INTEGRATED RENEWAL PROGRAM

Manager Readiness Session

October 7, 2020
We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the xwma0-kwafam (Musqueam) and Syilx (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.
A Go-Live of this magnitude can be a very stressful time for everyone involved.

In alignment with UBC’s respectful environment policy, please be kind and respectful to one another – everyone is doing their absolute best to make this as successful as possible.
AGENDA

1. Welcome
2. Go-Live: What It Means for You & Your Team
3. Supporting Your Team Leading Up To Go-Live
4. What To Do On Day 1
5. Next Steps
6. Appendix
GO-LIVE: WHAT IT MEANS FOR YOU & YOUR TEAM
SCOPE OF WORKDAY PROCESSES – HR AND FINANCE

HUMAN RESOURCES

- Benefits
- Compensation
- Core HR Management (incl. Onboarding/Off-boarding)
- Payroll
- Recruiting
- 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
TOP 5 CHANGES FOR MANAGERS

With so much shifting, it is important to highlight the main changes coming as it relates to the Manager role.

1. Approvals
2. Notifications
3. Task Delegations
4. Management | People Funds
5. Staff Onboarding | Role Based Access
TOP 5 HR IMPACTS

Below are the top 5 HR specific impacts with further details found [here](#). 

1. **Online Entry and Approvals**
   - Paper forms will be eliminated

2. **Security Roles**

3. **Absence and Time Tracking**

4. **Recruitment**

5. **Supervisory Organizations (SupOrgs)**

In addition: there will be minor payroll changes due to Workday’s more accurately calculating tax and benefits deductions. This will be communicated on October 13. Connect with your HR representative if you require more information ahead of October 13.
TOP 5 FINANCE IMPACTS

Below are the top 5 Finance specific impacts with further details found [here](#).

1. Real-Time and Accessible Data
2. Foundation Data Model (FDM)
3. Procurement
4. Travel and Expense Management
5. Internal Sales (Internal Service Delivery – ISD)
# IRP GO-LIVE CALENDAR

<table>
<thead>
<tr>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
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<tr>
<td><strong>IRP Critical Milestones</strong></td>
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<td><strong>Transition Network</strong></td>
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<td><strong>All Community</strong></td>
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**Today**

**Go-Live**

- **Oct 7 & 8** Leader Readiness Session (Leadership + TN)
- **Oct 15** Leader Briefing Note
- **Oct 20** IRP Newsletter
- **Oct 21** Call-In
- **Oct 22** Community Q&A with IRP/ISC Leadership

**Training for Workday available for the Community (via Workplace Learning and Community Trainers)**

**Hyper Care Period: Integrated Service Centre and Integrated Renewal Program Support Community**

**Ongoing targeted and community messages to prepare for Go-Live**

**Ongoing 1:1 meetings between CEP and Transition Network / Transition Network Advisory Meetings continue**

**November**

- **Nov 2** Workday and Integrated Service Centre is LIVE
- **TBD** All Transition Network Meeting: Thank you + Managing Post-Go Live

**Transition Network Continues to support Faculties and Units**

**November**

- **Nov 2** All-Community Go-Live Broadcast + Links to Go-Live kits

**December**

- **Oct 21** HR / FIN Combo Call-In

**January**

- **Nov 2** All-Community Go-Live Broadcast + Links to Go-Live kits

**Student Learning Rovers onboarded and supporting training**

**Continue Self-serve and Webinar Training**

**Training available online for knowledge refresh**
### COMMUNICATIONS / ENGAGEMENT CALENDAR

<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
<th>FRIDAY</th>
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<td>Other communications to specific audiences of note include:</td>
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<td>01 Finance Update</td>
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<td>1. Communication to Unions</td>
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<td>02 HR Network News</td>
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<td>2. Targeted follow up with employers of hourly staff and student employees</td>
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<td><strong>Week of Oct 5</strong>&lt;br&gt;<strong>Comms:</strong> Targeted Email to HR Advisors &amp; Payroll Admin - Payroll / Benefits Changes</td>
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<td>07</td>
<td>08 Finance Update</td>
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<td><strong>Staff Manager Readiness Meeting</strong></td>
<td><strong>Academic Leader Readiness Meeting</strong></td>
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<td><strong>STAT HOLIDAY</strong></td>
<td>12</td>
<td>13</td>
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<td>15 Finance Update</td>
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<td>16 HR Network News</td>
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<td>22 Finance Update</td>
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<td><strong>IRP Newsletter</strong></td>
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<td><strong>ISC Call-In Meeting</strong></td>
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<td><strong>Week of Oct 26</strong>&lt;br&gt;<strong>Comms:</strong> UBC Broadcast / UBCO Exchange – Go-Live Reminders</td>
<td>26</td>
<td>27</td>
<td>28</td>
<td>29 Finance Update</td>
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<td>02</td>
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<td>04</td>
<td>05 UBC Today - Thank you from Santa video</td>
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<td><strong>UBC Broadcast / UBCO Exchange – We’re Live! Login instructions + link to go-live toolkits</strong></td>
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SUPPORTING YOUR TEAM LEADING UP TO GO-LIVE
HOW YOU CAN PREPARE LEADING UP TO GO-LIVE

As a manager you will likely be the first person to receive these questions. You can leverage the resources provided by the IRP team to:

1. **Familiarize yourself with what’s coming**
   Use the resources available to you (e.g. the IRP website, IRP newsletter, training) to understand what’s changing for you and your team.

2. **Communicate to your team about Workday**
   Share key information and resources (e.g., cutover milestones, job aids, AEP updates) from the communications toolkits.

3. **Listen to and address their questions & concerns**
   We all know change can be stressful – having someone there to listen helps! Reference the searchable Q&A database, glossary, Workday demos and HR/Fin Call-Ins for support in answering questions.

4. **Connect them to the right resources**
   There will be questions you can’t answer. In those cases, you can point your team to the IRP website and other resources available (listed above), your Transition Network lead (UBCV and UBCO) or Learning Rover.
AUDIENCE TOOLKITS

Audience Toolkits for Faculty, Managers and Staff are available with links to FAQs, Job Aids and where to get support for targeted audiences.

- Faculty
  - Top 5 Impacts for Faculty
  - Task Changes
  - FAQs
  - Cyber Security Awareness
  - Job Aids

- Staff & Student Employees
  - Summary View
  - Hourly Employee | Student Employee
  - FAQs
  - Job Aids

- Managers
  - Top Impacts for Managers
  - Top 5 HR and FIN Impacts
  - FAQs
  - Job Aids
WHAT TO DO ON DAY 1
DAY 1 ACTIVITIES

To support you in navigating Workday Go-Live, planned for November 2, you will receive a Go-Live package from the IRP.

On November 2 you will receive a Go-Live package from IRP. This package will include information regarding:

- **Checklist of activities** for you to complete on day 1
- **How to access Workday**
- **How to access Workday mobile app** (optional)
- **Post Go-Live Integrated Service Centre (ISC) support** details
GO-LIVE TOOLKIT PREVIEW: ALL FACULTY AND STAFF CHECKLIST

- Log in to Workday and review your personal information (make sure to make any changes to bring your profile up to date!)
- Review available training understand how to navigate Workday. If you have not completed any training to date, start here!
- Check your Workday inbox and complete any requested actions
- If it applies to you:
  - Submit your first expense in Workday
  - Review your vacation balance and enter your upcoming vacation requests in Workday
- (Optional) Download the Workday app on your mobile if that is a convenient way for you to access Workday
- Bookmark the link to Workday in your browser

Hourly Employees
- Begin entering your time in Workday. Make sure you enter your time by Friday, November 6 (and every Friday, going forward) to ensure you’re paid accurately!
GO-LIVE TOOLKIT PREVIEW: MANAGER CHECKLIST

- Complete the Go-Live Checklist for employees (all staff and faculty)
- Review your Supervisory Org and make sure your direct reports are all included on your team
- Host a team meeting or a "drop in" hour to support questions from your direct reports
- Set up any delegation you would like to have in Workday
- Review your notification preferences and update what types of alerts you would like pushed to your email inbox
- Approve Hourly employee pay in Workday by November 9th. Employees must submit their time by November 6th for this shorter pay period.
- Remember it will take time for your teams to get used to Workday - keep an open dialogue and encourage questions!
ACCESSING WORKDAY ON DAY 1 AND LEGACY LINKS

- On day 1, Workday will be accessed via a link, which will take users to the live version of Workday. This information will be shared with users on the morning of November 2 through a communication that Workday is now live.

- Users will access Workday on November 2nd using their CWL credentials. Enhanced CWL (also known as Multi-Factor Authentication) is required for Workday. VPN is not.

- At Go-Live, those attempting to click legacy PeopleSoft links will be presented with a transition page.
  - On that page, visitors can choose to go to either Workday or PeopleSoft. This choice will be remembered until the existing browser is closed and a new one is opened. The Workday link will always lead directly to Workday.
MOBILE APP

Workday provides secure mobile access to your applications to complete activities like submitting time, expenses and workflow approvals.

Linked here is the job-aid for downloading the Workday App to your mobile device along with tips for setting up your PIN.

Of note:
There will be enhanced mobile security turned on such that:

- Biometric (i.e. FaceID) is enabled
- PIN Authentication is enabled
  - PIN must be at least 5 digits long
  - After 3 PIN failures account will lock out
  - This is a required setting; you will be automatically prompted to set this up when signing into the app

Please do not access Workday through your mobile browser. This presents a higher cyber security risk. Please use only the Workday App or your Desktop/Laptop browser.
A new Integrated Service Centre (ISC) has been created to support you once Workday goes live for HR and Finance on November 2.

The ISC team will focus on supporting faculty and staff through UBC’s transition to Workday by:

- Providing day-to-day support, helping to answer questions about Workday
- Assisting with Workday issues, such as access, errors, and functionality
- If needed, connecting you with existing teams around the university for support

Learn more about Workday support and the ISC at the upcoming community wide Call-In on October 22, 9-10 am. Register here
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?

1. Search the online knowledge base
   Find answers quickly using our searchable knowledge base

2. Submit a ticket
   Submit and track the status of your queries

3. Connect with an IRP Learning Rover
   Connect virtually with your unit or faculty designated Learning Rover for personalized support

4. Talk to a representative
   Connect with ISC service representatives to receive direct support for urgent questions

Contact details will be available closer to launch
NEXT STEPS
ACTIVITIES LEADING TO GO-LIVE

Next Steps

- Access the links in this document to prepare to address your team's questions up to and after Go-Live. Share the appropriate links with your team.

- Familiarize yourself and your team with how to access support
  - Get to know the Transition Network leads (UBCV and UBCO) and Workday Learning Rovers assigned to your unit
  - Refer to the IRP website for more information on how to contact the Integrated Service Center for support after go-live

- If you haven't already, take your IRP training - specifically "Workday for Managers" on Workplace Learning
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

WEBSITE https://irp.ubc.ca

CONTACT US VIA SERVICE NOW https://irp.ubc.ca/contact