Financials Transformation
Program Overview
In partnership with the University System of Georgia

Enterprise Transformation

2001
• Georgia Tech implemented highly customized PeopleSoft Financials 8.4

2006
• PeopleSoft Financials upgraded to version 8.8

2006 - 2014
• Additional systems implemented due to limitations within PeopleSoft

2014
• PeopleSoft 8.8 is out of support with Oracle

2016
• To unite the Financial system and improve capabilities, determined need for a new Financials System

2017
• Workday as vendor for Financial Transformation
Creating the Next

Transformation Vision

Transform | By designing data, processes, and systems for the digital age
Build   | By CREATING THE NEXT platform for service delivery
Unify   | By connecting our user community experience
Empower | By optimizing decisions with intuitive analytics
Enterprise Transformation

**WHY**
we are transforming to...

- Enable the Institute’s strategic plan and core academic, research, and service missions
- Support students, faculty, and staff through consistent, reliable, high-quality experiences
- Optimize decision making with consolidated, accessible, trusted data and intuitive analytics
- Prepare the Institute for the digital age

**HOW**
we are transforming by...

- Adopting streamlined, simplified, industry-leading business practices
- Fostering an environment of collaboration and transparency
- Engaging the Georgia Tech community through communication and outreach
- Being forward thinking and adapting to the iterative nature of implementing new technology
- Developing the workforce of the future

**WHAT**
we are transforming...

- Our business processes, policies, and service delivery models
- Our core financial systems with Workday
- Our data warehouse and analytic reporting capabilities
- Our related applications and systems
Financial Transformation Goals

#1 Collaborate between academic, research, and administrative areas to address system, process, and data deficiencies

#2 Streamline and standardize processes to enable faculty and researchers to work more efficiently, promote platform unification and to reduce customized applications

#3 Expand the core financial system to eliminate redundancies and enable outcomes currently provided by some extended systems

#4 Improve reporting capabilities to enhance the financial decision making
Guiding Principles

- Think Enterprise
- Streamline & Standardize Processes
- Minimize Technical Complexities
- Practice Effective Project Governance
- Communicate, Collaborate & Share
Enterprise Transformation

Financials

2018
- Plan
- Architect
- Configure & Prototype
- Test
- Deploy

2019
- July 2019 Go Live

2020
- Dec 2019 Deploy
- Jan 2020 USG Payroll

HCM

Plan
- Design
- Configure & Develop
- Test & Train
- Deploy

LITE

Student Reporting
- Live!
- Financials Reporting
- HR Reporting

- July 2019 Go Live
- Jan 2020 Go Live
Plan Phase Accomplishments

- PeopleSoft Chartfields transformed into FDM Dimensions
- 216 Integrations Identified
- 170,000+ Hours committed to the Transformation across the Institute
- 218 Current Systems Inventoried
- 150+ Stakeholders Engaged for Input and Discovery
- 500+ Current Pain-Points Identified
- 40+ Hours of Discovery Sessions Conducted

08/17/2018

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Architect Phase Accomplishments

- Configured 240 Objects and 118 Business Processes in Workday
- Conversion Designs 21
- Business Process Design Sessions Conducted 45
- Integration Designs 43
- Change Network Members Recruited 107
- Outreach Activities Completed 30+
- Reporting Requirements Identified 125+
- Customer Review Sessions 25

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Steering Committee Structure

Executive Sponsors
- G.P. Bud Peterson - Chair
- Chaouki T. Abdallah
- Rafael Bras

Executive Steering
- Jim Fortner - Chair
- Mark Hoeting
- Sandi Bramblett
- Sonia Alvarez-Robinson
- Kim Harrington
- Mark Demyanek
- Jennifer Hubert

Governance

Process Owners Committee
- Carol Gibson
- David Goldfarb
- Frans Barends
- Lisa Godfrey
- Sandy Mason
- Sub-Council Chair

Financials Transformation Committee
- Alan Katz (Chair)
- Rusty Edwards
- Erica Edwards
- Eric Trevena
- Janice Russell
- Liz Maryanski
- Carla Zachery
- 2-3 Faculty Members
- Melissa Lang
- Vanessa Payne
- Terry Fair
- Selinda Biggers
- Patrice Miles
- Kim Toatley
- Trudy Riley
- Emily Howell
- Carol Gibson
- Dan Taylor
- Melissa Hall
- Robert Foy
- Sandy Mason

Enablement Owners Committee
- David Rimmer
- Ira Bragg
- Jewel Coleman
- Jim Pete
- John Wilson
- Raj Vuchatu

CREATING THE NEXT®
Terminology Crosswalk

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<th>Georgia Tech Business Process Areas</th>
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Let’s stay connected!

Questions or Feedback?

- **Helpdesk Email:** erp.ask@gatech.edu
- **Website:** http://transformation.gatech.edu
Transform Your Workday