Transcending from Tactical to Strategic HR…

Realizing the strategic potential of Human Capital Management with SAP and Winshuttle.

March 28th, 2012; 10am GMT
Your Speakers Today

Gill Waite, Process Support Specialist, BP

Divya Kaiwar, Solutions Architect, Winshuttle

Evan Schulz, UK & Ireland Sales Director, Winshuttle

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Please describe your role and responsibilities as they relate to SAP Hire to Retire business processes at your company.

POLL #1
Today’s Agenda

• SAP Hire to Retire – Transcending the Tactical (:10)
• “Round Tripping” SAP H2R transactions (:15)
• Hire to Retire forms and workflow processing (:15)
• SAP Hire to Retire Process Innovations w. BP (:15)
• Q&A (:05)

Please use the GoTo Meeting Question & Answer Panel to ask your questions during the webinar

Please participate in our polls during the webinar and our survey at the conclusion.

We will be sending the presentation and a white paper on “SAP Hire to Retire – Transcending the Tactical” to all of today’s attendees
Transcending from Tactical to Strategic HR

Revenue per Employee by HR Maturity Level

- Level 4: Business Driven HR
- Level 3: Strategic HR
- Level 2: Fundamental HR
- Level 1: Compliance Driven HR

Figure 1: Revenue per employee in relation to strategic HR competency (source: Bersin & Associates)

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Barriers to Strategic HR Realization

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime

Source: Aberdeen Group, December 2010
Reducing Barriers to Strategic HR Realization

• Automation
  – decrease manual transactions

• Streamline Integration

• Self-Service
  – simplify portal development and deployment

Table 1: Savings from Employee and Manager Self-Service Implementation

<table>
<thead>
<tr>
<th>Process</th>
<th>Original Cost</th>
<th>Self-Service Cost</th>
<th>% Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Change</td>
<td>$33.50</td>
<td>$18.26</td>
<td>45%</td>
</tr>
<tr>
<td>Approve Promotion</td>
<td>$36.48</td>
<td>$14.01</td>
<td>62%</td>
</tr>
<tr>
<td>Create Job Requisition</td>
<td>$27.67</td>
<td>$11.11</td>
<td>60%</td>
</tr>
<tr>
<td>Performance Appraisal</td>
<td>$59.73</td>
<td>$47.60</td>
<td>20%</td>
</tr>
</tbody>
</table>

Source: Cedar Crestone 2008 Value Report

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Which of these business drivers are most critical to you and your company?

POLL #2
Winshuttle ERP Usability Platform…
Enabling you to transcend the tactical

<table>
<thead>
<tr>
<th>Data Entry</th>
<th>Entering data using the SAP interface is time consuming and error prone. Winshuttle products provide simplified UI and rapid automation using familiar tools like Microsoft Excel and Microsoft SharePoint to speed up data entry without sacrificing accuracy.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Maintenance</td>
<td>A constantly changing business environment requires constant updates to data and process rules. Winshuttle tools simplify the process of finding and updating data across multiple tables and records.</td>
</tr>
<tr>
<td>Data Extraction</td>
<td>The data stored in SAP is a resource for understanding the condition of the business. Winshuttle tools simplify the creation of custom queries for analysis and reporting.</td>
</tr>
<tr>
<td>Data Integration</td>
<td>Connecting disparate users and systems to SAP is a constant challenge. Winshuttle products allow users to build templates and workflows that shuttle data into and out of SAP and preserve data integrity and compliance.</td>
</tr>
<tr>
<td>Data Migration</td>
<td>The Winshuttle suite of products helps users upgrade to a new version of SAP or from a legacy system by automating the mass transfer of data and process rules.</td>
</tr>
<tr>
<td>Data Action</td>
<td>Winshuttle’s codeless development tools allow the rapid development of applications and workflow routines that enable a business to respond quickly to the demands of customers and the competitive environment.</td>
</tr>
</tbody>
</table>

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Which of these use case scenarios would benefit your company the most and help you transcend from tactical to strategic HR?

POLL #3
Winshuttle Product Architecture

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Round Tripping SAP Hire to Retire Transactions

Divya Kaiwar, Solutions Architect, Winshuttle
March 28th 2012

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
What does Transaction do?

1. Record
   - SAP transactions
   - Choose BAPI & sample recording templates

2. Map
   - Microsoft Access
   - Microsoft Excel
   - XML

3. Use
   - Run from desktop
   - Publish to others

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
What does Query do?

1. Select
   - SAP tables, infosets, and logical databases
   - Sample queries

2. Map
   - Microsoft Access
   - Microsoft Excel
   - XML
   - Microsoft SQL Server

3. Use
   - Run from desktop
   - Publish to others

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Winshuttle H2R Forms & Workflow

H2R Master Data Management

(PA30)

Divya Kaiwar, Solutions Architect

March 28th 2012

Please ask your questions using the Go To Meeting “Question & Answer” box at anytime
Salary change is requested

Manager reviews

HR reviews

Upload to SAP HCM
BP people

We all have different needs, it’s something we have in common.

Gill Waite
Process Support Specialist, BP
Agenda

- HR within BP
- Who am I?
- How is SAP used in BP?
- The use of Winshuttle in BP
- The driver for Winshuttle use
- Mass hiring Winshuttle
- ‘Change anything else’ Winshuttle
How does HR work within BP?

• Big decentralised HR function with HR professionals
• Relatively new SAP HR system – since 2009
• BP has an outsourced HR service centre responsible for all HR admin and updating of SAP – this model has been in BP since 2000
  – They handle c. 70,000 requests per year from our 11,000 UK employees
• BPpeople service centre is run by Aon Hewitt and based in Krakow and Mumbai
• HR complete forms to update someone's record on SAP e.g.
  – full time to part time
  – to move someone to another area
  – to exit someone
    – And the service centre process the request….
• The HR model is mature and works well
Who am I?

• I have been with BP for 7 years

• Background of operational HR with service driven companies prior to this

• First time working with an outsourced service centre with an HR system – it was Peoplesoft, now SAP HR

• Now I manage the processes that the Service Centre need to follow
  – effectively, I’m the link between front line HR and the service centre
  – I have to make sure everything I do is internally customer service focussed but also follows set processes
How is SAP HR used in BP?

Service centre update SAP based on instruction from HR and following set processes.

HR have view access (PA20) into SAP HR.

Employee can see themselves in a front end portal.

BP creates the processes and monitors the performance of the service centre.
Winshuttle process within BP

HR don’t care how this happens……so long as it happens!

HR submit spreadsheet → Winshuttle processed by service centre → Employee paid correctly

BP hold the author licences and prepare the master shuttles

Service centre run the shuttles
I’m not technical at all…….be warned!!!

- But I love Winshuttle files ....
- The speed is fantastic
- I marvel at how fast records can be changed!
- It doesn’t look technical – even I can complete it!!!
- Most importantly, my ‘customers love it!
So how do we use Winshuttle in BP?

• **Singular use Winshuttle templates – to fix a problem e.g.**
  - Updating the same code for lots of people
  - Amending addresses where there are duplicate lines
  - Bonus plans
  - Annual updates to absence quotas

• **Winshuttle templates with multiple uses….**
  - Loading employees on to SAP at the start of their employment
  - Amending a lot of different data for lots of people
  - Exiting lots of employees – being planned!!!
The challenges we faced introducing the more complex Winshuttles....

From within my own team and the technical team:

- **We have Mass Data Uploads (MDUs) which work fine**
  - Yes they do but....can only change one or two things on an MDU – may need to do several!
  - Difficulty to complete – have to overwrite data and easy to get wrong
  - No ID name/number check – wrong people have been processed
  - May have to complete more than one to change several things on an employee e.g. promotion is one and allowances is another
  - Very technical ‘look and feel’

- **The technology will prove too challenging and difficult to implement**
  - Very quickly, all the technical people realised how easy Winshuttle is to use and how effective it is
  - Used Winshuttle expertise to create but with BP as the driver
  - They love it now!
• **HR won’t understand it**
  - HR don’t need to understand Winshuttle as it’s a ‘simple’ Excel spreadsheet
  - Used HR to help shape the form
  - Created extensive instructions
  - Provide guidance on how to complete
  - Excellent feedback!

• **Service centre won’t be able to use it**
  - Change embraced by the service centre as they can see the benefits
  - Excellent Winshuttle support for everyone at all times
  - Will create some super users in Krakow
But the beauty of using Winshuttle....

• The driver for us is the customer experience for HR – HR see an Excel spreadsheet and don’t need to understand the data processing behind it – **the technology is easy to complete and process**

• Easy for the service centre to process – so fast!

• Customer service – we had to consider.....
  − Who is driving the need for the use of this technology?
  − How is it used?
  − The technology has to stand alone i.e. the spreadsheet can be completed by anyone who has no knowledge of Winshuttle

• It has to work – it affects pay......and it does!
In my view...

• If technology is the sole driver....
The hiring Winshuttle....

- Need to do mass hiring e.g. graduates/interns/TUPE situation
- Winshuttle is 3 separate scripts
- HR see a standard Excel spreadsheet, but with lots of columns!
- HR can simply copy and paste standard information, which is quicker and easier for them
- Need to ensure the correct format is used e.g. date specs

<table>
<thead>
<tr>
<th>Special Instructions</th>
<th>MANDATORY Start Date DD.MM.YYYY</th>
<th>MANDATORY New SAP position ID</th>
<th>Position Title</th>
<th>Job Key</th>
<th>Line Manager’s Name</th>
<th>Line Manager’s GPID</th>
<th>Line Manager’s org unit</th>
<th>Business Facing HR Name</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

29
The business needed to be able to:

- Move an employee from office location to another
- Promote
- Give a pay rise
- Change subsequent allowances

All at the same time......

All on the same spreadsheet

In a mass scenario so lots of people needed to be administered at one time

It needed to be user friendly – HR don’t understand the significance of Infotypes or even the intricacies of SAP
The process

- Consulted with knowledgeable people from HR – and got their opinion on what they wanted
- Worked with Divya from Winshuttle and key technical people within BP
  - Again
  - And again
  - And again – to refine the needs – but the needs were driven by BP not technology which is key!
- We tested and tested and tested – until we got to something worth testing with HR and the service centre
- We set up a dummy testing scenario and processed the forms
- We refined the needs, made some changes
- We set up another testing session with HR and the service centre
- AND IT WORKED!!!!
- THEY LOVED IT!!!
The Master template

• An excel spreadsheet with an instructions tab

• In built instructions with drop down menus, where possible, and explanations on each header

• HR request the ‘current data’ for their team – this allows them to see what requires changing

• They need to specify which recurring payment codes they want for each person – upwards of 7 per employee!!!

• They then fill in the columns that they need to change – if it doesn’t change, then they leave it blank

• Winshuttle is run.....

• And SAP changed!
HR complete the names and ID number on the master sheet and also detail any recurring payment wage types.

HR check it’s the right people and then complete all the columns that are changing.

Service centre run a ‘read’ script to validate the current data and send back to HR.

At this point, they also run the ‘check future dates’ scripts to see if there are any future dated activities already in SAP for this person.

Any updates which clash with a future dated activity are updated manually.

Service centre process and update SAP.
### SAP InfoTypes used in the Template

<table>
<thead>
<tr>
<th>SAP InfoTypes</th>
<th>Process Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Actions</td>
</tr>
<tr>
<td>1</td>
<td>Org Management</td>
</tr>
<tr>
<td>2</td>
<td>Personal Data</td>
</tr>
<tr>
<td>7</td>
<td>Planned Working Times</td>
</tr>
<tr>
<td>8</td>
<td>Basic Pay</td>
</tr>
<tr>
<td>9006</td>
<td>Work Location Updates</td>
</tr>
<tr>
<td>759</td>
<td>Compensation Progress</td>
</tr>
<tr>
<td>41</td>
<td>Date Specifications</td>
</tr>
<tr>
<td>14</td>
<td>Recurring Payments &amp; Deductions</td>
</tr>
<tr>
<td>15</td>
<td>Additional Payments</td>
</tr>
</tbody>
</table>

**T-codes Automated:**

- P20
- P30
- P40
But how does it actually work?

- Instruction worksheet included hyperlink to each infotype – but not called infotypes as might confuse HR

### Quick links to the template

<table>
<thead>
<tr>
<th>I want to…</th>
<th>Colour Code - Header &amp; Input Fields</th>
<th>click on the arrow to go to that part of the template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not amend any grey column</td>
<td>DO NOT TOUCH</td>
<td>This is the employee's current data</td>
</tr>
<tr>
<td>amend the employee's position, job code and payroll area</td>
<td>click here</td>
<td></td>
</tr>
<tr>
<td>amend where the employee works</td>
<td>click here</td>
<td></td>
</tr>
<tr>
<td>amend the employee's scheduled working hours as a result of changing their work location - NOT full to part time and vice versa</td>
<td>click here</td>
<td></td>
</tr>
<tr>
<td>change the employee's pay, grade or award a spot bonus, retention bonus or project bonus</td>
<td>click here</td>
<td></td>
</tr>
<tr>
<td>start, stop or change a recurring payment</td>
<td>click here</td>
<td></td>
</tr>
<tr>
<td>create a one time additional payment e.g. disturbance allowance - not spot bonus, retention bonus or project bonus</td>
<td>click here</td>
<td></td>
</tr>
</tbody>
</table>

The columns contain different formulas so please be careful if you need to change the contents of the cell as this could erase the formula.

The boundaries of the template which require to be completed are clear - please do not amend any other columns which fall outside of these parameters as these are crucial to updating SAP.
Spreadsheet to amend main infotypes

- Instructions at the top of each column
- Drop down boxes utilised where possible
- Hyperlinks to key documents

<table>
<thead>
<tr>
<th>PerNr (not GPD)</th>
<th>Enter Name</th>
<th>Name from SAP</th>
<th>Effective date of all changes</th>
<th>Future Date indicator</th>
<th>Reason for new position change e.g. re-org, promotion/demotion etc</th>
<th>Position ID</th>
<th>Position Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td></td>
<td>MANDATORY use a different line if the date is not the same for each change DD.MM.YYYY</td>
<td>DO NOT TOUCH. Checks whether there is a future dated activity which will prevent this activity being run</td>
<td>MANDATORY Action Reason - please pick the most appropriate one.</td>
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<td></td>
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<tr>
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<td></td>
<td></td>
<td>Action Reason Code do not amend - loads automatically depending on the reason chosen</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td>If this is 999999999 then the employee has left BP</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Data Dictionary

Instructions
- Colour coding for ease of use

<table>
<thead>
<tr>
<th>PerNr (not GPID)</th>
<th>Enter Name</th>
<th>Name from SAP</th>
<th>Employee Subgroup code</th>
<th>Work Location ID</th>
<th>Name of Work Location</th>
<th>New Work Location ID</th>
<th>Work Schedule Code</th>
<th>Work Schedule Code Description</th>
<th>New Work Schedule Code</th>
<th>Annual Salary</th>
<th>Reason for New Grade Change</th>
<th>Pay Scale Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td></td>
<td>MANDATORY FIELD FOR YELLOW SECTION</td>
<td></td>
<td></td>
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<td>where the employee works - can be found in the Data Dictionary</td>
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<td>the hours that an employee works per week based on location</td>
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<td></td>
<td>the hours that an employee works per week based on location - this can be found in the Data Dictionary</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
Recurring payments and deductions tab

- Need to request ‘read’ data for selected wagetypes – too many to request all of them
- Then amend/stop current ones or start new ones

Wage-type list under Useful Links on the right hand side of the first page

<table>
<thead>
<tr>
<th>PerNr</th>
<th>Name</th>
<th>Name from SAP</th>
<th>Payment/Wage Type</th>
<th>Description</th>
<th>Start Date</th>
<th>End Date</th>
<th>Amount</th>
<th>Number</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANDATORY IF YOU WANT TO VIEW A CURRENT WAGETYPE copy the PerNr from the Master spreadsheet and repeat it for as many lines as you need to gain current wagetype information</td>
<td>MANDATORY</td>
<td>Enter Name</td>
<td>DO NOT TOUCH</td>
<td>MANDATORY IF YOU WANT TO VIEW A CURRENT WAGETYPE can be found on the Portal under search for Wage type list. You always need to view the current list on the Portal</td>
<td>This report only bring back current dated payments and deductions - check any future dated payments and deductions in SAP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Additional one off payments

- No ‘read data available so simple to complete

<table>
<thead>
<tr>
<th>Personnel ID Number</th>
<th>Name</th>
<th>Effective date of payment</th>
<th>Payment/Wage Type</th>
<th>amount</th>
<th>Number</th>
<th>Unit</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td>MANDATORY. NOT SPOT BONUS, PROJECT BONUS OR RETENTION BONUS. Can be found on the Portal. Must be numeric code.</td>
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<td>MANDATORY. Complete either amount or number and unit.</td>
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<td></td>
<td>MANDATORY. GBP or USD</td>
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</tbody>
</table>
Script also checks to any future dated actions in SAP

- Checks on 2 different worksheets not touched by HR

<table>
<thead>
<tr>
<th>Personnel ID Number</th>
<th>Name</th>
<th>Start Date - Actions</th>
<th>Start Date - Org Management</th>
<th>Start Date - Work Location</th>
<th>Start Date - Planned Working Time</th>
<th>Start Date - Basic Pay</th>
<th>Start Date - Salary Change</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PerNr (not GPID)</th>
<th>Enter Name</th>
<th>Name from SAP</th>
<th>Effective date of all changes</th>
<th>Future Date Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td>MANDATORY</td>
<td>MANDATORY use a different line if the date is not the same for each change DD.MM.YYYY</td>
<td>DO NOT TOUCH. Checks whether there is a future dated activity which will prevent this activity being run</td>
</tr>
</tbody>
</table>

This box will go red with a Y if there is a future dated activity already in SAP based on the effective date of the change.
Any questions????
Which of these products would you like to learn more about (select all that you are interested in)?

POLL #4
Thank You Gill & Divya...!

Q&A
Our Next Webinar

• Excel to SAP Integration – Wednesday, April 11th