INTEGRATED RENEWAL PROGRAM

HR Update – Call In Session #5
Alex Bayne, IRP Sponsor & Managing Director, Strategic Initiatives, Learning & Engagement
Gerald Vanderwoude, Senior Human Resources Manager, HR Work Stream, Integrated Renewal Program
Lani McGill, Core HR Lead, Integrated Renewal Program

To view a recording of this session, please see: https://vimeo.com/317347706
WELCOME

ALEX BAYNE
IRP SPONSOR & MANAGING DIRECTOR, STRATEGIC INITIATIVES, LEARNING AND ENGAGEMENT
SESSION #4 RECAP

- January 29, 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

❤️ Supervisory Organizations – brief review of complex concepts and models

❤️ Sup Org Q & A – the floor is yours!

Please use the Chat window or go to https://www.sli.do/ and enter event code #IRPHR
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

April 2020
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 – February 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.
## CUSTOMER CONFIRMATION SESSIONS - OVERVIEW

### What it is …
- ✓ First look at Workday
- ✓ Demonstration of select transactions
- ✓ Capture feedback on significant concerns
- ✓ Confirm business process designs
- ✓ Discuss process initiators and approvers
- ✓ Identify additional change management and training needs

### What it is not …
- ✗ Final debut of the system
- ✗ Demonstration of the full system functionality
- ✗ Time to completely redesign a process
- ✗ Detailed overview of business processes
- ✗ Stakeholder testing
- ✗ Stakeholder training
HR CUSTOMER CONFIRMATION SESSIONS

Participants
• Targeted individuals in the HR practitioner community (Vancouver & Okanagan)
• Those who have been involved in HR work stream Architect sessions and/or have foundational knowledge of Workday and the processes the HR work stream has reviewed to date

Sessions
• Central HR Team & Community HR Practitioner Sessions – February 25 & 27, high level walkthrough of employee lifecycle
• Community Payroll Practitioner Session – February 28, high level walkthrough of employee time tracking cycle
• Core HCM & Employee Lifecycle Sessions – March 1, UBC Okanagan

Feedback is being collected in each session - high level themes will be shared at future Call In Sessions
SUPERVISORY ORGANIZATIONS

COMPLEX CONCEPTS & MODELS
WE’VE BUILT THE FRAMEWORK AND NOW…. 

- We need the community’s help to **validate key Sup Org data** the HCM team has built in our tenant to date

- We will use this validated data to **build the next iteration** of our tenant (May 2019)

- Transition Network **Leads & Captains will assist** -- and they **may ask for your help**

- **By March 31** – we are asking for the community’s help to:
  - Validate key data for your department/unit is accurate (names of Managers)
  - Name each Supervisory Organization (using naming conventions provided)

- Leads will be reaching out as appropriate for their department(s)

- You may be called on to review names of Managers, confirm Sup Org name etc.
CORE CONCEPTS – SUPERVISORY ORGANIZATIONS

Supervisory Organizations are the **foundation** of Workday HCM

A Supervisory Organization is a logical grouping of employees who report to the same **manager**

Each manager is associated with a Supervisory Organization that contains the workers and the positions they manage.
DEFINITION OF A MANAGER IN WORKDAY

• In Workday, a Manager is the person responsible for hiring, managing and terminating employees in their Supervisory Organization.

• Unionized Supervisors are not considered to be Managers based on this Workday definition.

• In some instances the Manager is also the person responsible for financial approval.
For the next tenant build we have recommended that Faculty members who are Instructors of Record, be considered the Manager of the union employee group Teaching Assistants.

For other student employees, a Manager can be either a faculty member or administrative staff person.

You can have multiple employment groups (i.e. CUPE 2950, M&P, Non-Union Technicians) within one Sup Org, as long as they all report to the same manager.
You can have multiple employment groups (i.e. CUPE 2950, M&P, Non-Union Technicians) within one Sup Org, as long as they all report to the same manager.
SUP ORGS THAT HAVE MULTIPLE MANAGERS

In Workday, pooled positions do not exist - there is a one-to-one relationship between position and employee.

In instances in which there are multiple Managers who manage (per the Workday definition) a group of employees, we can set rules in Workday so that all managers will have access to the same Sup Org allowing all managers to continue to manager as a team.

A common example of this will be in areas such as Student Housing and Hospitality and Building Operations.
A Matrix organization is a type of Supervisory Organization used to group worker(s) who report to more than one Manager.

These can be created in situations where an employee has two Managers to whom they report, for example one related to their functional department (e.g., Department of Medicine) and also reports to another manager related to their role (e.g., Development Alumni and Engagement).

Matrix Organizations will allow both Managers to initiate, and/or approve, and/or view employee information (vacation and sick balance, hours worked, etc.) and job changes (salary increase, FTE changes, etc.).
QUESTIONS? PLEASE USE SLIDO OR CHAT

For example:

• Can we delegate tasks to someone other than the manager?

• How do Sup Orgs handle employees who have to report to multiple managers?

• How to we handle multiple managers managing one Sup Org?

• Who should student employees report to?
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 STEPS

Next Call In Session – March 5

Agenda items to include:

☑ Update on Supervisory Organization Data Validation work

☑ Update on Customer Confirmation Sessions

☑ Review upcoming community activities and engagements— including when you can ‘see’ Workday

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

Visit www.integrated-renewal.ubc.ca to learn more about the program, latest news and Workday videos.

Watch a 2-minute video of Professor Ono sharing his vision for the Integrated Renewal Program, “The Workday Implementation Journey Starts Now” (News section).

Visit 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.

WEBSITE  integrated-renewal.ubc.ca

EMAIL  integrated.renewal@ubc.ca