<table>
<thead>
<tr>
<th>Today</th>
<th>Next Change Network Roundtable</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00-4:00 pm</td>
<td>Thursday, August 25, 2016 3:00-4:00 pm</td>
</tr>
<tr>
<td>Kissam Multi-Purpose Room, C210</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kissam Multi-Purpose Room, C210</td>
</tr>
</tbody>
</table>
Agenda

• Introductions and Objectives

• SkyVU Overview:
  o Implementation
    ▪ Timeline, Methodology
  o Change Management Overview
  o Business Process Mapping & Analysis Overview

• Change Network Overview:
  o Role of Change Champion
  o Role of Change Agent
  o Communication

• SkyVU Oracle Cloud Sample

• Questions and Answers
Introductions & Purpose of Kickoff
Objectives of Kickoff

Review *SkyVU* project

- Scope
- Timeline
- User Interface

Examine *Change Network*

Understand your *involvement* in:

- Communication
- Feedback
- Adoption
Why Are We Doing This?

Mission statement:

Support Vanderbilt University’s academic mission by modernizing its financial, administrative and research support systems.
Sponsorship, Management, & Outreach

Executive Steering Committee

SkyVU Project

- Financials
- Procurement & Disbursements
- Change Management
- Human Resources
- Business Intelligence
- IDM & MDM
- Grants
- Research
- Technical

Schools & Departments

- Business Partners
- Change Champions

Larger Vanderbilt Community
Guiding Principles

- Simplification & Standardization
- Forward Focus
- Accountable Governance
- Transparency & Inclusion
- Measurable Results
Solution Driven Approach

**SOLUTION - DRIVEN APPROACH ATTRIBUTES**
- Presumption that out-of-the-box will work 80% + of the time
- Time spent on defining and solving true gaps
- Drives process improvement discussion via leading practice “straw man”
- Prevents non-strategic differentiator scope creep
- Immediate end-user hands-on, day-in-the-life process experience mitigates change risk
- 35% project time savings typical

**REQUIREMENTS - DRIVEN APPROACH ATTRIBUTES**
- Presumption of customization
- Time spent defining and documenting “as is”
- Approach impedes process improvement focus
- Approach encourages “wish list” scope creep
- Significant delay until end user hands-on, day-in-the-life exposure increases project risk
SkyVU Timeline

**FY16**
- **Feb**: Design, Team Training
- **Mar**: Design, Oracle Applications Cloud
- **Apr**: Design, Business Process Mapping
- **May**: Design, Change Management
- **Jun**: Design, IDM & MDM
- **Jul**: Design, BI
- **Aug**: Design, Research
- **Sep**: Design, Facilities

**FY17**
- **Sep**: Configuration, Finance BP Workshops
- **Oct**: Configuration, Conversion Mapping
- **Nov**: Configuration, Integration Inventory
- **Dec**: Configuration, Finance BP Workshops
- **Jan**: Validation, Partner Review
- **Feb**: Validation, HCM BP Workshops
- **Mar**: Validation, Change Champions Kickoff
- **Apr**: Validation, Build User Training Prep
- **May**: Validation, Conversion Extract, Load Cleanse
- **Jun**: Validation, Conversion Extract, Load Workgroups
- **Jul**: Validation, Integration Mapping Testing
- **Aug**: Validation, Conversion Extract, Load Workgroups

**FY18**
- **Sep**: Transition, Go-Live (Phase I)
- **Oct**: Transition, User Validation
- **Nov**: Transition, Payroll Parallel
- **Dec**: Transition, System Integration Test

**Realization**
- **Jan**: Realization, Payroll Parallel
- **Feb**: Realization, System Integration Test
- **Mar**: Realization, Payroll Parallel
- **Apr**: Realization, System Integration Test
- **May**: Realization, Payroll Parallel
- **Jun**: Realization, System Integration Test
- **Jul**: Realization, Payroll Parallel
- **Aug**: Realization, System Integration Test

**Today**
- **Feb**: Today, Team Training
- **Mar**: Today, Oracle Applications Cloud
- **Apr**: Today, Business Process Mapping
- **May**: Today, Change Management
- **Jun**: Today, IDM & MDM
- **Jul**: Today, BI
- **Aug**: Today, Research
- **Sep**: Today, Facilities
- **Oct**: Today, Facilities Evaluation
- **Nov**: Today, Facilities Evaluation
- **Dec**: Today, Facilities Evaluation
- **Jan**: Today, Facilities Evaluation
- **Feb**: Today, Facilities Evaluation
- **Mar**: Today, Facilities Evaluation
- **Apr**: Today, Facilities Evaluation
- **May**: Today, Facilities Evaluation
- **Jun**: Today, Facilities Evaluation
- **Jul**: Today, Facilities Evaluation
- **Aug**: Today, Facilities Evaluation

**Additional Data Configuration**
- **Jan**: Additional Data Configuration
- **Feb**: Additional Data Configuration
- **Mar**: Additional Data Configuration
- **Apr**: Additional Data Configuration
- **May**: Additional Data Configuration
- **Jun**: Additional Data Configuration
- **Jul**: Additional Data Configuration
- **Aug**: Additional Data Configuration
Systems under consideration for replacement

**Financials**
- McCormack & Dodge General Ledger
- McCormack & Dodge Fixed Assets
- eDOG - General Ledger Data
- PeopleSoft Accounts Payable
- Concur Expense
- VUBudget
- Endowment (Unit) Accounting System
- QGLARS - Quarterly GL Reporting
- General Accounts Receivable
- Narrative Chart of Accounts (NCOA)
- Procurement Card portal (tbd)

**Grants - Post Award**
- ePac Effort Certification
- Center Management
- DMS (Departmental Mgmt System)

**Academic Affairs**
- Faculty Information System

**Procurement**
- PeopleSoft Purchasing
- eProcurement
- ePlus
- VandyContracs

**Enterprise**
- Privilege Management (PM)
- SAP Business Objects
- Access VU / Identity Systems
- Enterprise Person Index (EPI)

**Human Resources**
- PeopleSoft HR & Payroll Interface
- C2HR
- ePac
  - Job & Position Changes (JPC)
  - Earnings Distribution Changes (EDC)
  - Retroactive Changes (RDC)
  - Additional Pay
- WALDO (Labor Data)
- Benefit Express
- eTimesheet
- Exempt Time Off (ETO)
- Kronos
- VPES (Performance Evaluation System)
- JOBS
- Merit Increase
- CATS
- Taleo (re-implementation)
- Orientation Tracking (tbd)
- PeopleFinder (tbd)
- Tuition Reimbursement System
Cloud Systems Integrations

**Academic Affairs**
- PeopleSoft Campus Solutions - Student Fin
- Acorn Library System
- Coeus Pre-Award Mgmt
- PEER Award (no current integration)

**Dev & Alumni**
- Advance Donor/Gift Mgmt

**Human Resources**
- Tuition Reimbursement
- Unemployment & Employment Verification
- Background Checks
- Check Printing (HR & AP)
- Benefit Vendors (8-10)
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Division of Administration**
- Campus Planning
- AIM by Assetworks
- ePhil (requisitions)
- Plant Ops
- AIM
- Research/Grants
- CORES Award Mgmt
- Post Office
- Mail Metering
- Package Tracking

**Card Office**
- CBORD Card System
- CC Selection Meal Plan
- Childcare
- Procare Billing/Attendance
- Dining
- Dining Services
- VUPD
- AlertVU/Everbridge
- Traffic & Parking T2
- EHS
- Safety Hub (BioRaft)
- Health & Wellness
- H & W Portal

**General Counsel**
- Protection of Minors
- Conflict Disclosure

**Enterprise VUIT**
- Identity Management
- Data Warehouse & BI
- Master Data Mgmt
- AIMWorx/Pinnacle

**Finance**
- Shipping Mgmt
- Bank Integrations (3)
- Pcard Integration
- Concur Travel
- Blackline non-cash recons
- Debt Mgmt (post 7/1/17; new system)

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt

**Human Resources**
- Benefit Vendors (8-10)
- Check Printing (HR & AP)
- Background Checks
- PeopleFinder?
- Tax Reporting
- COBRA
- Benefit Express (thru 2017)
- Learning Mgmt
Why is Change Management Important?

**Organizational**
- What is our situation / issue today?
- What does the solution look like?
- Will new processes, policies and procedures need to be designed?
- How is my role changing?
- How will I execute my new role & responsibilities?

**Individual**
- Why are we doing this?
- What is in it for me – and my department?

**Results**
- Commitment
- What is the plan to implement the solution?
Change Management Methodology

Awareness
Desire
Knowledge
Ability
Reinforcement®
Business Process Mapping Overview
Change Management

Business Process Analysis: Iterative Approach

BP Mapping 1
BP Mapping 2
BP Mapping 3

Business Partner Validation
Change Impact Inventory
BP Maps 2 & 3

Lead Partners
Susan Hart  Kurt Shepherd  Mike Bannon  Jennifer Bischoff

Partners
A&S  Medicine  OGC  DAR
Blair  Nursing  Public Aff  Finance
Divinity  Owen  OOI  Athletics
Engineering  Peabody  DoA  Diversity
Law  Provost Other  VUIT
Institutional Validation & Engagement **Approach**

**Design**
- Conduct Workshops
- Business Partner Validation
- Update Maps

**Configure**
- Conduct Workshops
- Business Partner Validation
- Update Maps

**Validate**
- Conduct SIT Sessions
- Business Partner Validation
- Update Maps

**Realization**
- BPM 1
- BPM 2
- BPM 3

---

**Business Process Analysis**
- Lead works with **Business Partners** to engage institutional stakeholders
- Operationalize Business Processes
## Business Partners

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>School/Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susan Hart</td>
<td>Academic Affairs</td>
<td></td>
</tr>
<tr>
<td>Mike Bannon</td>
<td>Administration</td>
<td></td>
</tr>
<tr>
<td>Jennifer Bischoff</td>
<td>Enrollment Affairs</td>
<td></td>
</tr>
<tr>
<td>Kurt Shepherd</td>
<td>Enrollment Affairs</td>
<td></td>
</tr>
<tr>
<td>Gena Cobble</td>
<td>Development &amp; Alumni Relations</td>
<td></td>
</tr>
<tr>
<td>Chris Cook</td>
<td>Student Accounts</td>
<td></td>
</tr>
<tr>
<td>Stacey Crowhurst</td>
<td>Facilities Services</td>
<td></td>
</tr>
<tr>
<td>Jeff Duly</td>
<td>Student Loans</td>
<td></td>
</tr>
<tr>
<td>Judy Peterson</td>
<td>Divinity &amp; Libraries</td>
<td></td>
</tr>
<tr>
<td>Jane Zubulake</td>
<td>Medicine &amp; Nursing</td>
<td></td>
</tr>
</tbody>
</table>

## Functional Leads

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>School/Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dalana Robertson</td>
<td>General Ledger</td>
<td></td>
</tr>
<tr>
<td>Barb Carroll</td>
<td>Core HR, Taleo Recruiting</td>
<td></td>
</tr>
<tr>
<td>Jana Blick</td>
<td>Assets, Receivables</td>
<td></td>
</tr>
<tr>
<td>Terri Armstrong</td>
<td>Benefits, Absence Mgmt, Time &amp; Labor</td>
<td></td>
</tr>
<tr>
<td>Trey Beasley</td>
<td>Cash</td>
<td></td>
</tr>
<tr>
<td>Kristie Hall</td>
<td>Core HR, Absence Mgmt, Time &amp; Labor, Payroll</td>
<td></td>
</tr>
<tr>
<td>Michelle Vazin</td>
<td>Grants</td>
<td></td>
</tr>
<tr>
<td>David O’Ferrell</td>
<td>Payroll</td>
<td></td>
</tr>
<tr>
<td>Chuck Nicholas</td>
<td>Procurement</td>
<td></td>
</tr>
<tr>
<td>Kim Boyce</td>
<td>Benefits</td>
<td></td>
</tr>
<tr>
<td>Tony Grayson</td>
<td>Payables, Expenses</td>
<td></td>
</tr>
<tr>
<td>Candy Lindsay</td>
<td>Taleo Recruiting</td>
<td></td>
</tr>
<tr>
<td>Kirk Stonecipher</td>
<td>Budget &amp; Planning</td>
<td></td>
</tr>
<tr>
<td>Stacy Hatten</td>
<td>Taleo Recruiting</td>
<td></td>
</tr>
<tr>
<td>Evelyn Galletti</td>
<td>Budget &amp; Planning</td>
<td></td>
</tr>
<tr>
<td>Gena Cobble</td>
<td>Endowment</td>
<td></td>
</tr>
</tbody>
</table>

**Bold** denotes Business Partner Lead
Why a Change Network?

Augment the formal management structure and leverages the informal network of leaders and individuals across the university to provide an additional communications channel.

A feedback loop to identify gaps in information and risks in overwhelming individuals with the degree of change.
Change Network Supports

- Network of leaders
- Communication channel
- Feedback loop
- Encourage adoption
Campus Coordination

Change Champions
wide influence | enable change | actively engaged

Change Agents
local influence | advocate change | direct feedback
Change Champion Role

- Encourage and promote the implemented change
- Create positive expectations for the SkyVU changes
- Communicate benefits of SkyVU change to your team
- Provide critical information to your team regarding SkyVU
Sample Agenda for Monthly Change Network Roundtables

- **Welcome**

- **3:00-3:20– SkyVU Updates:**
  - Current Projects
  - Updates
  - Meet the Expert

- **3:20-3:50– Change Champions Updates:**
  - What are you hearing?
  - What meetings in your areas can we attend to offer resources and answer questions?
  - Open dialogue
  - Outstanding questions

- **3:50-4:00– Wrap Up/ Close**
Coming Fall 2016

Change Agent Role

The SkyVU team will kick off the Change Agents Network this Fall

Working with our Change Champions and Business Partners, we will identify Change Agents
Change Network Communication Plan

July
- SkyVU Blog Launch
  - Link in MyVU
  - Every 2 weeks
- Roadshows
- Configuration Report-Outs

August
- SkyVU website announcements
- Roadshows

September
- SkyVU Town Hall
- Roadshows

October

Website updates, MyVU updates, SkyVU Blog

Campus Coordination
- Welcome e-mail to Change Champions
- Change Network Kickoff
- Change Network Roundtable
- Change Network Roundtable
- Change Agent Network - Fall 2016
- SkyVU Town Hall
- Change Network Roundtable

Communication from Change Champions to campus communities

Change Network Communication Plan
SkyVU Website

https://www4.vanderbilt.edu/skyvu/

Website Content

About
Guiding Principles
Timeline & Scope
Training & Resources
Communications
Blog
FAQ
Contacts
Infolets:

- Allow user to monitor important data with a *glance* and quickly make a decision
- Quickly access Finance applications to act
Workareas with Infolets (e.g. Invoices)
Next Steps

Send Natalie a list of any meetings your area engages in to add to SkyVU Roadshows

Send to:
Natalie.Richardson@vanderbilt.edu
Questions

Next Change Network Roundtable

Thursday, August 25, 2016  3:00-4:00 pm
Kissam Multi-Purpose Room, C210