HCM Transformation Kick Off
Cohort 6 – Georgia Tech
Safe Harbor

The information delivered within this presentation was published on 02/15/19.

This information, while accurate at the time, is subject to change.
Welcome & Leadership Introductions
Objectives of HCM Transformation
GT By the Numbers
Teams / Roles and Responsibilities
Timeline Review
Welcome & Leadership Introductions
Welcome

- Kim Harrington
  - Chief Human Resource Officer, Georgia Tech
- Jim Fortner
  - Interim Executive Vice President for Administration and Finance
- Dr. Robert (Bobby) Laurine
  - Chief Information Officer, University System of Georgia
Bobby Laurine
Objectives
Purpose

OneUSG

A system wide initiative to develop and implement a consistent approach to policies, procedures, and technology solutions that benefit the University System of Georgia (USG), in an effort to support the Chancellor’s strategic imperative of accountability, efficiency, and innovation.

OneUSG Connect

A priority for the OneUSG initiative is to bring the University System Offices and all USG institutions onto one technology solution, OneUSG Connect, to manage USG human resources activities, benefits, and compensation.

HCM Transformation

An initiative to align Georgia Tech business processes to the OneUSG Connect technology platform. This will further the GT vision of Workforce of the Future and Create the Next Platform for Service Delivery.
Organizational Impact

Who will use OneUSG Connect?

**Employees**
- View and update personal information
- Submit time and leave requests
- Link to review benefits

**Managers**
- Approve time and absence requests
- Initiate employee actions formerly handled by PSFs

**Practitioners**
- Complete initiated HR processes
- Maintain HR transactions as they relate to their responsibilities
HCM Transformation Guiding Principles

- OneUSG Connect First
- Workforce of the Future
- Streamline, Automate & Standardize Processes
- Foster Accountability, Efficiency and Innovation
- Minimize Technical Complexities
- Communicate, Collaborate & Share
## The HCM Transformation

<table>
<thead>
<tr>
<th>WHY we are transforming to...</th>
<th>HOW we are transforming by...</th>
<th>WHAT we are transforming...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable the Institute’s strategic plan and core academic, research, and service missions</td>
<td>Adopting simplified, industry-leading HR business practices</td>
<td>Our business processes, policies, and service delivery models</td>
</tr>
<tr>
<td>Support students, faculty, and staff through consistent, reliable, high-quality experiences</td>
<td>Fostering an environment of collaboration and transparency</td>
<td>Our core HCM systems to OneUSG Connect</td>
</tr>
<tr>
<td>Optimize decision making with consolidated, accessible, trusted data and intuitive analytics</td>
<td>Engaging the Georgia Tech community through communication and outreach</td>
<td>Our data warehouse and analytic reporting capabilities</td>
</tr>
<tr>
<td>Prepare the Institute for the digital age</td>
<td>Being forward thinking and adapting to the iterative nature of implementing new technology</td>
<td>Our related applications and systems</td>
</tr>
<tr>
<td></td>
<td>Developing the workforce of the future</td>
<td></td>
</tr>
</tbody>
</table>

Progress & Service | Institutional Effectiveness | Accountability & Efficiency
Overview: The Target Outcome (CAR)

To improve how we accomplish our education, academic research, and economic development mission by improving the administrative efficiency and effectiveness across Georgia Tech. This can best be done by examining how we currently operate.

**USG Objectives of the CAR**
- Identify ways administrative functions can be conducted more efficiently and effectively;
- Enhance support for delivering on the global, statewide, and local missions of USG institutions;
- Achieve opportunities for savings to provide greater affordability and access for students; and
- Strengthen the core academic enterprise, and improve student support services.

**GT Actions to Improve Operations**
Improve organizational structures, work distribution, business processes, customer service, and cross-organizational collaboration in 4 functional areas:
- talent and people management
- information technology
- communication/marketing/events
- procurement/travel/expense management
Solutions for CAR Opportunities Through Implementation of OneUSG Connect

- Centralized future state hiring process for faculty, staff, and students with automated workflow and approvals to facilitate consistent policies and procedures
- Standardized processing will reduce duplication of efforts involved with multiple groups and processes
- Use of Manager Self-Service and other functionality eliminates PSF and reduces amount of manual, paper-based processing
- Standardization of affiliate onboarding
- Time and Labor and Absence Management will be used to replace various paper-based processes and homegrown systems
- Kaba Clocks will replace Kronos clocks for increased standardization and enhanced functionality
Critical Success Factors

Sufficient testing of End to End Processing and Integration Development

- Financial System Interface
- Identity Management
- Data Warehouse
- Pre-hire and Hire of All Employee Types

Standardized and Streamlined processes

- Time reporting and leave accruals
- Position Management, including group positions

Successful Parallel Payroll Processing (2 biweekly and 2 monthly)

Critical salary distribution functionality fully mapped into future state

- Commitment Accounting
- Labor Distribution and Redistribution
- Effort Reporting

Successful Conversions for Position, Payroll, and Financial data
Georgia Tech By the Numbers
# Georgia Tech
## By the Numbers....

<table>
<thead>
<tr>
<th>People</th>
<th>Function and Design</th>
</tr>
</thead>
<tbody>
<tr>
<td>• ~ 16,800 Active Employees</td>
<td>• Migrating from PeopleSoft 9.2</td>
</tr>
<tr>
<td>• 8,255+ Students</td>
<td>• 67 Time Clocks</td>
</tr>
<tr>
<td>• 1,576 Academic Faculty</td>
<td>• 18 Years – Academic Pay (Contract &amp; Summer Pay)</td>
</tr>
<tr>
<td>• 2,435 Research Faculty</td>
<td>• 200 Users</td>
</tr>
<tr>
<td>• 4,141 Staff</td>
<td>• 18 Years – Salary Planning and Distribution (SPD) 400 Users</td>
</tr>
<tr>
<td>• 378+ Tech Temps / Ret. Working</td>
<td>• 300 System Users</td>
</tr>
<tr>
<td></td>
<td>• 100 Reports Only</td>
</tr>
<tr>
<td></td>
<td>• 27,748 Average Transactions Annually</td>
</tr>
<tr>
<td></td>
<td>• ~ 20,000+ Paychecks per month</td>
</tr>
<tr>
<td></td>
<td>• ~ 20,704 - W2’s in 2018</td>
</tr>
<tr>
<td></td>
<td>• ~ 1,385 – 1042’s in 2018</td>
</tr>
<tr>
<td></td>
<td>• ~ 352 employees in 29 tax jurisdictions outside GA.</td>
</tr>
</tbody>
</table>
About Georgia Tech

• Member of the Association of American Universities (AAU)
• **Fall 2018 Enrollment**: 32,722 (16,047 undergraduate and 16,675 graduate; 8,800+ online master’s students)
• **Full time Workforce**: approx. 7,900
• **Research**: $825 million in R&D; 25th nationally in academic R&D spending; 12th overall in federal R&D; 2nd in U.S. Department of Defense R&D; #1 Public University w/o Med School or Health Sciences Center
• **Annual budget**: $1.84 billion
• **Endowment Market Value**: $2.09 billion
• **Strengths**: quality, focus, interdisciplinary, industry, technology transfer, incubation & commercialization
Unique Revenue Mix

Revenue by Major Source
Fiscal Years 2018-19 Original Budget
($M)

- 45% of the GT revenue budget is attributable to sponsored operations
Significant Growth

• **Inputs since 2009:**
  - Faculty and Staff: up 36% to 7,900
  - Revenues: up 62% to $1.84 billion
  - State Appropriations: up 10% to $318 million
  - Endowment Market Value: up 26% to $2.09 billion

• **Outputs since 2009:**
  - Research Generated
    - Sponsored Award Dollars: up 91% to $851.6 million
    - Sponsored Expenditures: up 78% to $908.9 million
    - Invention Disclosures and Patents: up 42% and 130% respectively in total for 2009-2018 vs. 2000-2008
    - 69 start-up companies licensed
  - Students Served
    - Freshman Applications: up 244% to 36,500
    - Graduate Applications: up 147% to 31,300
    - Enrollment: up 69% to 32,722 students
    - Credit Hours Generated: up 28% to 757,000
    - Degrees Awarded: up 58% to nearly 7,100
Sponsored Awards

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<tbody>
<tr>
<td>GTRI</td>
<td>$363</td>
<td>$338</td>
<td>$367</td>
<td>$377</td>
<td>$497</td>
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<tr>
<td>RI</td>
<td>$325</td>
<td>$310</td>
<td>$352</td>
<td>$313</td>
<td>$355</td>
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<tr>
<td>Total</td>
<td>$688</td>
<td>$648</td>
<td>$719</td>
<td>$690</td>
<td>$852</td>
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</table>

($$$ in millions)
Sponsored Expenditures

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTRI</td>
<td>$302</td>
<td>$349</td>
<td>$366</td>
<td>$383</td>
<td>$449</td>
</tr>
<tr>
<td>RI</td>
<td>$419</td>
<td>$422</td>
<td>$419</td>
<td>$442</td>
<td>$460</td>
</tr>
<tr>
<td>Total</td>
<td>$721</td>
<td>$771</td>
<td>$785</td>
<td>$825</td>
<td>$909</td>
</tr>
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</table>

($$$ in millions)
Team Roles & Responsibilities
The HCM Transformation

Georgia Tech’s OneUSG Connect Transformation
The HCM Transformation - Georgia Tech and OneUSG Engagement

**Georgia Tech**
- Project Leadership Team (IT, Human Resources, Research, Academic Affairs, Controller)
- Project Director (and Support Team)
- Project Management Team

**OneUSG**
- OneUSG Executive Sponsors (EVC – Strategy and Fiscal Affairs, EVC – Administration, Chief Academic Officer, CIO*, CHRO*)
- Executive Director (and Support Team)
- Project Management Team

Communication Frequency:
- Every 4 Weeks
- Every 2 Weeks
- Every Week
Georgia Tech HCM Transformation Governance

Executive Steering
- Emily Howell, Provost & Research
- Jennifer Hubert, A&F IPRM
- Kim Harrington, HR
- Mark Demyanek, A&F Operations
- Mark Hoeting – OIT
- David Bamburowski – Faculty Affairs
- Sandi Bramlett – IRP/EDM
- Sonia Alvarez-Robinson – GTSC

Executive Sponsors
- G. P. Bud Peterson, President
- Jim Fortner, A&F
- Chaouki Abdallah, Research
- Rafael Bras, Provost

Campus Advisory Leadership Committee (CALC)
- Jilda Garton - Research
- Bonnie Ferri - Provost
- Jennifer Herazy - Provost
- Steven McLaughlin – Engineering

Process Owners Committee
- Kim Harrington - HR Core, Onboarding, Compensation, ESS, MSS, Global, Careers (Undergrad Students)
- Leslie Sharp & David Bamburowski – MFE, FSS, Careers (Grad Students and Faculty)
- Jonathon Jeffries - Commitment Accounting
- Zach Rogers – Payroll
- Kevin Merkel - Benefits, T&A, Time Clock
- Charvette Webb – Careers (Staff)
- Greg Philips - ERP Transformation Director
- Sheila Garza & Germaine Sims – GTRI (T&L, Careers - Research)
- Julie McCoy & Kim Toatley – GTRI (CA & Fin.)

Enablement Owners Committee
- David Rimmer - GTRI
- Dan Hopkinson - EDM
- Ira Bragg - Provost
- Jewel Coleman - OIT
- Jim Pete - OIT
- John Wilson - OIT
- Raj Vuchatu - GTRI
- Noel Moreno - OIT (Kaba)
- Stephen Garrett – ITG
- Oksana Waugh – GTRI
- Aparna Madichetty - GTRI
- Sumathi Harihar – GTRI

Transformation Committee (Draft)
Campus Representatives
- Faculty
- Faculty Affairs
- GTHR
- HR Practitioners
  HR Business Partners (HRBPs)
  HR Reps
  HR Contacts
  Administrative Managers
The HCM Transformation Team Structure

- Executive Sponsors
- Executive Steering
- Transformation Committee
- Transformation Directors
- Process / Enablement Owners Committee

Program Management Track:
- Scope & Cost
- Work Plan
- Resources
- Quality
- Risk

Process Track:
- HR Benefits
- Time & Labor and Absence Commitment
- Accounting Self-Service
- Careers
- Faculty Events
- Global HR Payroll
- Time Clocks
- Security Testing

Enablement Track*:
- Conversion Integrations & Extended Systems

Organizational Readiness Track*:
- Outreach
- Engagement
- Alignment
- Learning & Development

Reporting Track*:
- EDW
- LITE Reporting

*Shared Across FIN & HCM
The HCM Transformation

OneUSG Project Team

OneUSG Executive Sponsors
John Fuchko – Strategy, Tracey Cook – Fiscal Affairs, Bobby Laurine – IT, Juanita Hicks – HR,
Tristan Denley – Academics, Tricia Chastain - Administration

Academic Affairs
Advisory

Legal Affairs
Advisory

Communications
Advisory

John Scoville
Executive Director

David Nisbet
Craig Golden
Layne Francis
Program Oversight

OneUSG Connect
Shared Services
Becky Prince
Julie Harris

ITS
Administrative Services
Financials
Donna Wooddell

ITS
Administrative Services
HCM
Christy Todd

Communications and
Training
Jules Donnelly

ITS
Infrastructure
Morgan Whaley
Paige Born
Questions
HCM Transformation Kick Off
Cohort 6 – Georgia Tech
HCM Transformation Presentation
(2:00 - 3:00pm)

• Progress To Date
• Approach Changes and Lessons Learned from Prior Cohorts
• Terminology and Definitions
• Key Deliverables and Deadlines (Next 90 Days)
• Change Request Process
• Question and Answer – Group
Plan & Discover Phase Accomplishments
Plan & Discovery Phase Accomplishments

- **20+ Integrations Identified**
- **32,500+** Hours committed to the Plan & Discovery Phase across the Institute
- **150+ Change Impacts Documented**
- **135+ Stakeholders Engaged for Input and Discovery**
- **30+ Critical Gaps identified**
- **90+ Historic PS Reports Identified**
- **25+ Business Process Review Sessions Conducted**
Lessons Learned from Prior Cohorts
Lessons Learned

- Time and Absence Most Impactful
  - Strong Institution Practitioners Needed to Support and Triage
  - Verify Workflow and Time Approvers for All Colleges and Units
- Identity Management
- Test Planning
  - Institution Specific Test Scenarios
    - Specialized Functionality
  - Performance Test
  - Load Test
  - Service Desk & Case Management
- Freeze Scope Early
  - Exercise Change Control
- Parallel Multiple Times
- Pilot Clock, Careers and Self Service Deployment
- Knowledge Share with Service Desk
- Data Warehouse
- Regression Test
  - Prior Cohorts
- College and Unit Validation and Ownership of Data
- Run the “tired and true” approach
- Collaborate, Collaborate, Collaborate
Terminology & Definitions
<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>RICEW</td>
<td>Reports, Interfaces, Conversions, Extensions, and Workflow (An inventory of all reports, interfaces, conversions, extensions, and workflow that will be implemented during the HCM transformation.)</td>
</tr>
<tr>
<td>REQ</td>
<td>Functional Requirement (A requirement that must be met by the system for a business process to be successful.)</td>
</tr>
<tr>
<td>RTM</td>
<td>Requirements Traceability Matrix (Requirements Inventory) (Identifies all requirements that must be met by an enhancement, interface, report, or conversion program. Used to link requirements throughout the validation process, and ensure that all requirements are tested.)</td>
</tr>
<tr>
<td>FDD</td>
<td>Functional Design Document (Describes in detail the how requirements for an enhancement, interface, report, or conversion program will be met.)</td>
</tr>
<tr>
<td>FSPD</td>
<td>Future State Process Design (Describes step by step how each business process will be executed in the future state. Includes a process flow and verbiage to describe the process.)</td>
</tr>
<tr>
<td>POC</td>
<td>Process Owner Committee (Committee of business process owners who represent the interest of users. Decisions made throughout the course of the project are vetted with the POC who will provide feedback and help steer the direction of the project.)</td>
</tr>
<tr>
<td>ESC</td>
<td>Executive Steering Committee (Advisory committee comprised of key executives who monitor the project as it develops, and assists by providing advice or assisting with critical decisions.)</td>
</tr>
<tr>
<td>IDM</td>
<td>Identity Management (System and process for identifying, authenticating, and authorizing individuals to have access to the system.)</td>
</tr>
<tr>
<td>EDW</td>
<td>Enterprise Data Warehouse (Central repository of data used for generating reports.)</td>
</tr>
<tr>
<td>GAP</td>
<td>Gap (A difference in functionality between Georgia Tech’s current state and OneUSG’s current state. A gap in requirements can be addressed by an enhancement to the system, or change in business process.)</td>
</tr>
</tbody>
</table>
Key Deadlines & Deliverables
OBJECTIVES

• Write Change Requests for all approved scope items.
• Finalize Business Process Inventory.
• Document requirements for all RICE items in the requirements inventory.
• Finalize meeting schedule for upcoming design and business process sessions with process owners and OneUSG.
• Designing, creating, and/or facilitating integrations between GT ERPs and extended systems to OneUSG’s hosted PeopleSoft HCM environment

Approach

• Aim is to schedule 2 two-hour meetings each week with working group per Process Area between March 18th and June 6th. Target meeting days will be Tuesdays, Wednesdays, and Thursdays
• Meet with extended system owners to review HR data needs & determine how best to satisfy the majority of integration needs through the new GT Enterprise Data Warehouse (EDW)

DELIVERABLES

• Change Requests
• Future State Business Process Inventory & Requirements Inventory
• Data Cleanup and Future state conversion architecture & system mapping strategy
• Design Specifications for point to point integrations btw GT & OneUSG & integrations routed through the GT EDW
# Georgia Tech Build & Unit Objectives

## Objectives
- Conduct sessions with process owner working groups and OneUSG to design, document, and unit test changes to system functionality & business processes.
- Convert data from GT to OneUSG and validate results.
- Complete Kaba Clock Parallel Test.
- Conduct pilot for MSS, Careers, and Kaba Clock.
- Prepare test plans and GT specific test scenarios to prepare for System and Integration Testing.
- Build awareness and support for the initiative.
- Assess Learning & Development (L&D) needs, develop L&D Plan, and begin creation of L&D materials.
- Launch and support a change agent network.
- Assist OneUSG with data conversion from GT’s current PeopleSoft HCM environment to OneUSG’s hosted PeopleSoft environment.

## Schedule
- Educate and inform campus through bimonthly newsletters (starting in April) and monthly info sessions (beginning in May)
- Collaborate with extended system owners to communicate status of conversions/integrations, development, and testing efforts
- Coordinate conversion activities and validations with OneUSG for all data needs (current & historical)

## Deliverables
- Conversion Validation Scripts & Programs
- Unit Testing Results
- System Integration Test Scripts
- L&D Documentation and Materials
Change Request Process
1. GT requirements not met by the current OneUSG Connect System lead to internal team gap reviews and the related documentation.

2. The gaps and the related documentation is then reviewed by GT HR Leadership, and if approved to proceed.

3. The gaps are then reviewed with OneUSG to check if this gap
   - Is in the USG build pipeline (or)
   - Will be implemented as part of an upcoming PUM release (and)
   - To confirm if it can be accommodated by OneUSG from a system viewpoint, taking into consideration impacts to the other cohort constituents.

4. After the GT & USG gap approvals to proceed...
If a GT gap build request cannot be part of the OneUSG PS HCM solution set:

- If a GT specific need cannot be accommodated by OneUSG due to the fact that the changes cannot be contained within the GT configured system space, and or the changes are system wide and are detrimental to the other cohorts HR processes, the following steps are to be taken:

  • If it is a business critical need, the decision is appealed.

  • If not approved, then

    - The reason is documented and relevant documentation
    - The change request form is updated
    - The GT review board and project leadership are informed
    - The changes then follow the process where the GT policy is updated to use the system functionality as-is, and or a work-around is found inside or outside the system to meet the GT need.
Georgia Tech HR Change Request Process

Area/Track Leads
Create Change Request

Business Process Owners Committee

A&R Working Group*

Institute Support Advocates*

Enablement Owners*

ESC

Ready for USG

*Based on type of request, CR's will visit these groups
Questions
HCM Transformation Kick Off Cohort 6 – Georgia Tech
Agenda
HCM Team Project Administration & Logistics Presentation (3:15 - 4:30pm)

- Project Administration Through Smartsheet
  - Why Smartsheet?
  - Directory with Links
  - Shared Materials (All Institutions)
    - Risks
    - Presentations
    - Core Training and Communications Inventory
    - Change Requests
- Institution Specific Materials
  - Project Plan Management
  - Configuration Management
  - Actions / Issues Management
  - Change Requests
Institution Specific Materials (cont'd)
- Testing Administration
- RICEW
- Security and Workflow

- Change Request Tracker
- Conversion Review
- Change Request Review
- Data Reconciliation and Sign-Off
- Program Reviews
- Change Management
  - Communications
  - Training
  - Readiness Assessment
  - Definition of Change Network
Planning and Analysis
- Project Plan
- Actions / Issues
- Risks

Design
- Change Requests
- Specifications (*)
- Matrices
- Security
- Time and Labor
- Workflow

Build
- Configuration
- RICEW
  - Reports
  - Interfaces
  - Conversions
  - Enhancements
  - Workflow

Test
- Test Conditions
- Data Sheets

Deployment
- Cutover Plan
- Reconciliation & Exceptions
- Readiness Assessment (*)
- Program Review (*)

(*) – Not in Smartsheet
OneUSG Connect

Smartsheet Directory
Smartsheet Directory

AUGUSTA UNIVERSITY

Resource Management
- Contact List
- Team Roster
- Key Employee List

HCM Issues / Actions / Agenda Items
- Workstream Meeting Links
- Add Discussion Topics to an Agenda
- Add Issues
- Add Actions
- Add a Decision
- Active Actions Report
- Active Issues Report
- Active Decisions Report
- Meeting Calendar

Analysis and Design
- AU - Requirements Inventory
- AU - Requirements Log
- AU - Business Process Fact Sheet

RICEVI Management
- AU - HCM RICE Inventory
- AU - FIN - RICE Inventory

HCM Convention
- Cotter Pla - Sprint 1.5
- Reconciliation - Sprint 1.6
- Cotter Pla - Sprint 2.0
- Reconciliation - Sprint 2.0
- Cotter Pla - Sprint 3.0
- Reconciliation - Sprint 3.0
- Cotter Pla - Sprint 4.0 (Coming Soon)
- Configuration Worksheet
- Environment Matrix
- Query Matrix

HCM Quality Assurance Management
- AU - Risk Report
- AU - OneUSG Defect Log

Project Management Plans
- Augusta University Project Plan
- FIN - Master Project Plan FIN (*)
- FIN - Configure and Develop Plan
- HCM - Master Project Plan (*)
- HCM - Transition
- HCM - Configure & Develop Plan
- HCM - Conversion Plan
- HCM - Institution Task Plan
- HCM - Kaba Pilot Plan
- HCM - Kaba Rollout Plan
- HCM - Security and Workflow Plan
- HCM - Service Desk Plan

Project Plan Reports
- Tasks in Red
- Tasks without Estimated Completion Dates

My Dashboard
- My Active Actions
- My Active Issues
- My Active Tasks
- My Active Decisions
- My Active Defects

Dashboard / Reports
- AU - HCM Leadership Dashboard
- AU - FIN Leadership Dashboard
- AU - OneUSG Program Sponsors Dashboard
- HCM - Development Dashboard
- HCM - Defect Dashboard
- HCM - Change Requests Dashboard
- HCM - Recon Dashboard - Sprint 2.0
- HCM - Recon Dashboard - Sprint 2.0
- FIN - Development Dashboard
- FIN - System Testing Dashboard
- FIN - Defect Dashboard

Kaba and Security Configuration
- AU - Time Clock Configuration Worksheet
- 120 - Security Assignment (AU)
## Smartsheet Directory

### My Tasks and Issues

<table>
<thead>
<tr>
<th>Event Date</th>
<th>Notify Change Management Team</th>
<th>Workstream</th>
<th>Team Name</th>
<th>Action Item</th>
<th>Comments</th>
<th>Assigned To</th>
<th>Status</th>
<th>Priority</th>
<th>Estimated Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/26/18</td>
<td>AU - WFA - Den Admin, ESS, MSS, POS, MGMT</td>
<td>HCM - Workforce Administrator Team</td>
<td>Self-Reporting of a Disability</td>
<td>Need a business process around self-reporting of a disability - what is the internal business process around this? This can be turned on in OneUSG Connect, but needs progression, and when this gets turned on, it will be for all institutions. This is a Jamieson issue, what do we do with the information once reported? Needs to go to the HCM steering committee. Craig will take this to the steering committee.</td>
<td>Craig Golden</td>
<td>In Progress</td>
<td>Minor</td>
<td>11/30/18</td>
<td></td>
</tr>
<tr>
<td>01/16/15</td>
<td>AU - Project Leadership</td>
<td>HCM - Core Project Team</td>
<td>Provide Readiness Assessment questionnaire to AU Leadership team</td>
<td>1/16 - Provided the OneUSG questionnaire. Working to obtain the UGA questionnaire. Will close once UGA materials have been provided to Augusta University.</td>
<td>Craig Golden</td>
<td>In Progress</td>
<td>Minor</td>
<td>02/13/19</td>
<td></td>
</tr>
<tr>
<td>01/31/19</td>
<td>AU - OneUSG Program Sponsor</td>
<td>AU - OneUSG Program Sponsor</td>
<td>Follow up with QnA in the system office to determine the status of the Policy Resources submitted by Susan Hobin</td>
<td>Follow up with the Benefits Team to determine if the existing Augusta University Payroll Instructio can be utilized for the shutdown payroll.</td>
<td>Craig Golden</td>
<td>Not Started</td>
<td>Major</td>
<td>02/13/19</td>
<td></td>
</tr>
<tr>
<td>02/15/19</td>
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OneUSG Connect

Key Processes: Project Plan Management
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Project Plan Management

• Updating Project Plan
  – Update Form Demonstration
    • Actual Start Date
    • Estimated End Date
    • Actual End Date
  – Comments Demonstration
  – Attachment Demonstration
  – View Cell History
  – Notification / Reminders
Planning and Analysis

OneUSG Connect

Actions & Issues Management
Comprehensive of Actions and Issues Cohort 6

- Utilize Filters or Reports to Limit....
  - Assigned To
  - Track
  - Status (Critical vs Blocker)

Smartsheet: Issues and Actions Log
<table>
<thead>
<tr>
<th>Date</th>
<th>Priority</th>
<th>Task Details</th>
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<th>Responsible</th>
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<tr>
<td>02/18/19</td>
<td>Minor</td>
<td>AU - Time &amp; Labor and Absence Mgmt. HCM - Kaba Rollout Team. Add new row for on Worksheet for GA War with external IP</td>
<td>In Progress</td>
<td>Steve Duckworth</td>
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<tr>
<td>02/20/19</td>
<td>Minor</td>
<td>AU - Project Leadership. AU - Project Team (AU Leads). Break the Workcenter for Augusta into two RICE items</td>
<td>Not Started</td>
<td>Craig Golden</td>
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<tr>
<td>02/25/19</td>
<td>Minor</td>
<td>AU - Commitment Accounting and Financials. HCM - Commitment Accounting Team. New Deduction Codes to be Mapped. Today I added two new deduction codes in HTEST2. 016G01 this is a new plan type so we may need to find out where AU has it mapped to. 01GERS this is also a new plan type so we need to find out where AU has it mapped to. 3/4 - J. Kehee - This will be entered manually in Sprint 3</td>
<td>Not Started</td>
<td>Carrie Vallone</td>
</tr>
<tr>
<td>02/28/19</td>
<td>Minor</td>
<td>AU - Payroll, Time and Absence. HCM - Time and Labor and Abs. Mgmt. Team. Check with Bryant to assure the Dynamic Groups and row level security is in place for the next Sprint for the time approvers. Be sure all managers can see their people. Bryant - GA War and perhaps the prison will be the next time entry on Kaba.</td>
<td>Not Started</td>
<td>Bryant Boldens</td>
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</table>
Each Issues or Actions has a Smartsheet Form that anyone can use to add an issue to the log.
Key Leadership Dashboard: Change Requests
Change Requests
Dashboard – By Status

Change Requests by Module

- Asset Management: 0
- Absence Management: 2
- Benefits Administration: 4
- Careers: 6
- Commitment Accounting: 6
- Employee Self-Service: 3
- Faculty Grants: 8
- Human Resources: 8
- Manager Self-Service: 8
- Payroll: 8
- Policy and Procedures: 0
- Technical: 5
- Time & Labor: 8
- Security / WorkLife: 1

Change Request by Status

1. Not Started: 0
2. Drafted: 0
3. Submitted for Consideration: 0
4. Under Review - System Office: 0
5. Under Review - Design Team: 0
6. Under Review - Steering Committee: 3
7. Under Review - Executive Leadership: 0
8. Approved: 41
9. Deferred / Rejected: 6
A. Additional Information Needed: 0
R. Redirected to Institution (Query): 0
W. Withdraw: 4
X. Under Appeal: 0

Change Requests
OneUSG Connect

Key Processes:
Configuration Management
• What is configuration management?
Summary
- GT Specific Configuration prototyped in HCONVR1 environment
- Smartsheet Used to Catalog Configuration Changes
  - Configuration Includes...
    - Changes to Core Functionality
    - GT Specific Setup
- Configuration Migrated from HCONVR1 via Data Mover Script as Each Environment is Built
- Tasks Added to Cutover Plan for Each Configuration to Verify Script was run Successfully
## Configuration Management
### Smartsheet – Configuration Matrix

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<th>Configuration Description</th>
<th>Source (if other than HCO)</th>
<th>Navigation</th>
<th>Filter criteria (i.e. company, setld, etc.)</th>
<th>Volume Estimates</th>
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OneUSG Connect

RICEW Inventory
• RICEW Inventory Definition
  – RICEFW means Reports (R), Interface (I), Conversion (C), Enhancements € and Workflow (W)

• How is Inventory Used by OneUSG
Test Scripts

• Roles and Responsibilities
  – USG Provided Materials
  – GT Expectations

• Locations
  – Athens
  – Atlanta

Expectations

• Create Data Sheets
• Supplement Core Test Conditions
• Author GT Specific Test Conditions
• Map Test Conditions back to Requirements
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<td>25) Institution Practitioner</td>
<td>Run BOR_CA_PYGRP_OUT_OF_SYNC_POS for pay groups out of sync between Position Management and Job data</td>
<td>Pass</td>
</tr>
<tr>
<td>Test User/Script</td>
<td>008</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>-----------------</td>
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<tr>
<td>Job Title</td>
<td>Payroll Coordinator Rehired Rt</td>
<td></td>
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<td>Effective Date</td>
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<td>Full/Part Time</td>
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<td>Department Description</td>
<td>Controller's Office</td>
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<td>Reports to Position ID</td>
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<td>Initiator Name</td>
<td>NA</td>
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<td>Employee Type</td>
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<td>Max Head Count</td>
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<td>Adds to FTE Count</td>
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<td>Budgeted Position</td>
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<td>Position ID</td>
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</tbody>
</table>
Testing

Defect Management

120 - AU - Defect Log

Defect Summary Statement *

Details/Additional Comments

Team Name *

Priority *
   2) Extensive Manual Workaround

Defect Status *
   00) Pending Assignment

Assigned To *
   Jeff Kehoe (jeff.kehoe@usg.edu)

Institution *
   120 - Augusta University

Environment *
   HTTEST2 (3.0)

File Attachments

AU - Defect Scorecard

AU Defect Dashboard

Benefit Administration * 5
   Open 3
   Closed 2
   Pending Retest 0

Budget/Commitment Accounting * 0
   Open 0
   Closed 0
   Pending Retest 0

Careers (Recruiting) * 6
   Open 5
   Closed 1
   Pending Retest 0

Employee Self Service * 2
   Open 1
   Closed 1
   Pending Retest 0

ePerformance * 0

Human Resources * 4
   Open 3
   Closed 1
   Pending Retest 0

Faculty Athletics * 0

Manager Self Service * 0

Payroll * 16
   Open 2
   Closed 14
   Pending Retest 0

Position Management * 0

Time & Labor/Absence Mgmt * 5
   Open 0
   Closed 5
   Pending Retest 0

Security/Workflow * 7
   Open 0
   Closed 7
   Pending Retest 0

AU - Defect Scorecard

Open
Closed
Pending Retest

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Deployment

OneUSG Connect

Reconciliation
Reconciliation

• Process Overview

Pass 1 - Begin
- Convert Job, Position and Personal Data

Pass 1 - Pause
- Reconcile Foundational Data

Pass 1 - Resume
- Convert Security, Time and Absence Enrollment, Faculty Events and Alight Benefits

Pass 1 - Reconciliation and Exceptions
- Compare Data Back to Source
- Manually Address Data Exceptions

Pass 2 - Go-Live
- Bi-Weekly Time Entry

Pass 2 - Reconciliation and Exceptions
- Convert Payroll and Absence Balances
- Convert Garnishments

Pass 2 - Compare Data Back to Source
- Manually Address Data Exceptions
<table>
<thead>
<tr>
<th>Phase</th>
<th>Module</th>
<th>Type</th>
<th>Status</th>
<th>Reconciliation</th>
<th>File Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pass 2</td>
<td>Absence Management</td>
<td>Reconciliation</td>
<td>Deferred</td>
<td>Health and Wellness PIF Validation</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Benefits Administration</td>
<td>Exception</td>
<td>In Process</td>
<td>Health and Wellness PIF Exceptions</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Benefits Administration</td>
<td>Reconciliation</td>
<td>In Process</td>
<td>GRA with 007 Job code</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Reconciliation</td>
<td>Complete</td>
<td>Script 101-Suspend Combo Code. Verify the proper suspense code was assigned to the HR department</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>No Rows Returns</td>
<td>Script 104 - check for funding to all 59929 CF</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>No Rows Returns</td>
<td>Script 13 Sequence Number</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Complete</td>
<td>Script 18 Active positions loaded without funding. It is fine to focus on the listed positions. For this system test, these positions listed in the supplement file 103 will cause GL to attend. So we need funding for these guys.</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Complete</td>
<td>Script 20-Confirm distr percent in DBE = 100</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>No Rows Returns</td>
<td>Script 22-Compare DEPTID between DBE_JOB and position</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Complete</td>
<td>Script 24b: Position Funded to inactive project. This is a list of combo codes with an inactive project. The combo code itself is ACTIVE. Do we need to inactivate this Combo Code?</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Complete</td>
<td>Script 29 - Funding with Invalid Combo Code. All positions listed are VACANT. Should be non-issue. Should we be concerned that we are inactivating Department Budget Table entries?</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Not Applicable</td>
<td>Script 60 Add Pay Missing Funding</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Not Applicable</td>
<td>Script HR12 Post to Inactive Dept</td>
<td>Smart Sheet</td>
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<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>No Rows Returns</td>
<td>Script HR21 Job without post</td>
<td>Smart Sheet</td>
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<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Complete</td>
<td>Invalid Funding - RUN LAST</td>
<td>Smart Sheet</td>
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<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>Not Applicable</td>
<td>85 - paygroup out of sync between JOB and position data. For these employees, the paygroup is out of sync between Position Data and JOB Data. Action: Get these synced-up</td>
<td>Smart Sheet</td>
</tr>
<tr>
<td>Pass 1</td>
<td>Commitment Accounting</td>
<td>Exception</td>
<td>No Rows Returns</td>
<td>39-Query to confirm all Depts who have a row in Dept Budget also have a row in DeptRef_Snapshots</td>
<td>Smart Sheet</td>
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</table>
## AU - HCM Sprint 3.0 Reconciliation

<table>
<thead>
<tr>
<th>Category</th>
<th>Not Started</th>
<th>In Progress</th>
<th>Defects</th>
<th>Complete</th>
<th>Defer</th>
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<td>Absence Management</td>
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<td>4</td>
<td>2</td>
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<td>5</td>
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<tr>
<td>Benefits Administration</td>
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<td>2</td>
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<td>Faculty Events</td>
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<td>Human Resources</td>
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<td>Payroll</td>
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<td>Time and Labor</td>
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## AU - HCM Sprint 3.0 Exceptions

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<th>Defects</th>
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<td>4</td>
<td>5</td>
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<td>Benefits Administration</td>
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<td>Human Resources</td>
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</table>
Deployment

OneUSG Connect

Cutover
• Cutover Plan
  – Series of tasks that are performed to deploy the components from the development/Pre-production environment to the Production environment and activate them
  – To Do List
  – Repeatable
  – Include: Scripts, Programs, Configuration, Verification, Communications, Checkpoints
Cutover
Scope / Tasks

Communications Needs:
- Approval Deadline
- System Up and Down Times
- Job Aids / Key Reference Documents
- Support Protocols
- Other

Pre-Conversion Tasks:
- Data Cleanup
- Additions / Deletions of Security
- Deadlines for Processing
- Other

Post-Conversion Tasks:
- Exception Management
- Processing of Blackout Transactions
- Other

86
<table>
<thead>
<tr>
<th>Pass 1 AL-to-USG Staging Table Copy</th>
<th>Pass 1 - Conversion</th>
<th>Rollup</th>
<th>9. Complete</th>
<th>01/08/19</th>
<th>01/31/19</th>
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<tbody>
<tr>
<td><strong>OneUSG: Project Migration</strong></td>
<td>Pass 1 - Conversion</td>
<td>Rollup</td>
<td>9. Complete</td>
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<tr>
<td><strong>Shelia Sloan</strong></td>
<td>Ensure project team has sufficient security for cutover activities</td>
<td>03/04/19</td>
<td>03/04/19</td>
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<tr>
<td><strong>Steve Liquori</strong></td>
<td>Merge projects into release project</td>
<td>03/04/19</td>
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<tr>
<td><strong>Emily Mautz</strong></td>
<td>Migrate Development Projects to Target Environment</td>
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<td>03/04/19</td>
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<td><strong>Emily Mautz</strong></td>
<td>Build project to recreate views and execute</td>
<td>03/04/19</td>
<td>03/04/19</td>
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<tr>
<td><strong>Brian Davis@usg.</strong></td>
<td>Run revised grants scripts to include TAL and AM tables - see Brian for updates to scripts or have him rerun scripts</td>
<td>03/04/19</td>
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<td><strong>Emily Mautz</strong></td>
<td>Move project definitions to target environment</td>
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<td>03/04/19</td>
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<td><strong>Emily Mautz</strong></td>
<td>Move revised conversion sql's to target environment</td>
<td>03/04/19</td>
<td>03/04/19</td>
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<td>Move revised non-conversion sql's to target environment</td>
<td>03/04/19</td>
<td>03/04/19</td>
<td>000</td>
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<tr>
<td><strong>Technical Environment Readiness</strong></td>
<td>Pass 1 - Conversion</td>
<td>Rollup</td>
<td>9. Complete</td>
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<tr>
<td><strong>Stephen Liquori</strong></td>
<td>Communication interim milestone - ETA 11:00pm - Send email main cohort 4 build applied to HP CDC, transitioning to conversion processes. (Go live only task)</td>
<td>03/04/19</td>
<td>03/04/19</td>
<td>11:00pm</td>
<td>000</td>
<td>-14</td>
</tr>
<tr>
<td><strong>Emily Mautz</strong></td>
<td>Assemble query project for all functional and institution queries and migrate to target - see Smartsheet</td>
<td>03/04/19</td>
<td>03/04/19</td>
<td>000</td>
<td>-14</td>
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</table>
Deployment

OneUSG Connect

Readiness Assessment & Program Review
Readiness Assessment & Program Review
Example

Score Interpretation

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Interpretation</th>
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<tbody>
<tr>
<td>31 – 40</td>
<td>Highly Confident to Go Live</td>
</tr>
<tr>
<td>21 – 30</td>
<td>Confident to Go Live</td>
</tr>
<tr>
<td>1 – 20</td>
<td>Risk Factors Exist</td>
</tr>
</tbody>
</table>

- Vision and Leader Alignment: 37
- Stakeholder Engagement and Communication: 37
- Sustainability and Governance: 39
- Organizational and Cultural Alignment: 40
- Training: 36
### Readiness Assessment & Program Review

#### Risk Matrix

<table>
<thead>
<tr>
<th>Current</th>
<th>Projected at 12/16</th>
<th>Risk</th>
<th>Mitigation</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>XXX is transitioning from a &quot;budget department&quot; organization structure to a &quot;true&quot; HR department organization structure.</td>
<td>Distributed units provided organization structure for conversion. Distributed units validating results prior to go-live.</td>
<td>• Impacts Org Chart, Security Rules and Time Rules&lt;br&gt;• Impacts ability to test lump sum conversion in PeopleAdmin</td>
</tr>
<tr>
<td><img src="red" alt="" /></td>
<td><img src="yellow" alt="" /></td>
<td>USG Project Resources will transition to Cohorts 5 and 6</td>
<td>XXX partner with USG to identify resource plan.</td>
<td>XXX will be in a critical stabilization period when USG project resources are transitioning</td>
</tr>
<tr>
<td><img src="red" alt="" /></td>
<td><img src="yellow" alt="" /></td>
<td>Significant manual data entry for conversion. Due to legacy system constraints not all data can be converted systematically. (*)</td>
<td>Assemble all Manual Data Entry by 11/30&lt;br&gt;Standardize Data to Facilitate Rapid Entry&lt;br&gt;Prioritize Bi-Weekly Employee data&lt;br&gt;Assemble a data entry team and approach</td>
<td>Failure to complete entry could impact pay, reporting, and user access to information,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data warehouse will be operational on January 7th.</td>
<td>Create stop gap queries, Workcenter, and reports in OneUSG.&lt;br&gt;Prioritize Hyperton and Elements Integrations.&lt;br&gt;Manage expectations with 3rd party data consumers.</td>
<td>• End users will not have the expected access to information through the warehouse until January 7.</td>
</tr>
</tbody>
</table>
GT Organizational Readiness

READINESS ASSESSMENTS
- Data Collected Via Surveys, Interviews, Focus Groups
- Initial Readiness Assessment: January 2019
- Additional Assessments to be Conducted Throughout Initiative
  - Complements USG Cohort Program Reviews

TRAINING
- GTHR and HR Practitioner Training – led by USG
- Campus End User Training – led by GT
- Late October 2019 – January 2020
- Web-Based Tutorials
- Instructor-Led Sessions
- Job Aids

COMMUNICATIONS
- Website: transformation.gatech.edu
- HCM pages launched in March (ongoing updates)
- Newsletter: connecTECH
  - Begins in April (bi-monthly)
- Articles, announcements, emails (ongoing)
- Info Sessions begin in May

CAMPUS ENGAGEMENT
- Change Agent Network Kickoff in May
- Stakeholder Focus Groups and Surveys
- Presentations, Webinars
- Transformation Expo in September

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GT Organizational Readiness

**COMMUNICATIONS**

**TRAINING**

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- HCM pages launched in March (ongoing updates)
- Newsletter: connecTECH
  - Begins in April (bi-monthly)
- Articles, announcements, emails (ongoing)
- Info Sessions begin in May
GT Organizational Readiness

**READINESS ASSESSMENTS**
- Data Collected Via Surveys, Interviews, Focus Groups
- Initial Readiness Assessment: January 2019
- Additional Assessments to be Conducted Throughout Initiative
- Complements USG Cohort Program Reviews

**TRAINING**
- GTHR and HR Practitioner Training – led by USG
- Campus End User Training – led by GT
  - Late October 2019 – January 2020
  - Web-Based Tutorials
  - Instructor-Led Sessions
  - Job Aids

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**CAMPUS ENGAGEMENT**
- Change Agent Network Kickoff in May
- Stakeholder Focus Groups and Surveys
- Presentations, Webinars
- Transformation Expo in September

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**COMMUNICATIONS**

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OneUSG Connect

Next Steps
Planning and Analysis

- Project Plan
- Actions / Issues
- Risks

Design

- Change Requests
- Specifications (*)
- Matrices
  - Security
  - Time and Labor
  - Workflow

Build

- Configuration
  - RICEW
    - Reports
    - Interfaces
    - Conversions
    - Enhancements
    - Workflow

Test

- Test Conditions
- Data Sheets

Deployment

- Cutover Plan
- Reconciliation & Exceptions
- Readiness Assessment (*)
- Program Review (*)

(*) – Not in Smartsheet
1. Sprint 1.0 Conversion & Reconciliation (Joint)
   - Target: First Week in April
2. Author Change Requests (GT)
3. Review Change Requests with OneUSG Counterparts (Joint)
4. Obtain Approval to Submit Change Request (GT)
5. Exercise Change Request Process (OneUSG)
6. Author Functional Specifications for Approved Change Requests (GT)
7. Author Test Plan to Ensure Requirements Satisfied (GT)
8. Participate in Augusta University Testing (GT)
9. Sprint 2.0 Conversion & Reconciliation (Joint)
SOLUTIONS
NOT PROBLEMS
RESULTS
NOT EXCUSES
Great Teammates Are...

- **Humble** – They don’t require the spotlight to feel important.
- **Fully Engaged** – They are “in” the moment at all times regardless of rank, or playing time.
- **Encouraging** – They notice the success of others.
- **Respected** – They command respect and are willing to speak the kind of truth that holds people accountable.
- **Reliable** – Everyone knows what to expect from them.
- **Problem Solvers** – They don’t point fingers, instead they ask “where do we go now?”
- **Resourceful** – They share what they learn and embrace a mentoring role.
- **Willing to Sacrifice** – They are not above doing the dirty work.
- **Positive** – They look for the good in key situations, especially when others go negative.
- **Communicators** – They seem to always have the right words at the right time.
- **Relationship Builders** – They build camaraderie with “all” members of the team.
- **Honest** – They are trusted and their motives are “team-first”.
- **Hard Workers** – They have an incredible work ethic; preparing for tough tasks excites them.
- **Always Ready** – They remain available to step up and succeed at a moment’s notice.
- **Competitors** – They feel that winning requires nothing less than maximum effort.
- **Fun** – Others want to be around them.
OneUSG Connect

Questions
Thank you!