MONTCLAIR STATE UNIVERSITY

Workday End User Community Kickoff

November 14, 2018

AGENDA

❖ Project Scope & High Level Timeline

❖ Responsibilities & Time Commitments

❖ MSU Project Leadership

❖ Testing Overview

❖ Change Management Overview

❖ Questions & Wrap up

Scope & Timeline

- **Core Financials:**
  - Financial Data Model (FDM aka Chart of Accounts)
  - Financial and Budget Management
  - Financial Reporting
  - Cash Management, Banking & Settlement (aka Accounts Payable)
  - Asset Management
  - Cost and Budget Reporting and Dashboards
- **Grants**
  - Post Award Grant Management
  - Billing
  - Budget vs Actual Reporting and Dashboards (detail level)
- **Capital Projects**
- **Procurement**
  - Purchasing
  - Supplier Management
  - Punch Outs
- **Expenses (Travel and Expense)**

SCOPE – EXTENDED HCM FUNCTIONLITY

- Affordable Care Act ACA Processing for 2018 Calendar Year
- Employee Recruiting
- Employee Performance Management
- Automated PAAF Workflow
- Rework of existing implementation as necessary to support an integrated HR/Finance System
- Security re-design to accommodate Financials deployment

CORE WORKDAY HIGH LEVEL TIMELINE
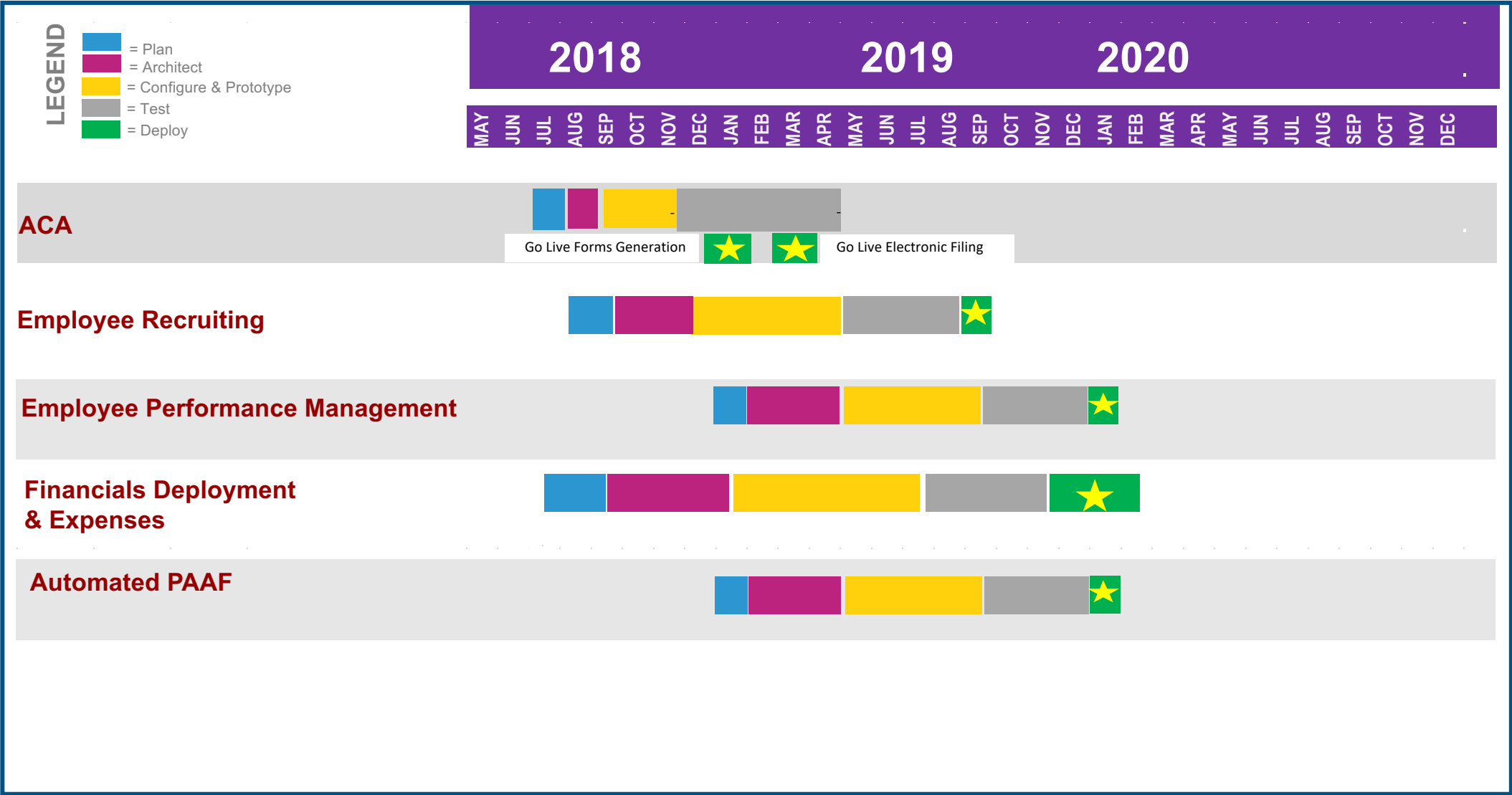
End User Community Responsibilities & Time Commitments

END USER COMMUNITY

- Ultimately responsible for ensuring the system supports school/department Finance/HR business processes

- Validate delivered system performs as expected

- Acts as school/department change agent

Participate / Advocate / Communicate

Review Designs Against Business Processes
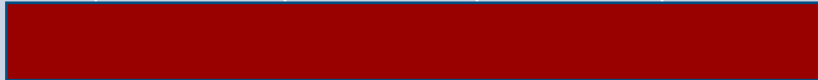
Go-Live Support for School

Test System

On-going feedback

Validate Security Access

END USER COMMUNITY TIME COMMITMENT

Project Activity/Phase	Time Allocation	Sep – Dec 2018	Jan –Jun 2019	Jul – Oct 2019	Nov -Dec 2019	Jan 2020
Architect Phase – 10%	• Contribute to future state process design • Contribute to definition/assignment of security roles	■				
Configure/Prototype – 5%	• Participate in iterative configuration reviews as needed • Validate security access as needed		■			
Test – 20%	• Perform end user testing • Report system defects and re-test as necessary			■		
Deployment/Post Go-Live – 15%	• Go-live support representative for your school/department				■	■
Change Management and Training	• Provide ongoing feedback to assist in managing end user change • Advocate for the project and facilitate communications/training across the campus		■	■	■	■

END USER COMMUNITY

CEHS

Jason Rubin

CHSS

Jason Dickinson

University Advancement

Amy Fairclough

Academic Affairs

Ken Sumner
Mary Colon
Nicola Sullivan

CSAM

Polina Chelnitsky
Gloria Rodriguez
Stefanie Brachfeld

Information Technology

Debbie Coull

SBUS & ORSP

Catherine Bruno
Jonida Dervishi

SDCL

Andrew Pignataro
Melissa Ginotti

Graduate School

Caren Ferrante

CART

Marie Sparks
Zacrah Battle

MSU Project Leadership

BUSINESS SPONSORS

Candy Fleming

Jon Rosenhein

David Vernon

David Josephson

- Executive champion(s) of the project who identify business case and business priority

- Accountable for the overall success of the program including scope management

- Champions people and process changes to impacted business operations

- Communicates with other business groups to advocate ongoing project support and sponsorship

- Ensures that the appropriate resources are available for the project

- Participates in monthly Steering Committee meetings to confirm the project is meeting the goals and timelines outlined at the beginning of the project

PROGRAM/PROJECT MANAGEMENT

Donna Sadlon	Bill Neal	Mike Galvin

- Plans, coordinates and delivers project/program resource dependencies and outcomes to timeline, scope, and budget
- Integrates business, IT and 3rd party service provider work efforts
- Facilitates scope negotiations when necessary
- Ensures program/project is delivered according to approved contracts
- Ensures project outcomes become part of normal business operations
- Facilitate human change management activities to encourage adoption of the new systems and processes
- Facilitate all programs/projects status meetings
- Accountable for delivery of the overall programs/projects

FUNCTIONAL LEADS - MSU

- Ultimately responsible for ensuring the system is configured to meet MSU requirements

- Responsible for supporting the system post go-live

Chris Palma Tony Markowsky Procurement	Carolen Amarante Capital Projects	Kevin Andreano Budgets
	Mike Galvin Core Finance	Lillian Nash Grants/T&E
Monica Tejeda Recruiting	Keesha Chavis Performance Management	Betty Paulino ACA
		Bindu John Automated PAAF

Testing Overview

"SYSTEMATIC

OBJECTIVE

THOROUGH"
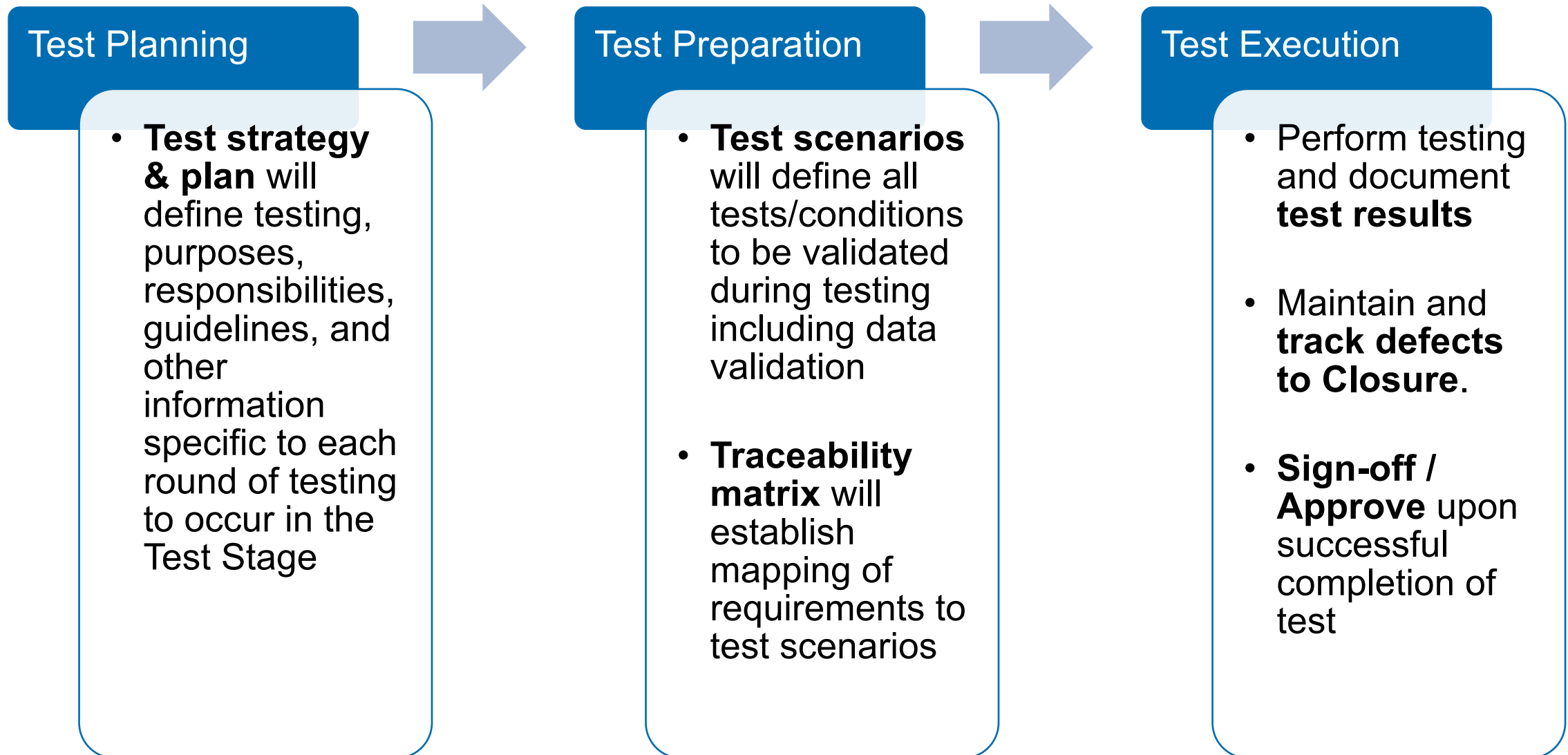
❖ Test planning & preparation activities to be performed earlier in the project lifecycle in alignment with the project life cycle phases

❖ Perform testing to meet the objective at various stages of the project through the different testing types

❖ Adequate and thorough testing to ensure that the project meets the business and technical requirements that guided it's design and development

TEST PROCESS

Test Planning

- **Test strategy & plan** will define testing, purposes, responsibilities, guidelines, and other information specific to each round of testing to occur in the Test Stage

Test Preparation

- **Test scenarios** will define all tests/conditions to be validated during testing including data validation

- **Traceability matrix** will establish mapping of requirements to test scenarios

Test Execution

- Perform testing and document **test results**

- Maintain and **track defects to Closure**.

- **Sign-off / Approve** upon successful completion of test

TESTING TYPES

	What ?	Who ?	Why ?
Smoke Testing	Conducted for each build in project to ensure build is complete by executing key business processes, organizational structures, security assignments and data spot checks	SCI Functional Consultants; Integration Consultants and Data Migration Leads	Uncover any conversion issues in advance before handing tenant over to MSU testers Perform Dry Run to ensure that profiles and security access is appropriate for testing to be able to start on time with minimal interference
Unit Testing	Logical/isolated tests of independent processes and functions during the Configure and Prototype stages	MSU Business Analysts/Functional Leads; SCI Functional Leads	Confirm design decisions Knowledge transfer Uncover issues related to the business process flow of transactions within a functional area Identify further consideration for configuration within a functional area Uncover issues related to security

TESTING TYPES

	What ?	Who ?	Why ?
System Testing	Initial review of configuration in the tenant to test flow of end-to-end processes between multiple functions and 3rd party integrations during the Test stage	MSU Business Analysts/Functional Leads (SCI supports); MSU Reporting and Integration Leads (SCI supports)	Test interdependencies of all functional areas Test inbound and outbound Integrations Test delivered and custom reports and identify reporting gaps
User Acceptance Testing	Allows select end users/business owners, outside of the core team, to provide final validation that the configured system and training/reference support is ready for production during the Test stage	MSU Business team including SMEs and other end users; Functional Process Leads and Business Analyst/Functional Leads to support the UAT testers	Validate business processes and configuration Validate mobile use functionality Validate security controls Test training materials, help text, procedures and documentation

APPENDIX

Test scenarios template / sample

					Test Scenario / Case			Test Result		
This section is to be prepared during test preparation('Build' phase of project lifecycle)							This section is to be filled during test execution ('Test' pha...			
Req ID	Test ID	Component / Requirement	Test Title	Test Summary			Actual Result	Status	Date Tested	Tester's name
IAMS-046, 169	002		1-time token delivery via email	Confirm that 1-time token is sent to student's correct external email address from Banner records						
IAMS-046, 169	003		1-time token delivery via SMS	Confirm that 1-time token is sent to student's correct cell phone from Banner records via SMS						

Organizational Readiness

CHANGE MANAGEMENT APPROACH

1. **Framework:** Naturally structured change adoption process drives
   - Communications
   - Training
   - Change management actions
2. **Roadmap alignment** with project plan phases
3. **Change agents / partners** build awareness and understanding
   - Share project information with peers
   - Champion the change
   - Bring feedback to project team

ADKAR:
THE PHASES AND SEQUENCE REQUIRED FOR AN INDIVIDUAL TO EXPERIENCE SUCCESSFUL CHANGE

KNOWLEDGEABLE CUSTOMERS ARE SUCCESSFUL CUSTOMERS

Awareness Campaign
- Build Change Network
- Announce project start-up
- Identify impacted audiences / communication channels

Desire Campaign(WIIFM)
- Communicate highlights and benefits (WIIFM)
- How processes will be improved
- General project updates at standing meetings

Knowledge Campaign
- Show-and-Tell Roadshows to impacted audiences
- Sample demos / video presentations
- Knowledge of what is changing and change impacts

Ability Campaign
- What training program and schedule look like
- Training formats available
- System Roles

Reinforcement Campaign
- Evaluate training
- Support model
- Opportunities for continuous education

2. THE ROADMAP ALIGNMENT

A	**D**	**K**	**A**	**R**
Planning	**Architect**	**Configure/Prototype**	**Testing**	**Deploy**

Nov. 2018   **Jan. 2020**

Awareness Campaign	Desire Campaign	Knowledge Campaign	Ability Campaign	Reinforcement Campaign

• **Objectives:**
  ○ Messages declaring the need for change
  ○ Why it is important to do at this time
  ○ How it conforms with MSU's mission and vision
 	
• **Kickoff Meeting** (Nov)
  ○ Change Management Overview
  ○ Introduction to ADKAR
  ○ Awareness Phase Overview
  ○ Workday is Coming Poster
 	
• **Discussion**
  ○ Project will be successful if:
  ○ Opportunities to share information with peers include:
	• Objectives:
	  ○ Exciting new features Workday Finance will bring
	  ○ End-user benefits, highlights, and WIIFMs (What's in it for me?)
	  ○ How processes will be improved
	  ○ Efforts of the project team and functional managers during this stage of the project
		• Objectives:
		  ○ How will business processes be performed after the change?
		  ○ Why is this new process better than our old way of doing things?
		  ○ What are the different user roles in the new system, and how are they different from today's roles?
		  ○ What are the impacts to current operations for Faculty? Staff? Student Employment?
		  ○ How will users be supported through the transition?
			• Objectives:
			  ○ Details about the training program and schedule
			  ○ How training will be supported, reinforced
			  ○ What tools are available to support day-to-day activities after the change
			  ○ General readiness activities taking place
				• Objectives:
				  ○ What users can expect on launch day
				  ○ Where to go for support and/or on-demand training
				  ○ User success stories and "a ha" moments
				  ○ How to provide feedback or recommendations for continuous improvement

3. THE CHANGE NETWORK – YOU!

Accelerating Adoption through Engagement

The **Change Network** helps move users toward adoption by:

- Providing team members with a **peer resource** to turn to for questions

- Ensuring end-users are **engaged and informed**

- Facilitating the current change management **ADKAR objective**

- Helping team members to adopt changes by demonstrating **active, positive leadership**

- Creating a **two-way communication** channel by disseminating project information outward, and reporting any local issues or concerns.

Team members listen to and learn from their peers, so creating a strong network of informed advocates for the project will help move audiences on the road to adoption.

- End-users will consider this project successful if . . .

- The opportunities I have to share information with peers include . . .

Awareness Talking Points:

➢ The Workday **Core Workday Project** has begun

➢ Scheduled for completion **January 2020**

➢ Visit the **Core Workday website** for ongoing information