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Objective and Scope
Objective and Scope

The overall objective of the Monthly Planning Activity Reports is to track current status of IV&V efforts, and describe progress and results of assessments and reviews.

There will be two Monthly Planning Activity Reports (Deliverable #02 and #03) for the project. The first for the month of December 2016 (Deliverable #02), and January 2017 (Deliverable #03). The reports will be submitted by the 5th calendar day of the month following the month of service.

This document is the initial report, and will include activities for the first two months of the project (November – December 2016). The scope of the activities for this period included attending project-related meetings, conducting project team and stakeholder interviews, reviewing relevant project documentation, and the creation of project deliverables.
Progress Summary

Since the inception of the IV&V project in November 2016, KPMG has assisted with recommendations for the feasibility of the implementation date through our formal deliverable, the Feasibility Assessment Report (Deliverable #01). The assessment was conducted in an accelerated manner to support the decision making process that was being executed collectively by project leadership, the project team, and the user community. The main outcomes of that assessment included recommendations to postpone the planned July 2017 big bang implementation date, as well as “decouple” the Financial and HCM/Payroll modules, and pursue separate implementation tracks for each. The final implementation decisions are pending.

In the later weeks of November 2016 through December 2016, the IV&V team built upon the observations and recommendations from Deliverable #01, and focused on conducting additional interviews in support of our Comprehensive IV&V Assessment Report and Recommendations deliverable (Deliverable #04) due in early January 2017. These activities were also conducted in an accelerated manner in view of the upcoming Holiday break. The deliverable will be largely based on interviews conducted with the project team in November, and supplemented by additional meetings with staff not previously interviewed, as well as documents reviewed for key project work streams.

In January 2017, the team will focus on engaging directly with the project teams and work streams in their week-to-week activities to facilitate the ongoing monitoring activities and monthly risk assessment reports that will commence in February 2017. We will also be drafting our next deliverable due in early February 2017, the Comprehensive IV&V Plan (Deliverable #05).
IV&V Deliverable Status
The following table provides the list of project deliverables and their respective status.

<table>
<thead>
<tr>
<th>Deliverable Number/Name</th>
<th>Due Date</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 – Feasibility Assessment Report</td>
<td>11/21/2016</td>
<td>Submitted; Pending Approval</td>
<td>• Submitted initial report, November 21, 2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Reviewed report with Leadership Team, November 28, 2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Revised report, submitted final report, November 30, 2016</td>
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<td></td>
<td></td>
<td></td>
<td>• Presented report to CUBO, December 1, 2016</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Pending approval</td>
</tr>
<tr>
<td>02 – Initial Monthly Planning Activity Report (November – December 2016)</td>
<td>1/05/2017</td>
<td>Submitted; Pending Approval</td>
<td>• Submitted report, January 4, 2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Pending review and approval</td>
</tr>
<tr>
<td>03 - Monthly Planning Activity Report (January 2017)</td>
<td>2/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>04 – Comprehensive IV&amp;V Assessment Report and Recommendations</td>
<td>1/05/2017</td>
<td>Submitted; Pending Review</td>
<td>• Submitted draft report, January 4, 2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Pending review and approval</td>
</tr>
<tr>
<td>05 – Comprehensive IV&amp;V Plan</td>
<td>1/31/2017</td>
<td>In Progress</td>
<td>• Report being developed</td>
</tr>
<tr>
<td>06 – Monthly Risk Assessment Report, Month 4 (February 2017)</td>
<td>3/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>07 – Monthly Risk Assessment Report, Month 5 (March 2017)</td>
<td>4/05/2017</td>
<td>Scheduled</td>
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</tr>
<tr>
<td>Deliverable Number/Name</td>
<td>Due Date</td>
<td>Status</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>08 – Monthly Risk Assessment Report, Month 6 (April 2017)</td>
<td>5/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>09 – Monthly Risk Assessment Report, Month 7 (May 2017)</td>
<td>6/05/2017</td>
<td>Scheduled</td>
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</tr>
<tr>
<td>10 – Monthly Risk Assessment Report, Month 8 (June 2017)</td>
<td>7/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>11 – Monthly Risk Assessment Report, Month 9 (July 2017)</td>
<td>8/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>12 – Monthly Risk Assessment Report, Month 10 (August 2017)</td>
<td>9/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>13 – Monthly Risk Assessment Report, Month 11 (September 2017)</td>
<td>10/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>14 – Monthly Risk Assessment Report, Month 12 (October 2017)</td>
<td>11/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>15 – Monthly Risk Assessment Report, Month 13 (November 2017)</td>
<td>12/05/2017</td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>16 – Monthly Risk Assessment Report, Month 14 (December 2017)</td>
<td>12/31/2017</td>
<td>Scheduled</td>
<td></td>
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### Project Deliverable Status (continued)

<table>
<thead>
<tr>
<th>Deliverable Number/Name</th>
<th>Due Date</th>
<th>Status</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>17 – Enterprise Readiness Verification Report</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
<tr>
<td>18 – End to End Testing Completion Report</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
<tr>
<td>19 – User Acceptance Testing Completion Report</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
<tr>
<td>20 – Workday Deployment Readiness Verification Report #1</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
<tr>
<td>21 – Workday Deployment Readiness Verification Report #2</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
<tr>
<td>22 – Workday Deployment Readiness Verification Report #3</td>
<td>TBD</td>
<td>Pending</td>
<td>• Pending go-live and big bang/decoupling decision</td>
</tr>
</tbody>
</table>
IV&V Activities
Deliverables
IV&V Activities – IV&V Deliverables

November 2016

- **Deliverable #01 – Feasibility Assessment Report**
  - Completed and submitted initial report for review, November 21, 2016
  - Reviewed report with Leadership team, November 28, 2016
  - Presented report to CUBO, December 1, 2016

December 2016

- **Deliverable #02 – Initial Monthly Planning Activity Report**
  - Submitted report for review and approval, January 4, 2017

- **Deliverable #04 – Comprehensive IV&V Assessment Report and Recommendations**
  - Submitted report for review and approval, January 4, 2017
IV&V Activities
Meetings Attended
IV&V Activities – Meetings Attended

November 2016

• Initial Meeting with Project Leadership, November 2, 2016
• Initial Enterprise Resource Planning (ERP) Overview Meeting with ERP Implementation Director, November 2, 2016
• Initial Meeting with Chief Information Officer, November 3, 2016
• Workday Context Overview Meeting with ERP Implementation Director, November 3, 2016
• Initial Meeting with ASMP Associate Vice President, November 8, 2016
• Initial Meeting with Enterprise Readiness Director, November 8, 2016
• Meeting with UT Austin President and CFO, November 10, 2016
• ASMP All-Hands Meeting, November 18, 2016
• Meeting with Project Leadership, November 28, 2016
• Meeting with PMO Project Manager, November 30, 2016
IV&V Activities – Meetings Attended

December 2016

• Meeting with CUBO, December 1, 2016
• Meeting with PMO Project Manager, December 1, 2016
• ASMP Weekly Team Meeting, December 1, 2016
• Meeting with ERP Implementation Director, December 2, 2016
• ASMP Town Hall Meeting, December 6, 2016
• ASMP Weekly Team Meeting, December 8, 2016
• Meeting with EDAM Senior Business Analyst, December 13, 2016
• ASMP Holiday Event, December 14, 2016
• ASMP Weekly Team Meeting, December 15, 2016
• Financial Readiness Coordinators Meeting, December 15, 2016
• Informal meeting with Enterprise Readiness Director, December 15, 2016
IV&V Activities
Interviews Conducted
IV&V Activities – Interviews Conducted

November 2016

- Academic Business Officers Group (TXAdmin), November 9, 2016
- Benefits ASMP Lead, November 9, 2016
- Benefits Director, November 9, 2016
- HCM/Payroll ASMP Leads, November 9, 2016
- HR Director, November 9, 2016
- HCM/Recruiting ASMP Lead, November 9, 2016
- Academics Personnel Lead, November 9, 2016
- Absence/Time Tracking Lead, November 10, 2016
- Workday Leadership, November 10, 2016
- Grants Lead and Team, November 10, 2016
- Academic Affairs Director, November 14, 2016
- Integrations Leads (HCM/FIN), November 14, 2016
- Testing Lead (HCM/FIN), November 14, 2016
IV&V Activities – Interviews Conducted (continued)

November 2016 (continued)

• HR Director and Benefits Director, November 14, 2016
• Enterprise Readiness Lead ASMP, November 14, 2016
• HCM Change Management Lead ASMP, November 14, 2016
• FIN Change Management Leads ASMP, November 14, 2016
• Communications Lead ASMP, November 14, 2016
• Organizational Alignment Lead ASMP, November 14, 2016
• Training Lead ASMP, November 14, 2016
• Data Conversion Lead, November 15, 2016
• Spend Lead, November 15, 2016
• Security Leads, November 15, 2016
• WD FDM Lead, November 15, 2016
IV&V Activities – Interviews Conducted (continued)

November 2016 (continued)

• Customer Accounts Lead, November 15, 2016
• Financial Accounting Lead, November 15, 2016
• Central Business Processing Office / Business Operations Leads (including Accounting, Purchasing, Cash Management, Human Resources, Payroll, Budget, OFA), November 15, 2016
• PMO Lead, November 17, 2016
• Data Management Lead, November 18, 2016
• Application Modernization Lead, November 18, 2016
IV&V Activities – Interviews Conducted (continued)

December 2016

- Chief Financial Officer, December 13, 2016
- EDAM Director, December 13, 2016
- Chief Information Officer, December 13, 2016
- Technical Architecture Director, December 14, 2016
- IT Campus Officers, December 14, 2016
- Security Officer, December 14, 2016
- Internal Auditor, December 14, 2016
IV&V Activities – Documentation Reviewed

November 2016

- ASMP Communications Plan
- ASMP Communications Strategy
- ASMP Content Strategy
- ASMP Program Overview (Roadshow presentation)
- Change Impact Analysis
- Financial Business Decisions Workgroup
- HCM Open Decisions and Issues
- HCM Workshop Overviews
- Integration Inventory – Finance
- Integration Inventory – HCM
- Issues Log
November 2016 (continued)

- Issues with Workday
- Master ASMP Workday Go Live Gantt Chart
- Project Organization
- Readiness Coordinator Presentations
- TXAdmin Key Points Regarding Workday
- UT Austin Critical Gaps as of November 2016
- Weekly Status Reports
Completed Activities – November 2017 (continued)

December 2016 (continued)

- ASMP 2.0 Sustainment Executive Brief dated 8/11/2015
- Big Bang v. Decoupled Decision Analysis, dated 12/13/2016
- Campus Integration Primer dated 4/7/2014
- Checkpoint 2 Sustainment Summary - May 2016
- Communication Plan dated 9/29/2014
- Enterprise Readiness Roles and Responsibilities dated 2/8/2016
- Risk Register as of 12/8/2016
- Sustainment Planning and Recommendations for Review by Work Group 1 – October 2016
- UT CIO’s About IT Governance dated September 2015
- Weekly Status Reports
IV&V Activities
Planned for January 2017
IV&V Activities – Planned for January 2017

Draft and Submit Deliverables

• Deliverable #02 – Initial Monthly Planning Activity Report
  ▪ Complete and submit report, January 4, 2017

• Deliverable #04 – Comprehensive IV&V Assessment Report and Recommendations
  ▪ Complete and submit draft report, January 4, 2017

• Deliverable #05 - Comprehensive IV&V Plan
  ▪ Create and submit draft report, January 31, 2017
IV&V Activities – Planned for January 2017

Attend Project Meetings

- ASMP Leadership Team Meetings, Tuesdays at 3:00 p.m.
- TAI Tech Arch Management Team Weekly Touchpoint, Thursdays at 9:00 a.m.
- ASMP Weekly Team Meetings, Thursdays at 2:00 p.m.
- ASMP Financials Weekly Meetings, Fridays at 9:00 a.m.
- Readiness Coordinator Meetings for all work streams, as scheduled
- BSC/ASMP Steering Committee Meetings, every third Friday at 1:30 p.m.
- IT Campus Leaders Meeting, January 11, 2016
- EDAM Team Meetings, as scheduled
- Integrations Team Meetings, as scheduled
- Sustainment Team Meetings, as scheduled
- Meetings with CFO, as scheduled
- Meetings with CIO, as scheduled
The information contained herein is of a general nature and is not intended to address the circumstances of any particular individual or entity. Although we endeavor to provide accurate and timely information, there can be no guarantee that such information is accurate as of the date it is received or that it will continue to be accurate in the future. No one should act on such information without appropriate professional advice after a thorough examination of the particular situation.

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