



*Thank You!*  
*Transition Network*



THE UNIVERSITY OF BRITISH COLUMBIA

# INTEGRATED RENEWAL PROGRAM

Transition Network Close-Out  
IRP OCM & ISC

January 27, 2021



# LAND ACKNOWLEDGEMENT

We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the x<sup>w</sup>məθk<sup>w</sup>əyəm (Musqueam) and Syilx (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.

# Opening Remarks

## Peter Smailes



# Agenda

- 1 | IRP Program Highlights – Jen Fullerton
- 2 | Transition Network Community Reflections – Faculty of Science and Applied Science
- 3 | Sponsor Address – Kate Ross
- 4 | ISC Update – Harjot Guram
- 5 | Transition Network Path Forward – Deirdre Brown
- 6 | Sponsor Address – Alex Bayne

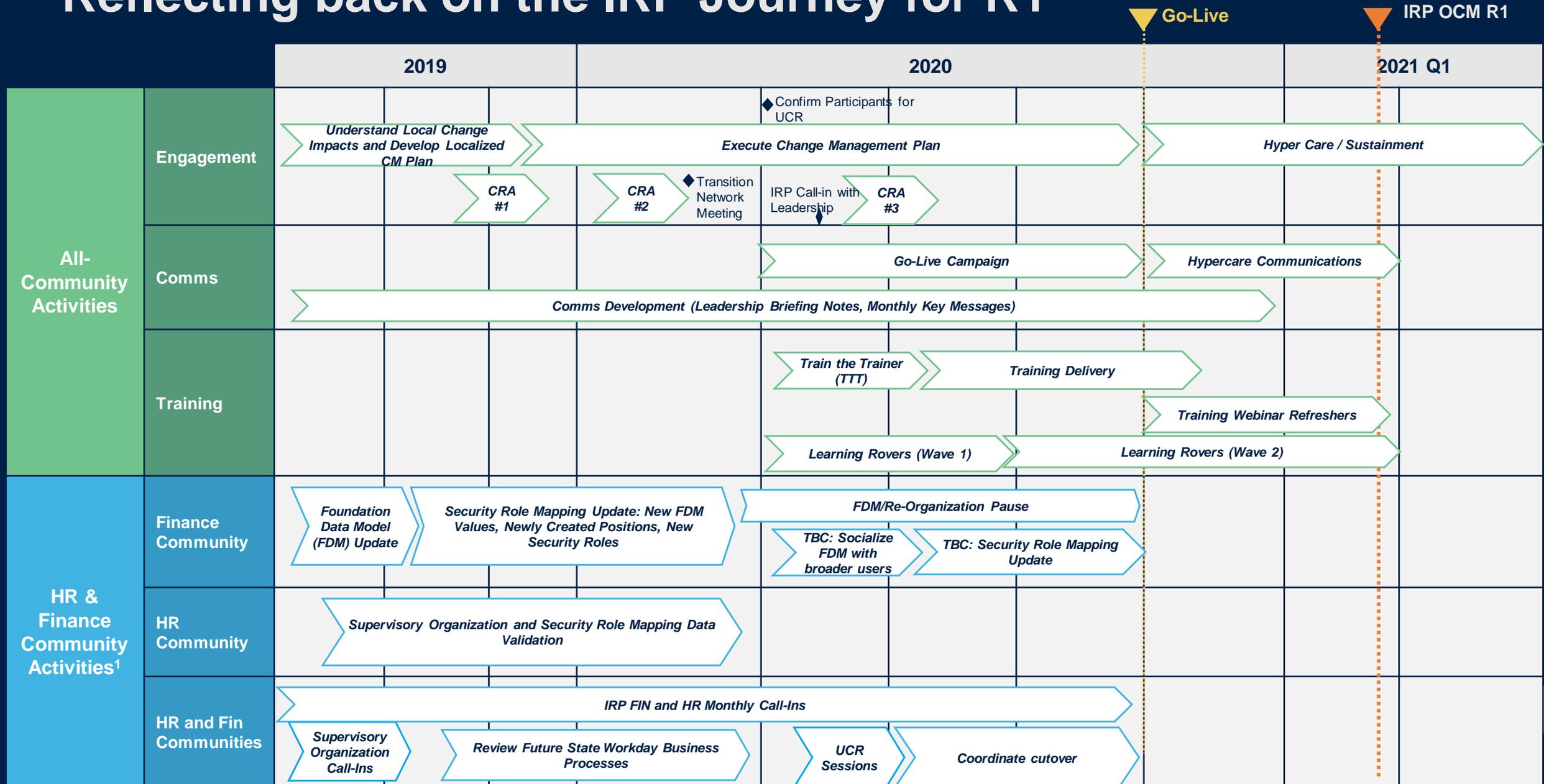


# IRP Program Highlights

Jen Fullerton



# Reflecting back on the IRP Journey for R1



# IRP OCM Activities – Highlights

## Community Hours of Effort for the IRP (estimated)



The IRP was a community effort. These groups spent the noted number of hours on the IRP training and engagement activities

276<sup>2</sup> Transition Leads

111<sup>2</sup> Transition Captain

54 Fin Trainers

83 HR Trainers

13 Staff / Faculty

31<sup>1</sup> HR Professionals

37<sup>1</sup> Finance Professionals

<sup>1</sup>Assuming 20% attendance rate for HR/Fin Call-ins. Local change management effort not included

<sup>2</sup>Training captured under HR/Fin professional group. Not all change management activities captured in this estimate

### Communications

INSIGHT

A robust communication strategy ensured messaging was shared across all audiences – from faculty and staff to leadership.

### Engagements

INSIGHT

Engagement activities were tailored to provide two-way communication for the community to understand how to prepare and manage the change.

### Training

INSIGHT

Targeted training supported blended learning to share knowledge and build a robust repository of knowledge artifacts for the community.

#### Key Activities



10

Community go-live preparation messages



10

Community go-live Toolkits



12

Leader briefing notes & key messages



39

HR and Finance Community Call-Ins



31

Leadership focused events



240

1:1 meetings between CEPs, Faculty and Administrative units



98.5%

of HR and Finance community trained pre-go live



446+

Training Delivery Sessions completed



220

Community members delivered Train-the-Trainer

# Community Feedback

Below highlights some of the feedback we've heard from the community over the past several months.

Day 2 after go-live... "Workday is like Christmas just without the sugar crash" – **Finance**

"The new Grant Dashboard helped me cut my work down to 1/3, and I can find information much faster" - **Principal Investigator**

"Almost everything can be accessed through [the Search bar]. One no longer needs to drill down through pages of data."  
- **Finance Director**

"CEP Model was a brilliant success" - **AVP**

"Excellent feedback from faculty and staff on the VISA reconciliation process relative to the prior system. Cardholders love it."  
- **Faculty of Pharmacy**

"I sincerely appreciate all the work that has gone into this training as I know it has been a tremendous amount. The training has exceeded my original expectations."  
– **Finance Staff**

"The collaboration between Finance and HR in CEP meetings was an important success factor"  
- **Transition Network Lead**



# Transition network highlights

Faculty of Science

Faculty of Applied Science



# Positive Experiences

- Sense of unity working towards a common goal.
- Members of community stepping up to meet challenges.
- Moving the institution towards digital workflow tools.
- New system is a catalyst for change, opening new possibilities to the way we work with consistent and standard practice.
- We learned a lot on a personal level working on a project of this scale and scope.

# Challenges

- Organizational and cultural change is still an ongoing process as we continue to adapt to the new system.
- Communicating effectively was challenging because of the staggering volume of information and complexity. In addition, we were limited to only emails or Zoom during the pandemic.
- Configuration requests and exercises required a lot of imagination to try and understand as information was mainly theoretical.
- Developing an understanding upstream and downstream implications on configurations and business processes.

# Lessons We Are Taking Forward

- Collaborative, engaging approach within our Faculty.
- Multiple project leads within the internal change teams to diversify perspectives and competencies.
- Strong communications framework: 1) Clear and transparent expectations. 2) Ongoing communications with super users and stakeholders.
  - Example: Be kind, be patient, we are all learning together.
- Workday's process flows weave various function areas together. It positions our campus to think about how we can break down silos and enable lateral communication streams.

**Sponsor address**  
Kate Ross



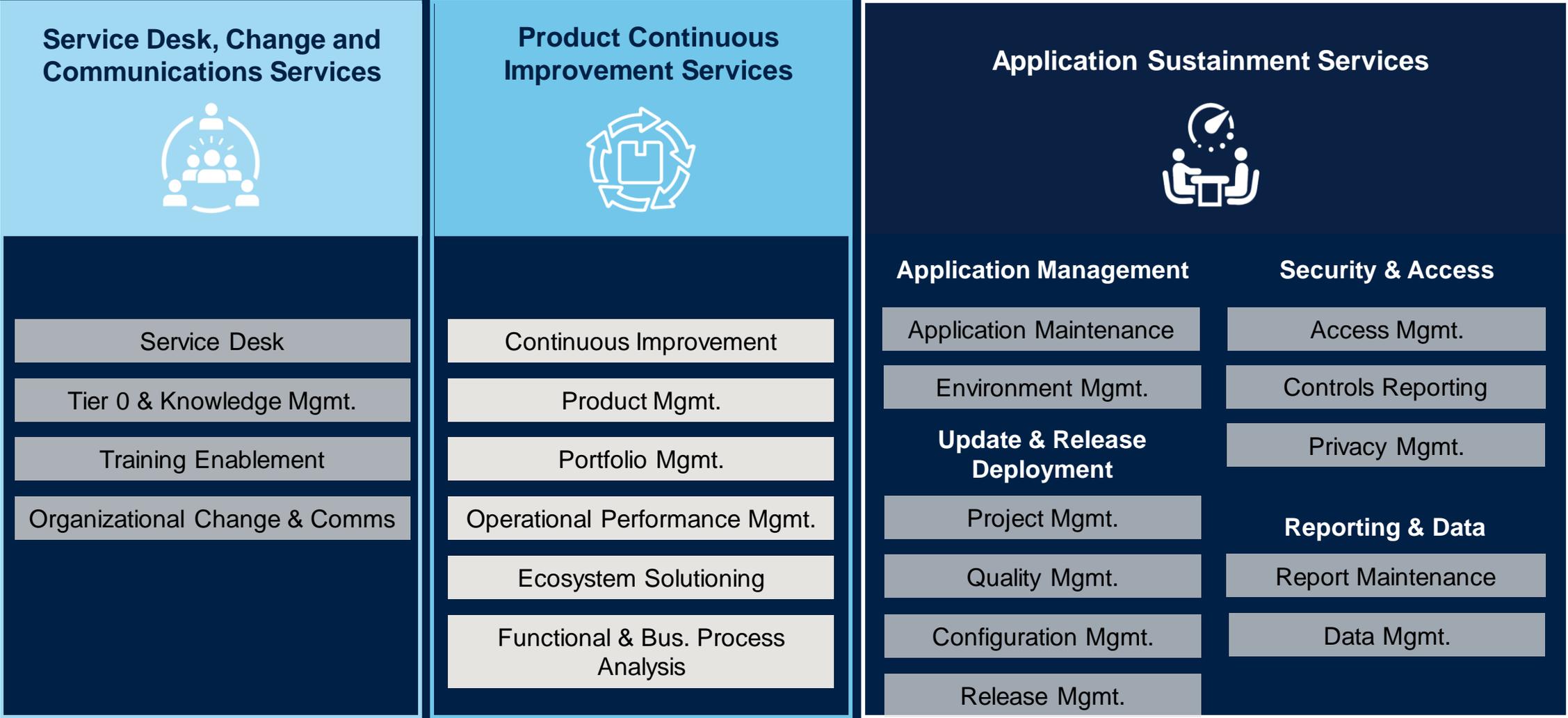
# Integrated Service Centre

## Harjot Guram



# ISC Service Offerings

The ISC is responsible for delivering 21 services to the UBC community. These services are categorized as, Service Desk, Change and Communications Services, Product Continuous Improvement Services or Application Sustainment Services.



# ISC Service Delivery Roadmap

The establishment of ISC service offerings to maintain, enhance and support Workday are phased across three waves in the first 16-18 months of operations.

**Increasing Maturity & Capability\***

- ▶ End user support
- ▶ Application hypercare and stabilization
- ▶ Vendor releases with limited optional features
- ▶ On/off boarding people for academic year
- ▶ Financial year end
- ▶ Review of ISC funding and org structure
- ▶ Review of Governance
- ▶ Completing critical operations activities

**Wave 1: Stabilize and Mature**  
Fall 2020 – Spring 2022

- ▶ Vendor releases with some optional features
- ▶ IRP backlog resolution for high priority items
- ▶ Retrospective review of ISC operations
- ▶ Review of ISC funding and org structure
- ▶ Review of Governance

**Wave 2: Sustain**  
Spring 2022 – Spring 2023

- ▶ Establishment of Continuous Improvement
- ▶ Continuation of IRP backlog resolution for remaining items
- ▶ Readiness for Student go-live
- ▶ Review of ISC funding and org structure
- ▶ Review of Governance

**Wave 3: Continuously Improve**  
Spring 2023 – STU go-live



# ISC Service Delivery Roadmap: Wave 1

**Increasing Maturity & Capability\***

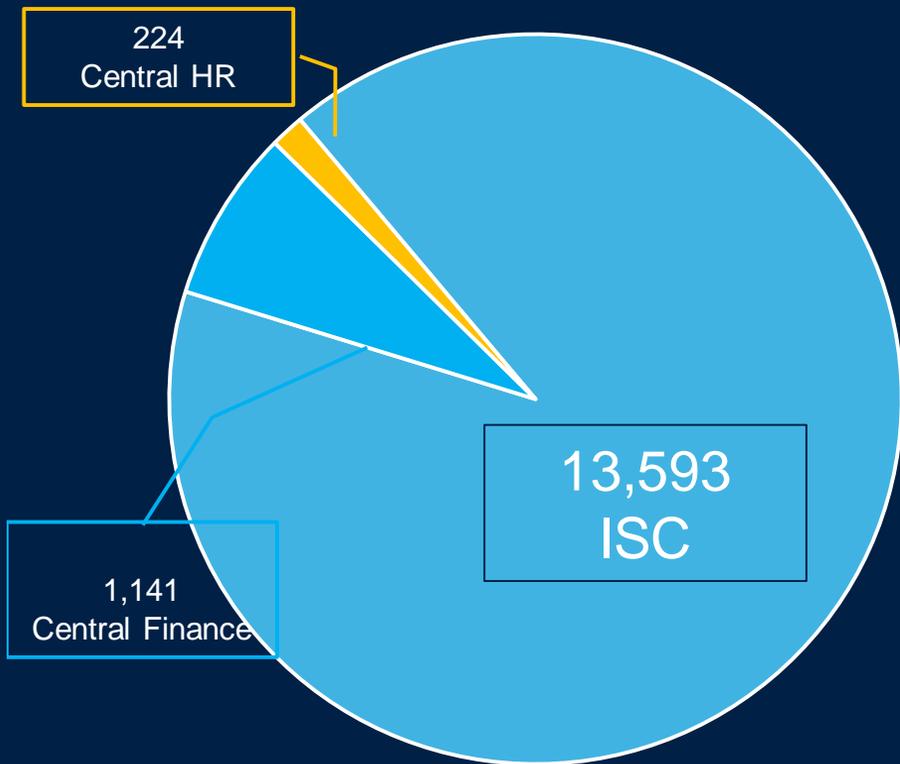
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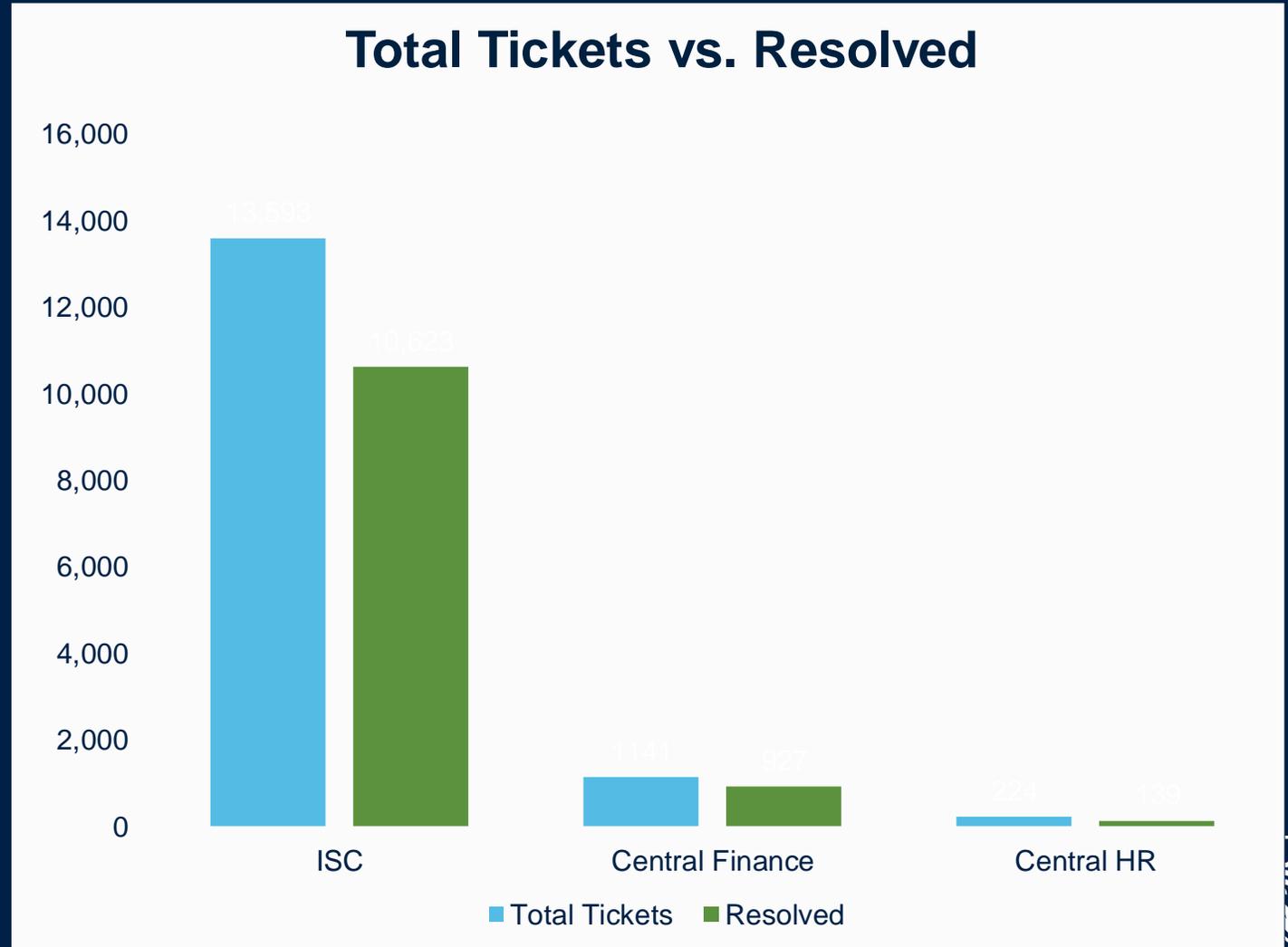


# Post go-live total tickets status – as of Jan 19, 2021

## Total Tickets – All States



## Total Tickets vs. Resolved

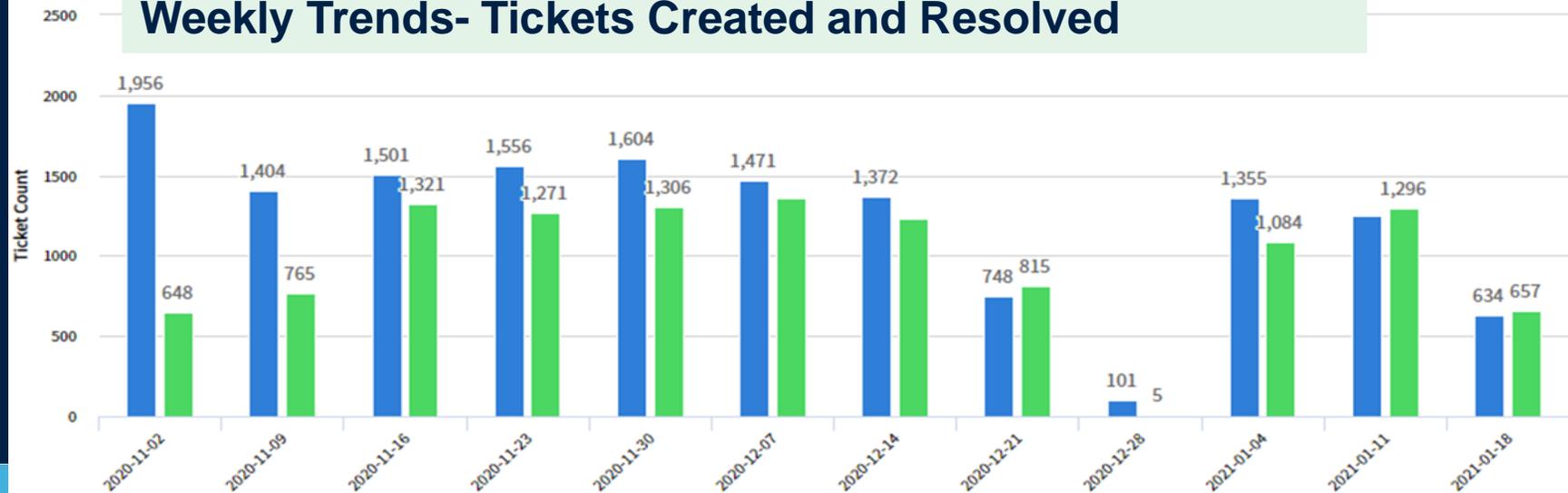


# Post Go-Live tickets trends

## Daily Trends- Tickets Created and Resolved



## Weekly Trends- Tickets Created and Resolved



■ New Ticket  
■ Resolved



# Statistics

Post go-live adoption is measured based on the identification and regular monitoring of overall engagement with Workday and assistance via the self-serve tools available through the Integrated Service Centre.

## Initial Workday Usage YTD

	Category	Nov 23	Dec 15	Jan 19
Gen	Unique Faculty and Staff Logins	18,875	22,120	24,279
FIN	Approved Expense Reports	3,775	13,725	23,150
	Approved Supplier Invoices	5,350	8,751	18,000
	Supplier set up requests	913	1,440	2,360
HR	Request Time Off	14,424	21,636	29,744
	Hire	924	1,866	3,737
	Create Position	2,168	3,195	5,038
	Termination	256	1,528	3,637

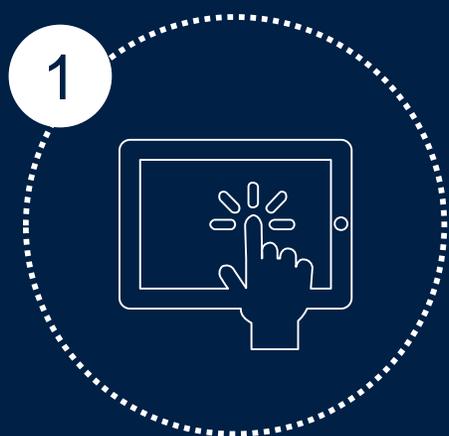
## Self-Serve Resource Usage – Jan 19th

- 99,203 views of Workday knowledge base articles. Most viewed articles this month:
  - Supplier Self Registration
  - How do I create an expense report (VISA rec.)
  - Assign Costing Allocation 101
  - How do I enter my time (hourly staff)?
  - How do I create an out-of-pocket expense report?
- 14,404 tickets received in ServiceNow
  - 77% resolved
  - 60% received through Self-Serve portal
  - 36% resolved at Tier 1 (Service Desk)



# How to Access ISC Support?

*How do I login to Workday? How do I request time off? How do I change a beneficiary or dependant? How do I access my T4? How do I submit time and expenses?*



## Search the online knowledge base

*Find answers quickly using our searchable knowledge base*



## Submit a ticket

*Submit and track the status of your queries*



## Talk to a representative

*Connect with ISC service representatives for direct support*

Vancouver | 604-822-8200

Okanagan | 250-807-8163



# Workday 2021 Release 1



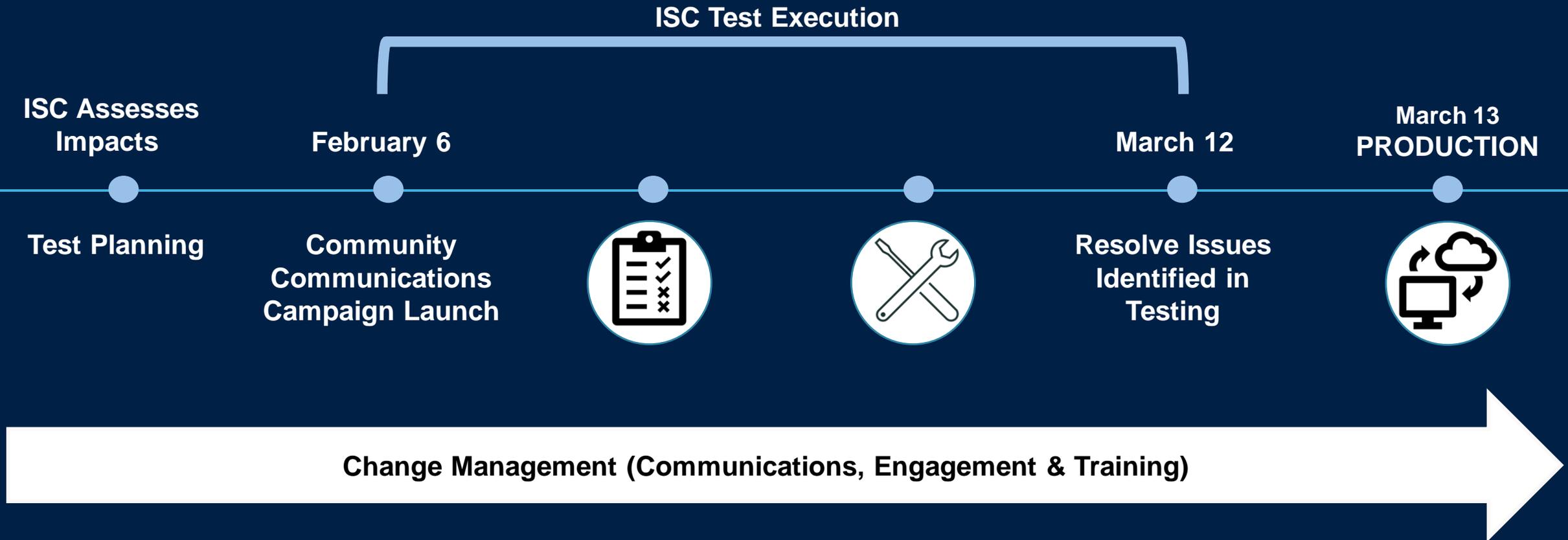
# Workday 2021 Release 1

Workday delivers two feature releases per year during March and September:

- Workday Release are different than releases in the past with Peoplesoft. The twice yearly releases are product driven and timing is set by Workday.
- Our first release will be March 13, 2021.
- For March the ISC will only adopt features that require immediate uptake to maintain the system and support stabilization.
- Details about specific impacts will begin to be shared with the TN Advisory at the February meeting.
- A Community wide communications campaign will start in February.



# Workday 2021 Release 1 Timeline Approach



# Transition Network Path Forward

Deirdre Brown



# Proposed Path Forward



**Build on the TN foundation & continue to:**

- Foster **collaboration** across Faculties/Units and the ISC
- Maintain a **dedicated space** for HR and Finance to come together with a focus on Workday
- Provide **feedback and advice** on initiatives and the path forward



# Proposed Approach

Who	What
<b>TN Advisory Group</b> <ul style="list-style-type: none"><li>• Directors</li><li>• Senior Managers</li><li>• Assistant / Associate Deans</li></ul>	<b>Strategic approach:</b> <ul style="list-style-type: none"><li>• Gain insight and awareness from ISC</li><li>• Bring forward areas of concern</li><li>• Advise on change initiatives and receive change coaching</li><li>• Define their faculty / unit plan for optimizing Workday, based on the configuration and UBC guidelines</li></ul>
<b>Community Super User Group</b> <ul style="list-style-type: none"><li>• Workday Super Users in HR and Finance as well as faculty admin support</li></ul>	<b>Operational approach:</b> <ul style="list-style-type: none"><li>• Bring forward issues with current configuration &amp; functionality &amp; discuss / make recommendations within the constraints of Workday (Inform)</li><li>• Work on solutions together with Subject Matter Experts (Consult)</li><li>• Opportunities to support review / uptake features and provide feedback for feature releases</li></ul>



# ISC CHANNELS AND WORKDAY SUPPORT



Website: [isc.ubc.ca](http://isc.ubc.ca)

[Workday Knowledge Articles](#)

[Workday this Week](#)

**Introducing the Integrated Service Centre**

The Integrated Service Centre (ISC) has been created to support you once Workday goes live for HR and Finance on November 2, 2020. The ISC will provide faculty and staff with day-to-day support, helping to answer questions about Workday. The ISC team will be able to assist UBC community members with issues such as access, errors, and functionality. The ISC will provide support via:

1. Search the Workday knowledge base online. Find answers quickly using our searchable knowledge base.
2. Submit a ticket. Submit and track query status. This will replace current email correspondence.
3. Speak with a representative. Connect with ISC service representatives for direct support. 604-822-8200 (UBCV) 250-807-8163 (UBCO)

**Access Workday Support**  
The Integrated Service Centre (ISC) offers support with Workday questions, issues, and requests. [Access Support](#)

**Login to Workday**  
An active CWL account is required to login to Workday – VPN is not. [Login to Workday](#)  
Don't have a CWL? [Create a CWL Account](#)

**Workday This Week**  
Learn about recent updates and access key resources on Workday. [View Workday Updates](#)

**Welcome to the UBC Self Service Portal**

Request a Service | Get Help | View My Tickets | Search HR Knowledge | Search Workday Knowledge | Workday Access Help

**myWorkday**  
Benefits enrollment, request time off, change personal info, etc.

**Finance Tasks**  
Tasks completed by people with finance roles in Workday

**HR Tasks**  
Processes completed by people with HR roles in Workday

**Manager Tasks**  
Tasks completed by managers in Workday

**Payroll Tasks**  
Processes completed by people with payroll roles in Workday

**Workday Basics**  
Learning how to use Workday

**Workday this Week**  
Revised by Brandi Harrington • 6d ago • 1903 Views • ★★★★★

**Tickets - tips & tricks to get the best results**

Before you submit a ticket:

- Search the knowledge base for answers – you'll get answers faster and this will allow the support team to focus on more complex queries

When you submit a ticket:

1. Submit one ticket per issue or request – this will help ensure your question gets routed to the right group
2. Clearly indicate if your query is related to your Workday access or this current pay period – this will help ensure your ticket gets priority

After you submit a ticket:

- Click on View My Tickets above to view all your submitted tickets and their current status. By clicking on INCP, you will be able to review all correspondence between you and the support team. You can also clarify your request or initiate additional correspondence with the Service Desk for each open ticket.

Once your request is resolved, please remember to close your ticket.

**Top Topics**

Topic	Key Messages	Relevant Resources
<b>Faculty Tuition Waivers</b>	<p><b>Faculty Tuition Waivers for Credit Courses</b></p> <p>Important Notice about Tuition Waivers for Faculty, Academic Executives and their dependent children.</p> <p>We are currently experiencing technical problems. If you are applying for credit-course Tuition Waivers for yourself or your dependent(s), you will need to use a manual process until the issue is resolved. For details and to learn more please visit <a href="#">the Tuition Waiver page on the HR website</a>.</p> <p>If you've made an application using the manual application form for Faculty &amp; Faculty Dependent Tuition Waivers, Enrollment Services will be automatically applying a deferral for all tuition waivers made on or after January, 12, 2021 for credit courses until this technical issue is resolved.</p> <p>If you have already contacted Enrollment Services to request a deferral, your request will continue to be processed until January 25, 2021. Please see <a href="#">this page</a> for further details.</p>	<p>Access the manual submission form and learn more on the HR website, <a href="#">Tuition Waiver Page</a></p>
<b>Tax Considerations That May Impact Your Pay</b>	<p>Reminder that CPP and EI deductions are resuming for those faculty and staff members who contributed the maximum in 2020.</p>	<p>For more information, please review the following news announcement: <a href="#">Employee Payroll Information for 2021</a></p> <p><b>Knowledge Base Articles:</b></p> <ul style="list-style-type: none"> <li><a href="#">How Do I - View My Payroll?</a></li> <li><a href="#">How do I update or correct my personal information?</a></li> </ul>

Last updated: January 15, 2021

# Sponsor Address

Alex Bayne





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