



## DOSIER – 6

### *Job Description or JD*

A very important part of HR is assigning Job Description (JD) and subsequently devise system to monitor the JD. One may choose to call these monitoring elements as Key Result Areas (KRA) for qualitative monitoring and Key Performance Indicators (KPI) for quantitative monitoring

The JD, KPI and KRA may be or may not be well defined in many organization, but broadly they exist in all companies.

ERP implementation is one such opportunity, which gives a company a great opportunity to formalize the JD, KRA and KPI's.

The above can be understood with the perspective of either you are implementing a new system or you are upgrading an existing system or you are running a stable system.

It is very important that in all the above scenarios a genuine effort should be made to draft a **User Engagement Matrix (UEM)** which should be able to identify the roles played by each employee and their engagement with the ERP or outside of ERP for a particular role.

This UEM should be prepared with respect to AS IS and TO BE. If the same can be prepared then one can assign the respective functions of ERP to every employee and can understand the current engagement for a role w.r.t to role post ERP for the same and therefore can plan the manpower deployment and also objectively understand the efficiency of resources.

The above exercise generally is never done in majority of implementations and therefore the ROI of any investment related to ERP get difficult to assess.

It is very important to understand that post an ERP implementation 80% of operations are driven by system, therefore it should become important for management to work on the UEM.

A sample UEM for TO Be and AS IS is presented below:



## ERP, HR and UEM?

USER ENGAGEMENT MATRIX (To be)												
S.No.	Employee Name	Department	Role	Engagement with ERP	Type of Engagement	Reports Involved	Frequency of reports	Reviews Involved	Frequency of Review	Involvement of report to Excel	If yes Reason	Benefit of Review
1	Ajay	Account Payable	Invoice review for compliance	No	This is to review any invoice for its genuinity and also understand the document checklist before data entry	NA	NA	NA	NA	NA	NA	NA
1	Ajay	Account Payable	Invoice Booking	Yes	Entry of supplier Bill with respect to PO and GRN/SRN	Supplier Ageing	On Demand or Monthly	Vendor beyond specified age or beyond payment term	Weekly	Yes/No		Vendor payment with cash flow can be
						Purchase Register	On Demand or Monthly	Pattern of Vendor invoice As on Date, current Month to date, Last Month, upto current date, last year same month and alst year same period	Monthly			
						GST Register	On Demand or Monthly	Input trend with respect to As on Date, current Month to date, Last Month, upto current date, last year same month and alst year same period	Monthly			
						TDS Register	On Demand or Monthly	TDS Payble pattern with respect to As on Date, current Month to date, Last Month, upto current date, last year same month and alst year same period	Monthly			
						Tax Reconciliation report	Daily	The balance in all related GL and the balance in Purchase register	Daily			
						TDS reconciliation Report	Daily	The balance in all related GL and the balance in Purchase register	Daily			

USER ENGAGEMENT MATRIX (AS IS)												
S.No.	Employee Name	Department	Role	Engagement with ERP	Type of Engagement	Reports Involved	Frequency of reports	Reviews Involved	Frequency of Review	Involvement of report to Excel	If yes Reason	Benefit of Review

What you should expect from these UEM?

1. The correct assessment of licences required for an ERP, which should be an area for saving cost for implementation and subsequent years
2. Possibility of removing at least one layer of middle management if the reports and reviews are managed well and adopted well



## **ERP, HR and UEM?**

3. Reduction in all audit operations of the company and also putting in place a periodic internal audit procedure
4. Creating a decisive middle management from more of a reporting middle management, therefore reducing the day to day involvement of top management and allowing space for strategies.
5. Creating a ground to measure the ROI of a IT investment and also deciding should the company start having an annual IT Plan every year and mark an investment so that a company can keep moving on with their IT transformational journey