

INTEGRATED RENEWAL PROGRAM

Workday Wednesday: The IRP Journey &
Employee Dashboard Demo

JUNE 3, 2020

Mike Nichols, Change Lead. Engagements UBCV

Barish Golland, Training Lead UBC



LAND ACKNOWLEDGEMENT

UBCV is located on the traditional, ancestral, and unceded territory of the Musqueam people

UBCO is located on the traditional and ancestral territory of the Syilx Okanagan Nation

AGENDA

- 1 | IRP Journey Overview & Timeline
- 2 | How Do I Prepare?
- 3 | Workday Employee As Self Dashboard Demo
- 4 | What's Next?
- 5 | Q&A



IRP JOURNEY

THE INTEGRATED RENEWAL PROGRAM

Procurement Modernization – Service Delivery Model

- A new service delivery model has been underway that prepared for Workday and redefined how people buy and pay for goods and services

Integrated Renewal Program – Workday

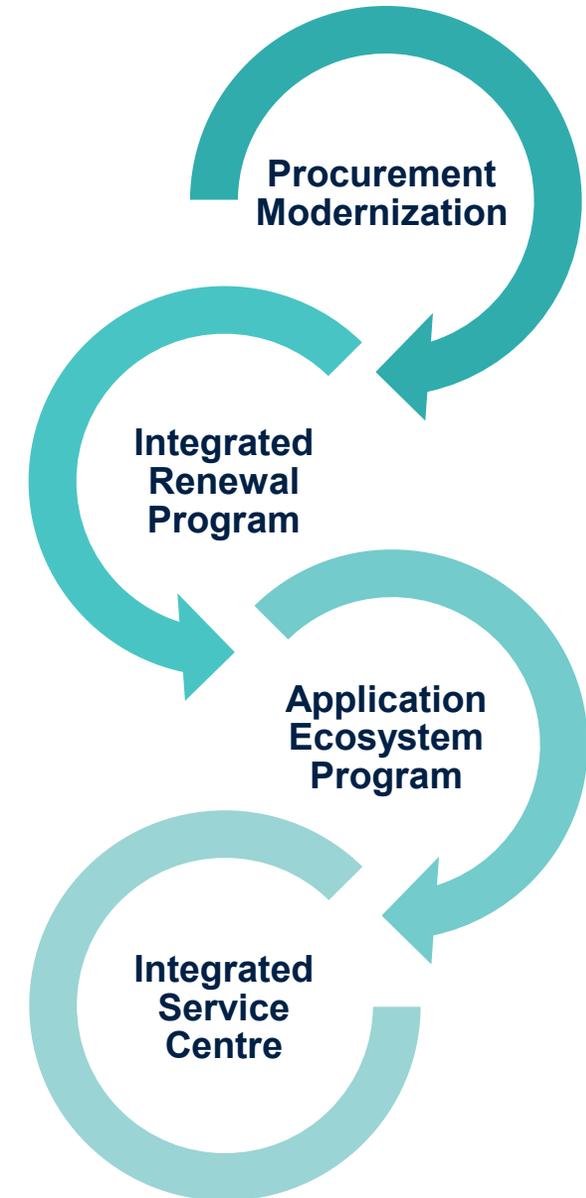
- An integrated system for UBC's core Human Resources, Finance and Student administrative systems
- Online transactions and single source of data to inform decision-making and planning

Application Ecosystem Program – Applications surrounding Workday

- Applications surrounding Workday are dispositioned appropriately to maintain business continuity
- Applications have been identified to be either retrofitted, integrated or sunset.

Integrated Service Centre

- The Integrated Service Centre (ISC) is a new unit within UBC that will focus on sustaining and enhancing Workday and providing user support to UBC students, faculty and staff, in conjunction with HR, Finance, and eventually Enrolment Services.



WHY ARE WE UNDERTAKING THIS WORK?

Program Vision

The way we support learning and research, and how we work at UBC will be transformed, creating a cohesive, integrated, and enriched experience for students, staff, and faculty.



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

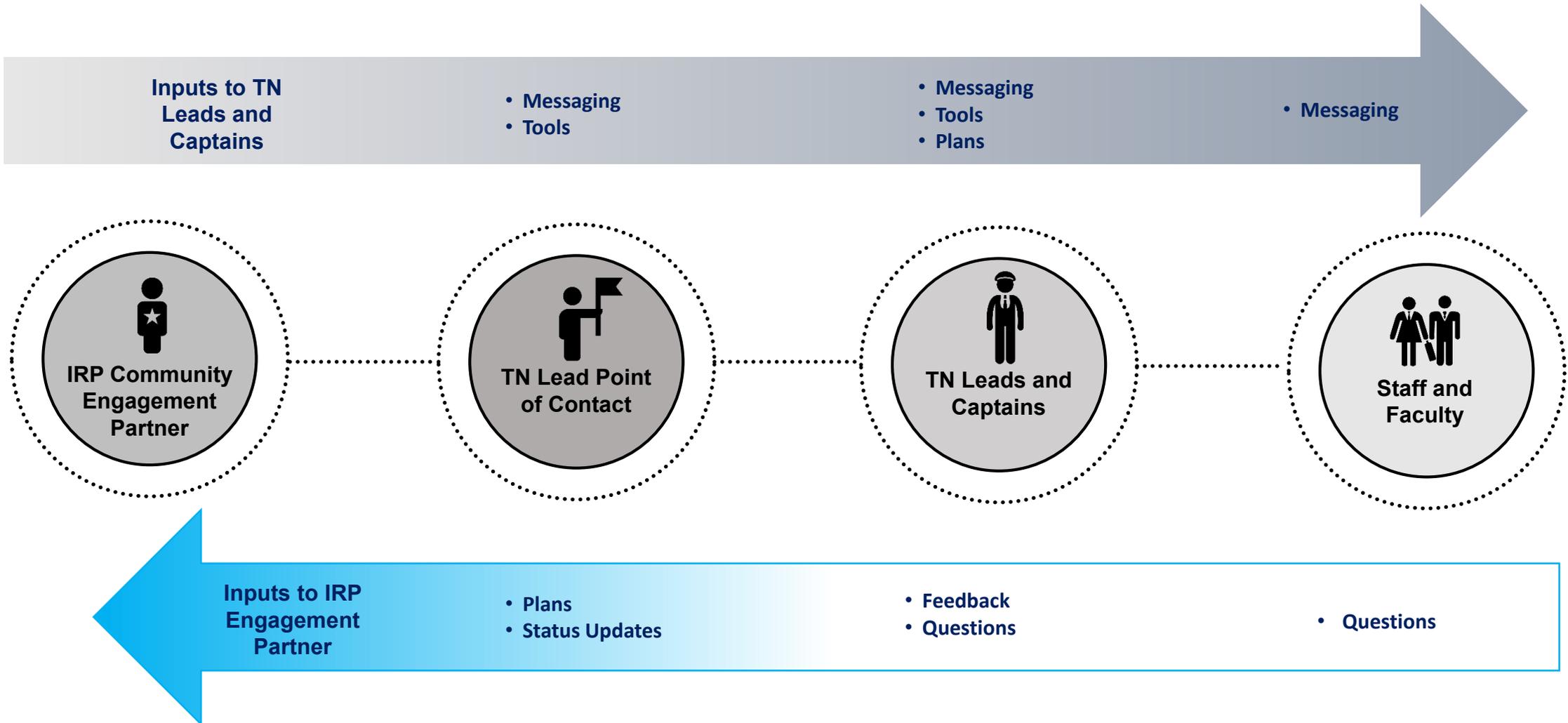


STUDENT

- 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

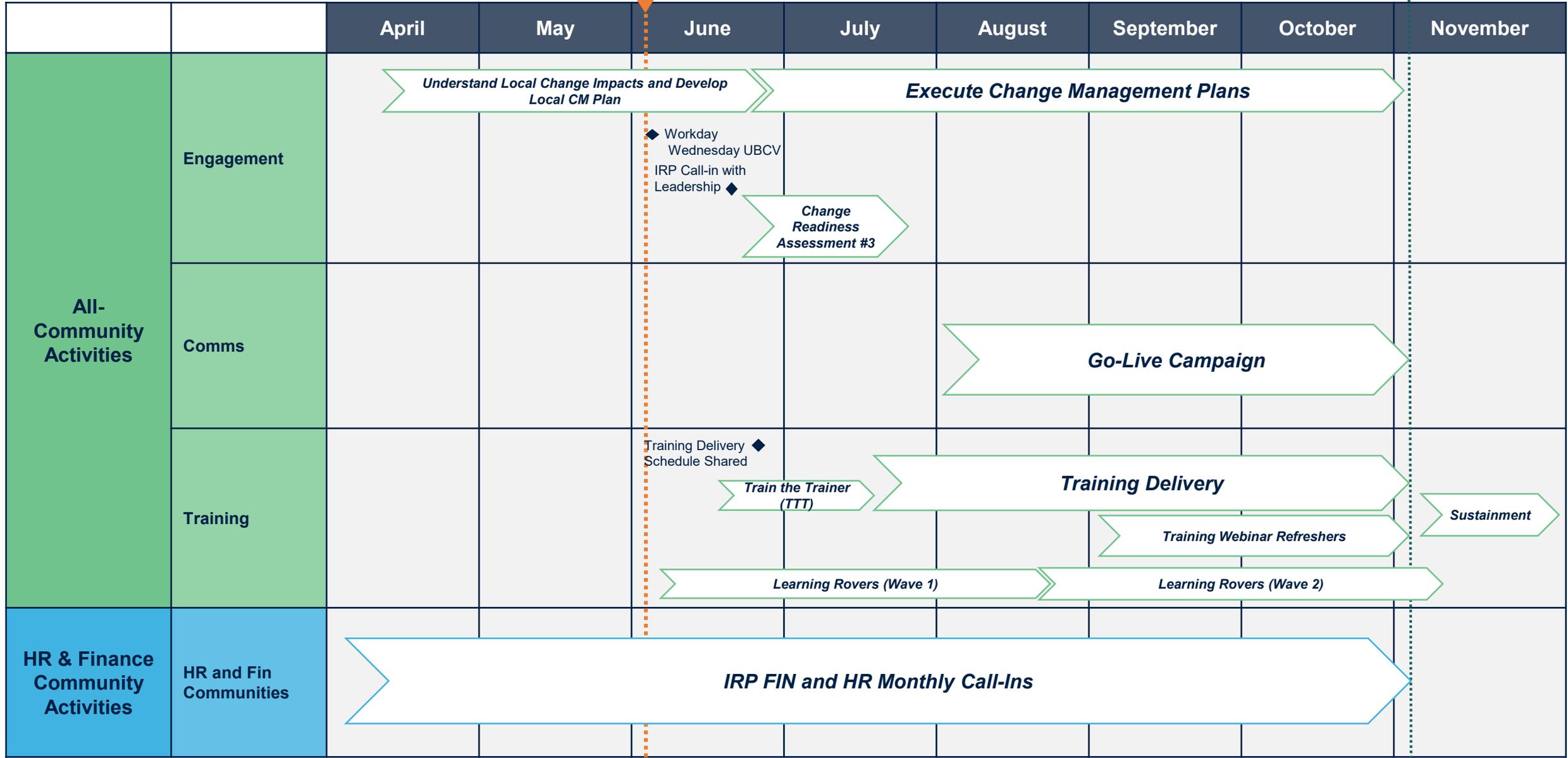


THE TRANSITION NETWORK & COMMUNICATION FLOW

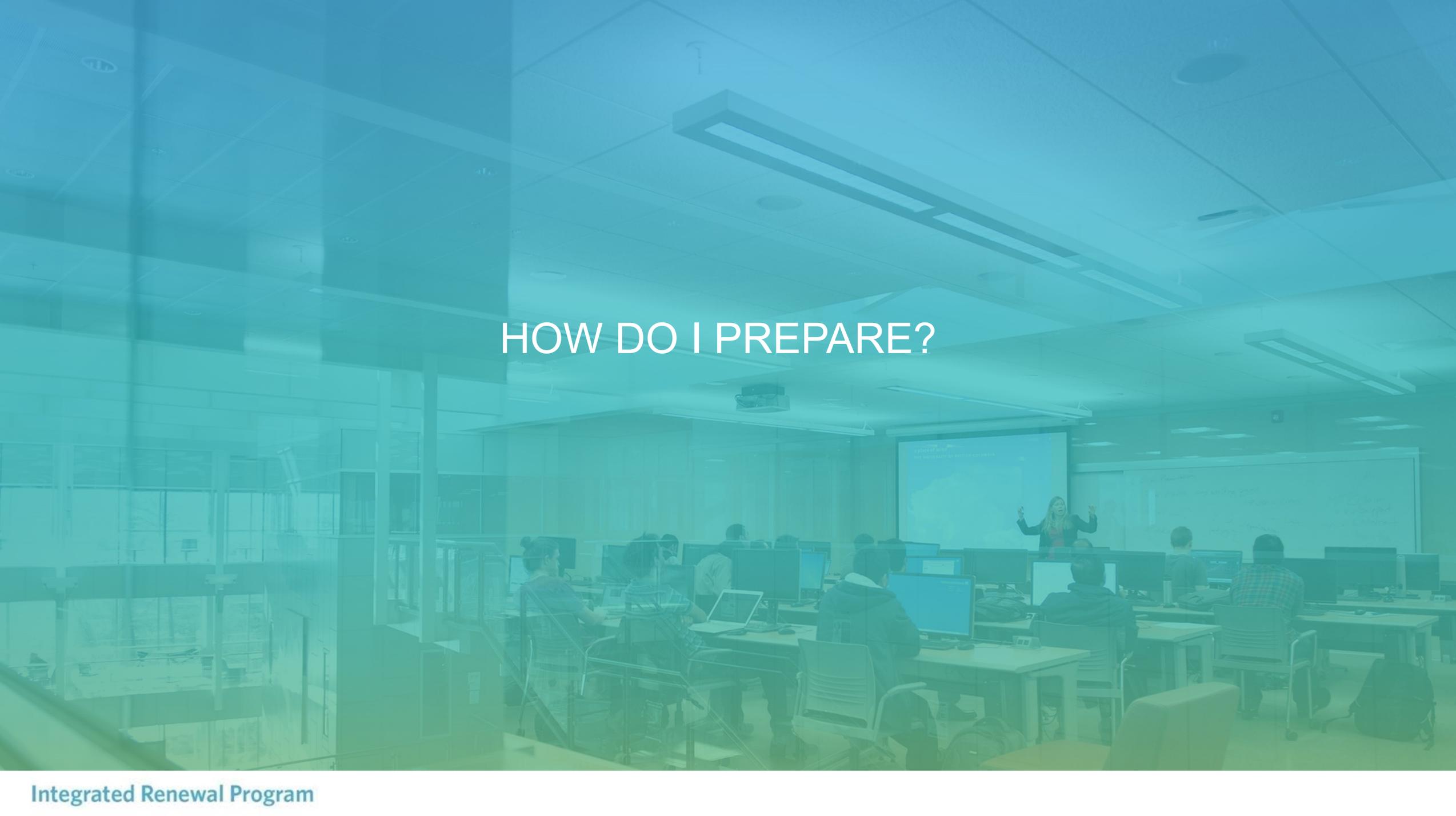


HIGH-LEVEL IRP TIMELINE

Go-Live
November 2



HOW DO I PREPARE?

A photograph of a modern classroom or computer lab, overlaid with a semi-transparent teal filter. In the foreground, several students are seated at long desks, each with a computer monitor. They appear to be working or listening. At the front of the room, a female instructor stands near a large projection screen, gesturing with her hands. The screen displays a presentation slide with a map and text. To the right of the screen is a whiteboard with handwritten notes. The room has a high ceiling with recessed lighting and large windows on the left side.

HOW DO I PREPARE?

Be aware of what's coming

- Learn about IRP & Workday
- Be aware of the general timelines for the project
- Know where to go for more info

Become familiar with what's coming

- Know what Workday looks like
- Understand that change is coming
- Learn more about what's changing

Get Ready for Workday

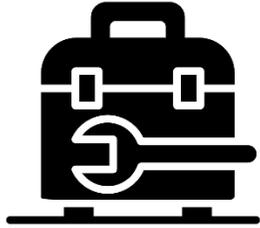
- Attend training and practice using Workday
- Get your units feeling ready and prepared to use Workday

Go-live with Workday November 2!

- Attend additional training as needed post go-live
- Get support post go-live



RESOURCES TO PREPARE FOR WORKDAY

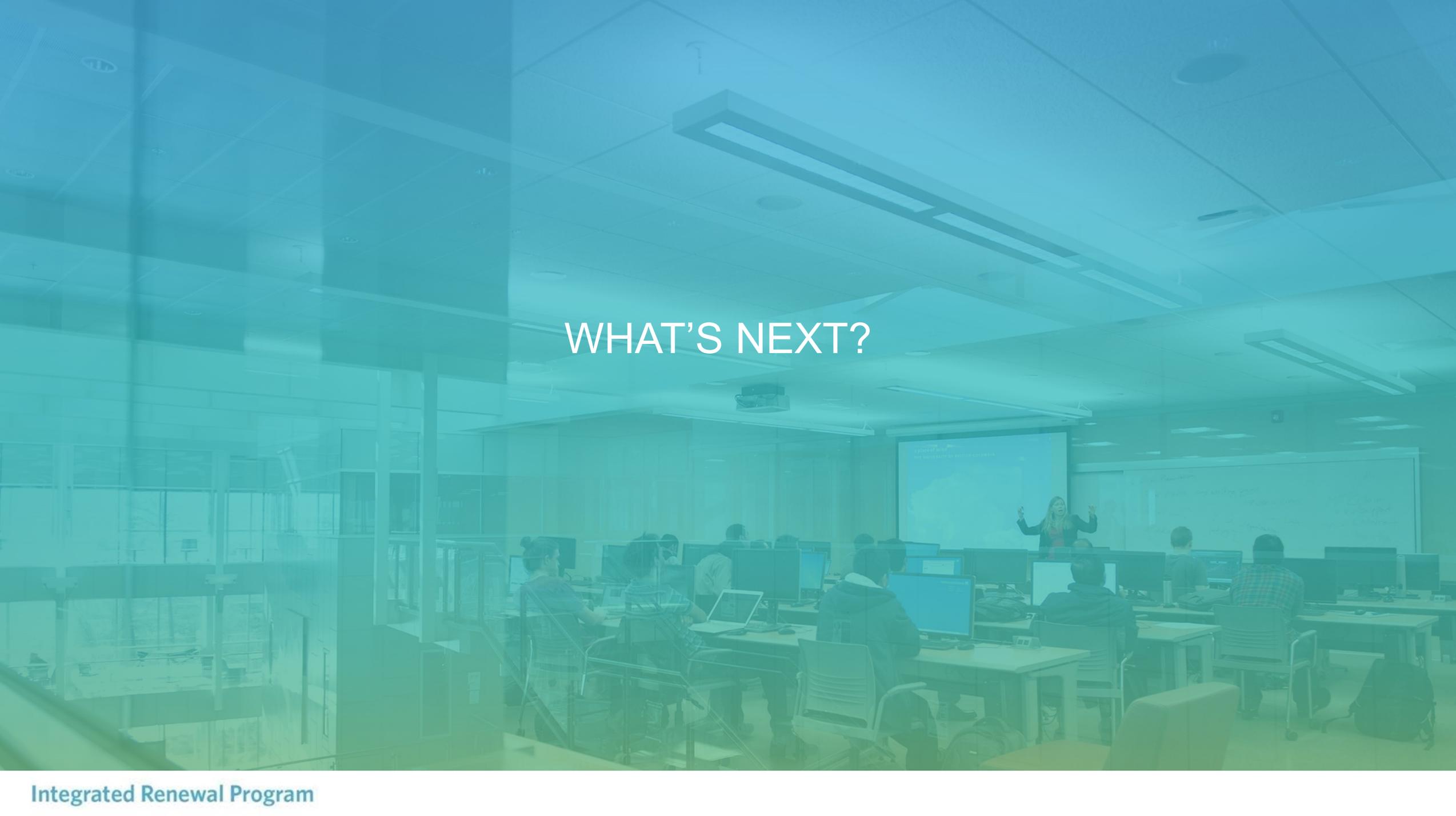


- ✓ [Community Demos](#) – Recordings of community demo events highlighting different Workday functionality
- ✓ [HR/FIN Call-Ins](#) – Monthly call-ins lead by functional subject matter experts to provide in-depth understanding of Finance and HR functions in Workday, view previous Call-Ins and register for upcoming
- ✓ [FAQs, Q&A](#) – Commonly asked questions and answers gathered throughout the program to date
- ✓ [ServiceNow](#) – General inquiries for the IRP program as well as AEP program
- ✓ Sign up for the [IRP Community Connect Newsletter](#) on the Contact page
- ✓ Get ready for Training starting July 20, visit <https://irp.ubc.ca/training> for training timeline and curriculum



HIGH-LEVEL TRAINING TIMELINES



A photograph of a modern classroom or lecture hall, overlaid with a semi-transparent blue filter. In the foreground, several students are seated at long tables, each with a computer monitor. They are facing towards the front of the room. At the front, a lecturer is standing near a large projection screen, gesturing with her hands. To the right of the screen is a whiteboard with some handwritten notes. The ceiling features recessed lighting fixtures. The overall atmosphere is professional and educational.

WHAT'S NEXT?

JUNE - JULY ACTION ITEMS

- ✓ | 1 Visit irp.ubc.ca and register for the June 18 Leadership Call-In
- ✓ | 2 Sign up for the [IRP Community Connect Newsletter](#)
- ✓ | 3 Stay tuned for Training delivery beginning July 20 <https://irp.ubc.ca/training>
- ✓ | 4 Navigate to the resources tab at irp.ubc.ca to review relevant Finance and HR Call-Ins and register for future Call-Ins
- ✓ | 5 Participate in the Change Readiness Assessment Survey # 3 coming June 22
- ✓ | 6 Contact IRP through [ServiceNow](#) with any questions



CONTACT

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>



GLOSSARY

Application Ecosystem Program (AEP): created to perform compatibility work to ensure that existing applications and related processes that are still required after the Workday implementation, continue to function after the new core system is introduced.

Integrated Renewal Program (IRP): The Integrated Renewal Program (IRP) unites the Student Academic Systems Initiative (SASI) and the HR/Finance Renewal Program. It will replace UBC's SIS (student), HRMS (HR) and FMS (finance) core systems with Workday.

Integrated Service Centre (ISC): Upon Workday going live, the Integrated Service Centre (ISC) will have three key functions: 1. To provide the UBC community with a single point of contact for resolving simple queries and ensuring more complex queries are resolved by appropriate functional experts (e.g., Service Centre, self-service knowledge base); 2. To ensure Workday continues to meet the evolving needs of UBC including delivery of continuous improvements over the long term (e.g., operational improvements, enhancements, etc.) 3. To manage and adopt the regular releases from Workday to ensure the system remains current

Organizational Change Management (OCM): The Organizational Change Management (OCM) team is responsible for developing and leading strategies that ensure stakeholders are ready, willing and able to adopt new business processes and enterprise technologies. This team ensures stakeholders are ready, willing and able to adopt new business processes and technologies during implementation.

Transition Network: team of volunteers who represent students, faculties and VP units across the UBC community. Fosters awareness and personal understanding of how Workday will impact and benefit faculty, students and staff.



GLOSSARY

Business Process (BP): Every procedure or Business Process (BP) in Workday follows a defined workflow, with automated handoffs facilitating actions and approvals needed to complete the work.

Community Engagement Partner (CEP): The CEP is consulting key stakeholders in order to ensure the successful development of Local Change Plans and implementation of Workday, co-creating the future, adopting streamlined and standard processes based on higher education best practices.

Change Readiness Assessment (CRA): CRA is an assessment conducted to determine the readiness of faculty and staff to implement Workday, and the create recommendation of actions for ensuring readiness.

Foundation Data Model (FDM): The FDM is the core of the entire Workday platform. FDM is the multidimensional structure of Workday accounting and financial reporting, and the basis of all Workday organizations and worktags.

Security Role: Security Roles are the basis of Business Processes (BPs). Workday Security Roles will govern what individuals can see and do in Workday, as well as what they can initiate and/or approve within their Supervisory Organizations or the Supervisory Organizations they support.

Supervisory Organization (Sup Org): Supervisory Organizations (Sup Orgs) are the foundation of Workday's Human Capital Management function. A Sup Org is a logical grouping of employees who report to the same manager, and each manager is associated with a Sup Org that contains the workers and the positions they manage.

User Confirmation Review (UCR): The purpose of UCR is to conduct reviews with select members of the community to validate particular Business Processes (BPs) to ensure that they are working.



GLOSSARY

Dispositions: Actions required to ensure business function and process continuity including if business process changes and application shut downs.

Train the Trainers: The IRP Training Team, with support from IRP Functional SMEs, will prepare Trainers to deliver in-class/webinar training to the end user community (for super user security roles)

Trainees: End users receiving training from the IRP Training team.

Subject Matter Experts: A local Functional Subject Matter Expert (SME) who has specialized skills or knowledge of a particular job or topic (e.g. Benefits)

Super Users: Super Users for IRP are individuals who are experts in the Workday system.

