

**Purchase to Pay (P2P)**  
**SAP Netweaver Upgrade**

**Performance Intervention Proposal**

*(Training Scope Document)*

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# Table of Contents

1. INTRODUCTION/PURPOSE .....	3
2. BUSINESS NEED .....	6
3. P2P PROJECT SCOPE .....	7
4. AUDIENCE AND TASK ANALYSIS .....	14
5. PREREQUISITE COURSES OR SKILLS .....	18
6. PERFORMANCE-BASED SOLUTION RECOMMENDATION .....	18
7. ASSESSMENT / MEASUREMENT STRATEGY .....	22
8. MAINTENANCE REQUIREMENTS / SUSTAINING PLANS .....	23
9. RISKS / ASSUMPTIONS .....	25
10. OPENS (NEXT STEPS) / HELP NEEDED .....	26
11. CONTACTS .....	27
12. PIP DOCUMENT REVISION HISTORY .....	29

# 1. Introduction/Purpose

The purpose of the Purchase to Pay (P2P) project is to deliver end-to-end purchase to payment capability for Indirect Materials using the SAP NetWeaver capability. The overall project scope that adds value to company operations includes:

- Deliver SAP NetWeaver platform while driving 90% or greater off the shelf capability, specifically leveraging the ECC and SRM environments
- Facilitate operation's Business Transformation (alignment of business reengineering and business processes)
- Partner with cross-project dependencies to ensure a comprehensive, integrated solution

The high level project goals include:

1. Reduced cost of ownership for the SAP NetWeaver platform (design and sustain)
2. Increased operations flexibility per enhanced design and integration models
3. Improved data quality with controls compliance visibility
4. Streamlined business operation processes to support direct, succinct and accurate cross-organization process models (reduce communication and task step barriers)
5. Stabilize the P2P project design and business transformation with minimal impact to company business

## P2P Key Capabilities in Scope

The primary focus for the P2P project is **Indirect Materials**, and consists of the following:

<b>Capability:</b>	<b>High Level Functional Activity:</b>
eBP	<ul style="list-style-type: none"> <li>• <b>Shop</b> (non MRP demand requisition capability for Shopping Cart functionality)</li> <li>• <b>eCheck Request</b></li> <li>• <b>Catalog Management</b> (to create/approve/publish Catalog ordering)</li> <li>• <b>Reporting</b></li> </ul>
eContract	<ul style="list-style-type: none"> <li>• <b>Contract Management</b> (create/change/display/reports)</li> <li>• <b>Reporting</b></li> </ul>
P2P	<ul style="list-style-type: none"> <li>• <b>Fulfillment</b> (manage PR/PO capabilities for: ZSTA, ZFO, EC purchase orders)</li> <li>• <b>Accounts Payable</b> (invoice, disbursement/payments)               <ul style="list-style-type: none"> <li>- Non PO (enter invoices without PO reference, Ship-Tide, utilities and leases)</li> </ul> </li> <li>• <b>Finance</b> (budgets: expense/capital/Marcom, general accounting, close)</li> <li>• <b>Receiving</b> (includes non-demand, pass-thru and desktop receiving)</li> <li>• <b>PSL (Preferred Supplier List)</b> (setup/create, maintenance)</li> <li>• <b>Supplier Collaboration</b> (Web Suites and Supplier Registration): [ WebPO, WebInvoice, Pymt Tracker, WebASN, Enterprise Supplier Portal (external) ]</li> <li>• <b>MicroStrategy / GPR Updates</b> (design/scope in the Q3/Q4 timeframe and supporting MicroStrategy, BI, EDW reporting capabilities)</li> <li>• Touch Points:               <ul style="list-style-type: none"> <li>- archiving (invoice, PO's)</li> <li>- FADB (Finance Approver Database) used w/ SC cost center approval routing</li> <li>- Signature Authority Database</li> <li>- Employee mini-master</li> <li>- Tax / GL / master data</li> </ul> </li> </ul>

This PIP document proposes a performance intervention for the P2P project. Identified in the below areas are the business needs and the analysis findings for the audience, task performance, training content, and intervention scope. This document identifies the recommended training strategy(s) that addresses the “what” will be delivered (online course, embedded help reference, lab simulation, performance exercises) and the recommended training plans that address the “how” training may be delivered (resources, dates, end user time commits, logistics coordination).

The goal of the performance intervention proposal (PIP) is to identify Training resource requirements (skills set, optimal training solutions) with integrated project solutions that will enable the P2P project team to continue skill and knowledge development in the overall purchase to pay community. In addition, the PIP identifies sustaining project solutions that will support continued business value goals while minimizing, or eliminating, additional resource requirements.

**P2P Key Capabilities Not In Scope**

The following key areas are not in scope for the P2P **Indirect Materials** project:

<b>Capability:</b>	<b>High Level Activity Area:</b>
Fulfillment	<ul style="list-style-type: none"> <li>• MSAP Direct Materials (ATM, FSM, Supply Network)</li> <li>• CED Capital Network Design</li> <li>• FSMO Factory Spares (stockroom) / WIINGS</li> <li>• Large Construction Purchasing</li> <li>• Non Demand EDB PR's (Equipment Database w/ NTM non-trivial many)</li> <li>• IWCS, Non-Win demand / VersaPro</li> </ul>
Sourcing	<ul style="list-style-type: none"> <li>• Web Forecast</li> <li>• Commodity Schema determination, mapping and set up - managed by Enterprise Supplier Commodity (MDM) project</li> </ul>
AP	<ul style="list-style-type: none"> <li>• Employee Services (payroll, reimbursement)</li> <li>• Travel and Entertainment</li> <li>• Freight Web Invoice / EDI</li> <li>• P Card</li> <li>• CVM Web Form and CVM Admin design capability - managed by Enterprise Supplier Commodity (MDM) project</li> </ul>
Finance	<ul style="list-style-type: none"> <li>• IT and CS Storefront</li> <li>• Expense accounts, Order (marcom) and WBS (capital) accounts regarding item create/maintain/budget reconciliation are not included in the P2P project</li> </ul>
Receiving	<ul style="list-style-type: none"> <li>• NIT (non inventory tracking) system - the Receiving scope will technically interface to the NIT system, but training scope will <u>not</u> include training needs for the NIT system.</li> </ul>
General	<ul style="list-style-type: none"> <li>• EDW (Enterprise Data Warehouse) integration to SRM/ECC platforms</li> <li>• GPR (Global Procurement Reporting) modifications or design capability - training scope <u>will</u> include updates to report capabilities resulting from the deployment of eContract</li> </ul>
MicroStrategy	<ul style="list-style-type: none"> <li>• There is no P2P impact (inclusion) to factor MicroStrategy/GPR reporting in the scope of P2P activities or ownership</li> <li>• GPR, Global Procurement Reporting Data Continuity</li> </ul>

**P2P Cross-Project Dependencies**

The following 7 projects have inter-dependencies with the P2P project regarding ownership of deliverables that must occur before P2P can successfully land, or, ownership of deliverables that are reliant on after P2P successfully lands.

Dependency Phase	Project
Before ...	<ol style="list-style-type: none"> <li>1. <b>Account Assignments</b> - Cost center/Internal Orders/WBS Elements configured &amp; uploaded into ECC</li> <li>2. <b>General Ledger</b> - Replicate the Chart Of Accounts to ECC</li> <li>3. <b>TAX</b> - Global Tax strategy and solution deployed across global company</li> <li>4. <b>ESC (Enterprise Supplier Commodity, MDM)</b> - Deliver master data management configuration to support Supplier and Commodity functionality across MDM-ECC-SRM platforms</li> <li>5. <b>CSP2P</b> - IWCS replacement application to support CS (Corporate Services) and facility maintenance leveraging SAP NetWeaver</li> </ol>
P2P ...	P2P Key Capabilities in Scope
After ...	<ol style="list-style-type: none"> <li>6. <b>SOAR</b> - WIINGS replacement application leveraging SAP NetWeaver</li> <li>7. <b>GPR Release 6</b> - Incremental data reporting solution needs that are not included in the BW (Business Warehouse) architecture, and, inclusion of EDW data availability</li> </ol>

**Project WSS Sites:**

WSS Site:	Description:
<a href="#">SAP P2P – Home</a>	Program and project overview.
<a href="#">SAP IDM P2P Project Team Status/Update Meeting</a>	Weekly project update meetings.
<a href="#">Purchase-To-Pay (P2P), EUT Site</a>	EUT project tracking and scope

## 2. Business Need

P2P delivers 100% e-commerce based purchase to pay (requisition to settle) capabilities that are directly supported by the SAP NetWeaver application software, or, can be directly integrated, e.g. linking the Supplier Collaboration suite. The project will enable business operations to leverage a unified architecture foundation to support the requisition of goods/services via Shopping Cart creation or Catalog orders, submit eCheck Request invoices (non PO payments), Catalogs, Contracts (and related Sourcing/PSL activities), Purchasing, AP/Finance, Receiving, and Supplier Collaboration.

The SAP NetWeaver architecture allows business operations to streamline data information sharing, improve data visibility and data mining, and to maintain data quality with appropriate controls and compliance measures.

The core P2P capability objectives include:

1. Corporate offices must install SAP NetWeaver – Extended Classic platform to enable
  - use of phase 1 contracting capabilities delivered by SAP (product supplier)
  - maintain product compliance with SAP design and product support controls
  - leverage a sustainable, SAP supported environment with integrated platforms that allow appropriate data model flows with minimal company configured modification
2. Minimize further impacts to the total cost of ownership while improving product upgrade capabilities that result from reduced system modifications and enhancements.

### 3. P2P Project Scope

#### Project Statistics – Historical Applications Impacted

The following are historical project scope items incorporated into the P2P project.

**Diagram 1: Historical Applications Impacted**

<b>Capability:</b>	<b>Design Description</b>
eBP	ePurchasing Shopping Basket (create / change / approve)
	Commodity Schema (product category job aid [mypurchasing.abc.com])
	PSMT (Preferred Supplier Management Tool)
	CED Network Approval
	VAW (Variable Approval Workflow)
	Catalogs - eMerge - BugsEye
	eCheck Request (Non PO)
	ePurchasing Reports
eContracts	SAS (Supplier Agreement System)
Fulfillment	SAP R/3
AP	SAP R/3
	FDMS (Finance Document Management System)
Finance	SAP R/3
	Marcom HOMER
	MIT (Marcom Improvement Tool)
	ACCORD (Account Control Consistent Ownership Risk Database)
Receiving	WISARD Receiving (Receiving Dock Operations)
PSL	Preferred Supplier Gateway
Supplier Collaboration	Web Suites - Web PO
	Web Suites - Web Invoice
	Web Suites - Payment Tracker
	Web Suites - Web ASN
	Enterprise Supplier Portal (i.e. how to register, logon, navigate - - for external Supplier) (also used for internal employees who check/validate items per above 4 pieces) - - focus is Enterprise Supplier Portal training for external (different look/feel for extern.)
	<a href="#">Web Suites - Routing Guide (not in scope due to no change)</a>
	<a href="#">Web Suites - Web Forecast (not in scope due to no change)</a>
<a href="#">Web Suites - Freight Web Invoice (not in scope due to no change)</a>	
MicroStrategy	MicroStrategy Reports (GPR)

#### Project Touch Points (team alignments)

The following represents project cross-team alignment needed to support overall training deliverables:

<b>Team Alignment:</b>	<b>Purpose:</b>
System Sub-Teams	Align system design scope and deliverables
IQA (Data Quality)	Align IQA partner relationship & training content impacts
HFE (Human Factors Engineer)	Align HFE partner relationship and HFE leveraging
Business Process Reengineering	Align scope and training intervention ownership (ARIS)
Test	Streamline SA design pass-off via Test Cases (vs TR docs)
Service Desk (embedded help)	Coordinate requirements for Service Desk embedded help

**Project Design/Process Methodologies**

The following represents project methodologies used for managing and tracking project deliverables throughout the project life cycles.

<b>Methodology:</b>	<b>Purpose:</b>
<b>PLC</b> (Project Life Cycle)	Project management model.
<b>ASAP</b> (Accelerated SAP)	SAP off-the-shelf project management.
<b>CMMI</b> (Capability Maturity Model Integration)	Project efficiency tracking model.
<b>ADDIE</b> (Analysis, Design, Develop, Implement, Evaluate)	Training project model.

**System Applications - Existing/New and Changes Impacted**

The following P2P project scope items will be deployed to end users. The system applications directly impact end user skills and knowledge performance. The table intentionally does not reflect system applications where “behind the scenes” design changes occur with no user interaction impact, e.g. CDIS HR, Finance HOMER, or Rosettanet applications.

**Diagram 2: Existing/New Applications and Changes Impacted**

<b>Tool</b>	<b>Status</b>		<b>Change</b>	
	Existing	New	Yes	No
1 ePurchasing SAP Shopping Basket [portal]		X	X	
2 eCheck Request [portal]		X	X	
3 Catalog Management [portal]		X	X	
4 eContracts [portal]		X	X	
5 Fulfillment/Purchasing [portal]		X	X	
6 AP [portal]		X	X	
7 Finance [portal]		X	X	
8 Receiving [portal]		X	X	
9 PSL (Preferred Supplier List) [portal]		X	X	
10 Supplier Collaboration (Web Suites) [Web Suite]	X		X	
11 GPR (Global Procurement Reporting) [MicroStrategy] - BI (Business Intelligence) - EDW (Enterprise Data Warehouse) - BEX (Business Excellence [efficiency, effectiveness])	X		X	

## Project Design Scope

The P2P project incorporates the following project scope items in the P2P design scope.

### Diagram 3: eBP Project Scope

Key Area:	Scope:
Shopping Cart (SC) + Security design factors <i>(Shopping Cart)</i>	<ul style="list-style-type: none"> <li>• Create SC</li> <li>• Change SC</li> <li>• Display SC</li> <li>• Approve SC <i>(includes Network PR and VAW approvals)</i></li> </ul>
Catalog + Security design factors <i>(Catalog)</i>	<ul style="list-style-type: none"> <li>• Create</li> <li>• Change (maintain)</li> <li>• Approve</li> <li>• Publish</li> </ul>
Catalog Shopping (SC) <i>(Catalog)</i> <i>(Shopping Cart)</i>	<ul style="list-style-type: none"> <li>• Internal catalogs</li> <li>• External catalogs</li> </ul>
eCheck Request (eCR) + Security design factors <i>(eCheck Request)</i>	<ul style="list-style-type: none"> <li>• Create eCR - Commodity Schema - Account Assignment</li> <li>• Change eCR</li> <li>• Display eCR</li> <li>• Approve eCR</li> </ul>
Reports + Security design factors <i>(Reports)</i>	<ul style="list-style-type: none"> <li>• eBP Reporting</li> <li>• BW (Business Warehouse) Reporting</li> </ul>

### Diagram 4: eContract Project Scope

Key Area:	Scope:
eContract  <b>Note:</b> Input from C. Fischer, eNeg iis not in scope for this release.	<ul style="list-style-type: none"> <li>• Create</li> <li>• Manage (Change)</li> <li>• Display</li> <li>• Approve</li> <li>• Activate</li> </ul>
Reports	<ul style="list-style-type: none"> <li>• Reports</li> </ul>

### Diagram 5: Fulfillment/Purchasing Project Scope

Key Area:	Scope:
Overview	<ul style="list-style-type: none"> <li>• Integrated Environment (master records/master data)</li> <li>• SAP Modules / SAP Hierarchy Structure / SAP Sessions</li> <li>• Help (matchcode, field help)</li> </ul>
Ind Proc PR's	<ul style="list-style-type: none"> <li>• PR Sources / PR Types</li> <li>• Display PR / Search PR (list displays: hazmat, expedite)</li> <li>• Change PR</li> </ul>
Ind Proc PO's	<ul style="list-style-type: none"> <li>• PO Types / Characteristics (Header, Item Overview, Details)</li> <li>• Display PO / Search PO (list display: hazmat, expedite)</li> <li>• Create PO: <ul style="list-style-type: none"> <li>ZSTA - Internal / External Delivery</li> <li>ZFO - Blanket Service</li> <li>EC - Catalog</li> </ul> </li> <li>* zero dollar ("free item") / * split 1 PR to create multiple PO's</li> <li>• Approve PO Release PO (approve / reject / x-override)</li> <li>• Output PO</li> </ul>

	<ul style="list-style-type: none"> <li>Change PO: header / line items fast change PO line close/open PO line add manual PO line (freight/cancel fees) goods recipient (Blanket PO)</li> <li>Miscellaneous: Mass Update Multiple PO's (Verify) PO Output Report Re-Output PO Expedite Goods Delivery (Waybill No.) Maintain CVM Vendor Record Manual RTV Process</li> </ul>
Blocked Invoice Resolution	<ul style="list-style-type: none"> <li>Manage blocked invoice: Price or Quantity</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>

### Diagram 6: Accounts Payable Project Scope

Key Area:	Scope:
Invoice	<ul style="list-style-type: none"> <li>Create (enter) invoice in <b>SUS</b></li> <li>Simulate invoice / Verify invoice</li> <li>Approve invoice</li> <li>Non-PO (Ship / Tide, utilities, leases)</li> <li>Create credit memo</li> <li>Create subsequent debit / credit</li> <li>Cancel invoice</li> <li>-----</li> <li>Create (enter) invoice w/ evaluated receipt in <b>SRM</b></li> <li>Approve invoice</li> <li>Display invoice</li> <li>Manage Blocked Invoices</li> </ul>
Payments	<ul style="list-style-type: none"> <li>x</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>
Tax ?	<ul style="list-style-type: none"> <li><b>TBD ?</b></li> </ul>

### Diagram 7: Finance Project Scope

Key Area:	Scope:
Expense Finance	<ul style="list-style-type: none"> <li>Expense account assignment set up/maintenance</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>
Capital Finance	<ul style="list-style-type: none"> <li>WBS capital number set up/maintenance</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>
Marketing Finance	<ul style="list-style-type: none"> <li>Marcom order number set up/maintenance</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>

### Diagram 8: Receiving Project Scope

Key Area:	Scope:
Receiving Dock Receiving	<ul style="list-style-type: none"> <li>Desktop Receiving</li> <li>Warehouse Receiving <ul style="list-style-type: none"> <li>- Movement Type 101: Post goods receipt</li> </ul> </li> <li>Back out / Cancel goods receipt</li> </ul>
Reports	<ul style="list-style-type: none"> <li>Reports</li> </ul>

**Diagram 9: PSL (Preferred Supplier List)**

Key Area:	Scope:
Preferred Supplier List	<ul style="list-style-type: none"> <li>• Create</li> <li>• Manage (Change)</li> <li>• Display</li> <li>• Approve</li> <li>• Activate</li> </ul>
Reports	<ul style="list-style-type: none"> <li>• Reports</li> </ul>

**Diagram 10: Supplier Collaboration (Web Suites) Project Scope**

Key Area:	Scope:
WebPO	<ul style="list-style-type: none"> <li>• Email notification(s)</li> <li>• Search for PO</li> <li>• View (Display) PO [Header, Detail, T&amp;C's]</li> <li>• View (Display) remaining PO dollar line amount</li> <li>• View (Display) outstanding quantity</li> <li>• Export PO</li> <li>• PO Response</li> <li>• Reports</li> <li>• Notices: Supplier Inbox Machine Down Interface PO status flags (change, communication)</li> </ul>
WebInvoice	<ul style="list-style-type: none"> <li>• Search for "to be" invoiced PO</li> <li>• Submit invoice</li> <li>• Invoice confirmation</li> <li>• Create credit memo</li> <li>• Error message help</li> </ul>
Payment Tracker	<ul style="list-style-type: none"> <li>• Check invoice status</li> <li>• Search invoice by: status / payment / invoice #, PO #, check/EFT/Pymt #</li> </ul>
WebASN	<ul style="list-style-type: none"> <li>• Search for PO</li> <li>• Create ASN</li> <li>• Create ASN profile</li> </ul>
Enterprise Supplier Portal (Registration)	<ul style="list-style-type: none"> <li>• Set Up Account Registration: <ul style="list-style-type: none"> <li>- Life Account / Standard Account / access addtl apps &amp; CVID</li> </ul> </li> <li>• Re-validate User, EVM</li> <li>• Change password, request new password via email</li> <li>• Maintain (Change) account information</li> <li>• Upgrade account registration type</li> <li>• Apply for User Manager role</li> <li>• Manage profile</li> <li>• Reports</li> </ul>
Supplier Presence Site	<ul style="list-style-type: none"> <li>• 57 other applications currently residing on SPS (NOT IN SCOPE for P2P)</li> </ul>

**Diagram 11: GPR (Global Procurement Reporting / MicroStrategy)**

Key Area:	Scope:
TBD	<ul style="list-style-type: none"> <li>• TBD (site tools &amp; development must occur for scope needs)</li> </ul>
TBD	<ul style="list-style-type: none"> <li>• TBD</li> </ul>

## **Project Timelines**

The below timeline outlines project plans and dependencies (see Diagram 10: *Project Timelines*). Identified are potential concerns (*items to watch*) that may result from timeline activity overlaps.

### **Concerns (Overall Project Level):**

1. Need to confirm that overall Business Process Reengineering (ARIS) is documented, reviewed, owned and training delivery managed by the business operations. EUT focus is on system application training with relevant job scenario information used to tie task input, purpose and sequencing relative to business process. Desk Top procedure information (processes, performance tasks outside SAP NetWeaver application, business process guidance) will not be included in online training development nor owned/maintained by EUT resources.

Additional Concerns Areas:

### **2. Concerns (eBP/Procurement - Purchasing/Fulfillment):**

1. Tied to Sourcing (Supplier Cockpit). SAP NetWeaver v5.2 currently reflects the term "Vendor" as the data field label for supplier information. When SAP NetWeaver 6.0 is released, the OTS system reflects the data field label to be "Supplier".
  - What is the impact to: a) timing of when v6.0 release to occur (before/after training material is documented), b) scope/size for SA's to manually change v5.2 system field label, or c) scope/size for EUT to manually change training material per updated system data field (simulations, job aids, static screen shots, static HTML content).

### **3. Concerns (Reporting - MicroStrategy (GPR)/BI):**

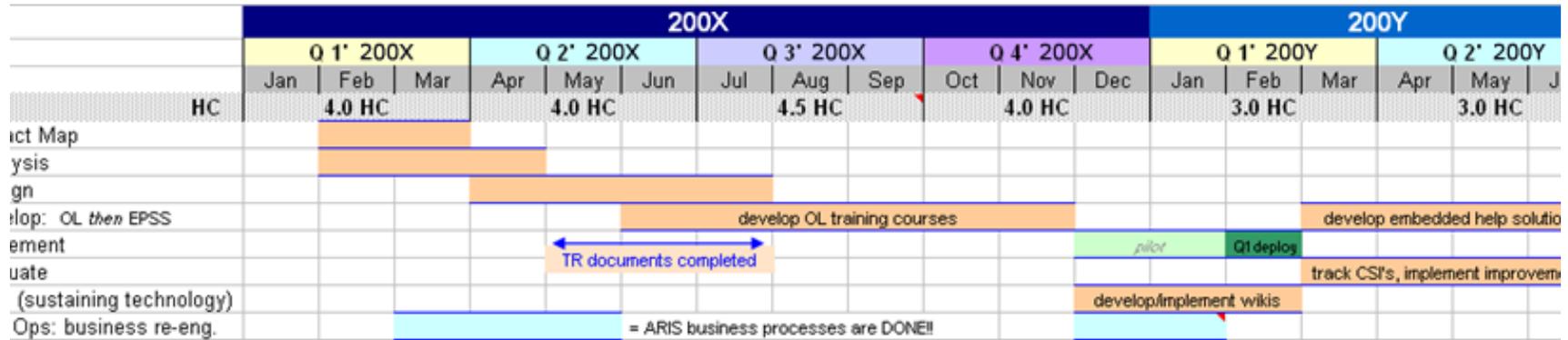
1. What is the impact for P2P project EUT resources regarding GPR Data Continuity efforts, Business Intelligence reports (what is the platform? where is the user interface?), and BEX foundation?

## **Business Process Impacts**

Please refer to proceeding Risks/Assumptions section (*section 9*) regarding potential business process, change impact (CIA) and transition management (TCM) impacts.

**Note:** Business "policies" are identified by the business organization(s). Business organizations(s) and TCM project teams own the documentation, communication and **compliance** regarding new or changing policies. Training may reference business processes to provide scenario examples in relation to users performing system task activities.

Diagram 10: Project Timelines



Test Case documentation to start: **WW18**

PAS monitoring to track completion progress:

- 20% WW 18.0 – WW 20.5 mid May 3 weeks
- 40% WW 21.0 – WW 23.5 early June 3 weeks
- 60% WW 24.0 – WW 26.5 late June 3 weeks
- 80% WW 27.0 – WW 29.5 mid July 3 weeks
- 100% WW 30.0 – WW 31.5 early August 2 weeks

Functional Area	Solution Interventions							Solutions Enabled:	
	eLearning Online Training	EPSS Embedded Help	eLearning Reporting	SU Trning Sessions	End User Trning Sessions	Final Proficiency Evaluation (CSI's)	OTJ Working Sessions (wikis)		
Shopping Cart	XX	2	business ops	X			X	1. Online training courses	
eCheck Request	XX	1	business ops				X	2. Embedded Help	
Catalog Management	XX	1	business ops				X	3. WKI collaborative learning forums	
eContract	XX	3	business ops	X			X	* SU training sessions (bus ops)	
Purchasing/Fulfillment	XX	5	business ops	X			X		
Accounts Payable	XX	8	business ops	X			X		
Finance	XX	5	business ops	X			X		
Receiving	XX	1	business ops				X		
Preferred Supplier List	XX	1	business ops				X		
Supplier Collaboration	XX	4	business ops				X		
MicroStrategy(GPR) Reports	XX	??							

## 4. Audience and Task Analysis

The P2P project impacts the following audience job roles. The performance-based solution recommendation will focus on improving skills and task related knowledge performance to meet the needs of the following identified job roles:

**Diagram 11: High Level Audience Identification**

	Functional Area:	Job Role:	Size (total):
eBP	General	SB Requester	14,000
	General	SB Approver (Department)	8,000
	Ops Finance	SB Approver (Finance Analyst)	1050
	CED Capital	SB Approvers: (FA/IE/Planners/ATM-FSM Mgrs)	560
	LTD Finance	Finance Analyst (Project owners / VAW users)	20 *
	Sourcing	Catalog Owner	15 *
	General	eCheck Requester (non PO)	2713
	General	eCheck Approvers (non PO)	2678
		<b>Total:</b>	<b>29,036</b>
eContract	Sourcing	Contract Owners / Managers	200
		<b>Total:</b>	<b>200</b>
Fulfillment	Fulfillment	Transaction Specialist (also includes Buyers)	78
		Fulfillment Approver (PO's)	32
		<b>Total:</b>	<b>110</b>
AP	AP	AP Invoice Processor	1188
		AP Payment Disbursements	32
		<b>Total:</b>	<b>1220</b>
Finance	Finance	Finance Analyst (Expense, general accounting, close)	828
		Finance Analyst (Capital)	122
		Finance Analyst (Marcom HOMER)	100
		<b>Total:</b>	<b>1050</b>
Receiving	Receiving	Receiving Dock Operations (Warehouse)	736
		Desk Top Receiving (General)	32,000 *
		<b>Total:</b>	<b>32,736</b>
PSL	PSL (Preferred Supplier List)		206
		<b>Total:</b>	<b>206</b>
Web Suites	Supplier Collaboration	Internal: Web PO / Web Invoice / Payment Tracker Web ASN / Web Forecast (not in scope)	119
		External: Web PO / Web Invoice / Payment Tracker Web ASN / Web Forecast / Freight Web Invoice / Routing Guide (not in scope)	43288
		<b>Total:</b>	<b>43,407</b>

SB = Shopping Basket

\* = these audience size numbers are estimates per past deployments.

### High Level Audience Identification Across Project Functional Areas

Functional Area:			Audience:																		
			General Requester	General Approver	General eCK Requester	General eCK Approver	Catalog Owner	Neg Plan Owner	Contract Own. / Commod. Mgr	PSL Owner	TS	Buyer	Fulfillment Approver	AP Invoice Processor	AP Payment Disbursement	General Accounting	FA Expense	FA Capital	FA Marcom	FA Approvers	Receiving Desktop
1	<b>Shopping Cart</b>	1 Create	Refer to P2P Audience Analysis spreadsheet for details.																		
		2 Change																			
		3 Display																			
		4 Approve																			
		5 * Reports																			
2	<b>Catalog</b>	1 Create																			
		2 Change																			
		3 Approve																			
		4 Publish																			
		5 * Reports																			
3	<b>eCheck Request</b>	1 Create																			
		2 Change																			
		3 Display																			
		4 Approve																			
		5 * Reports																			
4	<b>eContract</b>	1 Create																			
		2 Manage/Change																			
		3 Display																			
		4 Approve																			
		5 Activate																			
		6 * Reports																			

Add column audience: Stakeholder Mgr.

			Audience:															
<b>Functional Area:</b>																		
5	<b>Fulfillment / Purchasing</b>	1 Overview	Refer to P2P Audience Analysis spreadsheet for details.															
		2 PR																
		3 PO (goods/service)																
		4 PO (external staff)																
		5 Approve																
		6 Output / Supplier Resp.																
		7 * Reports																
6	<b>Accounts Payable</b>	<b>Invoice</b> (credit memo, subseqnt debit/credit)																
		1 Create																
		2 Cancel / Park																
		3 Change																
		4 Display																
		5 Release																
		6 Exceptions																
		7 * Reports																
		<b>Payment</b>																
		8 Run pymt prgm																
		9 * Reports																
7	<b>Finance</b>	1 Expense																
		2 Tax																
		3 Close																
		4 Capital (WBS)																
		5 Marcom (Order)																
		6 * Reports																

			Audience:															
<b>Functional Area:</b>																		
8	<b>Receiving</b>	<b>Desktop</b>	Refer to P2P Audience Analysis spreadsheet for details.															
		1 Create																
		2 Cancel																
		<b>Warehouse</b>																
		3 Create																
		4 Cancel																
9	<b>PSL (Preferred Supplier List)</b>	1 Create																
		2 Manage/Change																
		3 Display																
		4 Approve																
		5 Activate (??)																
		6 * Reports																
10	<b>Supplier Collaboration</b>	1 WebPO																
		2 WebInvoice																
		3 WebASN																
		4 Payment Tracker																
		5 Supplier Registr.																

## 5. Prerequisite Courses or Skills

The P2P project training scope does not include prerequisites to be completed for deployment activities. Note that the online training designs support 100% eLearning deployment opportunities for both deployment and sustaining training needs.

Students who have previous knowledge of the following project scope areas should possess fundamental **business process** facts and concepts that may reduce their required online training time. However, prior **system application** training knowledge or practical system application experience is not a requirement for the successful completion of online training and training value achievement.

Note: Prerequisite courses or knowledge may exist per business operations requirements which support business process, soft skills and/or existing foundational skills set curriculum. The P2P project and related End User Training developed training materials support **new** system application design and functionality per project scope requirements.

Previous System		New System
ePurchasing SAP		NetWeaver "portal" > Shopping Cart
eCheck Request		NetWeaver "portal" > eCheck Request
Bugs Eye / eMerge		NetWeaver "portal" > Catalog Management
Contract applications & tools		NetWeaver "portal" > eContract
SAP Reports		NetWeaver "portal" > Business Warehouse
SAP R/3: Fulfillment		NetWeaver "portal" > Fulfillment (purchasing)
Accounts Payable		NetWeaver "portal" > Accounts Payable
Finance		NetWeaver "portal" > Finance
WISARD Receiving		NetWeaver "portal" > Receiving - for Receiving Dock and desktop receiving
Supplier Collaboration (Web Suites)		Web Suites (updated release)

## 6. Performance-Based Solution Recommendation

The performance-based solution recommendation to support project goals and end-user (audience) needs includes the following products (deliverables) and services to be implemented per the respective project scope items. See the below Diagram 7: Project Scope Tied To Solution Model for the alignment of project scope items and corresponding solution models to meet deliverables.

Three solution models are proposed:

1. **Online Training Courses**  
(to include: printable job aids, task simulations, critical thinking models)
2. **EPSS (Electronic Performance Support System) Embedded Help**
3. **Instructor led session(s)\*** for Q&A / system demonstration  
\* sessions may be delivered via
  - Train-the-Trainer / SME resourced or EUT resourced facilitators (delivery plans are TBD)
  - F2F or remote supported delivery models (delivery plans are TBD)

**Diagram 7: Project Scope Tied To Solution Model**

<b>Project Scope:</b>	<b>Solution Model:</b>		
	<b>OL</b>	<b>EH</b>	<b>IL</b>
<b>Shopping Cart</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
1. MPT013860 Creating a SB in ePurchasing SAP 2. MPT012937 Managing a SB in ePurchasing SAP 3. MPT012936 ePurchasing SAP Approvals 4. MPT016211 Network PR Approvals * 5. MPT024739 Variable Approval Workflow *	<b>Old course(s) to DELETE.</b>		
<b>Catalog</b>	<b>Yes</b>	<b>Yes</b>	No
6. MPT021119 ePurchasing SAP Catalog Content Owner	<b>Old course(s) to DELETE.</b>		
<b>eCheck Request</b>	<b>Yes</b>	<b>Yes</b>	No
7. MPT024643 eCheck Request	<b>Old course(s) to DELETE.</b>		
<b>Reports</b>	<b>Yes</b>	<b>Yes</b> (limited)	No
N/A (potential new online course to support Reports)	<b>N/A</b>		
<b>SAP R/3: PR's</b>	<b>Yes</b>	No	No
8. MPT013480 Indirect Procurement Overview 9. MPT015036 Indirect Procurement PR's	<b>Old course(s) to DELETE.</b>		
<b>SAP R/3: PO's</b>	<b>Yes</b>	No	No
10. MPT015367 Create Indirect Procurement PO's 11. MPT015035 Display Indirect Procurement PO's 12. MPT015368 Maintain Indirect Procurement PO's 13. MPT012938 Approving PO's and SAP Reports	<b>Old course(s) to DELETE.</b>		

OL = Online Training \* Course design features to be merged into overall *approvals* content  
 EH = Embedded Help  
 IL = Instructor Led

**Diagram 8: Summary Result of Online Course Updates and Project Scope Tied To WW43'06 Solution Model**

Historical			Current		Future (WW43 Project Design)			
Project Scope	OL Courses Impacted		eBP Project Scope		OL Courses to Create	EH	IL	Audience
ePurchasng Shopping Basket	Creating a SB in ePurchasing SAP	⇒	Shopping Cart (SC) - Create - Change - Display - <b>Approve</b> (SC / CED / VAW) - BOBO - Delivery - Commodity Schema - Account Assignment - SC "Flags" ie. Blanket SC - Attachments - Data Loss Prevention Catalog Shopping (SC)	⇒	MPTxxxxxx <b>Go Shopping: Shopping Cart</b>	Yes	Yes SU's only	SC Requester SC Approver FIN Approver (Fin, Cap, LTD)
Commodity Schema	Managing a SB in ePurchasing SAP							
PSL (Pref. Supplier List)	ePurchasing SAP Approvals							
CED Network Approval	Network PR Approvals							
VAW (Var App Workflow)	Variable Approval Workflow							
eCheck Request (Non-PO)	eCheck Request	⇒	eCheck Request (eCR) - Create - Change - Display - Approve	⇒	MPTxxxxxx <b>Go Shopping: eCheck Request</b>	Yes	No	eCR Requester eCR Approver
N/A	N/A	⇒	SRM Portal - Portal access - Embedded HELP		* Component of SRM: - Shopping Cart - eCheck Request - Catalog - Reports	Yes	No	All
Catalogs	ePurchasing SAP Catalog Content Owner	⇒	Catalog - Create - Change - Approve - Publish	⇒	MPTxxxxxx <b>Go Shopping: Catalog Management</b>	Yes	No	Sourcing (Catalog Owner)
N/A	N/A	⇒	Reports - eBP - BW	⇒	MPTxxxxxx <b>Go Shopping: Reports</b>	Yes	No	SC/eCR Requester SC/eCR Approver
C-Pipe Impact	Indirect Proc. PR's		TBD – impact is not determined		Yes - course "What's New"	No	No	TS / Buyer
	Display Indirect Proc. PO's		TBD – impact is not determined		Yes - course "What's New"	No	No	TS / Buyer
	Create Indirect Proc. PO's		TBD – impact is not determined		Yes - course "What's New"	No	No	TS / Buyer
	Maintain Indirect Proc. PO's		TBD – impact is not determined		Yes - course "What's New"	No	No	TS / Buyer
	Approve Indirect Proc. PO's		TBD – impact is not determined		Yes - course "What's New"	No	No	TS / Buyer
	Variable Approval Workflow		Delete (roll WBS Approval into new online training for: Go Shopping: Approvals.					

**Diagram 9: EUT Resource Support Division for WWxx'XX Solution Model**

EUT Resource	Future (WW43 Project Design)				
eBP Project Scope		OL Courses to Create	EH	IL	Audience
<ul style="list-style-type: none"> <li><b>J. Harris</b> to own                             <ul style="list-style-type: none"> <li>- design / publish <b>online courses</b> for                                     <ol style="list-style-type: none"> <li>Go Shopping: Shopping Cart *</li> <li>Go Shopping: Approvals</li> </ol>                                     * this is an overview and guide to SC create/change process steps                                 </li> <li>- design and deliver Super User <b>labs</b> (delivery may include K. Nyborg for geo/frequency support)</li> </ul> </li> <li><b>K. Nyborg</b> to own                             <ul style="list-style-type: none"> <li>- design / publish <b>Ask Tech articles</b> and embedded application solution:                                     <ol style="list-style-type: none"> <li>Go Shopping: Shopping Cart</li> <li>Go Shopping: Approvals</li> </ol> </li> </ul> </li> </ul>	⇒	MPTxxxxxx <b>Go Shopping: Shopping Cart</b>  MPTxxxxxx <b>Go Shopping: Approvals</b>  Note: approval includes process for <ul style="list-style-type: none"> <li>- SC (SC / CED / VAW)</li> <li>- eCR</li> </ul>	Yes	Yes SU's only	SC Requester SC Approver FIN Approver (Fin, Cap, LTD)
<ul style="list-style-type: none"> <li><b>N. Laderas</b> (<b>J. Harris as backup &amp; support</b>) to own                             <ul style="list-style-type: none"> <li>- design / publish online course for                                     <ol style="list-style-type: none"> <li>Go Shopping: eCheck Request</li> </ol> </li> <li>- design / publish Ask Tech articles and embedded application solution</li> </ul> </li> </ul>	⇒	MPTxxxxxx <b>Go Shopping: eCheck Request</b>	Yes	No	eCR Requester eCR Approver
<ul style="list-style-type: none"> <li><b>N. Laderas</b> (<b>K. Nyborg as backup &amp; support</b>) to own                             <ul style="list-style-type: none"> <li>- design / publish online course for                                     <ol style="list-style-type: none"> <li>Go Shopping: Catalog Management</li> </ol> </li> <li>- design / publish Ask Tech articles and embedded application solution</li> </ul> </li> </ul>	⇒	MPTxxxxxx <b>Go Shopping: Catalog Management</b>	Yes	No	Sourcing (Catalog Owner)
<ul style="list-style-type: none"> <li><b>K. Nyborg</b> to own                             <ul style="list-style-type: none"> <li>- design / publish <b>online course</b> for                                     <ol style="list-style-type: none"> <li>Go Shopping: Reports</li> </ol> </li> <li>- design / publish Ask Tech articles and embedded application solution</li> </ul> </li> </ul>	⇒	MPTxxxxxx <b>Go Shopping: Reports</b>	Yes	No	SC/eCR Requester SC/eCR Approver
<ul style="list-style-type: none"> <li><b>J. Harris</b> to own                             <ul style="list-style-type: none"> <li>- update existing online courses per c-pipe impact.</li> </ul> </li> </ul> <p>* see below c-pipe impact summary.</p>	⇒	Indirect Proc. PR's Display Indirect Proc. PO's Create Indirect Proc. PO's Maintain Indirect Proc. PO's Approve Indirect Proc. PO's	No	No	TS / Buyer TS / Buyer TS / Buyer TS / Buyer TS / Buyer

**Training Scope will not cover**

- Change Impact Assessment (CIA) business process communication
- Transition Change Management (TCM) job role responsibilities communication
- Application Design ratification (organization buy-in of new processes and system design)
- Site business operations desk top procedures or people development e.g. *Code of Conduct*
- Production data communication (e.g. security profile assignment, hierarchy data elements)
- Downstream application touch-points:
  - MicroStrategy Reports
  - Accounts Payable or Finance documentation, reports, online training

**7. Assessment / Measurement Strategy**

Student readiness measurements and report out metrics are owned and tracked by the End User Training (EUT) Training team. Effective identification and measurement of student readiness ensures successful site operation critical success indicators and deployment goals.

The following student readiness measurements and criteria will be reported out.

**Student Readiness Measurements**

	<b>Metric:</b>	<b>Measurement Criteria:</b>	<b>Report Out Frequency</b>
1	Global Super User (SU) audience trained to support global operations and project/audience liason. Zero lines down impact to operations.	90% identified global operations SU's complete online training retrofit course, and, attend Q&A delta session.	WW34.5 WW35.5 WW36.5
2	Call Center metrics trend at < 3% call volume increase without incurring TAC HC increase.	Call Center metrics trend at < 3% volume increase during go-live (WW36) through ongoing user adoption (6 months post WW36)	WW36.5 WW37.5 WW38.5 WW10.5'07

The following EUT objectives support training value-add and end user

**Online Course – Objectives**

	<b>Metric:</b>	<b>Measurement Criteria:</b>	<b>Report Out Frequency</b>
1	Level 1 Evaluation (student satisfaction with online training)	Level 1 rating trend is: 85% green / 12% yellow / 3% red	<b>tbd *</b>
2	Level 2 Evaluation (student pass-rate of OL training "Quiz" objectives)	Level 2 trend is 90% user pass-rate on first attempt	<b>tbd *</b>
3	Pre/Post Test Evaluation (student learning delta between pre- score compared to post- "Quiz" score)	Training pass rate delta between pre-/post- tests to indicate 30% increase	<b>tbd *</b>

\* **tbd:** to be determined based on actual number of students and span of deployment timeline.

### Embedded Help (Service Desk) – Objectives

	<b>Metric:</b>	<b>Measurement Criteria:</b>	<b>Report Out Frequency</b>
1	Deliver embedded Help system (on-the-job, task performance “just in time” learning)	Deliver a min of 20 each embedded Help buttons	WW37.3
2	Deliver reusable learning objects (within help system, across TAC support)	Each Service Desk script designed (written) for end user and TAC use	WW37.3
3	Deliver Micro-eLearning (packaged, modular learning objects)	Service Desk scripts contain task step action w/ reference links (as needed)	WW37.3

## 8. Maintenance Requirements / Sustaining Plans

Online training courses, and instructor led lab guides (outlines), are maintained by EUT Training during the life cycle of in-flight projects. Updates to training material post ratification and deployment are determined based on system functionality impact and priority audit requirements.

Updates are addressed on an as-needed basis per priority. Delivery of training material updates will occur per resource availability; skills set requirements, and development time window.

Site specific business processes, user organization guidelines, or desktop procedures are maintained by site business organizations.

Refer to the below Diagram 11: Performance-based Solution sustaining Model regarding the End User Training sustaining model areas and SOW funding recommendations needed for support.

**Diagram 11: Performance-based Solution Sustaining Model**

<b>Performance-based Solution</b>	<b>SOW Funding:</b>
<p><b>Online Training Courses (Option A)</b>            Online course updates sustaining model with .5 HC funding from Q4’06 and forward will include:</p> <ol style="list-style-type: none"> <li>1. Monitor evaluation metrics (Level 1 feedback, call data indicator trends).</li> <li>2. Track and respond to student feedback and “Ask The Expert” questions.</li> <li>3. Update course content per project scope/design change needs (KTBR/KTBE)</li> <li>4. Support ad-hoc facilitation sessions on as needed basis (reuse existing instructor led sessions training materials w/ updates negotiable).</li> <li>5. Provide consulting and design/development support for Service Desk articles with KTBR team.</li> <li>6. Conduct quarterly course content audit and audience evaluation to measure course design meets audience (user) needs.</li> </ol>	<p><b>.5 HC/qtr</b>            = 15 hrs/wk</p>
<p><b>Online Training Courses (Option B)</b>            Online course updates sustaining model with .25 HC funding from Q4’06 and forward will include:</p> <ol style="list-style-type: none"> <li>1. Monitor evaluation metrics (Level 1 feedback, call data indicator trends).</li> <li>2. Track and respond to student feedback and “Ask The Expert” questions.</li> <li>3. Update course content per project scope/design change requirements (prioritized per available time and resource support needs).</li> <li>4. Conduct quarterly course content audit to ensure functionality and leading links (URL’s that may point to external sites) are valid.</li> </ol>	<p><b>.25 HC/qtr</b>            = 7.5 hrs/wk</p>

<p><b>Online Training Courses (Option C)</b>  Online course updates sustaining model with no funding from Q4'06 and forward will include:</p> <ol style="list-style-type: none"> <li>1. No ongoing course support to be provided. Feedback and "Ask The Expert" support response will not be sustained.</li> <li>2. Course may be transitioned to EUT KTBR team where course life is maintained based on utilization: <ul style="list-style-type: none"> <li>- A minimum of 25 students per year must Pass the course Quiz during a 3 year time frame.</li> <li>- After a 3 year time frame, the course will automatically be EOL'd if not funded by the project within the final year (3<sup>rd</sup> year of life cycle) a minimum of .25 HC for content re-validation.</li> </ul> </li> <li>3. Course may be transitioned to Project Team owner who will be responsible for: <ul style="list-style-type: none"> <li>- CourseTracker registration (feedback and "Ask The Expert" emails)</li> <li>- CMS (Contract Management System) contract owner</li> </ul> </li> </ol>	<p><b>N/A</b>  = 0 hrs/wk</p>
<p><b>Embedded Help (Service Desk)</b>  EUT will design, develop and implement Service Desk articles. Effective WW40'2006 (4 weeks post WW36'2006 deployment &amp; stabilization period), ownership and maintenance of Service Desk articles will transition to KTBR. New article requirements (new application scope, new business processes) will be managed either by KTBR, or per future funded eBP projects identified on the R2S roadmap.</p>	<p><b>N/A</b></p>
<p><b>Instructor led session(s)</b>  EUT will design, develop and implement instructor led training materials including: 1) activity methods outline, 2) instructor notes, 3) applicable presentation materials ie. .ppt presentation, whiteboard/flipchart designs. Instructor led training materials to be posted in SharePoint site. Post WW36, no updates will be made to materials by EUT support except per funded projects identified on the R2S roadmap.</p>	<p><b>N/A</b></p>

## 9. Risks / Assumptions

### Risks

- Low: N/A
- Med: Portal changes anticipated to occur between WW36 (epurchasing.abc.com access) and WW44 (circuit.abc.com access). Impact to new portal access and navigation must be considered regarding scope of system navigation and logon documentation.

Holistic portal training (portal features, portal configuration, customization) scope not included in EBP project scope and delivery. Portal ownership (design and future impacts) owned by Candice S Linnell per Next Generation scope she is managing.

To facilitate training labs, audience identification for logistics coordination must be completed and validated by TCM (Deployment) no later than WW28.5. User audience members that require training labs need to be communicated to EUT by WW28.5:

- ePurchasing Super Users (required)
  - Sourcing Catalog Content Owner SU's (optional pending design impact CIA analysis)
  - Purchasing TS/Buyers SU's (optional pending design impact CIA analysis)
- High: High dependency on project timeline deliverables specific to availability of eBP environments to support training documentation captures and simulation recording. Due to volume of tasks relevant to large project scope, access to functional environment with "live" replicated data (not 'test' examples with mock data) is critical per f-test and cons test timelines.

### Assumptions

- Project will use Solution Manager (SolMan) as document repository and tracking for purpose of system design/functionality documentation.
- Business operations, TCM and Project Leads will manage user compliance with data quality and performance standards behavior. End User Training will deliver training content to support user skills and knowledge performance. However, on the job behavioral decisions or enforcement of user choices (behavior actions) is not controlled or measured by EUT training.
- Product Category "Commodity Schema" decision choices is owned by the commodity schema project team. EBP training identifies system task performance and includes high-level process concepts to provide users a reference for how to choose a product category using the system application. Decision making criteria and user accountability for product category compliance is not in scope or control for EUT training's deliverables supporting the EBP project.
- Strong alignment between TCM and EUT must exist to support change impact communication tied with training strategies. Due to global audience factors, the timing and "marketing" availability of communication is needed to ensure user awareness of eBP activities, acceptance, and effective communication of training opportunities.

## 10. Opens (Next Steps) / Help Needed

Item	Subject:	Resource:
1		
2		
3		
4		
5		

## 11. Contacts

### Training:

- Harris, Jeff B P2P Training Lead / Trainer/Developer
- Bloom, Anna G (Gail) P2P Trainer/Developer
- Tyus, Julie P2P Trainer/Developer

### TCM / Communication:

- Magnuson, Brent R TCM: Deployment / Communication / CIA Lead
- Patokoski, Mikko Communications
- Simolke, Nikki TME (Materials) TCM

### Deployment:

- Magnuson, Brent R TCM: Deployment / Communication / CIA Lead
- Van Cleve, Paula M TCM: Program Alignment with Business Operations

### Human Factors Engineers:

- Canakapalli, Sri K HFE Lead
- Sweany, Andrew C HFE

### Testing:

- O'Day, Brian Test Lead

### Data Quality:

- Knoch, Kim Data Quality Lead

### Subject Matter Experts:

	Name:	Geo:	Support Organization:
1			
2			
3			
4			
5			



## 12. PIP Document Revision History

			Ratified?	
Date:	Change Made:	Change Owner:	Yes	No
WW40.5	<ul style="list-style-type: none"> <li>Rev0 PIP initiated per Business Blueprint docs.</li> </ul>	Jeff B Harris	n/a	
WW41.4	<ul style="list-style-type: none"> <li>Updated key capabilities (pg 3), historical apps (pg 7), and project design scope (pg 10) to now include PSL.</li> </ul>	Jeff B Harris	n/a	
WW43.3	<ul style="list-style-type: none"> <li>PIP ratified by business stakeholders &amp; EUT management.</li> </ul>	Jeff B Harris	X	
	<ul style="list-style-type: none"> <li></li> </ul>			
	<ul style="list-style-type: none"> <li></li> </ul>			
	<ul style="list-style-type: none"> <li></li> </ul>			