Meeting Minutes  
Technology Strategy Partners  
June 21, 2018  
9:00 A.M. – Rich 242

Attendees  
Sonia Alvarez-Robinson  Nelson Baker  Katie Crawford  
Cas D’Angelo  Jim Fortner  John Gilleland  
Mark Hoeting  Paul Kohn (via BlueJeans)  Lew Lefton  
Jimmy Lummis  Dwayne Palmer  Greg Phillips  
JulieAnne Williamson

Inform & Discuss Items  
ERP & Extended Systems Impacts  
- See attached slides  
- Questions/Comments
  - Do we know whether HCM will utilize the same nomenclature or will require further changes?  
    ▪ We are researching that question. Also looking at how many systems of record can be informed with the new nomenclature.  
    ▪ With HCM forecast to go-live approximately 6 month after Financials, there will be impacts. For example, new employee id’s will be required.  
  - How will this new structure will enable our core business reporting needs  
    ▪ Core business reporting will be handled separately from the ERP financials, most likely within the EDW.  
  - What are the benefits of the new ERP solution?  
    ▪ Today data is in silos and is difficult to report. The new solution will enhance data visibility, control and consistency and will make us more efficient.  
  - Need to adequately consider impacts of decisions made today on the future.  
  - How many systems are directly connected to PeopleSoft?  
    ▪ That is still being determined.

Comprehensive Administrative Review (CAR) Update  
- See attached slide  
- Questions/Comments
  - Span of control concerns: Is this on an internal concern? If a person manages a high budget project with corporate relationships, can they not have a Manager or Director title if they span is relatively small?  
    ▪ As part of the CAR analysis, we will need to research specific cases further.  
  - What is working well are our people, what needs improvement is our systems.  
  - Are there any action items for Ga Tech at this time?
- We are waiting on additional details from the USG team.
- We have been asked to assemble 2 groups to address CAR findings, a working group and a decision making group.
- Instead of implementing new efforts we should utilize existing efforts, where appropriate, to organize and track data and benefits related to CAR.
  - Is there a timetable for formalizing and reporting on CAR?
    - We are taking the summer to assemble necessary groups with a Fall launch on action plans.
    - Will produce a report in November regarding initiatives we are moving forward on and what progress has been made.

Banner Migration Roadmap
- See attached slides
- Questions/Comments
  - Does the USG include Ga Tech’s lifetime education initiative or are they focused primarily on undergraduates?

Inform & Decide Items
Recommendation from CIO to add 2 members to TSP
- Some members of TSP had to leave the meeting early so a quorum was not available to vote on the proposal.

Items brought up during the meeting (not included on the meeting agenda)
With USG discussions regarding Banner, ERP, etc., is there any discussion regarding a USG supported LMS?
- We are not aware of any USG discussions regarding LMS.

Items requested to be included on a future TSP meeting agenda
None

Action Items
Determine how/when to vote on proposal to add 2 members to TSP

Meeting adjourned at 10:30
ERP & Extended Systems Impacts (Phillips & Crawford)
Comprehensive Administrative Review Update (Alvarez-Robinson)
Banner Migration Roadmap
ERP Priorities & The Technology Portfolio

TSP Membership Proposal
ERP & Extended Systems Impacts

Greg Phillips, Senior Director, ERP
Katie Crawford, Senior Director, EDM
TSP Update: FDM & Extended Systems
Agenda

• FDM & Extended Systems
• FDM Details
• Extended Systems Details
Safe Harbor

The information delivered within this presentation was published on 06/19/2018

This information, while accurate at the time, is subject to change.
# Financial Transformation Timeline

<table>
<thead>
<tr>
<th>WORKSTREAMS</th>
<th>FY18</th>
<th>2018</th>
<th>FY19</th>
<th>2019</th>
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<tbody>
<tr>
<td>FDM Design &amp; Build</td>
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<tr>
<td>Business Process Workshops</td>
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<td>Customer Review Sessions</td>
<td>D2.02</td>
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<tr>
<td>Test Planning &amp; Preparation</td>
<td>D2.04 D2.05</td>
<td>D3.05 D4.06</td>
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<tr>
<td>Define Reports</td>
<td>D3.06</td>
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<tr>
<td>Integration Design/Architecture</td>
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<tr>
<td>Extended Systems Design</td>
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<tr>
<td>Conversion Design</td>
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<tr>
<td>Conversion Data Cleanup</td>
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<tr>
<td>Configure &amp; Prototype Kickoff Presentation</td>
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</table>

## ORGANIZATIONAL READINESS

- Communications
  - Stakeholder Engagement
  - Establish Change Network
- Readiness & Transition Workshops
- Assess User Adoption
- Organizational Alignment
  - Change Impact Analysis
  - Workforce Transition & Unit Design
- Learning and Development
  - Needs Assessment
  - Develop L&D Materials
  - Conduct Pilot Testing
  - Deliver L&D
  - Support Skill Development

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06/21/2018

In partnership with the University System of Georgia
FDM & Extended Systems
Approach & Scope

Approach
- Implementing Workday Financials will introduce a new data structure which Workday calls a FDM (Foundation Data Model)
- Workday’s integration capabilities are inherently different than what PeopleSoft offers
- Extended systems will need to adopt the new Workday FDM and convert from the current PeopleSoft Chart of Accounts (COA)

Current COA to Future FDM will cause the following to change:
- Current COA values will change (dimension values, lengths, descriptions, hierarchies)
- Account, Fund, Function, and Class values will align with USG values
- Speedtype / Project ID as a shortcut no longer applicable

How to Change with Workday:
- Collaborative effort between the Transformation team and Extended System Owners to determine impacts, timing, testing, communication, etc.
- New FDM integrations will be provided via Workday web services or the new Enterprise Data Warehouse
- For systems that need to convert old to new values, a crosswalk will be developed for conversions prior to go live

6/21/2018
What does this REALLY mean?

After the July 2019 Go Live:

- Georgia Tech & GTAA will adopt the new FDM as the sole data structure
- All new activity will be created in the new FDM structure and will not have corresponding PeopleSoft COA values
- Any system that is not modified will need to manually translate values to integrate with Workday Financials

- Effects:
  - The new FDM will provide additional details and dimensions that will improve reporting and decision making
  - Living in a single data structure will enable sustainability and reduce errors across systems
Goals and Objectives

#1 Adhere to the standards set by the University System of Georgia

#2 Easy to comprehend with each component having a single use, a clear and consistent definition, and flexible enough to accommodate future growth

#3 Support the Institute’s information, reporting and accounting at all levels of management and promote service capabilities unifying the unique needs across campus.

#4 Leverage best practices and innovative approaches in design, structure, and implementation.

#5 Promote strategic alignment and integration between the financial system of record and extended systems.
Design and Build Process

1. Gather & Learn
   - Understand strengths, weaknesses and gaps of current COA, budget structure and reporting
   - Gather requirements (i.e. USG, reporting)
   - Review FDM of peer institutions
   - Analyze Workday functionality

2. Analyze & Design
   - Define Dimensions & Usage
   - PeopleSoft COA to New Workday FDM Dimension Mapping
     - Define field lengths, format and representative list of values
     - Define relationship between budgeting & accounting
   - Prototype transactions in new FDM with different working groups

3. Socialize & Refine
   - Socialize new FDM and budget structure with broader campus audiences
   - Refine FDM design as appropriate
   - Assess and plan for impact to legacy systems
   - Develop full value lists
   - Develop COA/FDM value-to-value crosswalk/translation

4. Iterate & Test
   - Design & Build FDM Crosswalk Utility
   - Execute mock conversions and testing
   - Validate FDM Mappings

5/23/2018
In partnership with the University System of Georgia
## Key Decisions

<table>
<thead>
<tr>
<th>PeopleSoft ChartFields</th>
<th>Workday Dimension</th>
<th>Workday Ref. ID</th>
<th>Prefix</th>
<th>Additional Characters</th>
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<td>Department</td>
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## Key Decisions

<table>
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<th>PeopleSoft ChartFields</th>
<th>Workday Dimension</th>
<th>Workday Ref. ID</th>
<th>Prefix</th>
<th>Additional Characters</th>
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<td>Project ID</td>
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<td>N/A</td>
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<td>Sales Item (not used by GT)</td>
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Extended Systems
# Extended Systems Timeline

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<tr>
<th>FY18a</th>
<th>FY19</th>
<th>FY20</th>
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<tr>
<td></td>
<td>2018</td>
<td>2019</td>
</tr>
<tr>
<td>Mar-18</td>
<td>Apr-18</td>
<td>May-18</td>
</tr>
<tr>
<td>ARCHITECT</td>
<td>CONFIGURE &amp; PROTOTYPE</td>
<td>TEST</td>
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<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>▲ES Design Sessions Complete</td>
<td>▲Enablement Integration Design Complete</td>
<td>▲ES Confirm Build Complete</td>
</tr>
<tr>
<td>▲Finalize FDM Detailed Values</td>
<td>▲Ctg &amp; Build Phase Complete</td>
<td>▲System Integration Testing</td>
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</table>

**Legend**

▲Enablement Milestone
▲Extended System (ES) Milestone
▲Go Live Milestone
## Disposition Chart

<table>
<thead>
<tr>
<th>Recommended Disposition</th>
<th>Description</th>
<th>Count</th>
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<tbody>
<tr>
<td>Decommission</td>
<td>System Functionality is moved to Workday or another system. System is taken offline at an identified date.</td>
<td>16</td>
</tr>
<tr>
<td>Enable</td>
<td>Integrations needed, system functionality remains As-Is.</td>
<td>92</td>
</tr>
<tr>
<td>Read-Only</td>
<td>System does not have an operational function, except for historical purposes. No integrations needed.</td>
<td>1</td>
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<tr>
<td>Retrofit</td>
<td>Some functionality will move to Workday. System will still be needed for remaining functions. System needs to be updated to support it’s new function. Integrations likely needed.</td>
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<tr>
<td>TBD</td>
<td>To Be Determined.</td>
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**Total:** 126
## Configure and Prototype Phase

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Track</th>
<th>Duration</th>
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<tbody>
<tr>
<td><strong>Wave 1 Integration Build</strong></td>
<td>Enablement</td>
<td>84 days</td>
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<tr>
<td>Build &amp; Unit Test – Workday &amp; Extended Systems</td>
<td>Enablement</td>
<td>84 days</td>
</tr>
<tr>
<td>Build &amp; Unit Test – Workday &amp; Extended Systems into EDW</td>
<td>Enablement</td>
<td>84 days</td>
</tr>
<tr>
<td><strong>Wave 2 Integration Build</strong></td>
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<td>Build &amp; Unit Test – Workday &amp; Extended Systems</td>
<td>Enablement</td>
<td>95 days</td>
</tr>
<tr>
<td>Build &amp; Unit Test – Workday &amp; Extended Systems into EDW</td>
<td>Enablement</td>
<td>95 days</td>
</tr>
</tbody>
</table>
Questions?
Let’s stay connected!

Questions or Feedback?

• **Helpdesk Email:**
  erp.ask@gatech.edu

• **Website:**
  http://transformation.gatech.edu
THANK YOU
Comprehensive Administrative Review

Sonia Alvarez-Robinson
Executive Director
GT Strategic Consulting
## CAR Summary

<table>
<thead>
<tr>
<th>THEMES FOUND IN CAR REPORT</th>
<th>MAJOR GEORGIA TECH INITIATIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>GT administrative systems and processes must become more efficient and effective to support the Institute mission</td>
<td>- Financials ERP Implementation (Workday Financials)</td>
</tr>
<tr>
<td></td>
<td>- Human Capital Management ERP Implementation (oneUSG and oneConnect)</td>
</tr>
<tr>
<td></td>
<td>- Student Information ERP (USG Banner upgrade)</td>
</tr>
<tr>
<td>Structures for administrative operations (finance, IT, HR, grants mgmt.) could be optimized through better spans of control and consolidation of related functions</td>
<td>- OIT/ITG Unification project</td>
</tr>
<tr>
<td></td>
<td>- Ivan Allen Organizational Effectiveness project</td>
</tr>
<tr>
<td></td>
<td>- IRI Organizational Effectiveness project</td>
</tr>
<tr>
<td></td>
<td>- EVPR Organizational Effectiveness project</td>
</tr>
<tr>
<td>Human Resource Management practices, processes, systems, and structures need improvement</td>
<td>- Advancing Human Resource Business Partner program</td>
</tr>
<tr>
<td></td>
<td>- GTHR hired Deputy to define and lead improvement</td>
</tr>
<tr>
<td></td>
<td>- oneConnect (as noted above)</td>
</tr>
<tr>
<td>Information Technology must be more efficient and responsive to the needs of the Institute</td>
<td>- Numerous OIT strategies for improvement are underway</td>
</tr>
<tr>
<td>Central office business services functions need improvement</td>
<td>- Business services improvement efforts are in planning stage</td>
</tr>
</tbody>
</table>
Banner Migration Roadmap

- University System of Georgia has mandated all Institutions Migrate to Banner Managed Services by July 2021.

- Georgia Tech began to scope, migrate, and implement Banner on AWS in June 2017 in preparation for CODA.

- USG Strategy is to migrate the BMS Environment to AWS in ~2022.
Banner Migration Roadmap

- **GT AWS Environment Build**: June 2017 – August 2018
- **GT Banner 9 Migration to AWS**: August 2018 – April 2019
- **GT Run-State**: January 2019 – July 2022
- **GT/USG Cloud Connect**: May 2022 – December 2022
Inform & Decide

- Significant Overlap & Alignment with GTRI requires high levels of Coordination on Strategy, Policy, and Procedure

- Significant Technology Growth Opportunities in GTRI Research Areas

- Recommendation: Add Bo Rotoloni, Deputy Director, Information & Cyber Sciences to TSP
- The CIO is currently consolidating the OIT organization and the ITG (campus services) organization.

- A new organization structure will be established July 2018, which includes a new direct report.

- Recommendation: Add Jim Pete, Deputy CIO to TSP to represent the Digital Business organization.
The purpose of the Cyber Security team is to build a foundation of support for the Institute’s Strategic Plan by creating a secure environment in which the Institute’s goals and objectives can be realized.

The purpose of the Infrastructure and Foundational Technology team is to provide technology infrastructure, enable foundational applications and technologies, and provide advanced support for Institute technology services.

The purpose of the Research & Digital Learning Team is to manage and provide the research technology program of the Institute and to deliver the Digital Learning platforms and associated services for Faculty, Staff, and Students.

The purpose of the Digital Business team is to provide customer and business-facing applications, technologies, and services to the greater campus community.

The purpose of the Governance & Portfolio Management team is to manage and oversee Technology Governance, the Institute Technology Projects and Portfolio and Projects, IT Business Process Improvement and Strategic Planning.

The purpose of the Technology Business Administration team is to manage the financial operations, budget, enterprise IT procurement, facilities, and human resource needs of the technology organization.

The purpose of the Strategic Advisory Services is to provide customer and business-facing applications, technologies, and services to the greater campus community.

The purpose of the IT Marketing & Communications team is to manage and provide the research technology program of the Institute and to deliver the Digital Learning platforms and associated services for Faculty, Staff, and Students.