



EMMS UPDATE PHASE 2 STAKEHOLDERS

November 2019



Hi All,



Many of you attended the EMMS Summer Roadshow in August for Phase 2 stakeholders where we shared details on EMMS scope, governance, and timelines. Since then, it's been a busy few months collaborating with Phase 1 stakeholders and our Planon partner to determine how Planon will be configured to meet UBC's operational needs.

Given Planon is an enterprise solution which will be rolled out to other faculties and units in the future, we're committed to providing timely information to assist with your own internal planning. This update:

- Provides details on the status of UBC's Planon implementation journey*
- Shares what was approved by IRP and EMMS governance committees in terms of Planon Stream 1 functionality and extension to the target timelines*
- Details recent work completed and activities in progress*
- Directs you to information resources to keep in touch with EMMS*

The EMMS Team

EMMS PROJECT TRACKER

WHERE ARE WE AT?



✓ Project Initiation

- Mapped Current State Processes
- Business Improvement Areas
- UBC Objectives
- Selection of Planon for Industry Best Practices
- Completed Planon Accelerator Workshops to identify gaps

February – September 2019

✓ Accelerator to High Level Design

Accelerator Workshops

What are Planon best practice processes?

Fit Gap results

Decisions

High Level Design

We are here
For Go Live

Design Meetings to Configure Planon for Stream 1

Testing Schedule

Stream 1 for Planon
Combination of delivered & manual processes

workday.

October 2019...

Deploy Remaining Planon Functionality Fall 2020+

Prepare Stream 2

Detailed activities for system & processes aligned with High Level Design and objectives

PLANON





WORK RECENTLY COMPLETED

- *Following July's [Planon Accelerator Workshops](#) the EMMS team resolved outstanding questions and parking lot items raised by attendees to confirm UBC's understanding of Planon capabilities*
- *High level decisions, primarily related to maintenance management, have been made for reactive maintenance, cost recovery for work orders, crew scheduling and zone models to name a few.*
 - *Decisions related to processes that crossover with Workday such as purchasing are still under consideration*
- *Decisions will be revisited as required during the [Planon Design stage](#) as more information about Planon's capabilities are understood to configure UBC's Planon tenant.*

– For Phase 2 Stakeholders –

UBC is primarily adopting Planon's out-of-the-box processes, requesting minimal configurations. When Phase 2 timelines are confirmed, there will be opportunities for you to explore if additional configurations may be required to support your work.



ACTIVITIES IN PROGRESS (OCTOBER – DECEMBER 2019)

1. *[Approval](#) of Stream 1 functionality and revised timeline by IRP & EMMS governance committees*
2. *[Planon Design meetings](#) to determine Planon configurations for Stream 1*
3. *Continuation of [data readiness activities](#) in preparation for data migration to Planon*
4. *Execution of [change management strategies](#) focused on building staff awareness of Planon*
5. *Development of testing and [end-user training strategies](#)*

– For Phase 2 Stakeholders –

When Planon has completed configuration 1 of 2 for in-scope functionality which incorporates UBC sample data, a demonstration will be scheduled in early 2020 to walk through Planon processes and take questions relevant to your work.

APPROVAL OF STREAM 1 & TIMELINE*

WHAT'S BEEN APPROVED FOR GO LIVE?

*Note: Subject to change as part of re-planning activities with the Integrated Renewal Program (Workday)



| | STREAM 1 | | STREAM 2 | |
|--------------------|---|---|---|---|
| PROPERTIES | <ul style="list-style-type: none"> Buildings (with hazard indicator) | | <ul style="list-style-type: none"> Buildings integrated Terrains & outside properties | |
| ASSETS | <ul style="list-style-type: none"> BOPs regulatory assets Space room info only | <ul style="list-style-type: none"> EWS maintains assets in BuiltSpace | <ul style="list-style-type: none"> All assets | <ul style="list-style-type: none"> Municipal, Utilities, Fleet, Custodial Municipal, utilities & building meters Space & CAD Drawings All Hazard Management |
| INVENTORY | <ul style="list-style-type: none"> All inventory functionality | | <ul style="list-style-type: none"> ✓ Completed in Stream 1 | |
| MAINTENANCE | <ul style="list-style-type: none"> Service Requests* Work Orders Work Order Time Projects Resource Planner Equipment & Tool Reservation | <ul style="list-style-type: none"> Shutdowns (customization) PM Work Order Scheduling Regulatory Assets (Building Ops only) Planon Service Scheduler (Energy & Water Services) | <ul style="list-style-type: none"> Service Requests (student access) Checklists & procedures Contracts & SLAs (internal customer / external suppliers) → there might be a need for SLAs in Stream 1 Equipment & Tools as assets | |
| FLEET | <ul style="list-style-type: none"> N/A | | <ul style="list-style-type: none"> All functionality | |
| PURCHASING | <ul style="list-style-type: none"> Purchase orders, receipts, invoices integrated (change requests & returns manual) | | <ul style="list-style-type: none"> Purchase change requests & returns | |
| FINANCE | <ul style="list-style-type: none"> Work Order Cost Recovery | | <ul style="list-style-type: none"> Workday external customer billing interface | |

*no validation of Workday Worktag (project) signing authority for Stream 1; customization Stream 2

| | STREAM 1 | STREAM 2 |
|-------------------------------------|--|--|
| REPORTING | <ul style="list-style-type: none"> Planon delivered reports only plus Critical reports (up to 5 reports) | <ul style="list-style-type: none"> Additional Reporting (TBD) |
| MOBILE | <ul style="list-style-type: none"> Service Requests, Work Orders, Work Order time, Warehouse Management | <ul style="list-style-type: none"> Complete rollout of Planon mobile apps (in the context of additional functionality) |
| INTEGRATIONS & DATA | <ul style="list-style-type: none"> IAM (SingleSignOn) Person Services & SupOrg Service Absences O/T (Manual Upload to Workday) Workday Worktags (Chartfields, Projects) Planon to Workday Accounting Entries Purchasing (PO/receipt) AP invoices (actuals) Supplier Service | <ul style="list-style-type: none"> Person Service (certifications, licenses) Location Service (Properties & space) Asset service (ArcGIS for utilities & municipal assets and all other assets) Laserfiche integration Batch inventory issue to WD Workday Projects (signing authorities) Workday external customer billing interface Purchasing (change requests/returns) Customers service O/T (automated uploaded to Workday) |
| DECOMMISSION & MIGRATION | <ul style="list-style-type: none"> N/A | <ul style="list-style-type: none"> BuiltSpace, UMS, ARI BuiltSpace QR Codes migration |
| SUSTAINMENT | <ul style="list-style-type: none"> Implement sustainment model and team | <ul style="list-style-type: none"> Finalize sustainment model and team |



ALIGNMENT OF PLANON & WORKDAY TIMELINES



You've likely heard the target Workday timeline of April 2020 has been extended.

- Re-planning activities started in early November and will take a number of weeks to ensure that a sound recommendation is put forward that best supports a successful Workday implementation that meets UBC's needs.
- IRP expects to share more information when available, following feedback on proposed revised timelines from the Board.
- Planon's Stream 1 go live date may further adjust to realign with Workday to ensure a smooth transition from PeopleSoft.
- An update will be provided when this re-planning effort is complete.



– For Phase 2 Stakeholders –

Implementation planning for Phase 2 will follow decisions related to Phase 1 timelines for Planon and Workday.



EMMS RESOURCES TO STAY CURRENT

We invite you to visit <https://emms.ubc.ca> to access:

- [News items](#) updated weekly
- [What's Happening](#), a monthly brief of key activities
- [Talking Points for Managers](#), monthly updates
- [End-user Training](#) updates

The screenshot shows the top portion of the EMMS website. At the top left is the UBC logo. To its right is the text 'THE UNIVERSITY OF BRITISH COLUMBIA'. Further right is a search icon with the letters 'Q'. Below this is a dark blue banner with the text 'ENTERPRISE MAINTENANCE MANAGEMENT SYSTEM (EMMS)'. Underneath the banner is a navigation menu with the following items: Home, About EMMS, What's in Scope?, Who's Impacted?, What's Happening?, Training, News, Contact Us, and IRP. Below the navigation menu is a large image showing three men in a professional setting, with a colorful geometric pattern overlaid on the image.

Building a modern enterprise maintenance, asset and inventory management solution for UBC

The Enterprise Maintenance Management System (EMMS) will deliver a single unified platform called Planon and best practice processes for maintenance management, inventory management and asset management (*building and grounds assets associated with maintenance and work orders*) with integrations to other UBC applications to achieve UBC's strategic goals. EMMS is a multi-year initiative, with timelines aligned with the Workday HR and Finance implementation schedule in 2020.



WHAT TO EXPECT NEXT

1. Stream 1 Design & Configuration Report Out (early January)
2. Potential dates for an EMMS update and Planon demonstrations in early 2020
3. Visit the web site What's Happening monthly updates

Questions? Email deb.capps@ubc.ca



THE UNIVERSITY OF BRITISH COLUMBIA
Enterprise Maintenance Management System