

BRANDEIS



INBOUND TO WORKDAY

Workday Project Kickoff

Oct 26, 2017



Agenda

1. Welcome and Opening Remarks
2. Project Benefits and Guiding Principles
3. Collaborative Solutions Overview
4. Project Overview
 - The “Why” – Project Objectives
 - The “What” – Project Scope
 - The “Who” – The Team
 - The “How” – Change & Project Management
- [BREAK]
5. Project Approach
6. Project Oversight
7. Architect Workshops/Underway
8. Questions





Welcome and Opening Remarks



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Introductions



Project Benefits

As a result of implementing the Workday solution for Financial Management (Finance), Human Capital Management (HCM) and Student Systems , the Brandeis community will benefit through the ability to:

- Provide easy and consistent access to information for managing resources
- Modernize business processes and systems to take advantage of emerging technologies
- Ensure the system meets business and compliance requirements
- Minimize administrative overhead for faculty and end users
- Increase effectiveness in business process areas and lower operating costs
- Facilitate rapid adoption to business and system updates
- Improve student, faculty, and employee user experience



Project Guiding Principles

1. Adopt Workday best business practices
2. Follow the Workday LDP (Lifecycle Deployment Program) methodology
3. Drive consistency across HR and all business areas
4. Minimize handoffs
5. Honor the role of the 'Workday manager'
6. Minimize traffic in Inboxes
7. Just because the system can do something doesn't mean it should
8. Focus on the core activities not the exceptions: (80/20)





Next Stop: Collaborative Solutions Overview



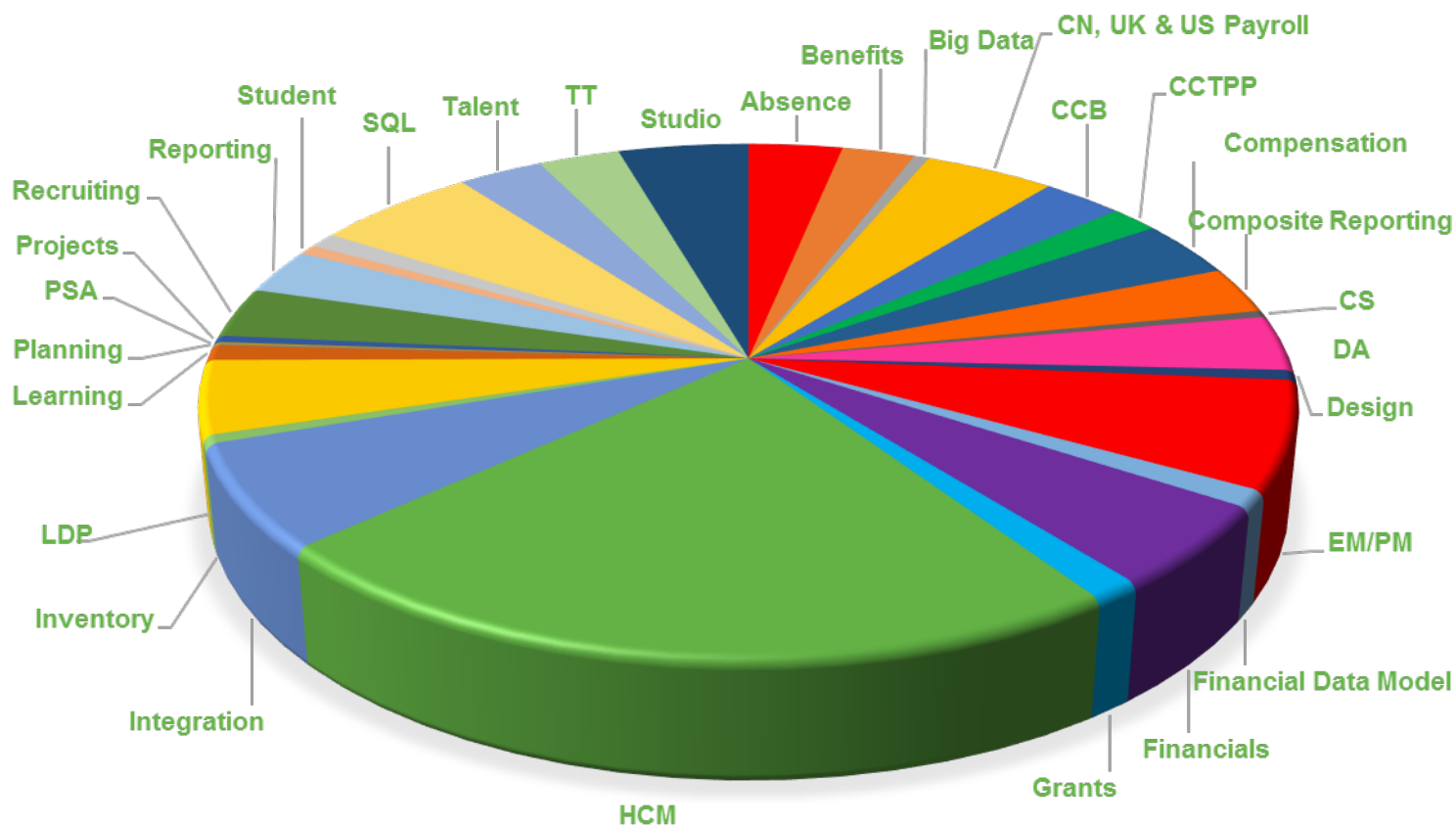
COLLABORATIVE SOLUTIONS

Over a decade of delivering
full-service HR and Financial
transformation to Education
& Government and Fortune
500 customers



Workday Practice Highlights

COLLABORATIVE SOLUTIONS WORKDAY CERTIFICATIONS
898 CERTIFICATIONS ACROSS 282 CERTIFIED CONSULTANTS AS OF SEPT
2017





Project Overview





Project Phases



Finance, Human Capital Management (HCM), Payroll

Student Systems

Updates to the timeline, should they occur, will be communicated to the Brandeis community.



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Workday Phase 1 Project Scope

HCM (Human Capital Management)	Finance
Core HCM	Core Financial Management, Accounting, and Finance
Compensation Plans	Financial Accounting
Compensation Processing	Banking & Settlement
Benefits	Commitment Accounting
Absence Management	Supplier Accounts
Time Tracking	Business Assets
Payroll	Revenue Management
Core Talent Management	Projects
Recruiting	Grants
	Endowments

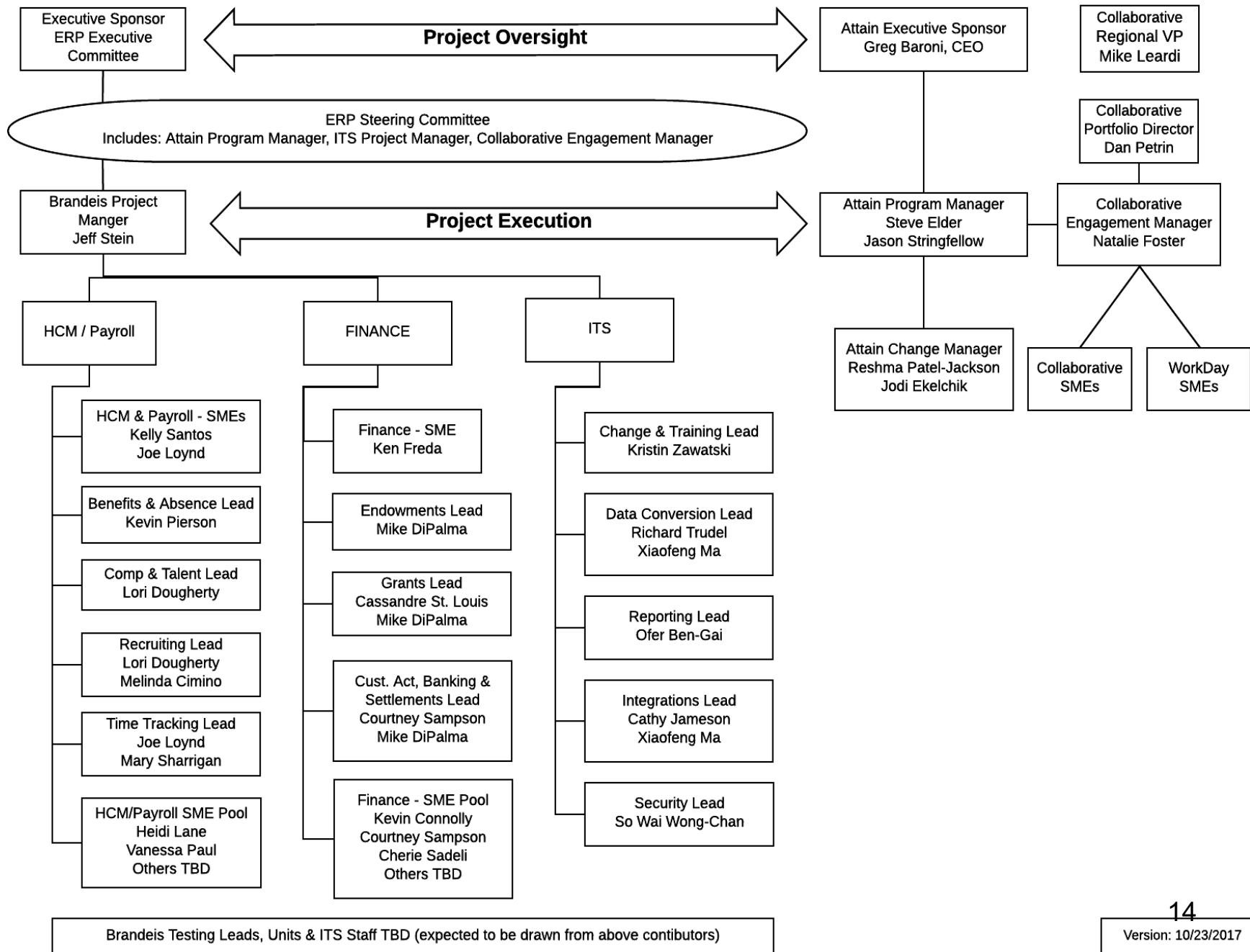




Project Overview



ERP Project Team Structure - Phase 1, HR and Finance





Project Overview





Workday Terminology

Workday Community

Tenants

AMU (Alma Mater University) = Workday demo environment

Implementation Tenants

Foundation Tenant

Configuration Tenant (Unit Test and Customer Confirmation sessions)

End-to-End Test (End-to-End and User Acceptance Test)

Parallel Tenant (Parallel Testing)

GOLD/Pre-Production (becomes Production)

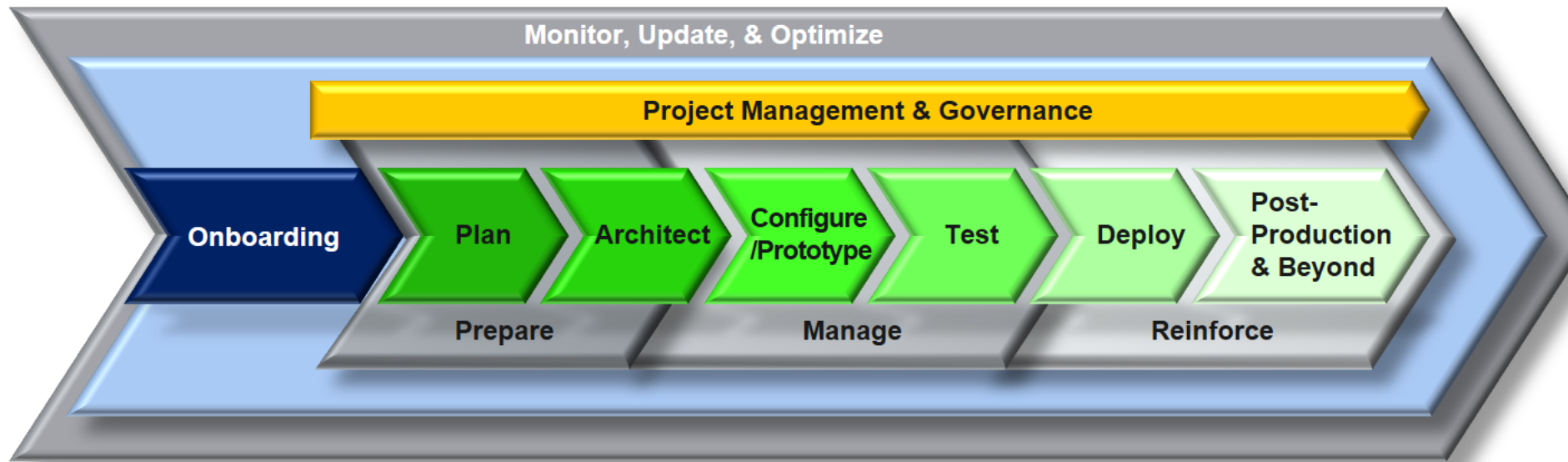
Production/Sandbox/Sandbox Preview

Workday Releases – current version WD29

Glossary of Terms - [in Community](#)



Implementation Methodology



**Project
Management
&
Governance**

**Tools,
Templates
& Best
Practices**

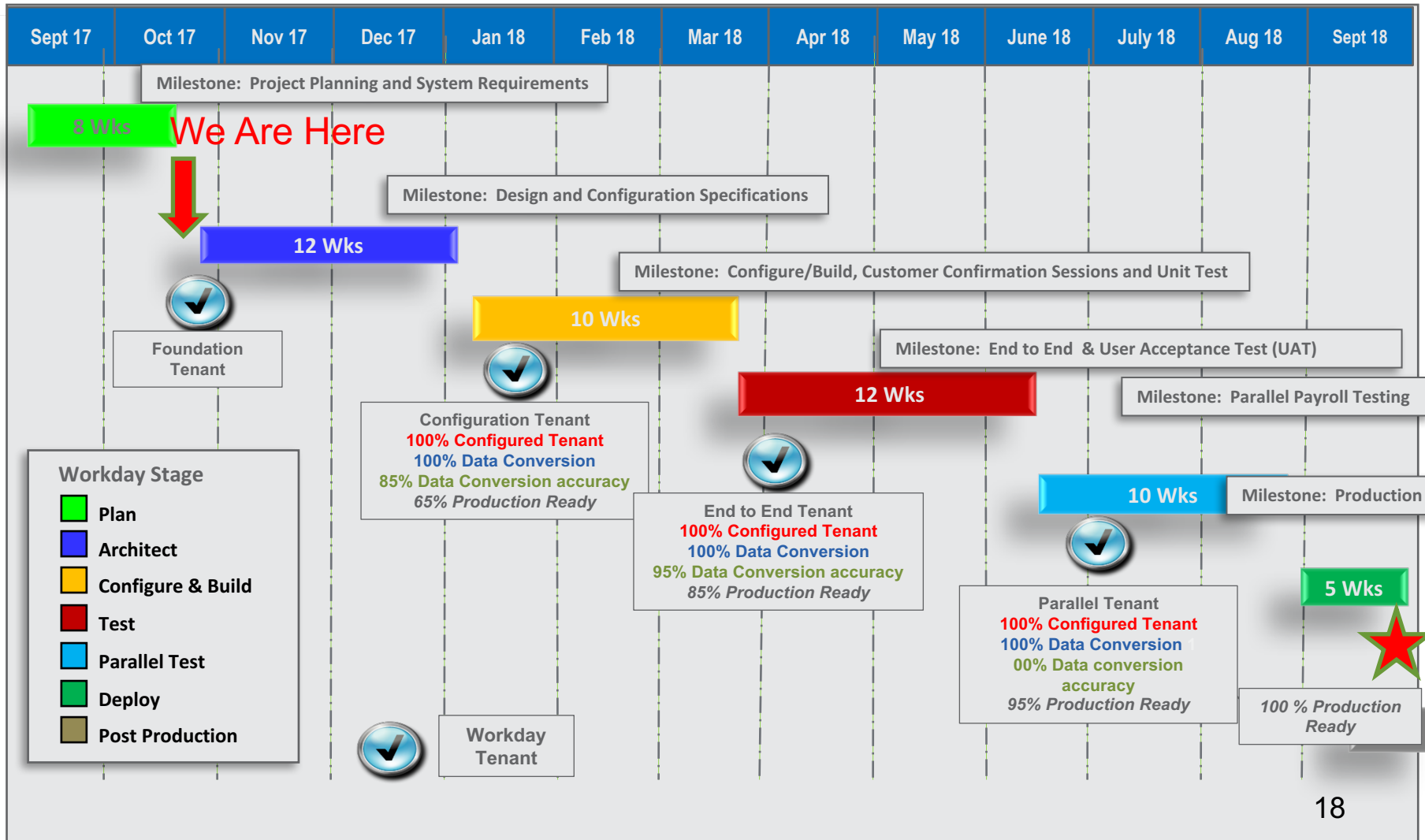
**Quality
Assurance
Reviews**

**Change
Management
Approach**



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High Level Project & Tenant Delivery Roadmap





Project Overview - Timeline

Stage	Start/End Date		
Plan	August 28, 2017	-	October 20, 2017
Architect	October 23, 2017	-	January 12, 2018
Configure and Prototype	January 15, 2018	-	March 23, 2018
Test	March 26, 2018	-	June 15, 2018
Parallel	June 18, 2018	-	August 24, 2018
Deploy	August 27, 2018	-	Sept. 28, 2018
Post Deployment	October 1, 2018	-	October 26, 2018



A Joint Ownership Approach

Brandeis: provide project management oversight, subject matter expertise, test planning and execution

Attain provide project management and change management support, including Communication and Training planning

Collaborative: provide the functional and technical expertise to design, configure or develop Workday based on **Brandeis** requirements, and leverage Collaborative's deployment methodology

Workday: provide Delivery Assurance to ensure the deployment meets all established guidelines and best practices

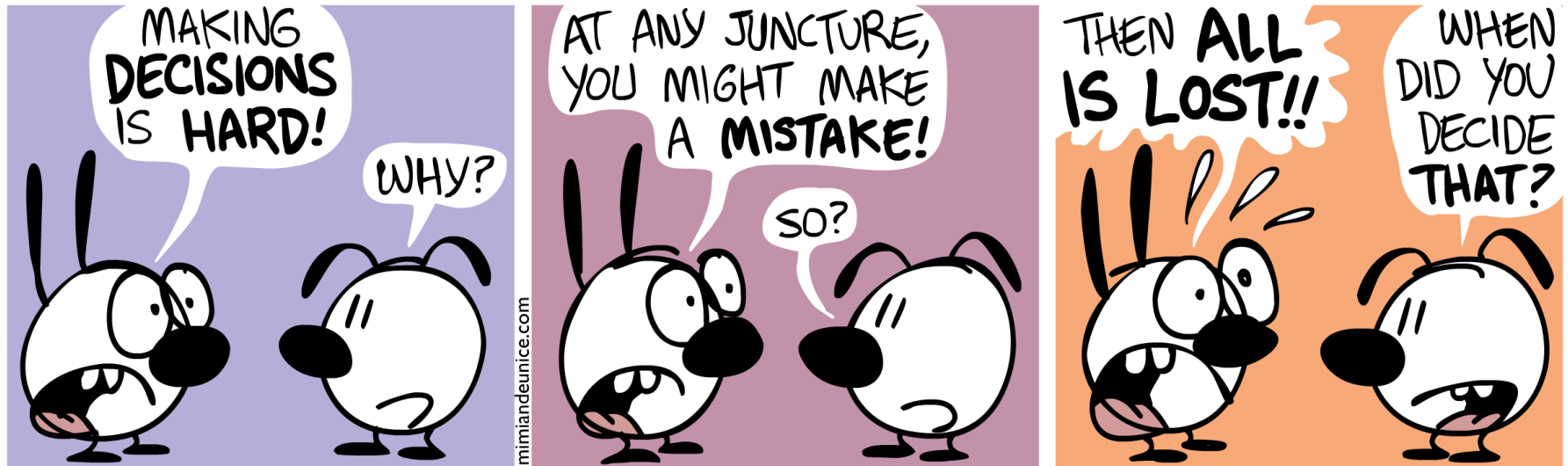


Workday	Collaborative	Brandeis/Attain
<ul style="list-style-type: none"> Provides Workday Deployment Methodology Workday Community and other resources Delivery Assurance Customer Success Workday Training Tenant Maintenance System Maintenance Quarterly Updates 	<ul style="list-style-type: none"> Provides Project Management Support Co-manage the Project Plan Delivers Deployment Methodology Provides Templates/Tools and Best Practices Project Team Training Setup & Configuration Configures and unit tests Data conversion & supports data mapping activities Supports the design & build of custom integrations Develops contracted reports Supports testing cycles Tenant Management 	<ul style="list-style-type: none"> Provides Executive Sponsorship Co-manage the Project Plan (Attain) Provides Functional Experts Defines Org Structure & Business Processes Provides Technical Resources for Integrations Data Conversion and Validation Strategy Data extracts, mapping & cleansing Design/develop client integration Execution of E2E, UAT & Parallel testing Change Management (Attain) End User Training & Documentation

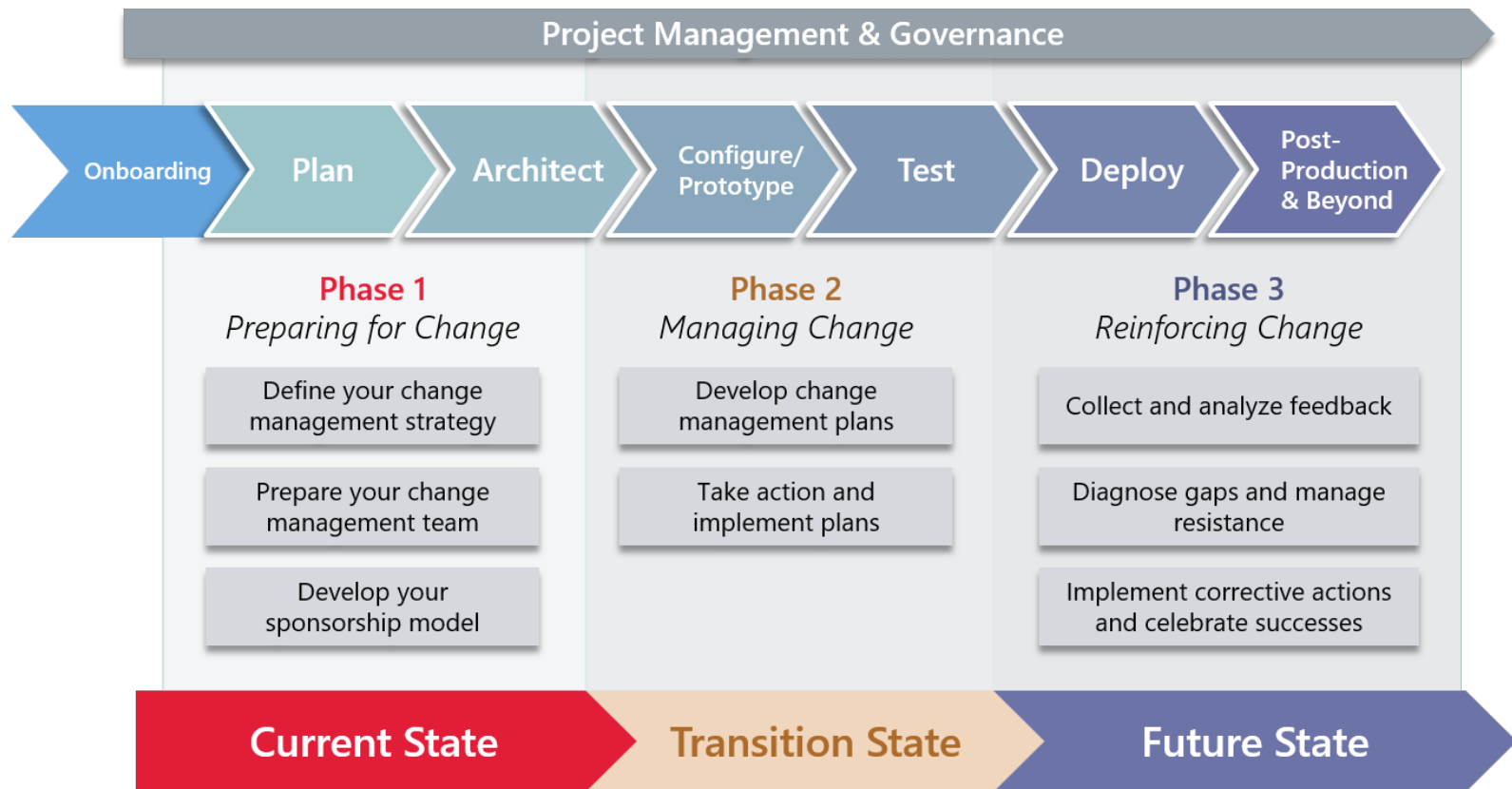
Next Stop: Change Management Communications Training

How are
we going
to do it?

What we are hearing....



Change Approach





Workday Project / Change Management

Change Management	<ul style="list-style-type: none">• Strategy and Plan• Deliverables
Communications	<ul style="list-style-type: none">• Strategy and Plan• Deliverables, e.g., Workday website, FAQs, Project Update
User Training	<ul style="list-style-type: none">• Strategy and Plan• Deliverables, e.g., job aides



Project
Training for
Project
Team

- Set up employee, vendors, customers, configure and maintain

End User
Training
for All

- E.g., Access your pay stub, enter time, login



brandeis.edu/workday

Brandeis University



Workday at Brandeis

Enterprise Resource Planning (ERP)

Enterprise resource planning (ERP) is a business process management software that will allow Brandeis University to use a system of integrated applications to manage the business and automate many back-office functions related to technology, services and human resources. This will enable the integration of systems for student administration, human resource management, financial management and business analytics environments that are currently supported by separate and sometimes incompatible information packages at Brandeis University.

Why Workday?

After a year-long ambitious and inclusive review process, Brandeis has determined that Workday, a modern, integrated, web-based software designed to standardize human resources and payroll processes, is the best system to meet the University's current and future operating requirements. By choosing Workday, the University will receive numerous benefits not available with traditional, on-premise software applications:

- Improve communications, collaboration and cooperation across campus
- Increase data integrity, validity and reliability and information flow

[Who Is Involved](#)

[Resources](#)

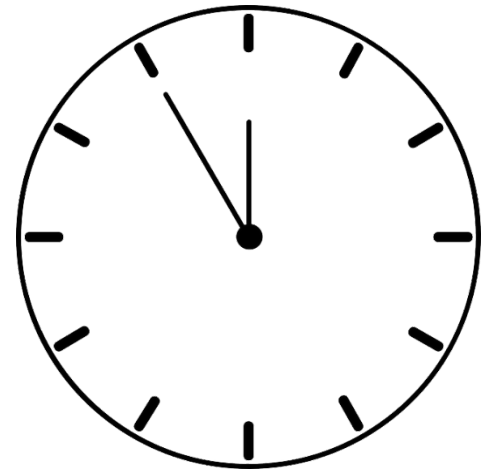
[Home](#)

About This Website

In the interest of providing transparency about the ongoing ERP project, the ITS Workday Team will continue to add information to this project website. Future iterations will include a project calendar, Workday training opportunities, videos, presentations and a project blog.


Please email workday@brandeis.edu with any questions, suggestions or comments.

Break – 5 Minutes



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Next Stop: Project Administration



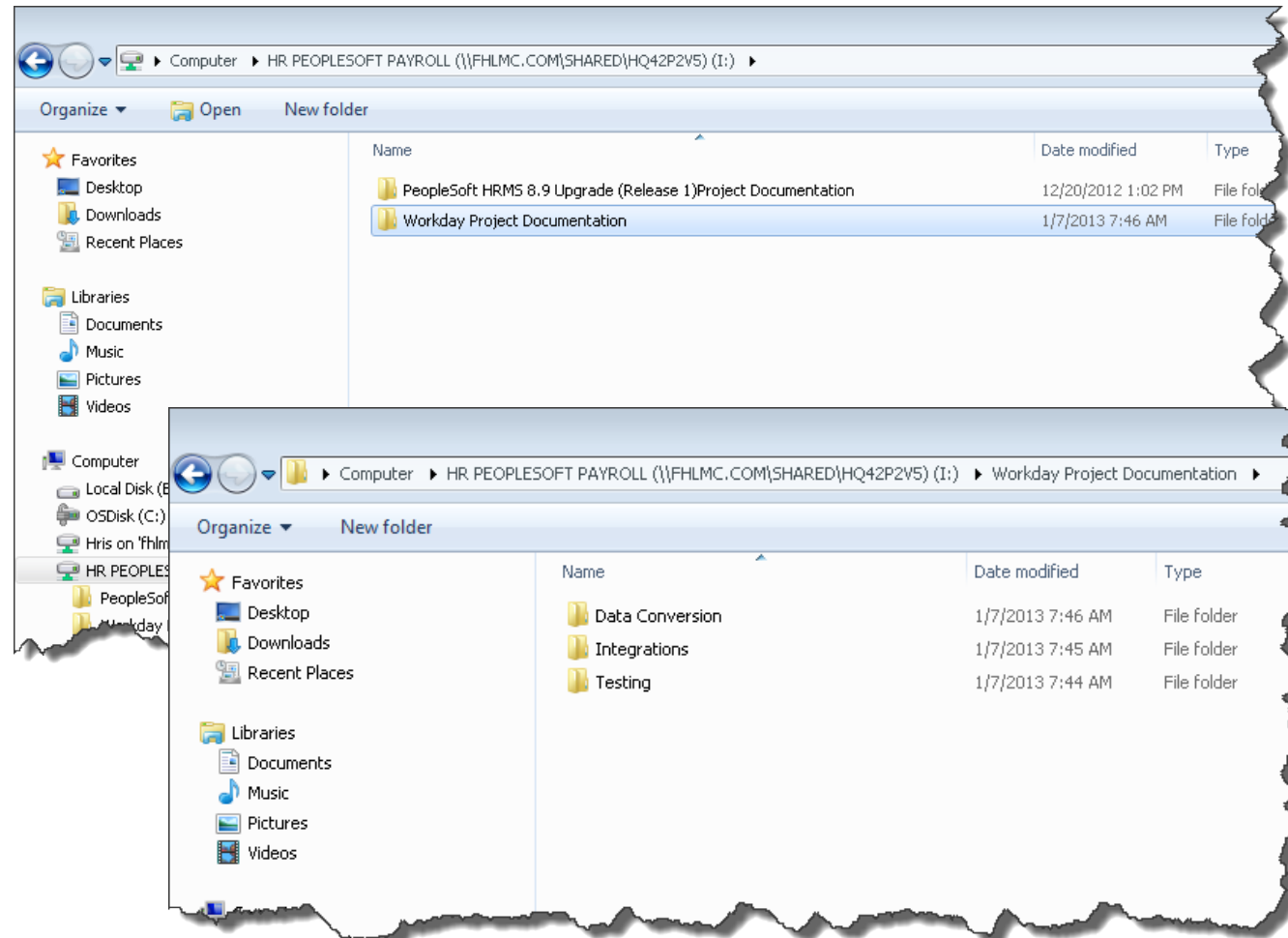
How are
we going
to do it?



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Confidential Data – Secured System Access

- Used to exchange Confidential Data
- Data Conversion
- Issue Details
- Screen Prints
- Exports/Reports
- Integrations



Security / Data Protection

Consider ALL Data Confidential

When in doubt – ASK!

Data Protection Requirements

Do not send emails, spreadsheets, etc. with sensitive information

Lock your computer/workstation when you step away (Ctrl+Alt+Delete)

Always use SFTP or secured shared drive for exchanging data

Do not download data to laptops

Delete data when task is complete and data no longer needed

Passwords

Stored in a Secure Manner

User Id/Password Sharing is Not Permitted

Generic User Id/Passwords only used when Authorized

Use Complex Passwords (upper/lower case, numbers, special characters, minimum length)

Access granted only with authorization from Project Managers

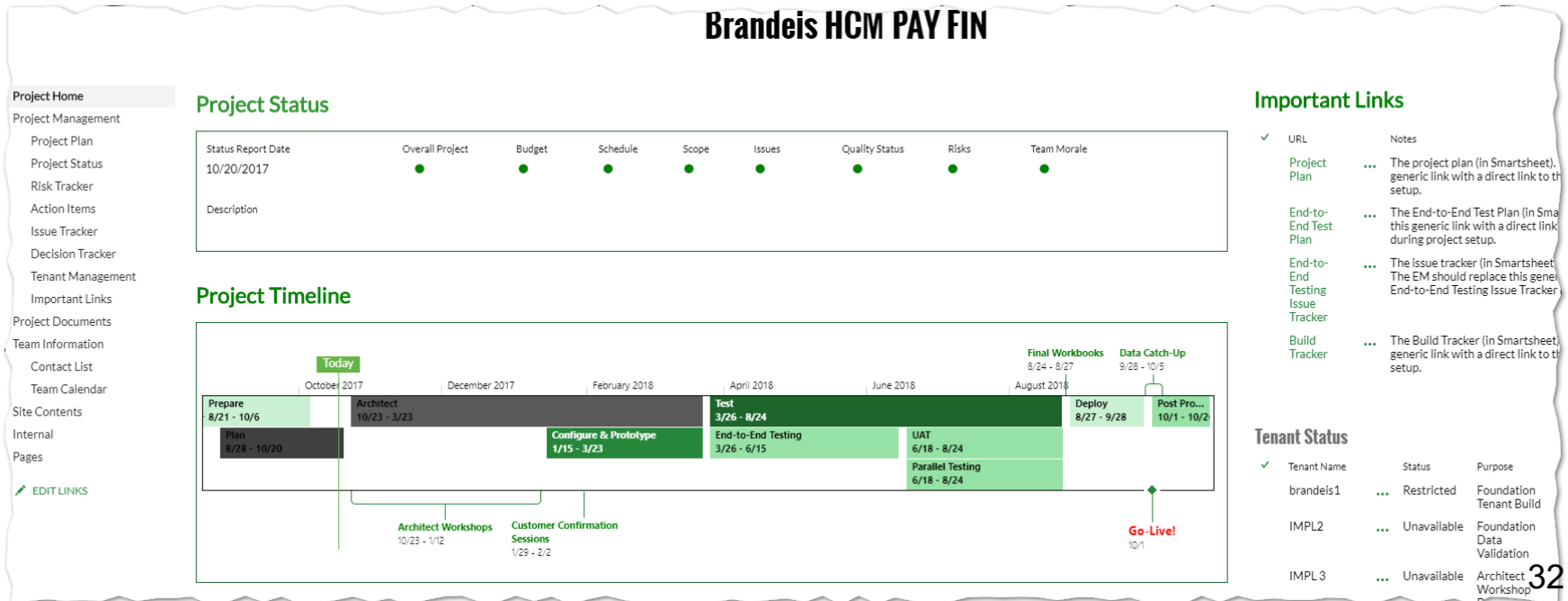
Data Protection is Everyone's Responsibility!!!!

Report any Data Protection/Security Concerns to Project Managers Immediately

CS Engagement Manager will report any data breaches to Workday

SharePoint

- Secured project collaboration and documentation tool
- Version control functionality on files
- Issue and report tracking
- Team Contact List
- Team Vacation Calendar
- Links/Tenant Management
- **Do NOT store Confidential data here!!**

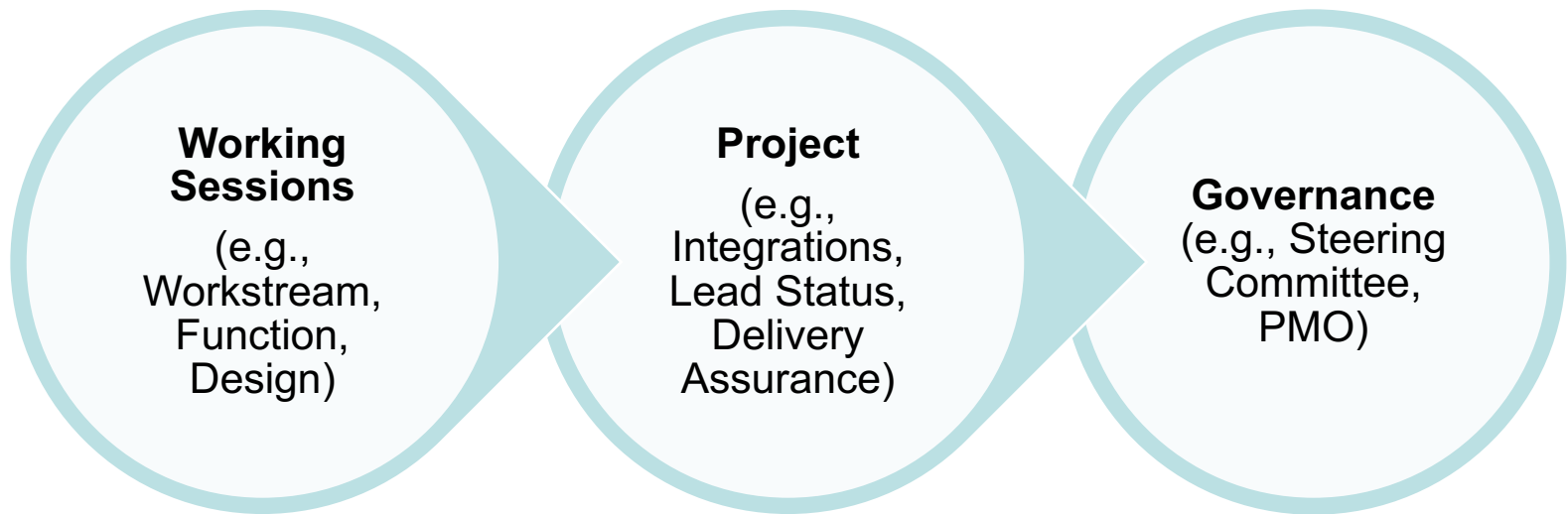


What's In SharePoint?

	Definition	Responsibility	Process
Risk	An issue that may occur that impacts the project	PMO to update and maintain	Identify, Analyze, Risk Response, Monitor, Close
Issue	An event that has occurred that impacts progress on the project	PMO to update and maintain (Initial), Transition to Leads to enter and maintain	Create, Resolve, CR, Close
Action Item	A task to be performed on the project (<8h) outside of the Work plan	PMO to update and maintain (Initial), Transition to Leads to enter and maintain	Create, Perform, Close
Project Plan	Tool to track progress during the project life cycle	PMO to maintain	PMO to update weekly
PMO = Project Management Office			



Project Meetings



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Scope Control

What do I do if I see an issue/risk or something missing?

All Staff	<ul style="list-style-type: none">• Notify the core project team (leads, PMO, CS counterpart, etc.)
Project Leads/Core Project Team	<ul style="list-style-type: none">• Notify the Project Management Team of the potential change in scope.• This is an accelerated project, so notifications are time sensitive• You may be asked to assist in documenting specifications and business case.• Do not proceed with the work associated with the adjusted scope until approved by the project management team.
PM/PMO	<ul style="list-style-type: none">• Assess feasibility and estimate time, cost and impact.• Present change order to PMO. Without the approval of the PMO, the feature/scope will not be added to the Scope for deployment.• Execute the change order in compliance with the terms of the Change Order Process



Next Stop: Architect workshops



Architect sessions begin Oct 24, 2017



Phase: Architect - Objectives

- Engage Brandeis SMEs in a review of the Workday system features, per scope, and the customer provided data.
- Discuss and derive application configuration decisions and identify requirements, dependencies or gaps.
- Present business processes and review Critical BPs. Identify change management impacts associated with transition to Optimized processes.
- Review Integrations scope and inputs.
- Review data gathering methodology and conversion tools and prepare Brandeis in developing data conversion and validation strategy.

Brandeis University

Monday	Tuesday	Wednesday	Thursday	Friday
Oct 23	24 HCM AM/PM FIN AM/PM	25 HCM AM/PM FIN AM/PM	26 FIN AM/PM Project Kick Off HCM AM/PM	27
30 Supplier Accts Business Assets	31 Grants Banking	1 Endowments Cust Accounts	2 Grants	3
Nov 6 Benefits Benefits	7 Benefits Benefits	8 Absence AM/PM	9 Absence Time Tracking Adv Comp/Talent	10 Time Tracking AM/PM
13 Data Conversion	14 US Payroll US Payroll	15 Recruiting US Payroll US Payroll	16 Recruiting US Payroll US Payroll	17 Integrations-TBD
20 Integrations-TBD	21	22	23	24



What Happens After Architect Workshops?

- Weekly work stream meetings to discuss open issues and assign to SMEs for resolution - working.
- Customer delivers final configuration and worker data to Collaborative in preparation for the Configuration Tenant build by **12/06/17**.
- Collaborative Configures Configuration Tenant for Customer Confirmation Sessions by **12/20/17**.
- Reconvene for Customer Confirmation of Configuration Tenant starting **01/16/18**.
- SMEs review Issues list on an on-going basis and maintain issues (status, resolution, target date to resolution, etc.).



Questions



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