# Knight Vision Retrofit Project

## Stakeholder Kick Off Meeting

### September 23rd, 2021

# Welcome
## Becky Vilsack

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# **Agenda**

1. Opening Remarks - Mike Sink
2. Project Overview - Rebecca Vilsack
3. What is a Retrofit?
4. Timeline
5. Environments
6. SailPoint Overview - Matthew Fitzgerald
7. Questions

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# Remarks from Mike Sink
## Associate VP & Deputy CIO, UCF IT

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# Mike Sink: Opening Remarks



**Mike Sink**
Associate Vice President and Deputy CIO
**UCF IT**

# Project Overview

**Becky Vilsack**
**Assistant Vice President Information Technology Financials System and Interim Enterprise Application Development**

# Knight Vision PeopleSoft Retrofit Project Overview

This program is an effort to ensure UCF meets all critical PeopleSoft functions, processes and bolt-on applications to enable continued critical business operations in Campus Solutions (student information system) at Go-Live for Workday HCM and FIN applications. This project encapsulates the retrofitting of all student-related functionality, the moving and retrofitting HCM, CRM, Integration Hub, & Bolt-on application functionality within Campus Solutions as well as mandatory reporting to Board of Governors.

# Knight Vision PeopleSoft Retrofit Project Overview

- Continue to provide student services to ~72,000 students

- Ability to integrate data between PeopleSoft and Workday, and other existing applications

- Manage the activity, promotion and other services for ~2,000 faculty & staff

- Continue mandatory state reporting

# PeopleSoft Applications Code Freeze



### October 15, 2021 Code Freeze Alert

In July 2022, UCF will replace PeopleSoft financials, human resources and grants administration applications with Workday, a modern, cloud-based enterprise resource planning (ERP) platform.

In our current PeopleSoft environment, integrations exist between our PeopleSoft student system and the PeopleSoft human resources and finance systems. As we move to Workday HR and Finance, the UCF IT team will be replacing current PeopleSoft integrations with the new Workday HR and Finance modules prior to the new Workday system going live in July 2022.

To ensure we have a stable system and adequate development team availability to complete the necessary transition between now and our go-live in July 2022, the PeopleSoft development teams will be administering a code freeze beginning October 15, 2021, for PeopleSoft human resources, finance and student systems software. Exceptions to this freeze will be limited to compliance and regulatory changes and updates necessary for bug fixes and maintenance.

### In Summary:

- As of October 15, the PeopleSoft development teams will be administering a code freeze on all PeopleSoft systems requests, with the exception of compliance, regulatory and break/fix code changes.
- Requests for PeopleSoft systems code modifications will be put on hold until after the Workday go-live, planned for July 2022.

**Michael Sink**
Associate Vice President and Deputy CIO
UCF IT
University of Central Florida | 12716 Pegasus Drive | Orlando, FL 32816

# Your Participation with the Retrofit Project

This project is integral to the business of the University.

It supports UCF's core customers (students, faculty and staff).

Your commitment and involvement to this project is **KEY** for

the success of the Knight Vision Retrofit project.

## Stakeholder Engagement

- Retrofit your Departmental custom Queries, Data feeds and Reports

- Testing support: Functional testing, User Acceptance Testing, Conversion Testing

- Integrations and database connectors will change:
  - Student Data: PeopleSoft Campus Solutions
  - Financials and HR data: Workday FIN & HR

# Campus Solutions
## Melissa Padula

# What is a PeopleSoft Retrofit?

Any change to the existing PeopleSoft Systems (Campus Solutions, Portal, CRM) to support the Workday HCM/FIN Implementation, including but not limited to, integrations, processes, and data.

Campus Solutions is integrated with both Human Capital Management and Financials Systems and heavily relies on their data. **With the Workday Implementation, this will change!**

Student data will reside in Campus Solutions.

Employee and Financial data will reside in Workday.

# Impacts on Campus Solutions

- Processes & Reports using HCM Data
- Processes & Reports using Financials' Chart of Account Data
- PeopleSoft CS objects selecting data directly from HCM using Database Links
- Data Sync Processes from HCM & FIN =>

- Employee Bio/Demo Data
- Workforce Data (including Job & Payroll)
- Job Code Data
- Position Data
- Department Data
- Bank Data
- ChartField Data
- SF Accounting Line Data

# Impacts on Campus Solutions Cont.

Analysis, Retrofits & Conversions Possibly Needed

## Sample Values Changing with Workday

- Position Number
- Job Code

## Chart of Accounts

- Account
- Fund Code
- Department ID
- Project ID
- Program Code

# Impacts on Campus Solutions Cont.

The PeopleSoft **Chart of Account Values** in Campus Solutions, will be **Converted** to the new **Foundation Data Model (FDM) Values** from **Workday!**

# Campus Solutions

Process Impacts

### Integrations Sending Employee Bio/Demo Data and/or Photos

- Business Services
- Health Services
- Parking Services
- Rec & Wellness Center
- DNA Fusion
- Library
- Rave Alert

### Workforce/Payroll Data

- Financial Aid Work-Study
- Graduate Assistantship Processing
- Grad Studies' Health Insurance
- Outcomes Competency Management System
- TPC/Computer Store
- ServiceNow
- FIM/MIM Views
- Many HR Bolt-On Applications

### ChartField/Item Type Data

- GL Processing
- Student Payments
- Student Refunds
- Tuition, Fees, Waivers
- Packaging
- Disbursements
- Loans
- Housing

# HCM / CRM / Reporting
**Varsha Das**

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# Impacts on Bolt-on Apps

"Lift & Shift" programming in UCF custom bolt-on applications that support business functions:

- Faculty Activity System
- Faculty Management System
- Board of Governors (BOG) Mandatory Reporting Applications
  - HCM
  - Student
  - Budget & Financials Analysis
- Faculty ePromotion and Tenure
- eAwards
- eKeys Forms

Integrations to any other KV Custom Applications migration to Cloud Applications

All Processes & Reports currently using both student and employee data will need to be analyzed and retrofitted

All Processes & Reports using Financials' Chart of Account data will need to be analyzed and retrofitted

All objects using Database Links need to be analyzed and retrofitted

All objects using Database Links need to be analyzed and retrofitted to only pull data from CS

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# Impacts on Customer Relationship Management (CRM)

Update integrations and programs in PeopleSoft Customer Relationship Management (CRM) to ensure continued core business operations for communications across campus units

Integrations for Employee Data may need to shift to Workday/SailPoint (TBD)

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# IH / SnapLogic / Informatica
## Ron Mathews

# Retrofits in myUCF/Integration Hub
## Changes on July 1, 2022

## Disappear

### Staff Applications > Human Capital Management

Links to HCMPROD backdoor no longer possible

### Employee Self Service

No more employee bio demo, payroll, etc. actions directly accessed from myUCF

### Manager Self Service

Similarly, no more managerial actions will be processed from myUCF

## New

### Staff Applications > Workday

New links will be available to access Workday for all employees to continue performing their regular self-service and payroll actions

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# SnapLogic Moving to Informatica

During the PeopleSoft Workday Retrofit Cycle, one of our current integration products will also be transitioning to a new tool which has a near go-live date with Workday.

Proofs of concept are underway covering a wide area of current connectivity points.

The migration will not be all at once, and the SnapLogic systems will still be processing during this transition period.

This transition impacts the following areas:

ServiceNow (with possible Workday retrofits)
Card Services
Canvas
UCF Connect Salesforce
CBA Salesforce
IKM Benchmarking and Reporting

# Financials
## Dorann Mullins/Varsha Das

# Retrofit Impacts on PS Financials

"Lift & Shift" development objects in UCF Financial custom bolt-on applications that support Board of Governors (BOG) data

- Financial Activity Report
- Budget Reporting

BOG data August 2022: Data will be drawn from current PeopleSoft Financials

August 2023-??: Data will be drawn from Workday Financials

# PeopleSoft Chartfields (Current)

| Chartfield | Comments |
|---|---|
| Business Unit | Legal entity |
| Department | Represent specific units of operations<br>- First through fourth digits = Functional area and Department<br>- Fifth digit = Funding source<br>- Sixth digit = Based on fifth<br>- Seventh through eighth digits = Specific departmental number |
| Fund Code | Represents source/pool of funds<br>-First digit = External Fund<br>- Second digit = Department or a Project<br>- Third through fifth digits = Financial Statement Code / Other Cost Accumulator (OCA) |
| Program Code* | Classify functional purpose of transactions |
| Account | Classify the nature of a financial transaction |
| Alternate Account | Higher level rollup<br>Defaulted from Account |

| Chartfield | Intended Use |
|---|---|
| PC Business Unit | Classify Projects into categories like Grants, Auxiliary, Construction |
| Project | Unit of operation, with specific start and end date |
| Activity | Specific tasks that make up a project<br>Can Budget at Activity level |
| Analysis Type | Identify different types of Project transactions |
| Budget Reference | Used to identify budget year |

| Chartfield | Intended Use |
|---|---|
| Chartfield1, Chartfield2, Chartfield3 | Generic Chartfields, can be renamed and used if necessary |
| Class Field | Identify Specific Appropriations |
| Resource Category, | Further define source types |
| Resource Subcategory | Further define source types |

**Chartfield Attributes: Additional classifications based on Chartfield**
- BE - Budget Entity
- EP Code - External Program Code
- VP Org - Vice President's Organization
- OCA - Other Cost Accumulator
- Etc.

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# FDM Segments Defined

*Driver Worktags

**Required** → **Conditionally Required** → **Optional**

| Worktag | Comments |
|---|---|
| Company | Legal entity with separate tax ID and a balanced set of books (UCF, DSOs)<br>- Balancing segment |
| Fund | Represents source/pool of funds primarily used to track spending restrictions<br>- Balancing Worktag<br>- Budget Controlled |
| Division | High level, visible roll up level within the org structure. Broader than our divisions today<br>- Balancing Worktag<br>- Budget Controlled |
| Cost Center* | Unit with an ongoing business purpose within the institution, budget, positioned employees, and generally occupies space. Generally synonymous with "department" today.<br>- Budget Controlled<br>- Fund Balance |
| Program | To classify functional purpose of transactions. Aligns with NACUBO and State Reporting Needs |
| Financial Site | High level 'location' worktag |

| Worktag | Intended Use |
|---|---|
| Gift* | Worktag associated with endowed and spendable gifts.<br>Conditionally required based on fund.<br>- Budget controlled<br>- Fund Balance |
| Grant* | Worktag associated with sponsored funding (e.g. Grants). Required to be associated with an Award.<br>Conditionally required based on fund.<br>- Budget controlled<br>- Fund Balance |
| Project* | Specific begin and end dates that may cross fiscal years. Used for Capital Projects, IT Projects, RF Licenses & Incubator Programs, Carryforward Plans. Additional use cases still TBD.<br>- Budget controlled<br>- Fund Balance |
| Designation* | Used to capture smaller buckets of designated funds (e.g. PI Funds, Start-Up, Balance Accounts)<br>- Budget controlled<br>- Fund Balance |

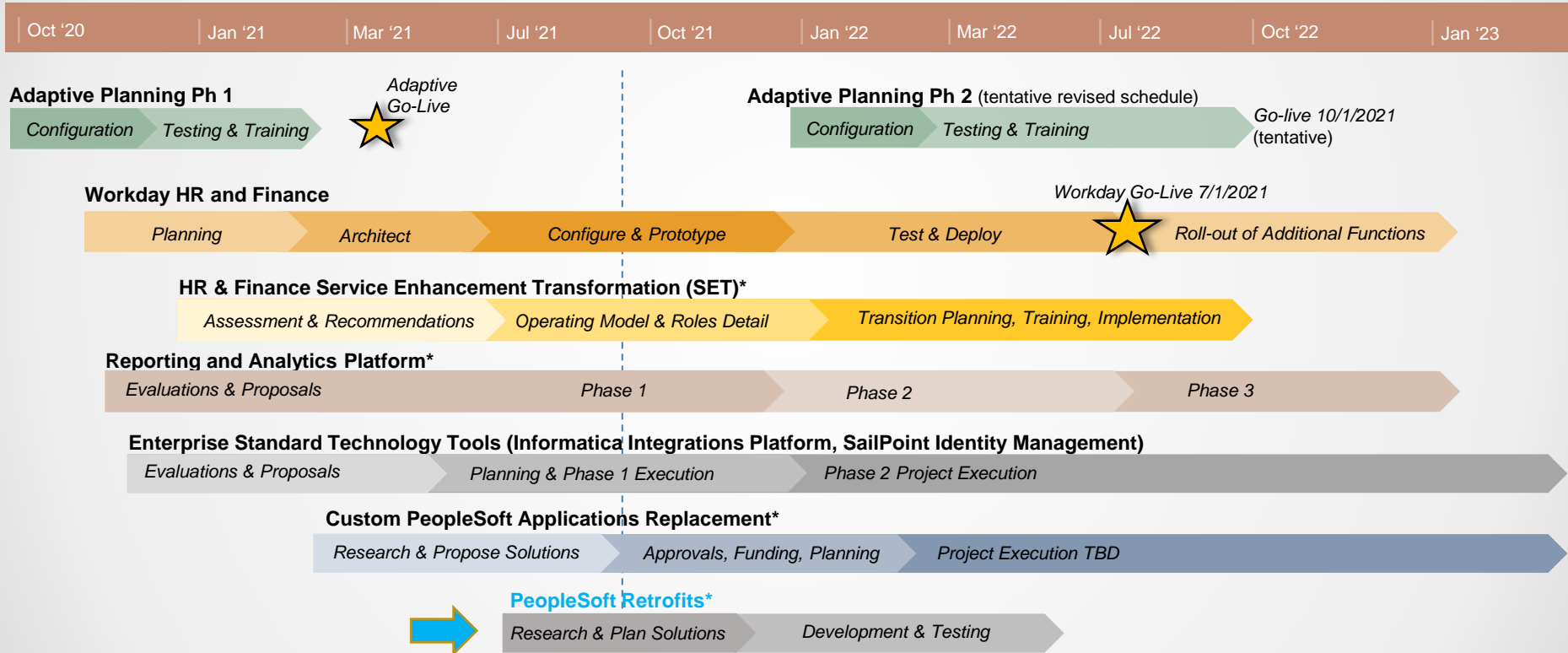| Worktag | Intended Use |
|---|---|
| Financial Initiative | Formal/Informal Inter-Departmental Initiatives<br>- Optionally Budgeted but not Controlled<br>- Fund balance |
| Activity | Departmental Use<br>- Optionally Budgeted but not Controlled<br>- No Fund balance |
| Specialty | Indicates a field of medicine a provider is billing.<br>Worktag to be used by our Health entities. |
| Provider | Delineates physician, nurse practitioner, and fellow.<br>Worktag to be used by our Health entities. |

**Additional Relevant Worktags:**
- Ledger Accounts
- Spend Categories
- Revenue Categories
- Fringe Categories
- Locations

As of August 2, 2021 – Subject to Change

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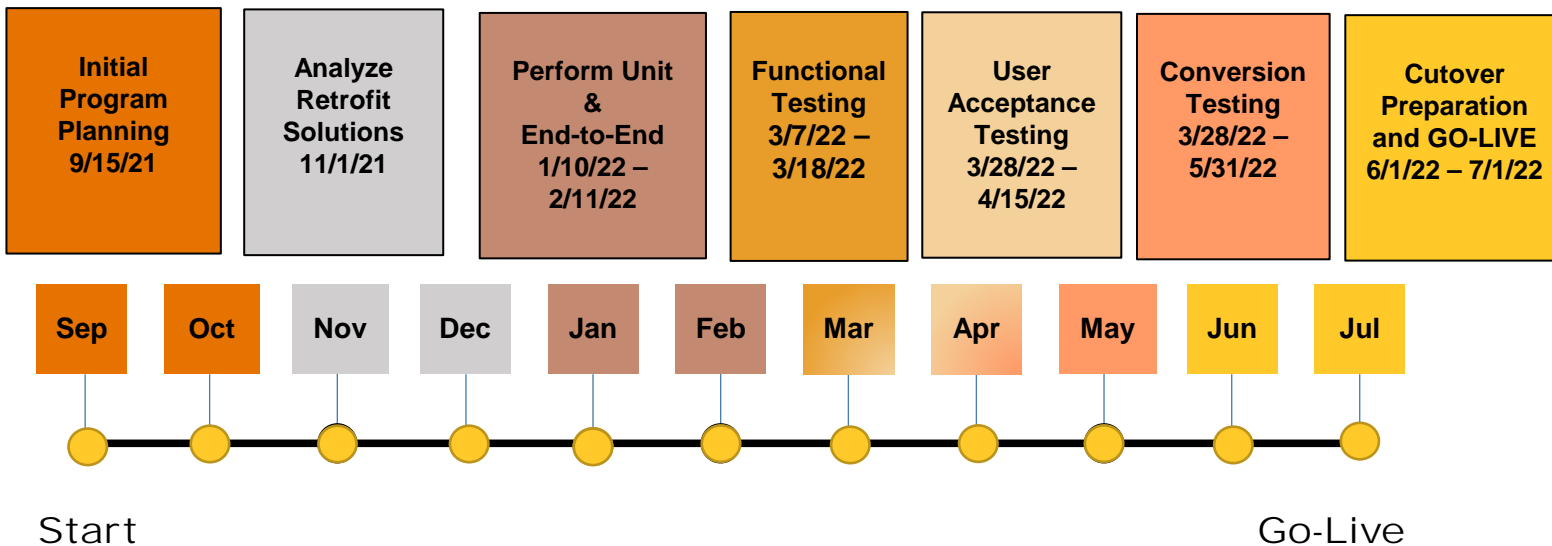# Timeline
**Varsha Das**

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# Knight Vision Program Timeline

| Oct '20 | Jan '21 | Mar '21 | Jul '21 | Oct '21 | Jan '22 | Mar '22 | Jul '22 | Oct '22 | Jan '23 |

**Adaptive Planning Ph 1**

*Adaptive Go-Live*

Configuration | Testing & Training

**Adaptive Planning Ph 2** (tentative revised schedule)

Configuration | Testing & Training

*Go-live 10/1/2021 (tentative)*

**Workday HR and Finance**

*Workday Go-Live 7/1/2021*

Planning | Architect | Configure & Prototype | Test & Deploy | Roll-out of Additional Functions

**HR & Finance Service Enhancement Transformation (SET)\***

Assessment & Recommendations | Operating Model & Roles Detail | Transition Planning, Training, Implementation

**Reporting and Analytics Platform\***

Evaluations & Proposals | Phase 1 | Phase 2 | Phase 3

**Enterprise Standard Technology Tools (Informatica Integrations Platform, SailPoint Identity Management)**

Evaluations & Proposals | Planning & Phase 1 Execution | Phase 2 Project Execution

**Custom PeopleSoft Applications Replacement\***

Research & Propose Solutions | Approvals, Funding, Planning | Project Execution TBD

**PeopleSoft Retrofits\***

Research & Plan Solutions | Development & Testing

*\*Detailed scope, schedules, and costs are still being evaluated*

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# Environments & Migration Paths

**Melissa Padula**

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# October 2021 – March 2022

## Campus Solutions Production Support Environments & Migration Path



CS92DEV → CS92TST → CS92QA → CSPROD

## Campus Solutions Retrofit Environments & Migration Path



Retrofit DEV (Unit/ Integration Testing) → Retrofit TEST (Functional & End-to-End Testing)

# March 2022 – June 2022

## Campus Solutions Production Support Environments & Migration Path

CS92DEV → CS92QA → CSPROD

## Campus Solutions Retrofit Environments & Migration Path

Retrofit DEV (Unit/Integration Testing) → Retrofit TEST (Functional & End-to-End Testing) → Retrofit QA (UAT Testing)

# June 2022 – Go-Live: July 2022

**Campus Solutions Production Support Environments & Migration Path**



**Campus Solutions Retrofit Environments & Migration Path**

# SailPoint Overview
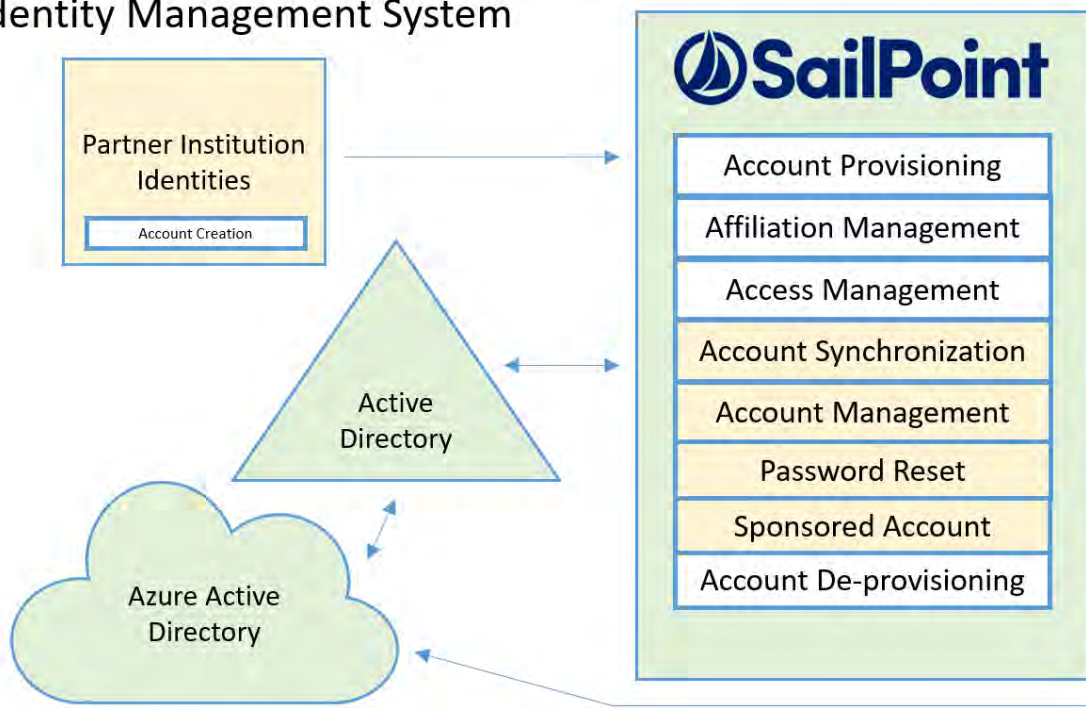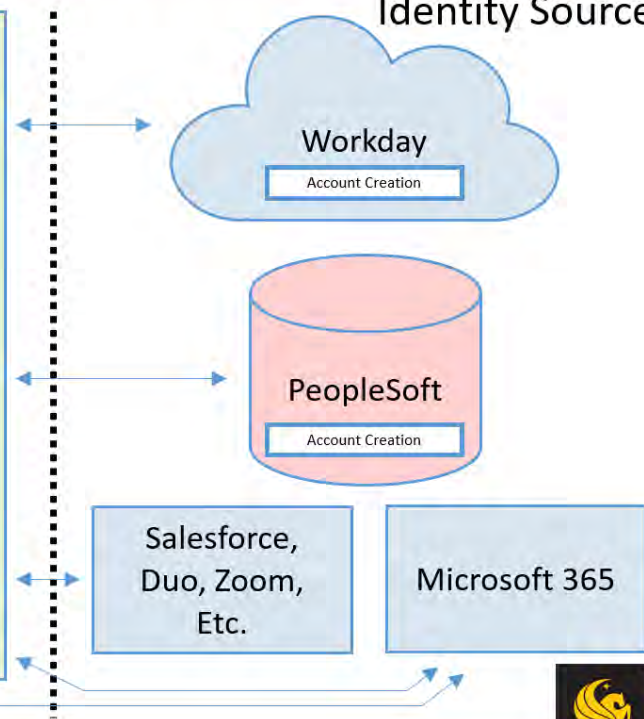## Matthew Fitzgerald

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# Proposed State of Identity Management System

## Positions the identity system at the center.



**Identity Management System**

Partner Institution Identities
- Account Creation

Active Directory

Azure Active Directory

**SailPoint**
- Account Provisioning
- Affiliation Management
- Access Management
- Account Synchronization
- Account Management
- Password Reset
- Sponsored Account
- Account De-provisioning

**Identity Sources**

Workday
- Account Creation

PeopleSoft
- Account Creation

Salesforce, Duo, Zoom, Etc.

Microsoft 365

# Get Involved

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