

## IT Project Change Management Form

### Workday Changes to Report Code 2

## PURPOSE

Change Management ensures that all Clemson University Foundation IT changes across Clemson University Advancement are planned, approved, documented, and reviewed to minimize disruption, protect services, and support business goals.

Structured change management enforces structured, documented, and reviewed IT changes to protect Clemson's data and resources. It requires proper approvals based on risk, strict controls on unauthorized and emergency changes, periodic reviews, and accountability through metrics and governance.

## TABLE OF CONTENTS

### A. EXECUTIVE APPROVAL/PRIORITIZATION

### B. CURRENT STATE

1. Problem Statement
2. Identification of Stakeholders
3. Identification of Data Involved
4. Process documents (from each stakeholder)

### C. FUTURE STATE

- Solution Overview
- User Requirements

### D. TECHNICAL SOLUTION

- Assumptions
- Scope of Work
- Requirements
- Functional Requirements
- Compliance Review
- Estimated Technical Effort
- Service Level Expectation/Maintenance

### E. PROJECT PLAN

- Schedule of deliverables, by deadline

### F. MONITOR & CONTROL

- Review after 6 months for ROI

**IT Project Change Management Form**

Workday Changes to Report Code 2

## IT Project Change Management Form

### Workday Changes to Report Code 2

## B. CURRENT STATE

### 1. PROBLEM STATEMENT

As part of the University's migration to a new ERP system, Workday, changes will be made to the structure of Departments. To ensure CADENCE's alignment with the Workday system, changes will be made to Report Code 2 code values.

### 2. IDENTIFICATION OF STAKEHOLDERS

1. **Unit Sponsor:** Jenna Smith/ Finance
2. IT Team
3. Central Donor Relations
4. Events & MARCOM
5. Annual Giving

### 3. IDENTIFICATION OF DATA INVOLVED:

1. Report Code 2 Values:
  - a. Departments
2. Queries
  - a. Adhoc
  - b. Smart Queries
3. Selections
4. Designation/Purpose Attribute
5. Stewardship Reports

### 4. Current State

- Report Code 2 is defined in the Business Glossary:

Business Term:	Report Code 2
Broader Term:	This is the department that the gift will be used by and is benefiting from the gift
Distinguishing Characteristics:	CADENCE can only have one department, but Fundriver and CUBs could have multiple listed
Related Term:	
Synonyms:	Department
Examples and Usage:	1301 - College of Business

## IT Project Change Management Form

### Workday Changes to Report Code 2

Source:	
Replaced By:	
Business Rule:	The Department should line up with the Business Unit per the Chart of Accounts from the University (link below). If it doesn't, for example, it is because CADENCE uses the Other option instead of a specific Business Unit. 5604 should go to A+A, but this is Other in CADENCE
Report/URL:	<a href="https://coa.app.clemson.edu/Dept_List_BC.php">coa.app.clemson.edu/Dept_List_BC.php</a>
Data Classification:	Public
Status:	Approved
Date Created:	10/28/2021
Date Last Changed:	9/9/2025

- The University Chart of Accounts is accessible via:  
[https://coa.app.clemson.edu/Dept\\_List\\_BC.php](https://coa.app.clemson.edu/Dept_List_BC.php)
- Adding new Report Code 2 values (departments into CADENCE):
  - Clemson University Foundation's Finance Team reviews a gift agreement and the University's Chart of Accounts to determine if and what number should be added into CADENCE.
  - Users who are filling out the Form 100 request will include the area based on the Chart of Accounts.

## C. FUTURE STATE

### 1. SOLUTION OVERVIEW

- Advancement IT, University IT, and CUF Finance Teams will work together to manage what data will change and plan the cutover from Workday into CADENCE.

### 2. USER REQUIREMENTS

- Report Code 2 values are updated to reflect Workday's Cost Center values in CADENCE.
- Communication related to the University's Workday conversion and how it will affect data within CADENCE.
- Updates to Report Code 2 changes are reflected in the Business Glossary. Queries, selections, and reports that have Report Code 2 criteria are updated.

## IT Project Change Management Form

### Workday Changes to Report Code 2

Must Have's	Nice to Have's	Someday
Create a task force to review updates for selections/reports/queries		
IT Team will ensure a clear schedule for Monitor and Control.		
Communication plan for the Division		
Create a temporary attribute to track historic data.		
	Mimic any gift hierarchies that are added to Workday to track groups of old report code 2 that will not persist in future state	

## D. TECHNICAL SOLUTION

1. Assumptions
2. Scope of Work (including any outstanding questions/limitations)
3. Requirements
4. Compliance Review
5. Estimated Technical Effort Per Solution
6. Service Level Expectation/Maintenance

### 1. ASSUMPTIONS

- Timeline:
  - Clemson University is migrating to Workday in FY27.
  - **Cutover will begin on July 1, 2026.**

## IT Project Change Management Form

### Workday Changes to Report Code 2

- **FYE Rollover for Advancement is scheduled for Friday, July 10, 2026.**
- **CADENCE Workday go-live transition will be Monday, July 13, 2026.**
- A Change Management Form was completed and approved in our first phase of testing for post-to-GL changes in CRM. All testing for this phase is approved and ready for Production go-live.
  - [Change Management Form - IMPLEMENTING PROJECT NUMBER CHANGES IN CADENCE FOR WORKDAY](#)
- CADENCE 'Report Code 2' will CHANGE from what we knew as 'Department' will become Workday's 'Cost Center'
- Today, there are 384 'Departments, but are being redefined into about 200 'Cost Centers' by Clemson University partners.
- Some projects will not have a Cost Center (ex. Clemson Corps which doesn't fit the University's budgeting criteria of a Cost Center).
- Historic FYFRS Snapshot values will still be old Report Code 2 values = department.
- New FYFRS Snapshots going forward be new Report Code 2 values = cost center values.
- Business officers can still look up Clemson Corp related accounts in Workday; Advancement staff can look up donors and gifts by designation in CADENCE.
- In some cases, there is a new Cost Center (ex. Honors College). Advancement staff will be able to look up donors and gifts by specific CADENCE designation OR by Cost Center (the collection of accounts related to Honors College).
- FYFRS, CADENCE reports, processes won't 'break'.
- Advancement will need to adjust their thinking when reviewing data and/or requesting lists. (i.e., no longer requesting data via Report Code 2, but via designations in CADENCE.)
- 'Report Code 2' values will be updated to 'Cost Centers' provided from CUF Finance from Workday.
- Specific 'Designations' can be pulled in CADENCE but are not always associated with a historic 'Department'.
- Former department numbers will not be referenced after cutover to Workday in Production (except in snapshot data).
- No changes are planned for how new funds (Designation/Purpose) are created in CADENCE.
- IT Team will upkeep a master list until go-live of Report Code 2 translations:
  - [Current CADENCE report code 2 translation With Primary.xlsx](#)
- The University has several resources available related to Workday updates:

## IT Project Change Management Form

### Workday Changes to Report Code 2

- Chart of Accounts: <https://news.clemson.edu/chart-of-accounts-to-sunset-with-workday-new-model-to-streamline-transactions-reporting/>
- Workday@Clemson: <https://www.clemson.edu/workday/>
- What's up with workday? <https://www.clemson.edu/workday/support-and-training/workday-ready-sessions.html>

## 2. SCOPE OF WORK

- Advancement IT, University IT, and CUF Finance Teams will work together to manage what data will change and plan the cutover from Workday into CADENCE.
- IT Team will replace existing Report Code 2 values with Cost Centers from Workday.
- IT Team will remove existing department values from Report Code 2 in CADENCE.
- Finance will provide a crosswalk of Cost Centers for both testing and a final version for 'go-live'.
- Communication/Training for Data Consumers
- IT Team will review and update about 100 queries (that use 'department' in the criteria).
  - IT will work with applicable stakeholders, Annual Giving, CDR, BiPO, to review their existing queries and provide recommendations for updating the criteria in the identified queries.

## QUESTIONS/LIMITATIONS

- We know there are groups that may get information on Report Code 2 that may no longer be available after Workday migration to Cost Center.

## 3. FUNCTIONAL REQUIREMENTS

REQUIREMENT	RECOMMENDED TECHNICAL SOLUTION
Update Report Code 2	IT Team will update Report Code 2 values to Cost Center
Create a historic attribute	Create a temporary attribute to track historic 'department' Report Code 2 values. <ul style="list-style-type: none"> <li>• Name: Historic Report Code 2</li> <li>• Access: all users</li> <li>• Purge in Winter December/January Semi-annual purge</li> </ul>

## IT Project Change Management Form

### Workday Changes to Report Code 2

Remove old Report Code 2 'department' values	IT Team will remove the existing department values from Report Code 2.
Update Queries/Selections	<p>IT Team will work with stakeholders to review existing queries and selections that have criteria pulling on Report Code 2.</p> <ul style="list-style-type: none"> <li>Stakeholders will recommend designations to replace Report Code 2 criteria.</li> <li>IT created the following spreadsheet: <a href="#">Queries including a Criteria of Report Code 2</a></li> <li>Access to this spreadsheet will need to be provided.</li> </ul>

#### 4. COMPLIANCE REVIEW

- N/A

#### 5. ESTIMATED TECHNICAL EFFORT

- High

#### 6. SERVICE LEVEL EXPECTATION/MAINTENANCE

- IT Team will meet with stakeholders to monitor and control updates to queries and selections to confirm Cost Centers and Designations (in CADENCE) meet the needs of users for reporting and communication needs.

## E. PROJECT PLAN

DELIVERABLE	DESIGNEE	DATE	STATUS	DURATION
Current & Future State Collection	SPONSOR	3/2026	Completed	
Confirmation of States & Requirements	IT TEAM	3/2026	Completed	
Programmer Review (Tech Specs)	IT TEAM	3/2026	Completed	
IT Team Develops Test Solution	IT TEAM	4/1/2026	Scheduled	Sprint

## IT Project Change Management Form

### Workday Changes to Report Code 2

UAT	SPONSOR	4/27/2026	Scheduled	2 days
Changes/troubleshoot from UAT	IT TEAM	4/29/2026	Scheduled	1 – 3 hours
Upload to Production	IT TEAM	7/10/2026	Scheduled	2 days
Verification in Production	IT TEAM	7/13/2026	Scheduled	2 days
Communication	SPONSOR	9/30/2025	Scheduled	1- 3 hours
Monitor & Control	SPONSOR	7/14/2026	Scheduled	Weekly

Lead Programmer Signature: 

Sponsor Signature: \*Approval located in SharePoint>Project Management>Workday folder.

## F. MONITOR AND CONTROL

The Monitor and Control process will occur in SIX months after the completion of the project. There will be a 2-hour max to any updates that are requested at the time of the Monitor and Control process.

- *Task force to meet weekly to ensure that reports, queries, and selections are providing what users need: July 29 – September 2.*
- *Monitor the automation of Workday FTP.*






# Change Management Form - Workday Changes to Report Code 2

Final Audit Report

2026-04-27

Created:	2026-04-27
By:	Mary Csernak (mcserna@clemsn.edu)
Status:	Signed
Transaction ID:	CBJCHBCAABAAZolc6zY8LFq2q7BelTcKcKfmmJrJtR28

## "Change Management Form - Workday Changes to Report Code 2" History

-  Document created by Mary Csernak (mcserna@clemsn.edu)  
2026-04-27 - 2:44:46 PM GMT- IP address: 130.127.255.220
-  Document emailed to James Huff (huff3@clemsn.edu) for signature  
2026-04-27 - 2:45:32 PM GMT
-  Email viewed by James Huff (huff3@clemsn.edu)  
2026-04-27 - 6:32:22 PM GMT- IP address: 104.47.66.126
-  Document e-signed by James Huff (huff3@clemsn.edu)  
Signature Date: 2026-04-27 - 6:38:58 PM GMT - Time Source: server- IP address: 130.127.255.220
-  Agreement completed.  
2026-04-27 - 6:38:58 PM GMT