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Objectives, Scope, and Approach
Objectives

Deliverable #19: User Acceptance Testing Completion Report, is the documented results of the formal End User Testing assessment.

Per the SOW, “during the final cycle of Workday User Acceptance Testing, Contractor will conduct a User Acceptance Testing Completion Assessment to verify that testing metrics and outcomes, defect closures, and sign-offs are accurately captured and reported; that defects are properly reported, prioritized, and tracked; and that any critical defects are resolvable before scheduled deployment.”

The Program now refers to User Acceptance Testing as End User Testing, and this document, as well as the deliverable, will also address the process and results of End User Testing.

The primary objectives of Deliverable #19: User Acceptance Testing Completion Report included:

• Assess and evaluate the End User Testing workflow: the Planning, Design, Execution, Documentation, and Resolution such that defects are prioritized and resolved prior to deployment.

• Review End User Testing related metrics (Testing User Surveys & JIRA) for overall trends of testing activities. This will provide an overall assessment of completion and any outstanding tasks that impact the Program’s Workday functionality.

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Objectives

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• Provide actionable and meaningful lessons learned to carry forward to a future Workday Financials Implementation.

• Provide End User Testing observations and recommendations (included within the Monthly Risk Assessment Reports).
Scope

The scope of this assessment and report include the full execution of the Program’s End User Testing process, which covers both Scripted and Unscripted Testing. The assessment and report creation followed the activities and tasks identified within the Approach section of this document. Meetings were attended, documentation reviewed, and discussions held with related Program team members and stakeholders throughout the process.

The assessment results, including observations and recommendation, are presented within this document. The assessment results are presented for the following areas:

- End User Testing Process and Documentation
- End User Testing Survey Analysis and User Response Themes
- Outstanding Defects, Resolutions, and Dispositions
- Additional Recommendations and Considerations

In addition, ongoing observations and recommendations for the End User Testing activities were provided within KPMG’s Monthly (April, May, June, and July) Risk Assessment Reports. This allowed for risks to be identified and discussed as the testing progressed, rather than provide that information after testing had concluded. These observations and recommendations are again provided as reference in Appendix A of this report.
Approach

This deliverable followed the same approach that has been applied to previous project assessments and deliverables, which includes following KPMG’s IV&V Methodology, a repeatable process for evaluating in-progress implementation activities to determine effectiveness relative to industry standards. The activities that KPMG performed during the assessment included:

- **Met With Program Leadership:** The objectives, content, and planned format of the deliverable was discussed and confirmed with Program Leadership. A Deliverable Expectation Document (DED) was created, discussed, and collaborated with Project Leadership to ensure the necessary assessment content was identified.

- **Applied Industry Standards:** Our team applied pertinent industry standards to the related activities and observations, which helped guide our team in developing recommendations.

- **Performed Assessment:** The assessment was conducted for the entire End User Testing process (Scripted and Unscripted). Assessment activities included:
  - Reviewed End User Testing scenarios.
  - Attended meetings relevant to End User Testing.
  - Conducted ongoing discussions with Program team members and stakeholders.
  - Reviewed execution of End User Test scenarios.

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Approach

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- Reviewed regular updates to issue logs and incremental completion of all testing scenarios.
- Reviewed testing outcomes and defect closures.
- Reviewed and analyzed testing progress, bugs, and completion trends to determine if critical defects were appropriately documented with a proper level of prioritization for formalize resolution.
- Reviewed and analyzed testing metrics (Testing User Surveys & JIRA)
- Provided ongoing End User Testing observations and recommendations (within Monthly Risk Assessment Reports).

These activities provided our team with an understanding of the status and progress of End User Testing and the associated activities, thus allowing the team to assess and report in a comprehensive manner.

- **Compiled Observations:** The KPMG team compiled observations from our analyses of the assessed areas.

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Approach

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• **Developed Recommendations:** Once the observations were identified and confirmed, our team developed recommended strategies to address the observed weaknesses and enhance the strengths, taking into account project constraints. Our recommendations were developed with the goal of being achievable and impactful for the project and UT.

• **Created Draft Report:** Upon completion of documenting the observations and recommendations, our team developed the draft report. The draft report went through the internal-KPMG review process, and was submitted to the Managing Executive Sponsor.

• **Created Final Report:** After the report was submitted to the Managing Executive Sponsor, the document was reviewed and discussed, and modifications to the document made based on the review and discussion; the final report was then submitted.
Executive Summary
End User Testing completed on July 31, 2018. The Program performed testing across the four University population types: Staff, Student, Faculty, and Non-Employee, in both scripted and unscripted situations.

Scripted testing included 28 master scenarios. Unscripted testing was mainly test user driven; however, the Program provided general use cases for test users. Overall, End User Testing resulted in minimal defects and user concerns. More importantly, throughout both the scripted and unscripted sessions, test user feedback was mainly positive, but also provided insightful information regarding challenges, new functionality, and perceived Workday readiness. It is important to note that test users had little or no prior Workday experience, and were chosen to ultimately play the role of Super Users from the Colleges, Schools, and Units (CSUs).

For End User Testing Process and Documentation, it is recommended the Program:

- For both scripted and unscripted End User Testing increase the significance of End User Testing exit criteria. Exit criteria for End User Testing was mentioned infrequently. It is important that the Program present exit criteria data for potential audit and verification purposes.

- As a means to increase test user engagement, continue to leverage structured elements in less formalized testing environments.
Executive Summary: Survey Analysis and Themes

Over the course of nine weeks, the Program completed both scripted and unscripted End User Testing. Scripted End User Testing was divided into three rounds, representing each of the four University population types: Staff, Student, Faculty, and Non-Employee. At the end of each scripted session, test users completed a short usability survey to provide feedback on Workday processes, including help text, and system alerts. The usability surveys also allowed for test user comments to each of the questions. In general, scripted test users reported an average of 3.6 out of 4.0 regarding their ability to effectively complete testing tasks.

For End User Testing Survey Analysis and User Response Themes, it is recommended the Program:

• Utilize the scripts as a means to guide in-person Workday training and/or Workday training documentation.

• Evaluate test user comments and the scripted test instructions associated with costing allocations, and determine how scripts can be improved to address some of the confusion and difficulty that was reported.

• Provide ongoing reminders to test users of the context in which they are to complete tasks. The context of the tasks serves as a point of consolidation of how transactions and processes in Workday differ from Legacy systems.
Executive Summary: Defects, Resolutions, and Dispositions

At completion of End User Testing on July 31, 2018, a total of two defects remained open across both scripted and unscripted testing. Both defects, TVL13881 and TVL-14062 remain in an open status and are classified as Critical and Major respectively. However, each defect is related to other issues.

The Security: Change Job Approval (TVL-13881) was reopened to retest functionality in response to a separate, and now closed defect, that may impact configuration. TVL-14062 is associated with a change request regarding the remapping of Faculty Time Type to “Part Time”. If the mapping is approved for future builds, including Gold and Production, it will contain this change. If mapping is not approved, the time type changes will likely occur during Gold or in Production as a “clean up” activity. Regardless, the change will reduce confusion among Faculty users. Overall, End User Testing resulted in minimal defects and user concerns.

For Outstanding Defects, Resolutions, and Dispositions, it is recommended the Program:

• Perform additional testing and close-out the Security: Change Job Approval (TVL-13881) defect; there appears no reason to believe TVL-13881 will remain a concern.

• Either correct the Faculty Position Time Type (TVL-14062) mapping prior to final conversion or denote this as a conversion “clean up exercise” prior to opening Workday to all University users.
Executive Summary: Additional Recommendations

Overall, the Program demonstrated a strategic and methodological approach to End User Testing. In similar fashion to End-to-End Testing, the Program kept an agile approach to meet the needs and questions of test users new to the Workday platform.

Proctors were consistently viewed as being helpful and reliable sources of information. In situations demanding higher level support, Proctors were able to involve QA Coordinators and other Program members with a robust knowledge of Workday in relation to University requirements. This kept both scripted and unscripted test users involved and active throughout each session. Further, when issues arose, test users, Proctors, and, when necessary, QA Coordinators would document the defect in JIRA and begin problem solving.

For Additional Recommendations and Considerations, it is recommended the Program:

- Document test user generated testing scenarios in unscripted testing. The Program will have greater visibility into what functionality test users were evaluating, and know what areas CSU users consider critical, that may not have been accounted for by the Program.

- Utilize a self-reporting metric for Unscripted End User Testing activities that evaluates test user engagement as well as provides insight into test user perceive effectiveness and productivity.
## Observations and Recommendations

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| **End User Testing – Process and Documentation** | The Program conducted End User Testing to assess Key Business Processes from Staff, Student, Faculty, and Non-Employee campus populations. End User Testing was divided into two parts: unscripted and scripted testing. Primary test users included users from the Colleges, Schools, and Units (CSUs). The Program defined 28 scripted tests for each round of testing that included between 30 – 35 test users. Further, the following goals of End User Testing were outlined:  
  - Provide end users with the opportunity to confirm critical business processes work as designed.  
  - Provide end users with the opportunity to validate that data converted from HRMS and DEFINE is valid.  
  - Provide end users with the opportunity to review and provide feedback on training materials.  
  Scripted End User Testing began June 4, 2018, and completed June 26, 2018. | End User Testing typically encompasses six key aspects: (1) planning, (2) design of test cases, (3) testing team selection, (4) execution and documentation of test cases, (5) defect resolution, and (6) sign-off. The end result of these tasks attempt to both validate and verify (1) that the Program constructed Workday business processes to requirements and expectation, and (2) that the actual business process follows the intended execution of steps, in proper order, and that the process is repeatable. In months prior to End User Testing kickoff on June 4, 2018, the Program began planning and developing test cases, Proctor training, goals, and exit criteria. Throughout both scripted and unscripted testing, test user feedback and results yielded encouraging outcomes. Specifically, (1) known complexities of Workday (i.e., costing allocations) could be addressed in the sessions, (2) minimal defects were reported, and (3) following participation in End User testing, test users reported having a better understanding of Workday functionality. |
### Observations and Recommendations

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<tr>
<td>End User Testing – Process and Documentation</td>
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<td>For future End User Testing efforts, it is recommended that the Program develop a similar process with a single caveat: it is suggested that the Program increase the significance of End User Testing exit criteria.</td>
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<td>Throughout testing and programmatic meetings, exit criteria for End User Testing was mentioned infrequently. For both audit and verification purposes, it is important that the Program present exit criteria metrics. Exit Criteria was defined in the document, “End User Testing Scripted Testing Scope” to include:</td>
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<td>• No Blocker defects</td>
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<td>• All gaps / defects covered</td>
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<td></td>
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<td>• Super User comfort with system</td>
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<td>• Every CSU participated</td>
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<td><strong>End User Testing – Process and Documentation</strong></td>
<td>Unscripted End User Testing began on July 2, 2018 and completed July 31, 2018. Although less formally structured than its scripted counterpart, unscripted testing involved multiple rounds and days. The purpose was to test use case scenarios in Workday that a CSU would regularly encounter. In addition, test users were to provide feedback regarding the usability of Workday, help text, notifications, and alerts. Unscripted test users brought or generated their own test cases, or Proctors provided general test cases if a test user did not bring their own.</td>
<td>The Program implemented an approach to unscripted testing that centered on testing scenarios in Workday that a CSU would regularly encounter and provide feedback to the Program. Test users either brought their own test cases or were provided, if needed, general use cases by the Proctors. Unscripted sessions were noted as having a positive environment in which test users could (1) chose to work independently and ask questions when needed, or (2) chose to sit along side a Proctor and look for guidance throughout the entire process. Further, test users could utilize documentation and scripts from the scripted portion of End User Testing to assist them. As unscripted testing is often less formal than its scripted testing counterpart, the provided general use cases were a very effective addition to keep test users focused and engaged throughout unscripted testing. As such, it is recommended that in future testing efforts, the Program continue to leverage structured elements in less formalized testing environments. In addition, in less formal test situations, it is recommended that the Program place greater emphasis on exit criteria or a means to capture straight forward metrics of test user engagement, challenges, and Workday user readiness.</td>
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## Observations and Recommendations

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<tr>
<td>End User Testing Survey Analysis and User Response Themes</td>
<td>Over the course of each day and round of Faculty End User Scripted Testing, a usability survey was distributed. Faculty testing scope included: Hire (PAR), Add Contract, Change Job, Add Job, Change Org Assignment/Costing Allocation, Request Compensation Change, and Termination transactions. Overall, test users responses indicated a trend of completing scripted test cases with minimal challenges. Faculty scripted test users averaged a 3.5 out of 4.0 rating regarding effectiveness to complete testing tasks.</td>
<td>At the start of scripted testing, the Program described a series of objectives for test users – some of which have previous been reported. According to the Program, the number one goal was to have test users complete the test scripts. With this goal in mind, test users clearly demonstrated satisfaction of this goal. As test users were (1) not formally trained on Workday prior to scripted End User Testing and (2) completed all testing tasks, the Program should consider Faculty testing a success. It is recommended that the Program leverage the scripts for Workday trainings and compliance purposes.</td>
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### Faculty Population - How effectively were you able to complete the testing task?

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<thead>
<tr>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 1</th>
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<th>Day 3</th>
<th>Day 4</th>
<th>Day 1</th>
<th>Day 2</th>
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<tbody>
<tr>
<td>Round 1</td>
<td>4 - Competed, not challenging at all</td>
<td>3 - Completed, slightly challenging</td>
<td>2 - Completed, extremely challenging</td>
<td>1 - Not Completed</td>
<td>4 - Competed, not challenging at all</td>
<td>3 - Completed, slightly challenging</td>
<td>2 - Completed, extremely challenging</td>
<td>1 - Not Completed</td>
<td>4 - Competed, not challenging at all</td>
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<td>Round 2</td>
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<tr>
<td><strong>End User Testing Survey Analysis and User Response Themes</strong></td>
<td>Over the course of each day and round of Non-Employee End User Scripted Testing, a usability survey was distributed. Non-Employee testing scope included: Contract Contingent Workers, End Contingent Worker Contract, and Covert Worker to Employee. Although the Non-Employee population had the fewest test users, the trend from the usability survey indicated that testing tasks could be completed, often with minimal challenges. Non-Employee scripted test users averaged a 3.6 out of 4.0 rating regarding effectiveness to complete testing tasks.</td>
<td>The Program had both limited testing and test users for the Non-Employee population; however, it is important to interpret the results in context of scripted testing’s goal: To complete all test scripts and testing tasks. Non-Employee test users reported to have effectively completed all tasks as either “not challenging” or “slightly challenging”. It is recommended that the Program utilize the scripts as a means to guide in-person Workday training and/or Workday training documentation. The granularity of scripts appear to have made an impact for new users such that Workday users can accomplish those tested day-to-day tasks without issue.</td>
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### Observations and Recommendations

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<tr>
<td>End User Testing Survey Analysis and User Response Themes</td>
<td>Over the course of each day and round of Student End User Scripted Testing, a usability survey was distributed. Student testing scope included: Job Requisition, Candidate Management, Job Application, Offer, Hire (Onboarding), Change Job, Add Job, Termination, Request Time Off, and Change Org Assignment/Costing Allocation Combo. Two instances exist in which a test user indicated testing tasks were extremely challenging. On the other hand, a significant number of Student test users reported minimal or slight challenges with the scope of these testing transactions. Student scripted test users averaged a 3.6 out of 4.0 rating regarding effectiveness to complete testing tasks.</td>
<td>The Student population of test users performed one of the widest arrays of transactions across Workday End User Testing. Similar to other campus populations already reported, Student test users were able to complete all testing tasks within their scripts, reporting only two cases in which tasks were “extremely challenging”. It is clear the Program created scripts that enabled new Workday users to complete transactions analogous to Legacy, and it is suggested to approach future testing with this level of detail. As new users assimilate Workday, the context of actions may not be immediate, and it is important for the Program to look for opportunities to incorporate a context with rote repetition of tasks.</td>
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#### Student Population - How effectively were you able to complete the testing task?

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<tr>
<td>Round 1</td>
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<td>Round 2</td>
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<td>Round 3</td>
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<tr>
<td>End User Testing Survey Analysis and User Response Themes</td>
<td>Over the course of each day and round of Staff End User Scripted Testing, a usability survey was distributed. Student testing scope included: Job Requisition, Candidate Management, Job Application, Offer, Hire (Onboarding), Change Job, Add Job, Termination, Request Time Off, and Change Org Assignment/Costing Allocation Combo. Two instances exist in which a test user indicated testing tasks were extremely challenging as well as unable to complete the daily tasks. Overall, Staff scripted test users averaged a 3.6 out of 4.0 rating regarding effectiveness to complete testing tasks.</td>
<td>Among the campus populations, Staff was the only population in which test users reported “Not Completed”. Further review of survey data indicated that a user was unable to complete testing on Day 3 of Round 2 due to a “personal reason”, and was unable to complete testing on Day 1 of Round 3 due to “error messages” not allowing them to continue. With this information in mind, test user survey results are similar and consistent across populations. That is, the granularity of scripted testing made Workday accessible to new users. As recommended, the Program should integrate scripted testing documentation into overall University wide training.</td>
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### Staff Population - How effectively were you able to complete the testing task?

![Chart showing how effectively test users completed the testing task for each day and round.](chart.png)
Observations and Recommendations

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| End User Testing Survey Analysis and User Response Themes | A common theme reported across test user populations were complexities and confusion regarding costing allocations and funding. A selection of test users responses are below:  
  - “Since [funding changes] will appear to be more involved than what we have today, it will be very important to make sure users understand step one is very quick and does not require approvals.”  
  - “I see how some may have issues with costing allocations if the steps are not followed exactly.”  
  - “I was confused when doing the cost center allocation of the teaching overload payment.”  
  - “Costing Allocation was a bit tricky. Had to cancel and start over.” | The challenges associated with costing allocations is well known to the Program. When moving to a platform like Workday, certain aspects of system functionality may be more visible to a user than in the Legacy system.  
As systems differ, users will learn and adopt to new functionality and a learning curve is expected. However, it is recommended that the Program evaluate both the test user comments and the scripted test instructions associated with costing allocations to determine how scripts can be improved to address reported confusion and difficulty. Further, the details gained from user commentary regarding costing allocations provide information into training opportunities; how to refine Workday demos; and prepare End User support personnel for situations involving costing allocation complexities at go-live and beyond. |
# Observations and Recommendations

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| **End User Testing Survey Analysis and User Response Themes** | A common theme reported across test user populations were not understanding the context of why test users were performing scripted actions. A selection of test users responses are below:  
- “I was able to follow the tasks and complete all of the steps, but I didn't completely understand what I was doing. It would have been helpful to provide some context in the test scenario as to what I was trying to achieve.”  
- “Script was very clear, but I had trouble connecting it to context of what I was actually accomplishing by following the listed steps. Would be helpful if each test included a very brief description of what the section was doing or even a hypothetical instance to connect to.”  
- “I understand that we are ‘testing’ the system, however, following the instructions doesn't provide any reasons for why we are doing what we are doing. Understanding the why will help us know what to do in the future without having to follow the steps in the materials.” | Prior to both Proctor testing and the start of End User Testing, the Program established a series of goals, basic ground rules, and fundamentals of how to approach End User Testing. In addition, at the start of each day of scripted testing, a small presentation detailed the scope, transactions to be tested, and offered an opportunity for questions.  
It is recommended that future End User Testing initiatives have the test team and/or Proctors further emphasize and revisit ground rules and testing goals. This will provide ongoing reminder to test users of the context in which they are to complete tasks. It is important to note, that the context in which tests were completed did not preclude test users from completing their tasks. Rather, the context of the tasks serves as a point of consolidation of how transactions and processes in Workday differ from Legacy systems. |
## Observations and Recommendations

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| End User Testing Survey Analysis and User Response Themes | A common theme reported across test user populations centered on assimilating to Workday and learning nuances of business process transactions. A selection of test users responses are below:  
• “Getting better with each session. I strongly suggest that there be more training of this nature, more sessions. I firmly believe it would be time well-spent in getting better and better acquainted with the system.”  
• “The biggest issue for me in testing (particularly on this day) is not knowing Workday very well and knowing what step to expect next. I know that will come with time, but that is my biggest personal challenge.”  
• “Just seems like a lot of steps, but I'm sure we will get used to it.”  
• “I feel this is more on the user side, just getting used to new terminology, process, interface.” | Overall, End User Testing has yielded positive and valuable information both qualitatively and quantitatively. The current theme provides insight both into how test users are accepting the transformational process of assimilating from the Legacy system to Workday as well as how Workday nuances are perceived and approached between systems. It is recommended that the Program utilize these test user comments as a baseline and barometer of how user adoption may occur during go-live and beyond. |
## Observations and Recommendations

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<td>Outstanding Defects, Resolutions, and Dispositions</td>
<td>On July 19, 2018, Critical Bug TVL-13881 entitled “Security: Change Job final approved when submitted by Academic HR Partner without routing to Academic HR Executive” was reopened for testing in response to a separate closed bug that may impact TVL-13881’s original solution. A Critical Bug is defined as: Critical loss of functionality and requires resolution within 4 business days. The Critical Bug is associated with End User Testing Master Task Non-Tenure Track Add Contract (Renewal) and Change Job (Inactivate/Reactivate). Critical Bug TVL-13881 details noted that while the test user was in the Academic HR Partner security role, both the inactivate and a reactivate change job process did not require an the expected Academic HR Executive approval. Further review indicated the Business Process step condition was not met, such that if the condition returns “false”, the step to route to Academic HR Executive will not initiate.</td>
<td>As of August 1, 2018, TVL-13881 was assigned for retesting. The initial testing and closure of TVL-13881 was performed through configuration changes to the Change Job Business Process step condition. Following testing of the configurational change, the step condition initiated appropriately, such that the process routes to the Academic HR Executive for approval when an Academic HR Partner submits a Change Job transaction. Based on this assessment, Critical Bug TVL-13881 was originally properly reported, prioritized, tracked, and resolved before scheduled deployment. Following the additional testing, there appears no reason to believe TVL-13881 will remain a concern.</td>
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| Outstanding Defects, Resolutions, and Dispositions | On June 18, 2018, Major Bug TVL-14062 entitled “Part Time Faculty Loading as Full Time” was opened to address a concern of part time faculty members (i.e., 20%) populating in Workday as full time faculty members (100%).  
TVL-14062 is associated with the Change Request (CHANGE-178). Currently, all Faculty members are loaded as Full Time. The intent of the change request is to reduce confusion in reporting, business processes, and within the user interface by remapping Faculty members to the “Part Time” position time type in Workday. Per JIRA Change 178, a meeting is scheduled to determine process and impact of remapping Faculty position time type to Part Time. | Pending evaluation of Major Bug TVL-14062 and the associated CHANGE-178 request on August 6, 2018, the Program has documented and provided feedback to the test user originally reporting the Bug.  
If the UT Faculty members are considered Part Time employees, it is recommended that these positions be associated with the Workday Position Time Type of “Part Time” and not “Full Time”. The Workday Position Time Type field is used differently across Workday customers and can often have unforeseen implications such as user confusion – as reported in Major Bug TVL-14062. It is recommended to either correct the mapping prior to final conversion or denote this as a conversion “clean up exercise” prior to opening Workday to all University users. |
## Observations and Recommendations

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<td>During the unscripted portion of End User Testing, test users brought their own documentation to assess Key Business Processes in Workday. During unscripted sessions, the Program also provided general use cases for test users.</td>
<td>It was unclear if the Program incorporated or documented the scenarios these users were evaluating within Workday. For future Unscripted End User Testing, it is recommended that the Program document and or collect the details from test users who bring their own scenarios. This provides greater visibility into what functionality test users are evaluating in Workday. More importantly, knowing what scenarios, situations, and functionality test users are evaluating, highlights areas that may be critical to the CSU user. Further, the Program should keep this documentation available in a repository, and use it for future testing or implementations. As Workday provides system updates twice a year, the documented unscripted tests collected from users can be helpful for CSUs to perform regression and/or unit testing to determine if updates impact configuration, business processes, integrations, and reporting. As a means to gain access to any test user who brought his or her own test cases, it is recommended the Program reach out to these test users. The importance of this information has been mentioned, and obtaining any actual tested cases or test themes of test users can provide the opportunity to generate additional training materials specific to CSUs.</td>
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Observations and Recommendations

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<td>During unscripted testing sessions, test users were asked to sign an attendance sheet. During and following the unscripted testing session, the Program did not have a method to determine test user engagement as well as how test user’s perceived their experience.</td>
<td>Unscripted testing by nature, which is test user driven, requires an overall metric to determine how his or her time was utilized during each session. Other than an attendance sheet, the Program had no formal process to document if and how a test user utilized his or her time in unscripted testing. It is recommended that future unscripted End User Testing activities also utilize a self-reporting metric (questionnaire) that evaluates test user engagement for each day and round of unscripted testing. This will provide the Program with analytical data, similar to that of scripted testing, that demonstrates how users perceive their productivity in sessions, as well as how users perceive Proctor assistance within those sessions.</td>
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Additional Recommendations and Considerations
Meetings Attended
Meetings Attended

- CHART End User Testing Planning Meetings
  - April 18, and April 25, 2018
  - May 2, 2018

- End User Testing Proctor Training, May 31, 2018

- End User Testing Sessions
  - June 12, 2018 Faculty Scripted Session
  - June 18, 2018 Staff Scripted Session
  - June 21, 2018 Student Scripted Session
  - June 26, 2018 Faculty Scripted Session
  - July 17, and July 18, 2018 Academic Unscripted Sessions
  - July 18, 2018 Staff Unscripted Session

- Program Status Meetings
  - June 5, June 12, June 19, and June 26, 2018
  - July 10, July 17, July 24, and July 31, 2018

- Steering Committee Meetings
  - June 13, and June 27, 2018
  - July 11, and July 25, 2018

- Ongoing discussions with Program Leads, Proctors, QA Coordinators, consultants, and stakeholders
Documentation Reviewed
Documentation Reviewed

- End User Testing – Scripted Testing Scope Document
- End User Testing Script Development Timeline
- End User Testing Session Schedule
- JIRA Testing Dashboard
- End User Testing Final Testing Scripts
- End User Testing Scripted Testing Surveys
- End User Testing Presentations
Appendix A: Monthly Observations and Recommendations
# Monthly Observations and Recommendations – April 2018

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| **Project Testing – End User Testing** | CHART review meetings began to outline the plan for End User Testing (EUT). EUT is targeted to begin on June 6, 2018 and will include both scripted and unscripted testing. Although unscripted testing will occur, it was pointed out it will include a structured element. Currently, scripts are being developed, and during testing there will be a 1 proctor to 2 tester ratio. The following goals were outlined:  
- Provide end users with the opportunity to confirm critical business processes work as designed.  
- Provide end users with the opportunity to validate that data converted from HRMS and DEFINE is valid.  
- Provide end users with the opportunity to review and provide feedback on training materials.  
For EUT, the Program has asked several HR staff members to participate in the testing, acting as proctors to oversee testing activities, and address questions that may arise. While this idea in theory seems feasible, if proctors are not well versed in Workday and the testing process, having them involved may actually be counterproductive. | Documentation on SharePoint is already available for scripted testing across Staff, Student, and Faculty. It is recommended that the “structured” unscripted tests begin development and are placed on SharePoint for review and finalization. Further, the EUT goals are well stated and clearly defined.  
With the overlap of Payroll Parallel Testing, End-to-End, and EUT, it is important that EUT continue to stay ahead of planning. This will mitigate risks concerning resource availability, improve clarity of tasks required of process/test owners, as well as allow for proper scheduling alignment.  
It is recommended that the proctor candidates be assessed to determine if they can effectively carry out their responsibilities. Based on that assessment, action plans, if necessary, should be created and executed, to ensure all proctors are ready once the EUT commences. |
## Project Testing – End User Testing

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<td>Proctor Training for End User Testing was completed on May 31st, 2018 setting the stage for testing beginning the following week.</td>
<td>The training was well planned, thought out, and was well received. The training outlined basic ground rules and the fundamentals of how to approach End User Testing. Over the course of End User Testing, it is recommended that the team revisit these ground rules and fundamentals. This will provide ongoing reminders of the testing approach, keep work focused and prioritized, and reduce basic procedural questions. Further, as End User Testing moves into unscripted test scenarios, these reminders will continue to keep resources concentrated on completing tasks to close out an important element to Workday implementation.</td>
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## Monthly Observations and Recommendations – June 2018

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<td>Project Testing – End User Testing</td>
<td>On June 5, 2018, the Program began the scripted modules of End User Testing (EUT) across the Staff, Student, Academic, and Non-Employee populations. Both the reports and initial feedback from users has been positive. Further, the week of June 18, 2018 marks the half way point of scripted End User Testing. With minimal bugs and no standout concerns reported during sessions and in questionnaires, EUT is briskly moving forward in providing end users with Workday system foundational skills.</td>
<td>Feedback and results from the first half of End User Testing is encouraging. As certain aspects of Workday system functionality may be more visible to users than in the Legacy system, scripted testing provides a foundational path for users to grasp Workday nuances. For instance, funding and costing allocation procedures are performed differently in Legacy than in Workday in that these processes in Legacy are more “backend” rather than being more visible to user. In addition, surveys, taken by users at the end of each EUT session, have yielded important details regarding Workday processes, user adoption, and, most importantly, provide information regarding training opportunities. These specific user experiences can be utilized to develop and refine Workday demos and future training sessions. As EUT so far has yielded positive and encouraging results, it is recommended that the Program continue the current EUT procedures and continue preparing for unscripted sessions.</td>
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## Monthly Observations and Recommendations – July 2018

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<td>Project Testing – End User Testing</td>
<td>Throughout July, the unscripted portion of End User Testing continued across the Staff, Student, Academic, and Non-Employee populations. Final End User Testing sessions occurred on July 31, 2018. Minimal defects and/or concerns have been reported throughout End User Testing.</td>
<td>Overall, End User Testing resulted in minimal defects and user concerns. More importantly, throughout the unscripted module, feedback has continued to yield positive and encouraging results. Testers have reported that after playing a role in End User Testing they are excited for additional Workday training and have a better understanding of Workday functionality. This is especially true of processes and procedures in Workday that are more visible than in the Legacy system. With both the scripted and unscripted modules of End User Testing finalizing, the Program provided users with foundational Workday system skills. This should help those that participated with further understanding as they head into formal training sessions.</td>
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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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