

ON THE WAY TO

workday@UCHICAGO

Project Overview



Introduction

This presentation outlines the University of Chicago's implementation of Workday Human Capital Management (HCM). Workday@UChicago, the University's first Human Resource Information System (HRIS) will replace the University's current payroll and benefits administration systems, and provide enhanced functionality for Human Resources.

The following pages detail the governance, scope, timelines and guiding principles of the Workday@UChicago project. Track the background and future of Workday@UChicago, and join us on the way to Workday.

Background (2013)

March 1 – March 15

Business Case

- **Stakeholder interviews**
- **Found a multigenerational technology gap** with peer institutions
- Identified **risks and opportunities** with current system
- Established a need to **implement new technology to mitigate risk**, better deliver core HR services, and develop the University's talent base

May 1 – June 30

Software Selection

- Functional/technical **requirements** gathered
- **Software demos and selection (Workday)**
- **Scope** defined and approved
- Implementation **project plan**
- Integration, reporting and conversion assessments
- Initial **change management** assessment and plan

August 1-31

Project Ramp Up

- Selected **integrator** to assist in implementation (**Deloitte**)
- Set up **project** office and identified project resources
- Documented 'as is' **faculty hire process**
- Assessed **legacy data** and identified gaps/ quality issues
- Developed strategy for **systems integrations**
- Identified **core reports** required in the new system

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What are the expected benefits of us implementing a new HRIS?

Mitigating risks

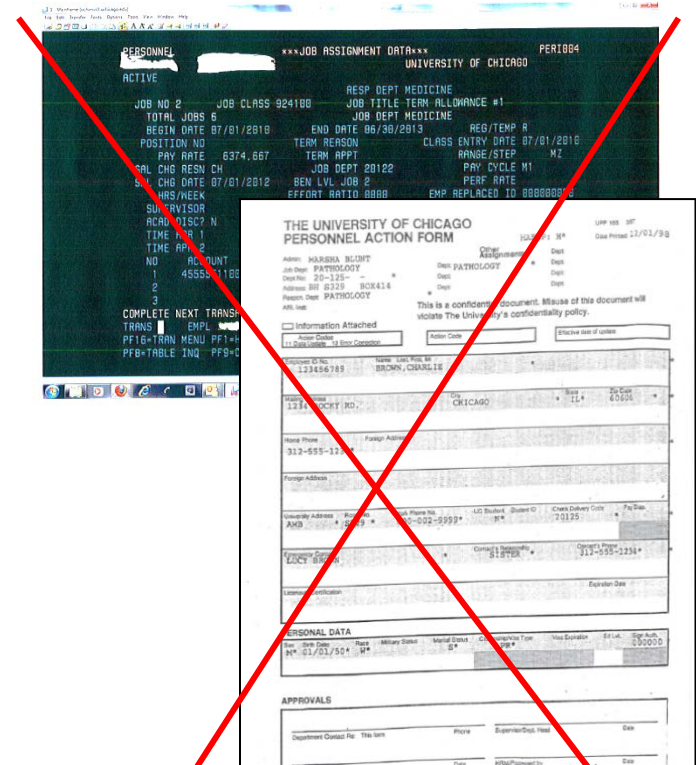
- Replacing technology that is outdated and no longer supported
- Remove manual processes for **regulatory reporting**
- Improved **data security**

Better delivery of core HR services

- More **efficient and consistent HR** processes
- Improved **processes and standardization**
- Improved **turnaround time**
- Electronic workflow and **less paper**
- **Reduce manual** processes, workarounds and exceptions
- Reduce information requests and calls – **more self service**

Access to better reporting and information

- Better **standard and ad hoc** reporting
- Cleaner and more **accurate data**
- Access to **real-time** information and history
- Ability to **track positions**
- View of **joint appointments**



Project Governance

- **Executive Sponsors**

Rich Iorio (Human Resources), Eric Isaacs (Provost), Nim Chinniah (Finance & Administration)

- **Oversight Committee**

Rich Iorio (Human Resources), Ingrid Gould (Provost's Office), Klara Jelinkova (IT Services), Rowan Miranda (Senior Associate VP for Finance)

- **Project Leadership**

Mike Knitter (Human Resources), Byron Nash (IT Services), Mark Fehlberg (Financial Services)

- **Project Team**

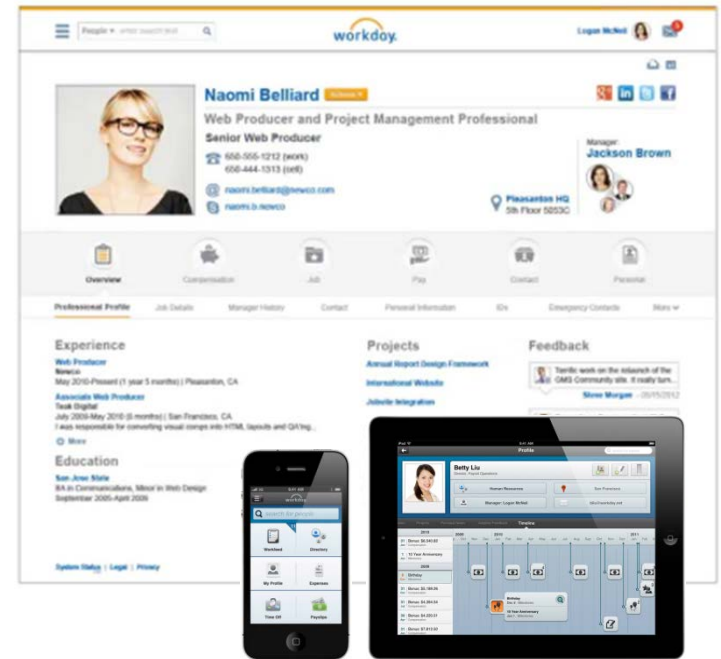
35 FTEs from Human Resources, IT Services, Financial Services, the Office of the Provost, and Deloitte Consulting

- **Campus Advisory Committees**

Business Advisory Committee, Technical Advisory Committee

So....what is Workday?

- Features of Workday include:
 - Software-as-a-Service
 - Intuitive user interface
 - **Cloud-based**
 - **Mobile-enabled**
 - Automatic updates
 - Real-time information and reporting
 - Focus on speed, usability and flexibility
- Other **higher education clients** include Georgetown, Brown, Cornell, Carnegie Mellon, Yale, University of Southern California

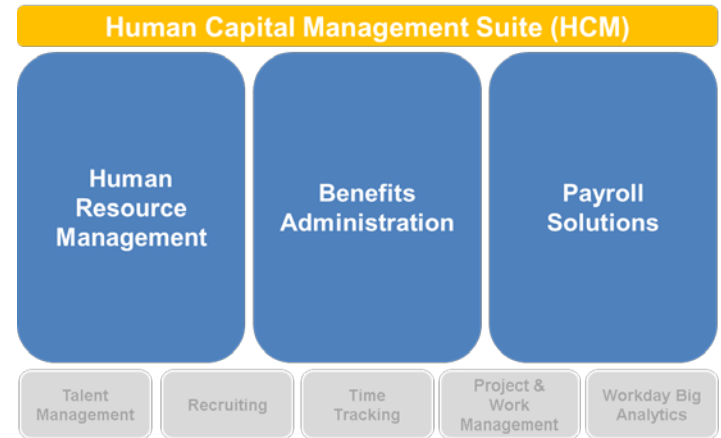


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What is in scope?

- **Workday's Human Capital Management Suite**
- **Phase I (January 1, 2015): Laying the Foundation**
 - Human Resource Management (hire, terminate, maintain records, compensation)
 - Benefits Administration
 - Payroll Solutions
 - Employee Self-Service
- **Future Phases: Additional Functionality**
 - Features from Phase I (Faculty Information, Open Enrollment, Regulatory Reporting)
 - Talent Management
 - Recruiting
 - Time Tracking



What is in scope?

- **139 Workday-delivered business processes** and **107 system integrations** are in scope for Phase I
- **Who will be impacted at UChicago?**
 1. All staff, faculty and other academic appointments, temporary and student workers currently being paid by UChicago and using Employee Self-Service (ESS)
 2. Those with management oversight or responsibility, i.e. “approvers”
 3. Central and Department HR/Payroll teams who currently manage HR transactions for the University via a PAF/ MAF and add/update/view HR data using HRMS, iTrust or Business Objects

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The following table identifies the Workday Business Processes that were available in Workday 20 and the classification of business process IN SCOPE for Phase I.

1. Activation	71. Edit Position
2. Assign Role	72. Edit Position Restrictions
3. Assign Self-Assign Roles	73. Edit Worker Additional Data Element
4. Assign Supervisor	74. Edit Additional Job
5. Change Organization Assignments for Worker	75. Edit Contingent/Worker Contract
6. Change Organization Assignments for Worker	
7. Change Ability	
8. Create Subcontract	
9. Create Workday account	
10. Change Test	
11. Distribute Documents or Tasks	
12. Divide Organization	
13. Integration Process Grant	
14. Make Assign Self-Assign Roles	
15. Move Worker	
16. Move Workers	
17. Request Delegation Change	
18. Extract Payroll Inheritance Data	
19. Manage Education Preferences	
20. Manage Travel Preferences	
21. Payroll Inheritance Data	
22. Change Service Code	
23. Change Service	
24. Change Service for Life Event	
25. Change Service for Open Enrollment	
26. Change Retirement Savings	
27. Dependents Grant	
28. Revoke COBRA Eligibility Grant	
29. Acknowledge Compensation Statement	
30. Change Salary Compensation	
31. Create Salary Compensation Statement	
32. Change Role	
33. Initiate Bonus Process	
34. Initiate Health Process	
35. Mark Location Hierarchy Review	
36. Periodically Eligibility	
37. Periodically Pay	
38. Process Compensation	
39. Request Compensation Change	
40. Process Employee Service Award	
41. Process Employee Service Award	
42. Process Employee Service Award (non-eligible)	
43. Process Employee Service Award (non-eligible)	
44. Request Bonus Payment	
45. Request Compensation Change	
46. Request Compensation Change for Leave of Absence	
47. Request Compensation Change for Leave of Absence	
48. Request Employee Health Insurance	
49. Request One-Time Payment	
50. Request Post-Termination Compensation	
51. Set Up Allowance Plan Adjustment	
52. Set Up Commission Plan Adjustment	
53. Set Up Compensation Grade Job Profile Job	
54. Set Up Compensation Step Adjustment	
55. Set Up Hourly Plan Adjustment	
56. Set Up Leave Allowance Plan Adjustment	
57. Set Up Lump Sum Salary Plan Adjustment	
58. Service Worker	
59. Set Up One-Time Payment	
60. Add Additional Job	
61. Add Address Data	
62. Assign Health Organization	
63. Change Job	
64. Close Job Requisition	
65. Close Position	
66. Create Position	
67. Contract Contingent Worker	
68. Edit Headcount	
69. Edit Hiring Restrictions	
	70. Edit Hiring Restrictions

Agreed scope for Phase I of UChicago Workday Implementation

Human Capital Management Suite (HCM)

Human Resource Management	Benefits Administration
<p>Core HR</p> <p>HCM is designed to help administer University positions and appointments, hire staff, and maintain records.</p> <p>Hire Employees (Staff, Faculty, Other Academic Appointments, Internal Temp, Visiting Faculty, Academic Staff, Student Employee)</p> <ul style="list-style-type: none"> • Hire employee • Employment verification processing • Track faculty and staff data and tax withholding preferences • Offer letters • Maintain faculty and other academic appointments, reappointments and promotions • Student employees (PIV and non-PIV) • Contingent labor management • Manage affiliations (non-UChicago employee with supervisory responsibility or need to be on-site) <p>Administer University Positions and Appointments</p> <ul style="list-style-type: none"> • Establish and maintain organizations • Create, edit and close job requisitions • Create and close positions • Maintain job data • Essential operational reporting <p>Maintain Employee Records</p> <ul style="list-style-type: none"> • Add staffing changes and transfers • Add or update faculty appointments • Add or update other academic appointments • Process job/employment data changes • Process employee personal data changes • International assignments • Titles, classifications, certifications and training <p>Employee Separation</p> <ul style="list-style-type: none"> • Administer employee separations (voluntary, involuntary, separation due to death, reduction in workforce, mass data changes) 	<p>HCM helps administer and manage benefits plans offered at the University.</p> <ul style="list-style-type: none"> • Benefits core administration, events and eligibility • Provider integrations for benefits • Review and communicate benefit plan offerings and rates • Provide confirmation of elections to employees (new hires) • Provide employee benefit election data to provider • Self-service available in 2015 for benefits enrollment
	<p>Payroll Solutions</p> <p>HCM addresses a full range of payroll needs to assist in processing, audit, and reporting.</p> <ul style="list-style-type: none"> • Foreign national processing • Apply automatic tax updates • W2 and W2c self-service • Quarterly and annual tax filing integrations • Process expense and payroll payments • Schedule payroll operations • Calculate and process gross and net pay • General ledger integration • Produce and review payroll and audit reports • Process other deductions • Collect garnishments • Perform PE, GE, ME, and YE closing • Transmit data to service providers, federal and state entities • Process retroactive payroll adjustments, including corresponding accounting entries
	<p>Cross-Module Functionality</p> <p>Employee Self Service</p> <ul style="list-style-type: none"> • Perform personal data changes • Benefit election for new faculty and staff • View payroll advice • Onboarding (IS, affirmative action, direct deposit) <p>Historical Data Conversion & Archiving</p> <ul style="list-style-type: none"> • Convert essential historical data where practical and possible; when impractical or impossible, archive essential historical data <p>Reporting</p> <ul style="list-style-type: none"> • Reports to support business processes • Limited set of essential operational reports • Query tool (super users only) <p>Integrations</p> <ul style="list-style-type: none"> • Integration for core systems • Essential integrations to systems <p>User Support</p> <ul style="list-style-type: none"> • Workday Service Center • Workday knowledge base and training • Deployment support

THE UNIVERSITY OF CHICAGO

Project Guiding Principles

“Why not Workday?”

Workday embodies leading industry practices in human resource and financial management and we want **to leverage these system-delivered leading practices**. We will implement business practices and procedures at UChicago as delivered by Workday, even when it means **changing our current business processes**, unless there are significant and compelling reasons to do otherwise. Our starting point must first be ‘Why not Workday?’ This may mean that some people’s jobs may change, that some work may shift from one office to another, or that the method of accomplishing certain actions may be different.

Design for the rule, not the exception

We will use **“native” Workday features and functions in all cases** unless there are significant and compelling reasons to do otherwise. Workday has substantial “configuration” capabilities that will allow us to tailor Workday to the University’s requirements in most cases. We **cannot “customize” Workday**, and we will avoid using third-party point solutions whenever possible.

System of record

The Workday system will be the **official, authoritative data source for employee information**. We know that certain other systems at UChicago also contain information about employees. If there is disagreement between systems, the **Workday information shall take precedence**. Ideally, procedures should be established so that new and updated employee data are entered first into Workday and subsequently provided to other systems via download or other data exchange process. Where this is not possible, owners of secondary systems are responsible for validating that data in their systems matches the corresponding Workday data.

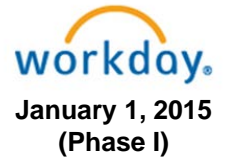
Inclusion and consensus

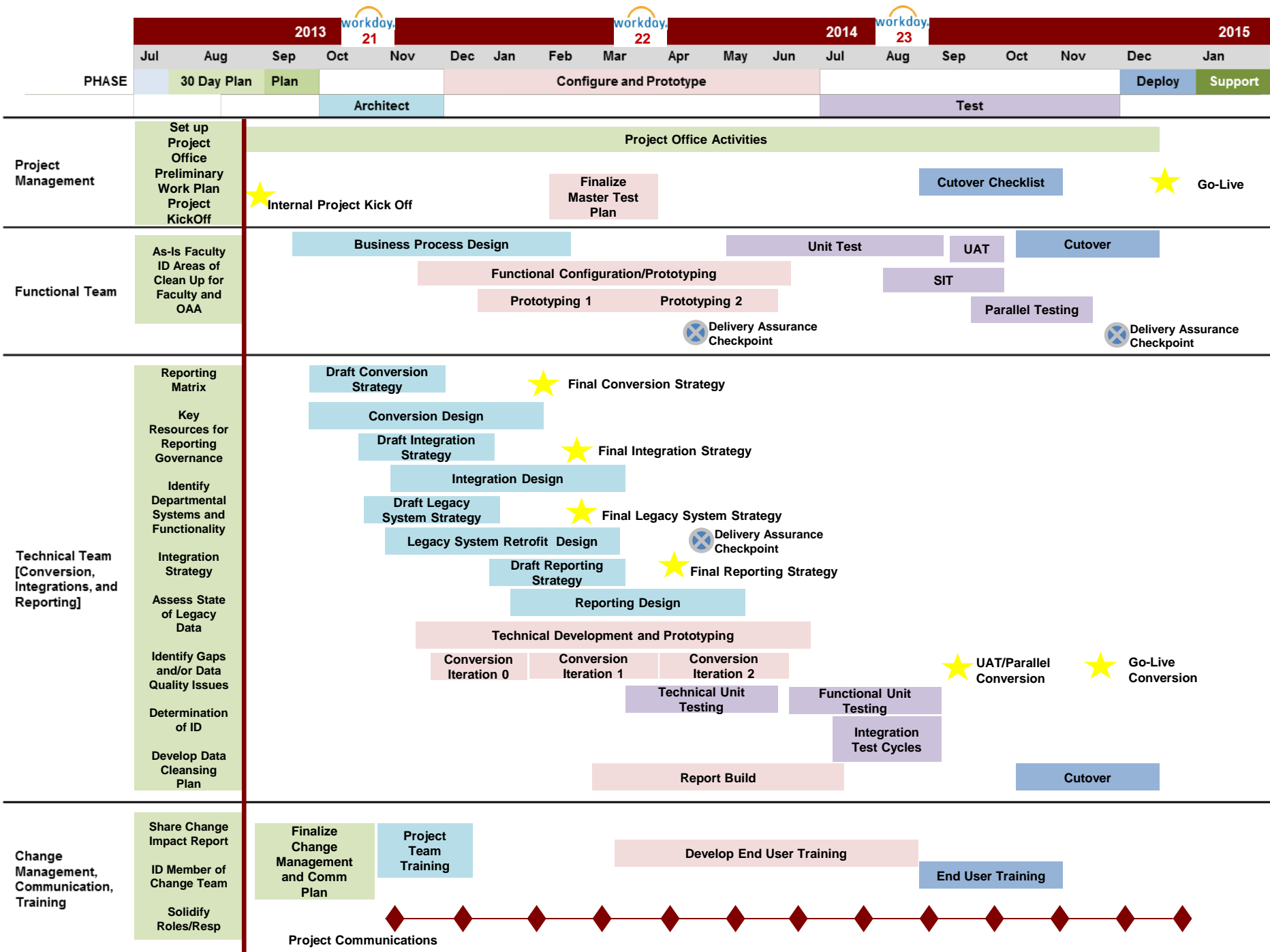
We are committed to making information about the project available to the UChicago community via **open lines of communication and dialogue**, including a project website and periodic stakeholder updates. We invite members of the community to make suggestions about the project, share their ideas, and also share their concerns. We take the needs of stakeholders seriously, and we will consider all suggestions and comments. However, we cannot promise—and there should be no expectation—that every suggestion or comment will be acted upon or adopted.

Keep an open mind to change

For UChicago, implementing Workday is more than just new technology. It will **radically transform the way we manage end-to-end employee and faculty processes today**, and may require changes to not only to technology, but also to mindsets and behaviors. We will take the necessary time to understand the current state and stakeholder concerns in order to **develop a best-fit change approach** that is tailored to our unique user community.

Deployment Approach & Timelines





Questions, comments or concerns?

Please contact projectworkday@uchicago.edu for more information.

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