



Alta Via Consulting, LLC

SUCCESS STORY

Success in Higher Education

One of the Top 25 public research universities in the U.S., serving a student population of 40,000 serviced by approximately 10,000 staff and faculty members, launched a new project called **UC Flex** in 2004. This project would replace the university's multiple computer systems with a single Enterprise Resource Planning (ERP) system. As directed by the CFO, this integration project would enable the university to gain clarity and insight into overall costs, funding and financial reporting, including reporting requirements mandated for all public universities.



Alta Via Consulting, a trusted SAP Business Partner, was instrumental in the success of the **UC Flex Business Warehouse Reporting project**. This involved four separate efforts or phases: (1) Budget Formulation and Simulation, including SEM and reporting (2) Funds Management reporting, (3) Purchase reporting, and (4) Planned Compensation (Position Budgeting) reporting.

The combined expertise of Alta Via Consulting and the university's BW Team addressed the challenges of Business Warehouse design, R3 to Business Warehouse data transfers, reporting standards, training, and knowledge transfer.



"Alta Via's knowledge, expertise, and commitment to excellence were an integral part of our highly successful implementation of SAP. Above and beyond the call of duty."

— James Plummer, VP Finance, University of Cincinnati

Alta Via began the project with the installation of the Budget Formulation system on an SEM platform. The other SEM system (Planned Compensation) came later. In addition to designing and creating the reporting systems, Alta Via also wrote the initial BEx reports for Funds Management, Budget Formulation, Planned Compensation, and Purchasing.

The Purchasing project involved more than just creating reports: it required the creation of customized report files that enabled a history of 'point in time' purchase order activity. Alta Via led a team that completed this project in time for state government reporting requirements.

With the Planned Compensation project, it was necessary for Alta Via to understand the design and content of the human resource master data and the payroll's base calculation files. This enabled the comparison of Actual to Planned compensation. This concept was later designed into SAP's new Public Budget Formulation (PBF) system.

The Planned Compensation project was a long awaited system change that enabled the university to finally track and control their labor costs.

Alta Via's latest role at the university was slightly different. It involved assisting the university in the conversion of the Comprehensive Rate Calculation (CRC) system, which calculated indirect cost rates for the Government Cost Compliance (GCC) office. Alta Via extracted the necessary data from the new SAP system and provided it to the university's Government Cost Compliance team, which used the data to replace the CRC system data.

With *UC Flex's* success, Alta Via's presence was ultimately extended through five years in order to install additional reporting capabilities, assist in the university's conversion to SAP NetWeaver 7.0., and fine tune the existing system. The BW Team, which Alta Via initially organized, remains the university's core support center for reporting.

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"A Better Use of Information"

Key Benefits:

Within the scope of the project the entire integration had several impacts:

- **Decision-focused reporting** was achieved for performance reporting system.
- **Master data consolidation** from legacy systems were now reliable and consistent across all university entities.
- **Key knowledge transfer** to the university's BW Team which continues to be a core support center for reporting.
- **Integrated regulatory compliance** reporting system completed to assist the university's Government Compliance Control department.



Alta Via Consulting is passionate about what we do and proud of our record.

"I consider Alta Via's thought leadership in the area of management accounting without peer."

— Peter von Zimmermann, Development Mgr - Financial Analytics, SAP AG (2001)

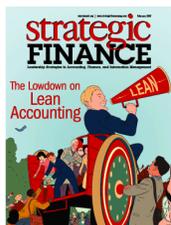
Publications:

GPk: Cracks In The Silver Bullet? — by Dawn Sedgley & Peter von Zimmermann published in *Cost Management* (Jul/Aug 2010) examines two management accounting approaches, GPk & RCA in an effort to determine how they fit—and to what degree—in the current business and management environments.



The Management Accounting Philosophy I, II, & III Series — by Anton van der Merwe published in *Cost Management* (May/Jun; Sep/Oct; Nov/Dec 2007) discusses how the explosive growth in tools, theories, and approaches during the 1980s fueled defensive infighting within the profession. This series discusses acceptable solutions based on proven philosophical principles and the laws of logic in management accounting.

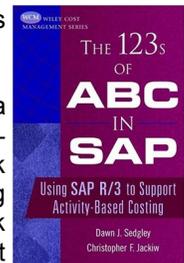
The Lowdown on Lean Accounting — by Anton van der Merwe, Alta Via partner, and Jeffrey Thomson, Institute of Management Accountant (IMA's Past President & CEO), published in *Strategic Finance* (February 2007) and featured as the cover story focusing on



answering the question "What is lean accounting all about?".

The Case For RCA (Resource Consumption Accounting) — by David E. Keys & Anton van der Merwe introduces a three-part series of articles in *Cost Management* (Jul/Aug; Sep/Oct; Nov/Dec 2001) that outlines RCA as a solution that provides a resource view and a direct expression of the interrelationships between resource elements detailing the benefits gained.

The 123's of ABC in SAP — Alta Via partners, Dawn Sedgley and Christopher Jackiw wrote this seminal work on advanced cost management using the SAP suite of products. This work has been characterized as a book that "do[es] not suffer fools".

**Awards:**

In 2006, Anton van der Merwe was presented with the prestigious **Bonsack Award** for his distinguished contribution in the advancement of cost management from the Consortium of Advanced Management - International (CAM-I).