IT Update
Workday Phase I, Phase II
Other ITS topics

P&S Council
Kristen Constant and Steve Mickelson
July 1, 2021
Agenda

• Phase I
  HCM/Finance/Payroll/Planning
• Phase II
  SIS/Receiveables
• ITS Updates
Phase I – HCM, Finance, Payroll, and Planning

• In production – TWO years today
• Continuous Improvement Efforts
  • Satisfaction survey through Institutional Research
  • Regular ‘immediate’ feedback through ServiceNow requests
    • Compiled, reviewed and reported on through ISD Advisory Committee
  • Quality Assurance ‘Health Check’
    • Support team
    • Finance ‘Super users’
  • Focus Group Discussions
• Resources for Support
  • Additional Training Coordinator
  • Change Management and Communication Specialist
<table>
<thead>
<tr>
<th>Phase I</th>
<th>Phase II</th>
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<tbody>
<tr>
<td>HCM/Finance/Payroll followed by Planning</td>
<td>Student Information System and Receivables</td>
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<tr>
<td>Improved Service Delivery Transition</td>
<td>No equivalent</td>
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<tr>
<td>Readiness Assessment - Fit Gap Analysis</td>
<td>Readiness Assessment, Fit Gap Analysis,</td>
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<td>Business Case, Budget/Resource Plan</td>
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<td>Major Accounting Transition: Cost to</td>
<td>No equivalent</td>
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<td>Modified Accrual</td>
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<td>Concurrent Go Live</td>
<td>5 Staggered Go-Lives</td>
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<td>No Backfill for Team</td>
<td>Partial Backfill</td>
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<td>Consultant leads for Communications and</td>
<td>Iowa State leads for Communications and</td>
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<tr>
<td>Change management</td>
<td>Change management</td>
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<tr>
<td>Initial timeline very short</td>
<td>Using Workday recommended timeline</td>
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<td>Limited faculty engagement started 18</td>
<td>Faculty engagement beginning in the planning</td>
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<td>months before go live.</td>
<td>phase</td>
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<td>Reporting outreach ramped up 6 months pre-</td>
<td>Focused institutional reporting and analytics</td>
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<tr>
<td>go live</td>
<td>team created pre-launch</td>
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<td>ITS experience with limited Enterprise</td>
<td>Experience with major ERP implementation</td>
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<td>programs. Some distributed experience.</td>
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<td>Learning ‘as we go’ to work with distributed</td>
<td>Experienced working remote and distributed</td>
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<td>teams (campus-wide and nationally)</td>
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Phase II – SIS/Rec Desired Outcomes

• **Outcome 1. Helping Cyclones Succeed**
  • Support diverse student populations, curricular clarity, data analytics
  • Satisfying, valuable experience
  • Ease in navigating systems, identifying resources and options

• **Outcome 2. Innovation and Agility**
  • Strong yet flexible
  • Engagement in decision making
  • Trust and transparency

• **Outcome 3. Standardization and Simplification**
  • Eliminate unnecessary complexity
  • Reduce redundancy
  • Simple, elegant, effective
Phase II – SIS and Receivables

- Leadership Team Identified
  - K. Constant and S. Mickelson – Co-Leads
  - SIS/Rec Functional Leads
    - Geoff Janes, Crystal Johnson (Co-Leads: Steven Moore and Tammy Hansen)
  - Technical Team
    - Brian Ntem
  - Change Management
    - Scott Butterfield
- Functional Team – Tech
  - Data Conversion, Integrations, Reporting, Security

- Functional Teams – SIS/Rec
  - Academic Advising
  - Curriculum Management
  - Financial Aid
  - Non-Student Receivables
  - Recruitment and Admissions
  - Reporting and Analytics
  - Student Financials
  - Student Core and Academic Foundation
  - Student Records
Phase II – Where are we now?

• Plan and Discovery Phase
  • April 2021-January 2022

• Program Manager Hired – Steve Kish

• Student, Staff and Faculty Experience Focus Groups Held
  • More scheduled in the fall (and possibly beyond)

• Team Workday Training has begun

• Finalizing governance and change management approaches
  • Steering Committees, Advisory Groups, Campus Change Network

• Documenting current state policies, procedures, integrations and reports

• Baseline Value Assessment Planning
**Draft Timeline**

**April 2021 - January 2022**
- Plan and Discovery

**December 2021 - May 2023**
- Architect, Configure, and Prototype

**2021**
**2022**

**December 2022 - December 2024**
- Test

**January 2025**
- Full Production

**January 2025 - February 2026**
- Postproduction Support

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**June 2023**
- Recruiting & Admissions
- Application Fees & Tuition Deposits
- Academic Calendar
- Academic Units
- Programs of Study
- Student Core

**October 2023**
- New Student Financial Aid
- Course Catalog
- Class Schedule

**March 2024**
- Registration & Advising
- Tuition & Fee Assessment
- Continuing Student Financial Aid
- Student Record Conversion

**September 2024**
- Financial Aid Distribution
- Billing
- Payment Processing

**December 2024**
- Grading
- Graduation
- Transcripts
- End-of-Term Processing

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**Phased Implementation for Business Function Go-Lives**

**2021 - 2022**
- Plan and Discovery

**2022 - 2023**
- Architect, Configure, and Prototype

**2023**

**2023 - 2024**
- Test

**2024 - 2025**
- Full Production

**2025 - 2026**
- Postproduction Support

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Other ITS Updates

Hybrid Work Pilot starting today
  • Evaluation of Pilot Planned

Conversion of Students to Microsoft e-mail (from Google)

Continuing to monitor and address escalating security threats

Continuing pandemic response
  • Technology needs moving forward

Identity Management Modernization on the Horizon
Thank you!

Discussion and Questions