UR Financials Project
Demo Days
August 2014
Agenda

• Project Update
• Change Readiness Survey Results
• Q & A
• Wrap Up
Chatting for WebEx Participants

For those joining the WebEx:

• 1) Please access the chat feature at the top of your screen

• 2) Please chat directly with Mike Bonanno (He will then pose the questions on your behalf)

• 3) Select Mike in the drop down menu in the chat window (do not select “everyone”)
Project Update

• Day-in-the-Life functional testing complete
• Workday 23 release:
  – Report development
  – Testing in September
• Performance testing - Phase 1 complete, Phase 2 during September
• FY15 Data Conversion
• Training material development
Change Readiness Survey Results

• 150 surveys returned out of 2000 sent

URF Change Management Action Items
question 6 (August 2014)
Survey Results – Areas of Concern

• Understanding the FRS to Workday Chart of Accounts translation/Forms
• Workday Monthly Ledger Report
• Hands-on experience with Workday
• Scheduled training dates and times
• More demonstrations
• Post Go-live Support plan
Understanding COA Translation

• 60 % don’t understand the Chart of Accounts conversion from FRS to Workday
• Some divisions have had extensive practice while others have very little

Action Plan:
• Introduction of eLearning and Forms videos on UR Financials website
• Conversion of FY15 data into Workday terms
• Distribution of COGNOS FRS to Workday mapping report
• Financial Data Convertor with Spend/Revenue Category descriptions (and mobile!)
Workday Monthly Ledger Report

• Previously reviewed Workday 22 Monthly Ledger report at May Demo Days
• Requires Workday 23 release (available Monday 8/18)
• In process of developing new Monthly Ledger reports based on WD23. Review at September Demo Days

Action Plan:
• Converting the Monthly Ledger report based on WD 23 functionality
• Conversion of FY15 data into Workday terms
Hands-On Experience with Workday

- People want hands-on experience with Workday reports
- They want to see THEIR data in Workday
- .... prior to training???

Action Plan:

- Hands-on sessions in late September/October (requires completion of eLearning course prior to signing up) to run a few Workday reports against converted data
- “Brief” training session during hands-on session. NOT a substitute for training!
Training Dates and Times Schedule

- Want exact schedule of when training will be held
- Want training sooner than currently announced
- ... but not too soon???

**Action Plan:**
- Pre-released eLearning and Forms videos on UR Financials website
- Will add dates and times to training schedule
- Continue to follow a “just in time” approach to training, but will provide some Hands-On sessions prior to formal training
More Demonstrations

• How does UR Financials project affect their work?
• Want less talk and more demonstrations – after all, they are called “Demo Days”!

Action Plan:
• Current focus is finishing up testing
• Will institute more demonstrations starting in September
Demonstration Focus

INPUTS

Forms (25,000)

Integrations (100)

Converted Data (1,000)

OUTPUTS

Workday Transactions (100)

Reporting (1,000)

Numbers in parenthesis represent impacted users
Post Go-Live Support Plan

• UR Financials “support room”
  – IT Help Desks
  – Dedicated email inbox
  – Walk in capabilities
  – Remote office visits
  – Morning conference call in sessions
  – Website, training tools, etc.

**Action Plan:**
• We’ll review more details in upcoming months
Q & A
Wrap Up: Demo Days

• Please complete survey that will be sent out on Monday morning
• Demo Days next month will be September 17, 18, 19
• Topics for upcoming Demo Days
  – General Updates
  – Reporting
  – Training
  – Data Conversion and Validation
  – Cut-Over Plans
• Please continue to reach out with questions and share project information with your Department