INTEGRATED RENEWAL PROGRAM

HR Update – Call In Session #6
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/322813845

March 5, 2019
WELCOME

ALEX BAYNE

IRP SPONSOR & MANAGING DIRECTOR, STRATEGIC INITIATIVES, LEARNING AND ENGAGEMENT
SESSION #5 RECAP

- February 14, 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…

- UBC Tenant Demo – common features and functions as an employee of UBC

- Ask Questions of the team
IRP UPDATE
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 – 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

February - March 2019

- **Unit Testing** – HCM team is running the 2000+ scenarios we created to test the business process design and data we have put into the tenant to date. 876 tests completed to date!!

- **Reporting** – creation and testing of priority reports in the tenant continues

- **Customer Confirmation Sessions** – held 6 sessions (Vancouver and Okanagan) with 150+ HR stakeholders previously involved in HCM design sessions, Architect workshops and/or have foundational knowledge of Workday and HR processes.

- **Supervisory Organization Data Validation** – built tool in HRMS and held call in sessions to review how to use for data validation tasks due March 31
SUPERVISORY ORGANIZATIONS – UPDATE

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)

The community has been working hard on this, and it shows! To date you have:
• Marked 507 of 20,000+ Sup Orgs as done (names of Manager(s) and Sup Org confirmed)
• Assigned 24,593 workers to a Sup Org

All but 29 departments have reviewed their data in the new HRMS tool to date!

Please keep the Sup Org questions coming…
HR WORK STREAM – NEXT 30+ DAYS

March – April 2019

☐ **Continue Unit Testing** – to test the business process design and data we have put into the tenant to date

☐ **Continue updating and configuring the next UBC tenant** – including reviewing and incorporating Customer Confirmation session feedback as required and reviewing and finalizing Sup Org data submitted by community for March 31

☐ **Review feedback from all Customer Confirmation sessions** – and share high level feedback with the community via Call Ins and other channels

☐ **Call In Sessions** – demo key pieces of HCM functionality at every call in going forward, **next call April 10**, 9:00-10:00 am
UBC TENANT - WORKDAY WALKTHROUGH
EMPLOYEE AS SELF
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’
- Employee as Self – common features and functions as an employee of UBC
YOUR WORKDAY HOMEPAGE

Please note: Limited slides available for the ‘demo’ portion of the presentation.
HOME PAGE APPLICATIONS

- Purchases
- Expenses
- Personal Information
- Processes Awaiting Me
- My Team Management
- Team Absence
- Absence
- My Team
- Compensation
- Benefits
- Recruiting
- Time
- Team Time
- Pay
PAY STATEMENT

• Pay statement can be viewed online

• Can be exported to a pdf for printing/archiving

• Detailed view – see next slide
EMPLOYEE – PAY INFORMATION (PAY SLIPS)
MANAGER – MY TEAM (TEAM TIME)

Team Time

Actions
- Review Time
- Enter Time for Worker
- Correct Time Off
- Place Worker on Leave
- Return Worker from Leave

View
- My Team's Time Off Balances
- My Team's Schedule
- Team Absence Calendar
## My Team's Time Off Balances

### Worker Details

<table>
<thead>
<tr>
<th>Worker</th>
<th>Time Off Plan</th>
<th>Time Off Balance</th>
<th>Time Off Balance including Pending Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alana Parrott-Jolly</td>
<td>Annual Leave</td>
<td>320</td>
<td>320</td>
</tr>
<tr>
<td></td>
<td>UBC Sick Leave</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>UBC Vacation</td>
<td>320</td>
<td>320</td>
</tr>
<tr>
<td>Betty Davis</td>
<td>Annual Leave</td>
<td>36.9</td>
<td>36.9</td>
</tr>
<tr>
<td></td>
<td>Compensatory Time Off</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>UBC Sick Leave</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>UBC Vacation</td>
<td>36.9</td>
<td>36.9</td>
</tr>
<tr>
<td>Daniel Burch (On Leave)</td>
<td>Annual Leave</td>
<td>1088</td>
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</table>
## Team Absence Calendar

### Dec 2 – 8, 2018

<table>
<thead>
<tr>
<th>Sun 12/2</th>
<th>Mon 12/3</th>
<th>Tue 12/4</th>
<th>Wed 12/5</th>
<th>Thu 12/6</th>
<th>Fri 12/7</th>
<th>Sat 12/8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jill Jones</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alana Parrott-Jolly</td>
<td>21 Hours ✓ Approved</td>
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<td></td>
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<tr>
<td>Betty Davis</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daniel Burch (On Leave)</td>
<td>154 Days ✓ Approved</td>
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<tr>
<td>Grace Anderson</td>
<td></td>
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<td></td>
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<tr>
<td>John Smith</td>
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<td></td>
</tr>
<tr>
<td>John Wayne</td>
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<tr>
<td>Jonathan Thomas</td>
<td>14 Hours ✓ Approved</td>
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<td></td>
<td></td>
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<tr>
<td>Karen Smith</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Manager – My Team (Salary of Team)

| Organization | Human Resources |

| More         | 11 Items |

## Job

<table>
<thead>
<tr>
<th>Current Job</th>
<th>Administrative Assistant</th>
<th>Administrative Assistant</th>
<th>Payroll Clerk</th>
<th>Director, Operations &amp; Administration</th>
<th>Director, Operations &amp; Administration</th>
<th>Administrative Assistant</th>
<th>Accountant</th>
<th>Assistant Professor College of Arts &amp; Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexa Parrott-Jolly</td>
<td>0.09</td>
<td>0.31</td>
<td>13.43</td>
<td>13.43</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>Betty Davis</td>
<td>0.31</td>
<td>0.3</td>
<td>13.42</td>
<td>13.42</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>Daniel Burch (On Leave)</td>
<td>0.09</td>
<td>0.3</td>
<td>13.43</td>
<td>13.43</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>Grace Anderson</td>
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<td>0.3</td>
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<td>13.42</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>John Smith</td>
<td>0.09</td>
<td>0.3</td>
<td>13.43</td>
<td>13.43</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>John Wayne</td>
<td>0.09</td>
<td>0.3</td>
<td>13.43</td>
<td>13.43</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
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</tr>
<tr>
<td>Jonathan Thomas</td>
<td>0.09</td>
<td>0.3</td>
<td>13.43</td>
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<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
<tr>
<td>Karen Smith</td>
<td>0.09</td>
<td>0.3</td>
<td>13.43</td>
<td>13.43</td>
<td>0.18</td>
<td>0.13</td>
<td>0.92</td>
<td>0.5</td>
</tr>
</tbody>
</table>

## Base Pay

| Total Annualized Amount   | $25,998.88                | $87,207.38                | $14,040.00    | $84,751.18                            | $3,009,600.00                      | $0.00                    | 0          | $0.00                                           |
|                          | $20,230.01                | $64,207.39                | $10,800.00    | $74,751.18                            | $3,009,600.00                      | $0.00                    | 0          | $0.00                                           |
| Last Increase Amount      | $24.90                    | $41.93                    | $13.50        | $1,661.79                             | $3,009,600.00                      | $0.00                    | 0          | $0.00                                           |
|                          | $19.50                    | $32.63                    | $10.50        | $1,661.79                             | $3,009,600.00                      | $0.00                    | 0          | $0.00                                           |
| Last Increase Percent     | 0.00%                     | 0.00%                     | 0.00%         | 2.00%                                 | 0.00%                               | 0.00%                    | 0.00%      | 0.00%                                           |
| Years Since Last Increase | 0.09                      | 0.31                      | 0.31          | 2.84                                  | 0.18                                | 0.13                     | 0.92       | 0.5                                             |

## Date of Last Increase

| Alexa Parrott-Jolly       | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| Betty Davis               | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| Daniel Burch (On Leave)   | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| Grace Anderson            | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| John Smith                | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| John Wayne                | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| Jonathan Thomas           | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
| Karen Smith               | 11/01/2018                | 08/13/2018                | 07/01/2005    | 02/01/2016                            | 09/27/2018                          | 01/01/2018                | 06/04/2018          |
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 – April 10

Agenda items to include:

- Update on Supervisory Organization Data Validation work
- UBC Tenant Demo – key HCM functions
- 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

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