iNtegrate 2 Orientation

March 17, 2015
2:00pm
iNtegrate 2 Vision

• To provide campuses, the System office, and the Regents with a single version of the fundamental and foundational NSHE-wide financial data in the most efficient and effective manner.

• Implementation of best practices in business and administrative processes as well as the reduction of unnecessary duplication of back office functions across all NSHE institutions, while ensuring that consistent and effective operating policies are in place.
Guiding Principles

• We will fundamentally “transform” how NSHE does business
• We will design and follow standardized business processes system-wide
• Workday First: Adopt native Workday configured processes first, with considerations from the Huron Business Process Review, the Huron Chart of Accounts Study, and BoR Efficiency and Effectiveness report.
• We will eliminate duplicative and unnecessary back office operations across NSHE
• We will design an efficient state-wide management structure for shared services
• We will make a dramatic move away from a paper-based work environment
Shared Services

- Payroll
- Benefits
- Purchasing
- Classified Personnel (long term)
- Other areas as identified
Governance

• iNtegrate 2 Executive Steering Committee

• Campus Executives Committee

• Business Process Exception Request
Roles

• The Subject Matter Expert is that individual who exhibits the highest level of expertise in performing a specialized job, task, or skill within the organization. The SME should know the who, what, when, how and why of steps within the business process.

• The Designees are SME’s who have been deemed to have the highest level of expertise within NSHE for the function and will lead/coordinate discussions during Business Process Design sessions.
Implementation Methodology

Workday Project Methodology by Stage

Plan
- Review Project Scope
- Develop Project Plan & Project Charter
- Define Roles & Responsibilities
- Define Communication Plan
- Initial Prototype (P0)
- Project Kick-off

Architect
- Establish a shared understanding of requirements and solution design

Configure & Prototype
- Complete the configuration based on specifications from Architect

Test
- End-to-End Testing
- Prototype 3 (P3)
- User Acceptance Testing

Deploy
- Training and Roll-Out
- Go-Live Checklist
- Transition to Production Services
- Project Close

Why
- Define what needs to be done, how it will be done, and who will do it
- Establish a shared understanding of requirements and solution design
- Complete the configuration based on specifications from Architect
- Confirm that the system meets client’s quality criteria
- Prepare and execute client’s move production

Project Management
Knowledge Transfer and Change Management
Delivery Assurance
Implementation Methodology

Plan: Set overall project direction, administration and expectations

Architect: Analyze requirements and business processes by leveraging Workday's optimized configurations

Configure & Prototype: Iterative approach to configuring Workday based on requirements

Test: Validate configuration decisions, system and user readiness

Deploy: Final build and move to production

Optimize: Transition to Workday production support. Ongoing update and optimization as needed.

Project & Quality Leadership, Change Management, Knowledge Transfer
General Timeline
Schedule

HCM Architect

April
- Workday Fundamentals Training
- HCM Overview

May
- HCM Design Sessions
- Workday Functional Area Training (e.g., Benefits, Payroll)

June - July

FIN Architect

March
FDM Overview

April
Workday Fundamentals Training

May
FIN Design Sessions

June - August
- Workday Functional Area Training (e.g., Procure to Pay, Grants)
- Design Sessions: Procurement, Grants Management
Team Meeting Logistics

- Consultants will be on-site approximately every other week.
- On-site meetings will alternate between North and South SCS locations.
- Video Conferencing will be used, when appropriate.
- Homework and other assignments will occur during consultant off-site weeks.
Risks

• Resistance to Change/Fear of Change
• Resource Availability (NSHE & SCI)
• Retirements
• Disagreement on standard business process
Next Steps

• Conference call week of 3/23 with Designees & SMEs about training (NSHE Core Team responsibility)
• Issue Project Charter (NSHE Core Team responsibility)
• Develop and publish a detailed project plan (Sierra-Cedar responsibility)
• Backfill plan (Executive Steering Committee responsibility)