AGENDA ITEM SUMMARY

NAME: Committee of the Whole　　　　　　　　**DATE:** October 16, 2024

TITLE: NextGen Project Update

☐ Action　　　　　　　　　　　　　　☒ Review and Discussion

☐ *This item is required by policy*

PRESENTERS
Jacquelyn Bailey, Vice Chancellor for Information Technology
Satasha Green-Stephen, Senior Vice Chancellor for Academic & Student Affairs
Eric Davis, Vice Chancellor for Human Resources
Bill Maki, Vice Chancellor for Finance and Facilities
Clint Davies, BerryDunn, Third-Party Owner's Representatives

PURPOSE
This is the regular quarterly presentation to update the Committee of the Whole on the NextGen project.

BACKGROUND INFORMATION
The project has been live for just over 90 days and now has entered extended care. During the next 12 months of extended care Team Workday is providing MinnState Extended Care to support during the first cycle of processing after Hypercare and includes both functional and technical support for addressing issues and Defects that arise in the execution of the business cycles. In addition, Team Workday will provide MinnState support with the review and adjudication of Workday releases.

SEPTEMBER FUNCTIONALITY RELEASE
September 21, 2024, was NextGen's first post go live release. The Workday SaaS platform does two major releases a year. Some changes are required, and others are voluntary.

OVERALL PROJECT STATUS
Finance
The finance team continues to refine its integrations with several being successfully remediated after some unanticipated challenges. Staff are becoming more comfortable running the queries and reports within the Workday modules. College and university finance leaders continue to work with the finance team to help identify issues, find potential solutions, and have been

understanding that it will take time to get to stabilization.

The finance team continues to review and reengineer some business processes to ensure that appropriate security roles are assigned. The team is also working to eliminate double entries with ISRS, the number of manual entries, and workarounds. Remediation continues around data access and the ability to have understandable budget information for campus constituents.

The teams have found that more direction and training are needed to successfully complete the timely entry and reconciliation of sensitive transactions with additional training resources and communication being formulated as needed.

Priorities for the next 30-60 days are to:
1. Continue to clearly communicate to the finance community a timeline and prioritization of addressing outstanding issues.
2. Reengage the college and university CFO advisory committee.
3. Complete stabilization of Integrations.
4. Stabilize Cash Management Reconciliations and Reporting between the State Treasury and Local Accounts.
5. Fix the E-Builder integration by October 11, 2024; and
6. Update the job aids and provide additional training

HCM
The HCM team is planning to form a cross-functional user group to evaluate/ re-engineer HCM Business Processes to improve efficiency in response to feedback from Campus HR, the HR Service Center and tickets received. The team is also working on new training materials for users in the form of job aids, videos and monthly topical learning sessions.

The HR user community continues to provide valuable feedback and opportunities for process improvement. As we continue to evolve our processes and improve how we address HR-related challenges, we are adopting an Agile (project management methodology) approach to prioritization. This shift will allow us to be more flexible, responsive, and focused on delivering solutions that align with the most pressing needs of our teams.

As with Finance, work continues on reviewing and making adjustments to business processes and integrations. The Organizational Change Management team is working with HR on how we provide stakeholders with more process specific resources and training. We are also Identifying and replicating reports that don't exist or have missed requirements in Workday.

Priorities for the next 30-60 days are to:
1. Implement an internal process for gathering requirements, testing, prioritizing and communicating changes to HCM business processes
2. Partner with the OCM team to build new and continually update job aids and quick reference guides when business processes are updated
3. Add needed validations to current HCM business processes to ensure data accuracy and collective bargaining agreement compliance
4. Improve communication by restructuring the weekly communication plan to ensure we

meet the needs of the HR college and university teams
5. Engaged with continuous process improvement to enhance the speed and accuracy of Workday business processes and integrations

<u>Student</u>
The Workday Student team continues its ongoing pre-planning work which consists of companion project information gathering of all system wide third-party technologies and business processes. The team also continues the important work on planning for standardization and alignment.

Negotiations to update the student Statement of Work (SOW) is ongoing. We are focused on keeping the integrity of our pre-negotiated fixed fee for student which was negotiated as part of the original 2020 Workday contract. Part of this work includes Student worker functionality that will now be implemented with Workday Student.