EMMS TALKING POINTS ~ NOVEMBER 2019

Planon Stream 1 Functionality

Stream 1 functionality for the initial Go Live has been approved by the EMMS Steering Process & Outcomes Committee and Integrated Renewal Program as detailed below:

Properties	• Buildings (with hazard indicator)
Assets	• BOps Regulatory Assets • Space room info only • *EWS maintains assets in BuiltSpace until Stream 2*
Inventory	• All Inventory Management
Maintenance	• Service Requests • Work Orders • Work Order Time • Projects • Resource Planner (crew scheduling) • Equipment & Tool Reservation • Shutdowns • Preventative Maintenance Work Order Scheduling Regulatory Assets (BOPs only) • Planon Service Scheduler
Purchasing	• Purchase orders, receipts, invoices
Finance	• Work Order Cost Recovery

Planon Go Live Timeline Revision

Planon will be deployed in two streams of functionality to minimize operational impacts. While developing the project plan, it was determined the desired functionality for Stream 1 would require more time than is available to align with Workday's target timeline in 2020.

Recently, as part of the Integrated Renewal Program (IRP) governance for Workday, UBC conducted the first in a series of reviews to determine, based on the information currently available, whether all technical and functional requirements are met and the university community is ready for the change.

As a result of the review, there was recognition of the need for more time to meet UBC's commitment to delivering the best solution possible, and to prepare our community for an implementation that meets the needs of our students, faculty and staff.

Over the coming weeks, IRP will conduct re-planning to determine a revised implementation timeline. It will be presented to the Board of Governors in December for approval. Until the new timeline is approved by the Board, it will be business as usual for the IRP team, and they will continue to work toward the current plan. We expect an IRP update via a December 6th UBC Bulletin, following the Board's decision.

Key Messages

- The replacement of UBC's aging systems, many of which are 25 years old, is complex and requires a major effort by many people across UBC to be successful
- The EMMS project plan is based on Planon's implementation methodology to accelerate deployment using out-of-the-box functionality
- Project timelines and target Go Live dates are subject to change as the scope and scale of the effort is quantified

Questions and Answers

Q: How was Stream 1 functionality determined?
A: The Planon functionality is comparable to what is delivered by PeopleSoft today. By establishing a foundation in Planon to conduct business operations, UBC will be well positioned to implement the remaining functionality in Stream 2, later in 2020.

Q: When does Stream 2 begin?
A: Stream 2 will begin immediately after Stream 1 deployment with the remainder of Planon functionality and technical integrations with other UBC applications. For example, terrain and outside property information will be integrated with Planon and EWS will be able to retire BuiltSpace and replace with Planon.

Q: Why was the Go Live date changed?
A. UBC's leaders are committed to a successful launch of Planon. An extension of a few months will ensure there is sufficient time to complete testing, migrate data, develop integrations to other applications and most importantly, to prepare our staff for this major change.

Q: What are the anticipated impacts to staff resulting from Planon?
A. The change impacts are currently being identified. There will be both process and technology changes which will be defined by functional area. For example, once Planon goes live, field staff will use a mobile device to complete their daily work. All change impacts will be shared and socialized with staff during business readiness well in advance of the Go Live with training provided. Please note, there will be some frontline staff who will not be using Planon in their day-to-day work.

Highlights of the Next 30 Days

- Planon Design meetings continue through to late November or early December to document Planon functional configuration decisions
- Functional Specifications developed by the EMMS Functional team in consultation with staff will be used by Planon to generate Solutions Documents for their team to configure UBC's solution
- Data classifications and mapping are being assessed in anticipation of migration to Planon
- End user training strategies will be shared with the Process & Outcomes Committee in November
- Development of the testing strategy is in progress to support an iterative review leading up to Go Live with staff included at various points