E-Mail Form Templates
- Prospective Student Import (ACT/SAT)
- Recruitment Event Management
- Ratings & Interviews

**EASY-TO-USE Browser-Based Portal**



# Admissions Interaction Center

*Leveraging Phone Interactions To Drive Enrollment*

## Recruitment Planning & Execution

- Multi-Channel Support
- CTI Screen Pop
- Prospective Student Maintenance
- Interaction Management & Follow-up
- Call List Management
- Interactive Scripting
- Frequently Asked Questions
- Queue Inbox
- Alert Modeler
- Scratch Pad

## EASY-TO-USE Browser-Based Interface

Interaction Center WebClient

交互中心Web客户机

接受 拒绝 持有 恢复 挂断 热情传输 咨询 会谈 结束 拨号板 就绪 尚未就绪

标识科目

标识帐户

科目

名/姓

科目

帐户标识

街道/住宅编号

城市

邮政编码/地区

国家

电话

电子邮件地址

事务编号

登记产品

产品 ID

可选组件标识

可选的已安装的基本设备标

安装设备清单描述

街道/住宅编号

城市

邮政编码/地区

国家

搜索帐户 清除 创建

搜索产品 清除

结果清单

0/0

Tuesday, November 04, 2003 19:14



Release Strategy

HER Solution Update 2007

**HER Solution Direction**

SAP Ecosystem Co-Innovation

THE BEST-RUN BUSINESSES RUN SAP™



**An accelerated process for gathering product requirements**

- **Involves customers with CM planning as early as possible**
- **Ensures that CM represents “real world” requirements**
- **Determine the desired trade-offs between providing completely new functionality vs. “fleshing out” existing functionality**
- **Provides a realistically prioritized requirement list for product development**


**Goal is to achieve a good balance between flexibility and usability**

- **Continued flexibility to allow universities to configure the system in their own unique ways**
- **Looking for good opportunities to provide ‘best academic practices’ in a fully–delivered fashion (i.e. customers should not have to all re-invent the same wheel)**

## **What to expect from the CM Development Phase**

- **Emphasis on usability (including Web Self-Service)**
- **Emphasis on delivering complete processes**
- **Emphasis on ease-of-implementation**



- 
- **Make use of existing applications, functionality and technology easier**
  - **Leverage composition of innovative end-to-end processes**
  - **Enhance User Experience**
  - **Provide solid foundation for managing „constituents“ on the campus**

### Student Life Cycle Management & Academic Service and Learning

- Campus Management
- CRM – Constituent Master Data Management
- Learning Management Partnership with Blackboard

### Research

- Grants Management enhancements with focus on Research Portfolio Management (especially Pre-Award process integration)

### Business Process Platform

- Identity and Master Data Management
- Composite Application Framework
- Exchange Infrastructure
- Public Services Platform

# Campus Management Plan – High Level

## Implementation Accelerator Packages

### Web-UIs & Portal Roles

- Student Portal Role and Web Dynpro based UIs
- Registration Officer Role
- Expert-UIs for Module Booking and Academic Work maintenance

### Student Relationship Management CM – CRM

- Prospect, Student, Employee – one person, multiple roles
- Duplicate Checking & Merging
- Data and Process sharing concept CM – CRM (- other systems)

### Continuous Enhancements

- Cross-field validation, Obsolete IMG values
- Enhanced prerequisite functionality
- Progression and Degree Audit enhancements
- Attendance Tracking

### Enterprise-SOA

- LMS Integration – 2nd phase
- Re-use of Services in ERP (LSO, Business Partner, Talent Management)
- Support „Composition“ of Processes for End-users
- Support Integration scenarios
- Driven by Input from Enterprise Service Definition Groups

**Priorities  
mainly  
influenced by  
the  
Requirement  
Planning  
Forum**

# Implementation Accelerator Packages

**„IAP“ is an initiative for the Campus Management development for**

- **Fast delivery of new functional developments**
- **More out-of-the-box web UIs**
- **Delivery on the promises of Netweaver technologies, e. g.**
  - **Guided procedures**
  - **BI Analytics**
  - **Adobe Forms**
  - **Workflows**
  - **WebDynPro**
- **BC Sets with pre-defined commonly-used IMG settings**
- **Extended library of technical configurations**
  - **Business Add-in implementations for common scenarios**
  - **VSR rules**
  - **Selection Methods**
- **Templates for interface programs (e.g. test score loads)**
- **Detailed implementation instructions via ‘cookbooks’**

## **Examples for first IAPs**

**BC Set for CM base configuration**

**Admission Application Form, extended Workflow**

**Web-UI to display students admissions deficiencies**

**Composite Test Score Calculation**

**Web interface for an Equivalency Determination Self-Service**

**Transfer Articulation Rules Data Load**

**XML file extracts for online public Course Catalog and Schedule**

**Selection Method: Students Based upon Admissions Data**

**SSN Setup and Synchronization between BP SSN and Student Personal ID Number**

**Mass Assignment of Booking Windows**

**Sample Student Bill**

**Mass Transfer of Course Registrations**

**Web-based Search for Rooms**

**Graduation Application Form and Workflow**

**Transcript Request**

**Missing Grade Process**

- Grants Management meanwhile „standard“ for new implementations

- Integrated in ERP, streamlined implementation, flexible and stable

- Customers integrate Pre-Award and Portfolio Management applications

- Researchers don't get access to the information in GM

**Extend Grants Management to the end-users desktop – from Grants Management as product to a solution for research scenarios**



Release Strategy

HER Solution Update 2007

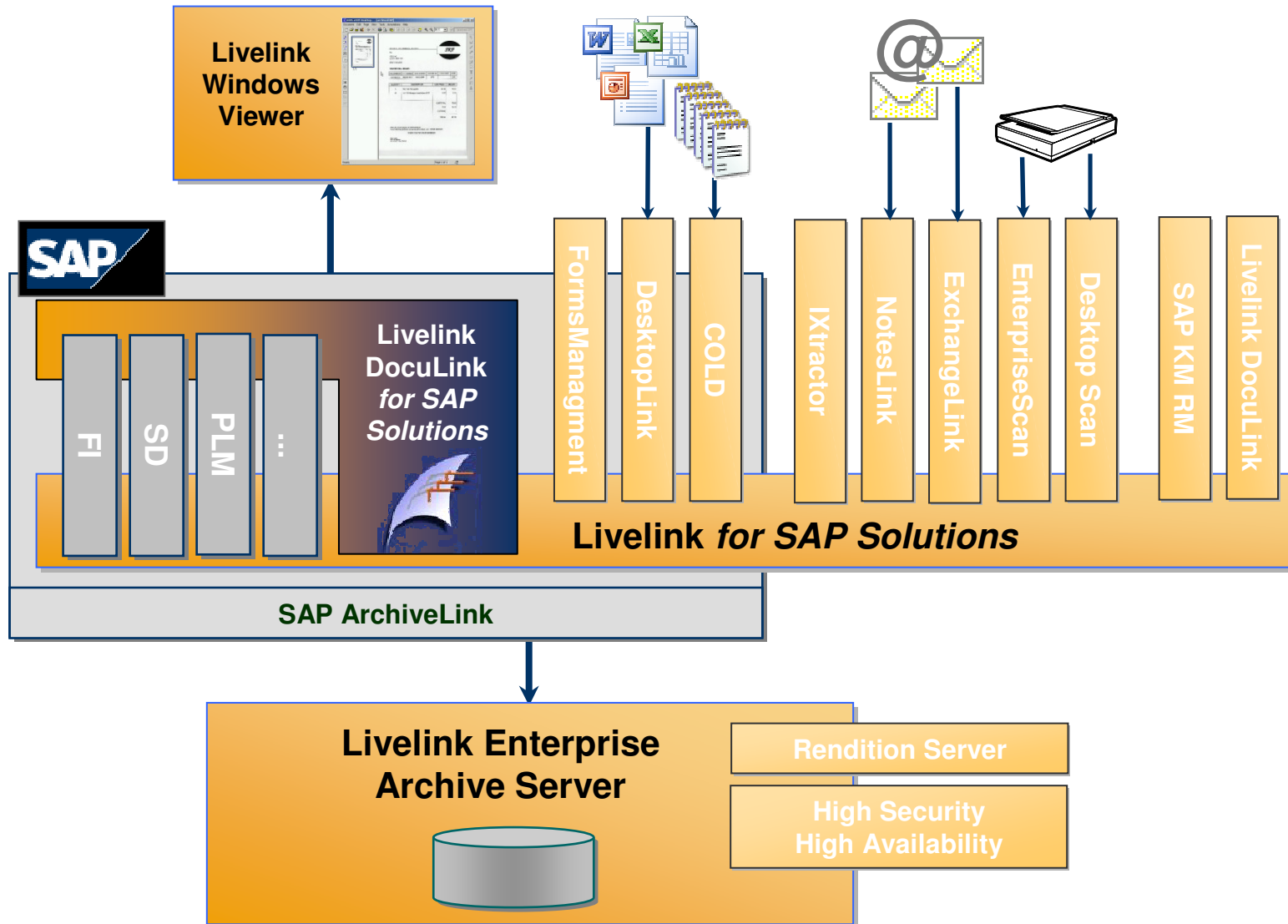
HER Solution Direction

**SAP Ecosystem Co-Innovation**

THE BEST-RUN BUSINESSES RUN SAP™

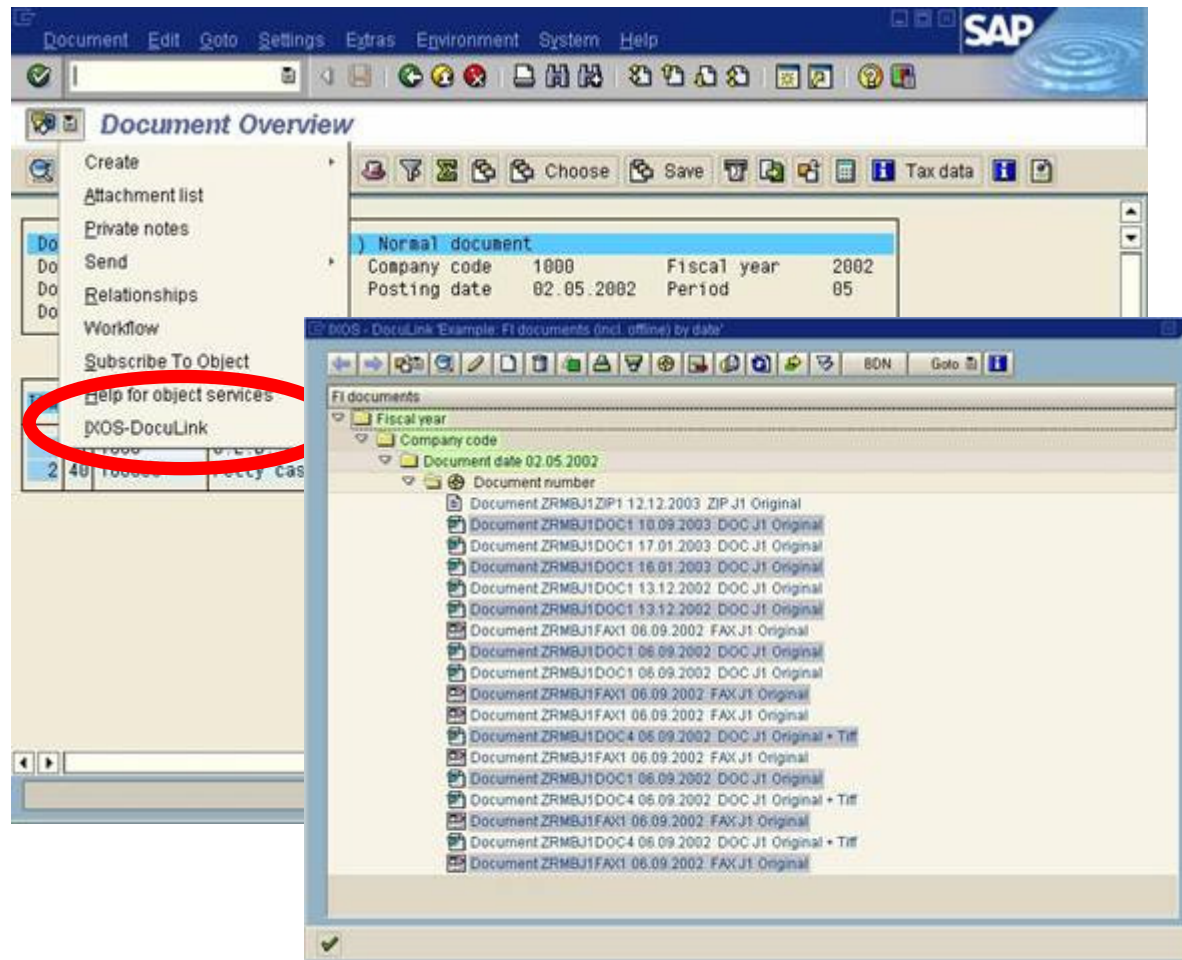


# OpenText Livelink for SAP® Solutions Ver. 9.5





# Livelihood DocuLink for SAP Solutions Integration into SAP Standard Applications



- SAP Standard Applications
- Call of Livelihood DocuLink for SAP Solutions via SAP menu
- Livelihood DocuLink starts with related process view

## Value Proposition



Educate. Innovate. Everywhere.

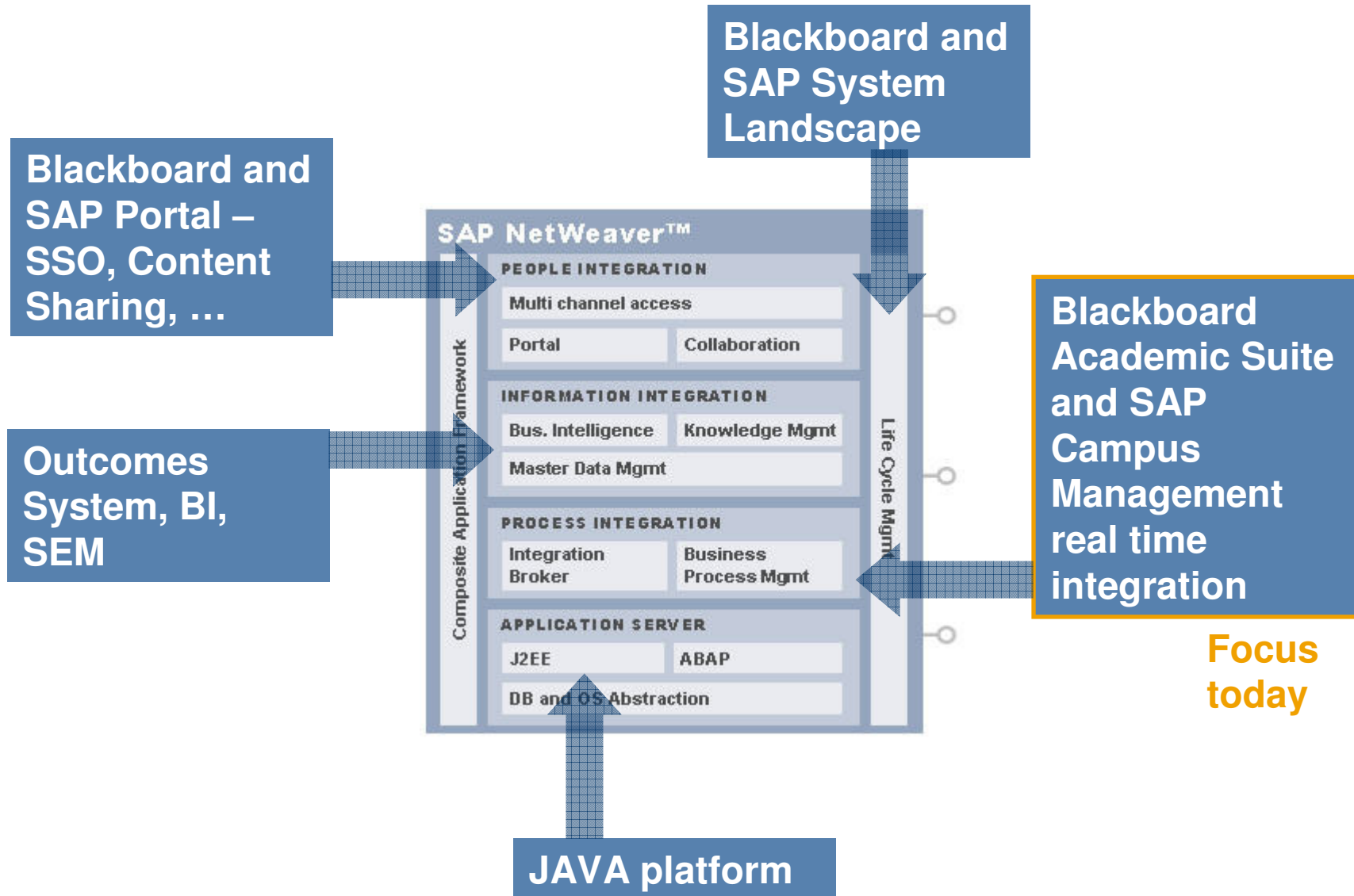
## What's different?

- **Comprehensive view on the whole core business of Universities across administrative and academic areas**
- **Modernization of administration, learning and IT in one integrated approach**

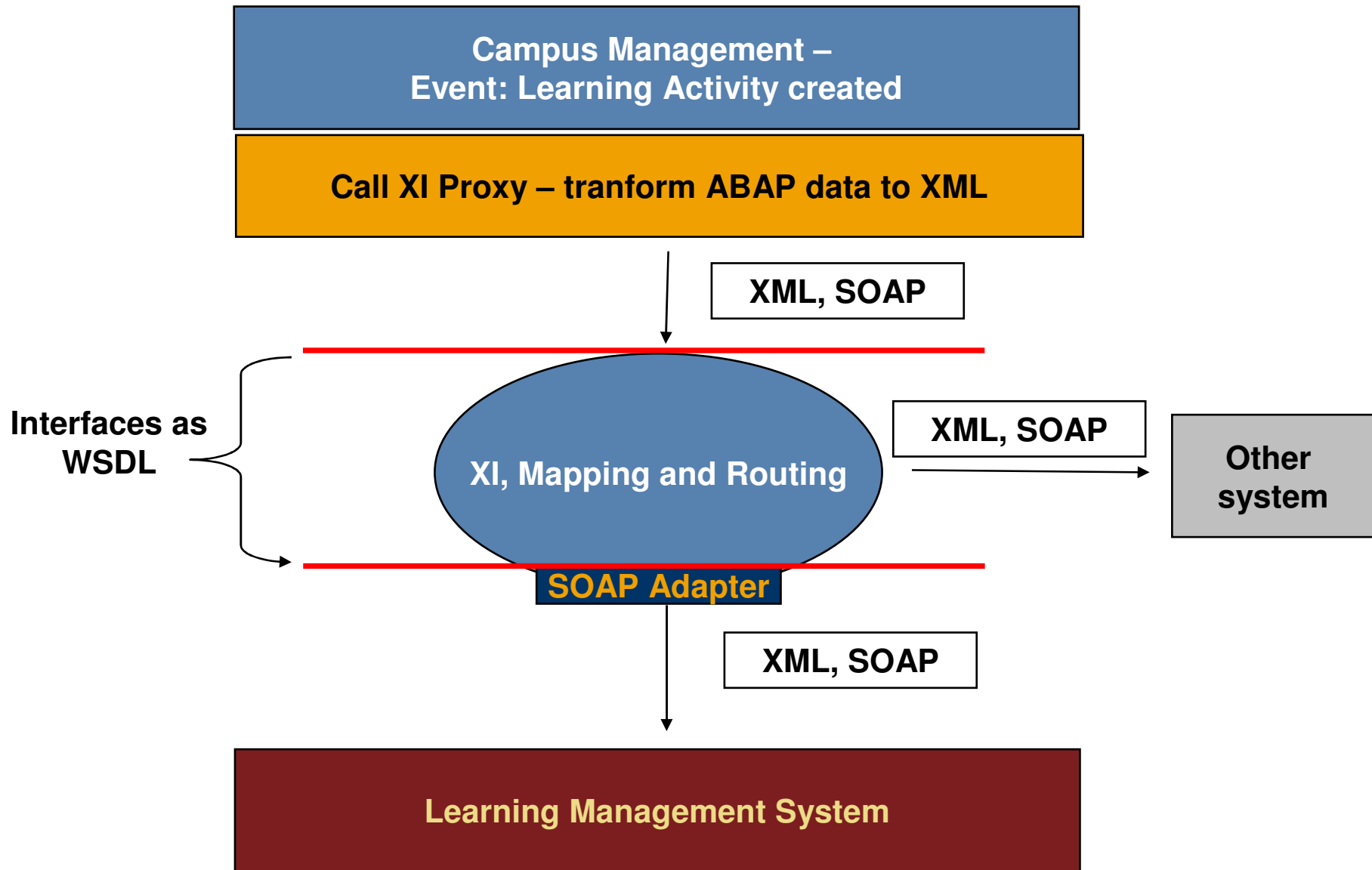
## Value

- **Enables integrated strategy**
- **Allows emerging universities to leap-frog modernization**
- **Accelerates transformation**
- **Avoids expensive pre-studies and evaluations**

# Integration Ideas

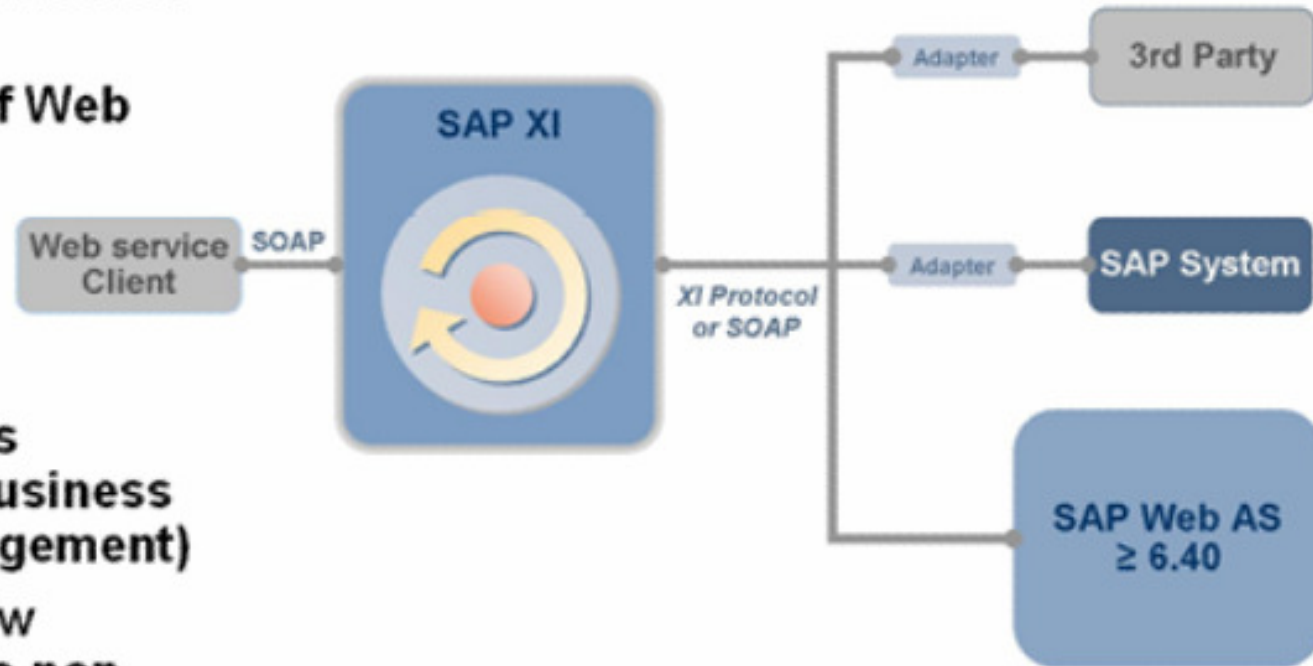


# Brokered Web Service Calls Using XI

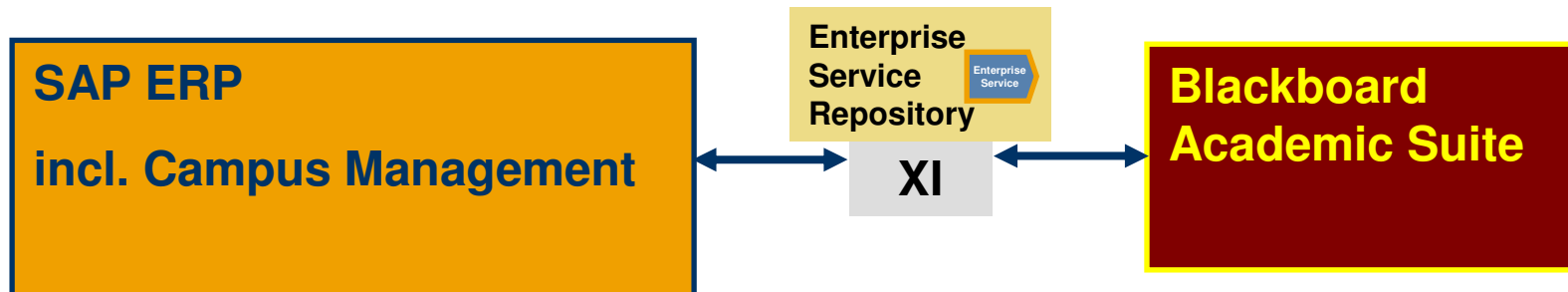
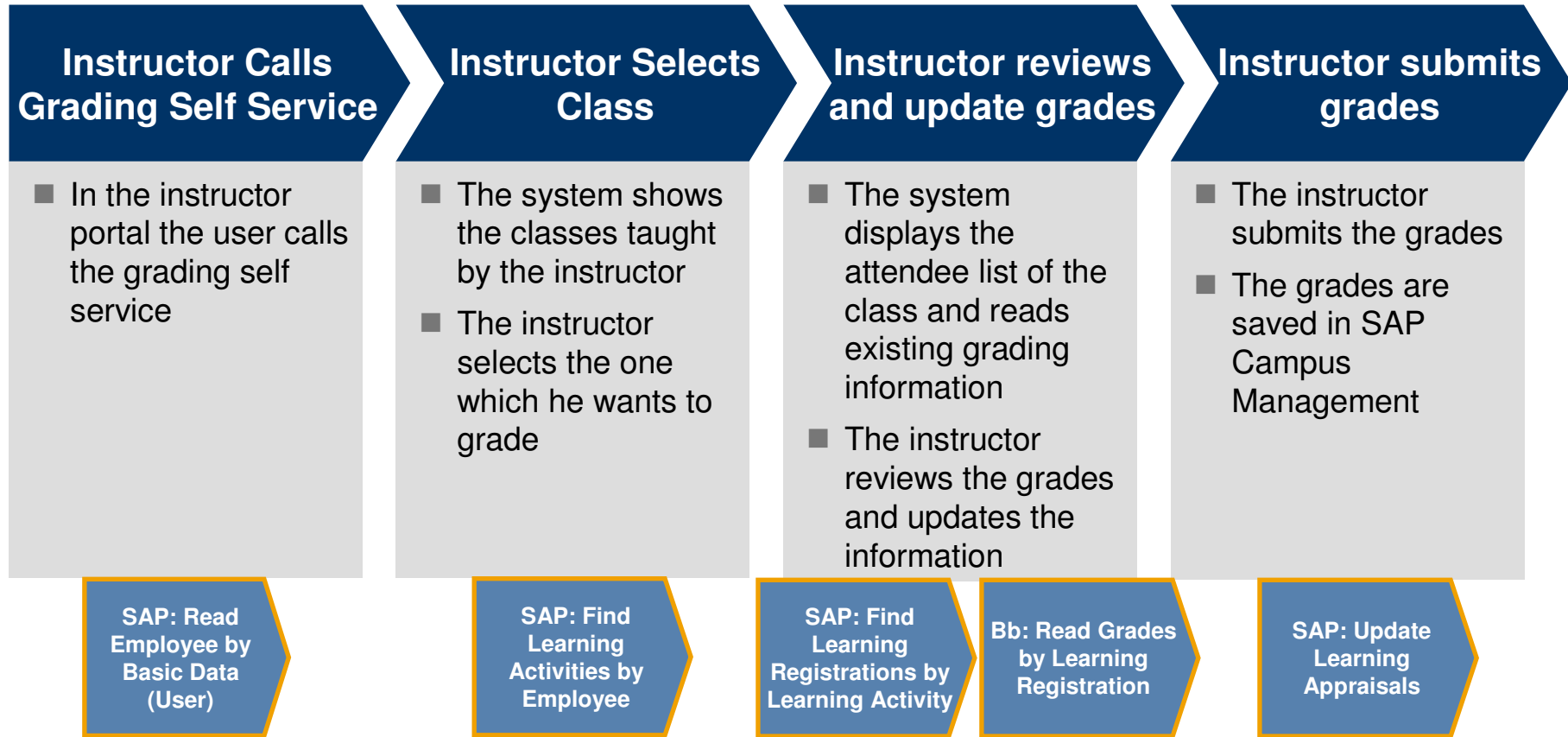


# Brokered Web Service Calls - Advantages

- Value added Web Service
- Monitoring of all Web Service calls
- Decoupling of Web Service and application
- Mapping
- Routing
- ccBPM (Cross Component Business Process Management)
- Adapters allow connections to non Web Service enabled applications



# Composite Process Between SAP & Blackboard



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