INTEGRATED RENEWAL PROGRAM

IRP Update to UBC Leadership

August 2020
AGENDA

1. Welcome & Introduction from Professor Ono
2. Review of Key Changes and Program Timeline
3. Preparing for Go-Live: Cutover Activities
4. Support After Go-Live: The Integrated Service Center
5. Building Change Capability
6. Upcoming Activities and Your Next Steps
REVIEW OF KEY CHANGES AND PROGRAM TIMELINE
SCOPE OF WORKDAY PROCESSES

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

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
CHANGES COMING TO YOU AND YOUR TEAMS

Training Time Commitment and Productivity

- From now through October, as well as after Go-Live, faculty and staff will need to learn to use Workday for HR and Finance related tasks.
- They will need your support to block time for this, and there will be a drop in productivity as they go through this learning process.

Approvals

- UBC Leaders, including Heads and Directors (as managers in Workday) can see all pending transactions in Workday inbox instead of relying on emails or paper forms like expense approval, time off requests, faculty appointment transactions, etc.

Task Reassignment

- You can reassign your own tasks from your Workday inbox to others, as needed.
- Reassignment only works for tasks that have arrived in your inbox.

Task Delegation

- You can delegate your entire Workday inbox or specific business processes for a specified period of time.
- Delegation does not remove responsibility (ownership) for the task from the original task owner.
- When the delegation period ends, any incomplete delegated tasks revert to the original task owner.
- **We will provide delegation guidelines and suggestions for you to consider**.
CHANGES COMING TO YOU AND YOUR TEAMS

Elimination of Paper Forms
- All HR and Finance processes will be initiated and approved in Workday
- Heads and Directors who currently sign off on HR and Finance paperwork will do this online using Workday

Contingent Workers
- Non-UBC employees who need Workday access will be set up as contingent workers with appropriate security roles

Role-based Security
- Ability to initiate, review, or approve processes and view information in Workday is assigned to the position, which streamlines employee on-boarding and off-boarding, improves visibility into training needs, and improves visibility into who is involved in which processes
# COMMUNICATIONS AND ENGAGEMENT PLAN

<table>
<thead>
<tr>
<th>IRP Critical Milestones</th>
<th>Leadership</th>
<th>Transition Network</th>
<th>All Community</th>
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<tbody>
<tr>
<td><strong>August</strong></td>
<td><strong>Sep 11</strong> Payroll Parallel Testing Completion</td>
<td><strong>Aug 26</strong> All Transition Network Meeting</td>
<td><strong>Prepare for Go-Live Community Message</strong></td>
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<tr>
<td><strong>Sep 20</strong> Workday + AEP Testing Complete</td>
<td><strong>Sep 1 Leader Briefing Note</strong></td>
<td><strong>Sep 17 Community Call-In Q&amp;A with IRP Leadership</strong></td>
<td><strong>Aug 18 Newsletter</strong></td>
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<tr>
<td><strong>Oct 25</strong> Begin Production Workday Tenant Build</td>
<td><strong>Oct 5 Leader Briefing Note</strong></td>
<td><strong>Sep 23 FIN &amp; HR Call in Preparation for Go-Live 1</strong></td>
<td><strong>Aug 14 Newsletter</strong></td>
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<tr>
<td><strong>Nov 2</strong> Go-Live for Workday and most AEP Applications</td>
<td><strong>IRP Update to Leadership at President’s Leadership Forum / 30 Day Leadership Session</strong></td>
<td><strong>Oct 14 Community Call-In Q&amp;A with IRP/ISC Leadership</strong></td>
<td><strong>Aug 14 Go-Live Community Message</strong></td>
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**Legend**
- Communications
- Engagements
- Training

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

- Training for Workday available for the Community (via Workplace Learning and Community Trainers)
- Training for Central Roles (i.e. Payroll, FinOps, etc.)
- Training available online for knowledge refresh
- Student Learning Rovers onboarded and supporting training

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**Irrelevant**

- July 31 User Confirmation Reviews Complete
- Aug 13 Leader Briefing Note
- 17 Aug Countdown Leadership Session
- Aug 19 FIN & HR Call in Reports Available for Managers of People and Funds
- Aug 26 All Transition Network Meeting
- Aug 14 Prepare for Go-Live Community Message
- Aug 18 Newsletter
- Sep 1 Leader Briefing Note
- Oct 7 Manager Readiness Session (+ TN)
- Sep 17 Community Call-In Q&A with IRP Leadership
- Sep 23 FIN & HR Call in Preparation for Go-Live 1
- Sep 15 Newsletter
- Oct 14 Community Call-In Q&A with IRP/ISC Leadership
- Oct 21 FIN & HR Call in Preparation for Go-Live 2
- Oct 14 Newsletter
- Nov 2 Go-Live for Workday and most AEP Applications
- Nov 14 All Transition Network Meeting: Thank you + Managing Post-Go Live
- Nov 2 All-Community Go-Live Broadcast + Links to go-live kits
PREPARING FOR GO-LIVE: CUTOVER ACTIVITIES
Minimized disturbance to business operations
Provide a clear understanding of alternatives during the freeze timelines

Socialized with impacted staff and faculty
All dates have been confirmed with central HR and Finance teams to co-develop interim processes to support during process freezes

Aligned with Workday build timelines
Freeze dates support planned build timelines to allow the IRP team to meet technical goals for Workday Go-Live

Coordinated across IRP Teams and the UBC Community
The timeline leading to cutover aligns Finance, HR, and AEP activities to communicate clearly and cohesively to the UBC community

Freeze dates to ensure readiness for cutover have been determined based on a set of guiding principles across FIN & HCM
MILESTONES TO PREPARE FOR CUTOVER AND GO-LIVE

Times indicate final dates for noted activities until Nov 2 Go-Live

HRMS Tool Closed
Freeze Security Roles, Sup Org Assignments, Contingent Workers, New Sup Orgs
HRMS and PAT users ensure Absence information is up to date
Last day to update address, emergency contact, and other personal information in HRMS

7 Non-PAT users submit absence balances

24 HRMS Tool Closed
Freeze Security Roles, Sup Org Assignments, Contingent Workers, New Sup Orgs

30 Freeze job postings
Faculty

15 Last day to submit Tuition Waivers

22 Freeze job postings
BCGEU Okanagan

23 Freeze job postings
Staff

26 Salary Payroll close date

28 - Noon Submit time sheets for Hourly Payroll close date

1 - Midnight HRMS UBC Staff and Faculty Careers pages close at midnight

22 Approval of OPT expense claim & non-PO invoice

9 Submit approved PO/Change Orders
Submit approved PO invoices
Request Vendor creation or changes
Submit requests for Research PGs, Grants PGs and related fund codes

16 Final date for submission of approved manual expense & non-PO invoice (T/Qreq)
Creation of OPT expense claim & non-PO invoice
Submit payments received for grants to Research Finance
Submit cash or cheque deposits for processing

31 PeopleSoft Chartfield Value Freeze
Freeze creating new PGs (excl. endowment, capital and research funds)
Already Frozen
New Dept ID, Fund codes (excluding capital and research funds)
New Dept Tree and Ledger Accounts, Account Trees

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THE INTEGRATED SERVICE CENTRE
The Integrated Service Centre (ISC) was created to enable that partnership, with a common goal to meet the changing needs of the community through integrated services that support and improve our use of Workday and related products and services.

Workday is an integrated platform that brings together HR, Finance and eventually Enrolment Services processes under one system. This requires HR, Finance, IT and Enrolment Services to collaborate to sustain Workday.
ISC SERVICE OFFERINGS AT GO-LIVE

The ISC service offerings are broken down into three areas, in alignment with the ISC organizational structure. Due to the varied nature of work performed by the Application Sustainment team, four additional sub-categories have been identified to better understand the services delivered by this team.

* New investments for Workday are out of scope for the ISC at Workday go live.
WORKDAY SUPPORT SERVICES
The ISC will be the point of contact for Workday related questions, issues, and requests. The following are key services that will be provided:

1. **Support with Using Workday**
   Find out how to navigate, use, and complete tasks within Workday.

2. **Resolving Issues with Workday**
   If you are experiencing issues or errors when using Workday, you will be able to contact the ISC to help resolve them.

3. **Requesting Workday Access**
   Request access to additional functionality or information you need in Workday.

4. **Resolving simple / basic, HR, Payroll, & Finance questions**
   Ask us simple questions about HR, Payroll, and Finance processes and policies. We can help answer them or route them to the proper team within each area.

5. **Referring to other Help Desks or support services**
   We can support with referring you to the right place to get help.
ACCESSING WORKDAY SUPPORT THROUGH THE ISC

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

Search the 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 to receive direct 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?"

Once Workday launches, access support here: https://ubc.service-now.com/selfservice
HOW IS SUPPORT AT UBC CHANGING?

Once Workday goes live, the Integrated Service Centre (ISC) will be the point of contact for Workday related questions, issues, and requests. This means the way support is provided to the UBC community is changing.

What **will** change due to the ISC?

- ISC will be a new point of support for Workday related queries, issues, and requests.
- The ISC will be responsible for maintaining and sustaining Workday in an integrated fashion with IT, HR, and Finance.
- The IT self-service portal will become the “UBC self-service portal” and will include access to Workday related support (e.g., self-serve knowledge base, submitting a ticket, or request access).

What **won’t** change due to the ISC?

You will still be able to access the following services for your usual support:

- IT Service Centre
- LT Hub
- HR and Finance advisory support
- Administrative support
- SalesForce application support
- Facilities support
- Campus security
- Other services not related to the Workday application or Workday support
BUILDING CHANGE CAPABILITY
READINESS FOR CHANGE

The Commitment Curve illustrates the stages stakeholders will experience through the project. Each stakeholder group will require a different level of involvement and engagement throughout the program.

Commitment:
Individuals are ready to change and accept the program as the new status quo.

At this point we expect that staff and faculty are ready for the change, and are prepared for the new ways of working.

Resources within this presentation can be used to bring yourself up to speed.
BRINGING WORKDAY TRAINING TO YOUR UNITS

**HR & FIN SMEs**
Functional experts who will support Trainers

**IRP Trainers**
Comprised of Transition Network members, the IRP training team, and distributed volunteers across campuses

Train the end user community via webinar training

**Transition Network Members**
Comprised of individuals across various faculties and units

Provide key local support for faculties and units, cascade key messaging, and gather feedback

**Workday Learning Rovers**
Comprised of FT Coop Students providing hands on Workday support prior and post go-live

Provide hands on key local support for faculties and units when required. Distributed across campus
UPCOMING ACTIVITIES AND YOUR NEXT STEPS
AUGUST IRP COMMUNITY ACTIVITIES

**Next Steps**

- Take Workday training and encourage your teams to do the same
- Share messages related to the IRP when they reach your inbox, particularly those related to preparing for cutover and go-live
- Support your transition network to help prepare faculty and staff in your unit
- Get to know your Transition Network leads and Workday Learning Rovers assigned to your unit
- Use the IRP Resources noted here and share them with your team

**IRP Resources**

- The IRP website is our central source for upcoming events, training, and other resources, including a [glossary of terms](#) and past recordings of Workday demos and HR/Fin Call-Ins
- Sign up for the [IRP Newsletter](#) for IRP updates direct to your inbox
- Read through the [August leader briefing](#) and [talking points](#) for guidance on how to answer questions from your unit
- Encourage all staff and Faculty in your unit to take online Workday training available now! [Link here](#)
- Use the [Searchable Q&A](#) to find answers in our repository of previously-answered questions
- Link to access the Integrated Service Center: [https://ubc.service-now.com/selfservice](https://ubc.service-now.com/selfservice)
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

WEBSITE

integrated-renewal.ubc.ca

CONTACT US VIA SERVICENOW

https://irp.ubc.ca/contact