INTEGRATED RENEWAL PROGRAM

HR Update – Call In Session #7

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To view a recording of this session, please see: https://vimeo.com/329906803
WELCOME
SESSION #6 RECAP

- March 5, 2019

- Presentation materials available on IRP website in the Resources section at https://integrated-renewal.ubc.ca/ (includes instructions to access session recording)
TODAY’S DISCUSSION

- Integrated Renewal Program (IRP) Update

- Learn more about the work of the IRP HR Team – the last 30 days, the next 30 days and beyond…

- Academic Appointments in Workday – core concepts and overview, UBC tenant demo

- Ask Questions of the team
FUNCTIONAL SCOPE & SCHEDULE

STUDENT
- Admissions (Undergraduate)
- Assessment Outcomes
- Curriculum Management (limited)
- Enrolment
- Graduation
- Learner Financial Management
- Learner Financial Support
- Learner Management
- Program Planning and Management
- Progression
- Registration
- Scheduling
- Transfer Credit

HUMAN RESOURCES
- Benefits
- Compensation
- Core HCM
- Onboarding/Off-boarding
- Payroll
- Talent Acquisition
- Workforce Management – Time & Attendance

FINANCE
- Budget Development (core to Workday)
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning)
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense
WHERE ARE WE AT IN THE PROGRAM?

**HR/FIN Release 1 PLAN**  
May – July 2018  

**Deliverable:** Develop Foundation Data Model & preliminary UBC Workday tenant build.

**HR/FIN Release 1 ARCHITECT**  
August – December 2018  

**Deliverable:** Determine how UBC wants Workday to function across HR/FIN streams.

**STUDENT Release 1-4 PLAN**  
November 2018 – 2019  

**Deliverable:** Build STUDENT tenant and implementation plan.

**HR/FIN Release 1 CONFIGURE & PROTOTYPE**  
January – June 2019  

**Deliverable:** Develop an HR/FIN Workday tenant, based on Architect phase decisions, that is ready for the testing phase.

*HR is here!*
WORKSTREAM UPDATE - HR
WORK IN PROGRESS AND PLANNED
HR WORK STREAM – LAST 30+ DAYS

March 2019

- **Unit Testing** – HCM team tested the business process design and data we have put into the tenant to date. 740+ tests completed so far!!

- **Supervisory Organization Data Validation** – 90% of the community completed 90-100% of their validation by March 31!

Thank You!!!!!
HR WORK STREAM – NEXT 30+ DAYS

April – May 2019

- **Continue updating and configuring the next UBC tenant** – including reviewing and finalizing Sup Org data submitted by community

- **Unit Testing** – HCM team continues testing the business process design and data put into the tenant to date

- **Assessing, documenting and confirming data integrations** – including development of approach for HR historical data into Workday
UPCOMING HR UPDATE CALL INS

Each Call In session will include an IRP Update, HCM work stream update and a ‘demo’ of key HCM functionality in Workday as below. Demo topics listed below are subject to change.

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ACADEMIC APPOINTMENTS - WORKDAY
OVERVIEW & KEY CONCEPTS
ACADEMIC APPOINTMENTS - OVERVIEW

Academic Appointment

- Position
  E.g. Head, Dean, Chair

- Academic Rank
  E.g. Professor, Associate Professor, Assistant Professor, Sessional, Teaching Assistant

- Track Type / Category
  E.g. Tenure Confirmed, Tenure-Track, Sessional

- Appointment Identifier / Types
  E.g. Joint Primary, Joint Secondary

- Tenure Status
  E.g. Grant Tenure, Grant Tenure Track, Tenure Track

Academic Unit
ACADEMIC APPOINTMENTS – KEY CONCEPTS

In Workday Academic Appointments…

• Are provided to individuals who are **directly involved in the delivery** of academic education and research at UBC. This includes all Academics at UBC (paid or unpaid)

• Track detailed information:
  • Start/end dates, review dates, reappointments, promotions, rank, title, tenure status, academic unit

• Are updated corresponding with actions on the job such as reappointments or promotions

• **Do not** drive pay or benefits

• Multiple appointments are possible including joint, dual, affiliate, administrative etc.

• Are **distinct from** ‘Positions:’
  • Academics will have both an appointment in an Academic Unit **and** a Position/Job in a Supervisory Organization
ACADEMIC APPOINTMENTS AND POSITION/JOB

Academics will have both an Academic Appointment in an Academic Unit AND a position/Job in a Supervisory Organization.
Person A is a Professor in Faculty of Arts Supervisory Organization and has an appointment in the Faculty of Arts academic unit.
ACADEMIC APPOINTMENTS – FAQ’S

Can Workday track Associate members through Academic Appointments?
• Yes, and Workday will replace this tracking currently done via memo

Who can see the Academic Appointment information in Workday?
• The Supervisory Organization Manager, the individual faculty member, Faculty Relations, Department Head and the Dean.

At go live, who will have Academic Appointment in Workday – all faculty, only current faculty, other?
• All individuals with jobs that involve teaching and those that have promotions that need to be tracked such as Tenure stream (teaching/promotion), Librarians, Sessionals, TAs, Partner Appointments and Clinicals, Adjuncts, Lecturers, Postdoctoral Teaching Fellows.

Can Joint Appointments be tracked in Workday?
• Yes, using Academic Appointments you can identify the department the Joint Appointment is in and the primary and secondary unit. This can then be viewed by Managers and Deans to see the relative percentage and location.
WORKDAY DEMO
ACADEMIC APPOINTMENTS
UBC’S WORKDAY TENANT – TO DATE

UBC 4 Tenant
- Has the HR/HCM framework and basic business processes built
- Has a snapshot of UBC employee data
- Reflects UBC HCM configuration (UBC terms, data fields, etc.)
- Is a work in progress – building the next iteration of the tenant that will be used for Testing in summer 2019

The ‘Demo’
- Academic Appointments
  - Add Appointment
  - Maintain tenure status, review dates, rank
  - Update Appointment (update information on job profile)
  - End Appointment
YOUR WORKDAY HOMEPAGE
ACADEMIC APPOINTMENTS

Identifier: Primary - Primary
Roster Percent: 0
Related Academic Unit:

Additional Appointment Information

enter your comment

Attachments

Drop files here
or
Select files

Submit  Save for Later  Cancel
ACADEMIC APPOINTMENTS

Worker homepage prior to Academic Appointment added

Worker homepage after Academic Appointment added
QUESTIONS & ANSWERS

On the phone? Go to https://www.sli.do and use event code #IRPHR

On the computer” Use the Chat feature on the right hand side of the screen or go to www.sli/do and use event code #IRPHR
NEXT STEPS

Next Call In Session – May 8

Agenda items to include:

- UBC Tenant Demo – Time Tracking & Absence
- Review upcoming community activities and engagements (June – August)

Staying in Touch
Email us at integrated.renewal@ubc.ca
WANT TO LEARN MORE?

Visit [www.integrated-renewal.ubc.ca](http://www.integrated-renewal.ubc.ca) to learn more about the program, latest news and Workday videos.


Visit [www.Workday.com](http://www.Workday.com) to learn more about its commitment to higher education. Visit Workday’s [YouTube](#) channel.
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

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