<table>
<thead>
<tr>
<th>Topic</th>
<th>Comments Heard</th>
<th>Today’s Agenda Item / Objective</th>
<th>Target Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>N/A</td>
<td>Agenda Overview</td>
<td>5 min</td>
</tr>
<tr>
<td>FST Project Overview</td>
<td>N/A</td>
<td>Project Timeline - Where Are We?</td>
<td>5 min</td>
</tr>
<tr>
<td>Foundation Data Model (FDM)</td>
<td>What’s our progress on FDM Mapping?</td>
<td>FDM Sprint update</td>
<td>10 min</td>
</tr>
<tr>
<td>Security Role to Position Mapping</td>
<td>What decisions have been made? When will I have input?</td>
<td>Security Roles Approach and timeline</td>
<td>10 min</td>
</tr>
<tr>
<td>GL Balance Conversion</td>
<td>N/A</td>
<td>GL Balance Conversion Approach</td>
<td>5 min</td>
</tr>
<tr>
<td>Adaptive Updates</td>
<td>N/A</td>
<td>Testing</td>
<td>5 min</td>
</tr>
<tr>
<td>Reporting &amp; Analytics</td>
<td>N/A</td>
<td>Use of Workday reporting in UBI</td>
<td>10 min</td>
</tr>
<tr>
<td>Organizational Change Management</td>
<td>N/A</td>
<td>Change Management Chart</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>UER Engagement Update</td>
<td>35 min</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training Plan</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Change Readiness Assessment #4 Overview</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Communications</td>
<td></td>
</tr>
<tr>
<td>Other Business and Wrap Up</td>
<td>N/A</td>
<td>Questions/Comments</td>
<td>5 min</td>
</tr>
</tbody>
</table>
FST Project Overview
Plan: Preparing for Phase 3

- **Expect:** Behind-the-scenes work: hiring, planning to implementing.
- **Involvement:** The team is putting the foundation in place!

Architect: Building the Model

- **Expect:** The team starts establishing implementation; requirement gathering sessions begin, known as Architect sessions.
- **Involvement:** The team displays Workday functionality during the Architect sessions and gathers requirements. Architect sessions cover a variety of topics and include 20-30 team members from Functional, Technical and Change Management areas from across Grounds for each session. Focus groups that take place after the Architect sessions help refine.

Configure & Prototype: Walking through the Tenant

- **Expect:** The requirements we gathered are now validated and UVA's initial tenant is built. The team creates training plans based upon what we know from Architect sessions.
- **Involvement:** Participate in interactive walkthrough of processes; the team gathers feedback on issues and opportunities from staff to enhance the system.

Test: How Does Workday function at UVA?

- **Expect:** The team starts end-to-end testing in the Workday Tenant. Initial training materials may also be distributed during this time.
- **Involvement:** You may be asked to help test UVA's Workday Financials or to evaluate how ready you think you and your unit are to go live with Workday Financials.

Deploy: Workday Goes Live!

- **Expect:** Training as we prepare to transition to Workday Finance.
- **Involvement:** Once Workday goes “live”, we will ask for everyone's active involvement in training as UVA staff and faculty acclimate to new workflows and processes. We'll depend on our Advisory Group members to help us know what is working – and what needs to be tweaked.

Support & Stabilization: The New Normal

- **Expect:** With the system live, we are making the small process changes necessary for Workday to be effective for all users.
- **Involvement:** Keep us apprised of challenges you encounter, as well as continuous improvement opportunities.
Project Updates
FDM Mapping Updates
FDM Mapping | Update – Sprint Complete!

Consistent, wide engagement (100+ people at weekly all-pods; 50+ at weekly office hours; unit check-ins and other 1:1s)

Information provided to stakeholders:
- Assignee basics
- Naming convention basics
- Designated basics
- Revised worktag request form
- More FAQs based on stakeholder questions
- Guidance on using UBI for mapping, including new reports
- Demo of payroll costing transition
- SIS/SAFM discussion
- Grants / Cost share demo & discussion
- Cross-funding discussion & documentation
Approach to Security Role Identification
Project Updates | Approach to Security Role Identification

1. Update and Review Business Process Workflows
2. Identify and Define Security Roles
3. Template for each School/Unit
4. Ensure Separation of Duties
5. Identify Training Needs
GL Balance Conversion Approach
Project Updates | GL Balance Conversion Approach

1. Mapping out default worktags for all elements of the Oracle GL String
2. Test Data loaded into the Workday tenant
3. Refine default conversion rules
4. Develop “Quick Look” reports in Qlik for Schools/Units
5. Schools/Units review and prepare for realignment exercise
The implementation of Adaptive Planning, Workday’s budgeting software, is one of the four integral parts of Finance Strategic Transformation. The testing taking place now started on January 18 and will continue until February 25.

HUGE THANKS TO THESE WONDERFUL FOLKS!!!

Michelle Gregory
John Mastrandea
Alicia Rudie
Katie Walker
Kara Beth Glover
Amanda Meares
Eduardo Lorente
Sarah May
Ben Baer
Billy Mak
Shawn Gu
Charles Rush
Detria Thomas
Ana Lynch
Derrick Carter
Anjula Joseph
Jen Hale
Missy Brads
Rafa Kouki
Hunter Hollins
Evan Barrow
Glenda Notman
Phil Paulick
Jen Starkey
Rohan Patel
Mick Watson
Ava Thorsted
Carol Gilbert
Bill Click
Carol Temerson
Reporting & Analytics
After working with our School/Unit R&A focus group we will be augmenting planned Workday reporting with supplementary UBI (Qlik Sense) reporting.

Driven by the need to provide an additional layer of flexibility, customization, and self-service.

Specifics and communications/messaging are in the works.

Message was very positively received by the Focus Group members.

### Use Cases

<table>
<thead>
<tr>
<th>Use Cases</th>
<th>Workday</th>
<th>UBI</th>
<th>Adaptive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operational/Transactional/Real-time</td>
<td>Orange</td>
<td>Gray</td>
<td>Gray</td>
</tr>
<tr>
<td>Managerial Reporting</td>
<td>Orange</td>
<td>Orange</td>
<td>Orange</td>
</tr>
<tr>
<td>Analytics</td>
<td>Orange</td>
<td>Orange</td>
<td>Orange</td>
</tr>
</tbody>
</table>
Organizational Change Management
The Change Journey
The Change Journey

Future State

Competence

Confidence

Cautious

Chaos

Certainty

Valley of Despair

Current State

Organizational Change Management | Change Journey
UER Engagement
## OCM Updates | User Experience Review - Business Processes

<table>
<thead>
<tr>
<th>Banking &amp; Settlement</th>
<th>Customer Accounts</th>
<th>Payroll</th>
<th>Procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous Payment Request Event</td>
<td>Billing Schedule Event</td>
<td>Assign Costing Allocation</td>
<td>Catalog Load</td>
</tr>
<tr>
<td>Consolidated Invoice Email Event</td>
<td>Customer Contract Amendment Event</td>
<td>Create Payroll Accounting Adjustments</td>
<td>Change Order</td>
</tr>
<tr>
<td>Customer Contract Event</td>
<td>Customer Event</td>
<td>Requisition Event</td>
<td></td>
</tr>
<tr>
<td>Customer Invoice Email Event</td>
<td>Customer Invoice Event</td>
<td>Requisition Intercompany Event</td>
<td></td>
</tr>
<tr>
<td>Customer Statement Event</td>
<td>Customer Summary Change Event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue Recognition Installment Event</td>
<td>Revenue Recognition Schedule Event</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supplier Accounts**

| Supplier Invoice Request Event |

<table>
<thead>
<tr>
<th>Expense</th>
<th>Financial Accounting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Report Event</td>
<td>Account Certification Event</td>
</tr>
<tr>
<td>Expense Report Intercompany Event</td>
<td>Accounting Adjustment Event</td>
</tr>
<tr>
<td>Spend Authorization</td>
<td>Accounting Journal Event</td>
</tr>
<tr>
<td></td>
<td>Accounting Journal Unpost-Reverse Event</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gifts</th>
<th>ISP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Set Up (Custom Business Process - WD Extend)</td>
<td>Internal Service Delivery Event</td>
</tr>
<tr>
<td></td>
<td>Internal Service Delivery Intercompany Event</td>
</tr>
</tbody>
</table>
Training Plan
OCM Updates | Training Plan

Training will be role-based

• Users will be trained for their role(s) and will be required to complete training before the role will be assigned.
• Users will be trained when and why in addition to the how to.
  - What is the business process?
  - When in the process is the task completed?
  - What comes next in the process?
  - What are the steps involved in the task and how are they completed?

Training will be offered in a variety of modalities

• Self-paced Learning and Quick Reference Guides
• Instructor-led – virtual and in person (depending on circumstances and need)
• Training will incorporate hands-on exercises
• Post go-live office hours

Training will be offered Just in Time – May/June and ongoing
Change Readiness Assessment #4 Overview
To provide visibility and accountability, two tools have been created: a monthly Readiness Dashboard and Leadership Checklist.

The **Readiness Dashboard** provides a progress measure across the different priority areas throughout the project and helps assess the level of readiness; establishing visibility for project and university leadership around which units need additional time and attention to be ready for Go-Live.

This dashboard will be updated by unit leadership at a **combined** meeting of Advisory Group and Steering Committee after taking into consideration the units’ readiness and the readiness checklist status.
Purpose: The purpose of the CRA is to make sure that we understand the perception of schools/units around Workday and inform engagement, communications, and training strategies to transition stakeholders to new ways of working, and to facilitate the adoption of new processes and technology needed to achieve the goals of the FST Project.

**WHAT**

CRA #4 should be a combination of information from:
- Readiness Dashboards (2/16)
- Focus groups
  - 3-4 focus groups
  - 1 hour in length
  - No more than 10-15 participants that have had little or no FST Engagement

**WHO**

Participants will be selected by 2/3. The ideal focus group participants will:
- Have had Oracle access
- Be an end user (represented from each unit on campus)
- Limited to no engagement with project team

**WHEN**

Focus groups facilitated through February 18

**CONTENT**

Topics discussed during focus groups will be:
- Overall thoughts of Workday/FST
- Expectations
  - Training
  - Engagement
  - Support
- Project outcomes
Purpose:
• To understand the perception of end users within each school/unit around Workday and inform engagement, communications, and training strategies in order to transition all stakeholders to new ways of working.
• Focus groups are the second qualitative method for the Change Readiness Assessment. They will be used to develop key readiness themes gathered from end users throughout UVA.
• Collect additional insights on specific readiness priorities identified in focus groups

Participant Criteria:
• For this fourth Change Readiness Assessment, we hope to engage with 40-45 participants from various departments across campus to reflect end users that will be impacted by change. Each focus group will consist of 10-12 participants
• We are looking for participants who:
  − Have oracle access
  − Have not been heavily involved with the project team – someone who doesn’t represent the department on the project team and hasn’t been involved in testing or other engagements
The hour-long focus groups will take place on the following days/times:

- February 9, 2022, at 10-11am
- February 10, 2022, at 2-3pm
- February 14, 2022, at 1:30-2:30pm
- February 15, 2022, at 10-11am

If you are interested in participating and/or can recommend a colleague or two to attend, please sign up using the link below by the end of day on February 3, 2022.

https://virginia.az1.qualtrics.com/jfe/form/SV_9vEzTcOUdrXEazA
Communications
OCM Updates | Communications Resources

- WFST Radio: >10 min, audio only
- Five Things to Know about FST
- FST Update Summary in the blog digest
- One Pagers
- Blog articles on work areas
- Website tracking on work areas
- The Online Community
Other Business and Wrap Up