

## **Elevate Program Update**

## Senate

February 7 2023

#### **Jack Blanchard**

Associate Provost for Enterprise Resource Planning





## Agenda :

- 1. Overview of Elevate
- 2. Timeline and progress
- 3. Go/No-Go decision
- 4. Training
- 5. Support
- 6. Student System





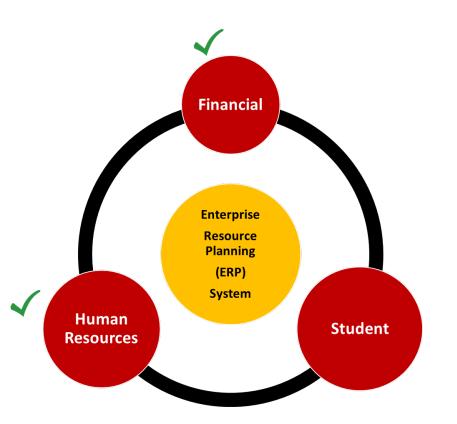
## **Overview**





## Purpose of Elevate

To modernize our obsolete ERP system to better meet the complex needs of a flagship research university.



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## **Elevating our ERP to the cloud with Workday.**

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#### Ensuring Workday will work for Maryland.

Over 360 staff with direct input to Elevate:

- Project Implementation Teams (PIT Crews)
- From across campuses (UMCP, UMES, UMCES, UMSO)
- Representing diverse perspectives from Divisions, Colleges, Institutes, Centers and Departments.
- Contributing *thousands of hours* of time to confirm configuration decisions, provide critical input, and communicate with their home units.

#### Faculty Advisory Committee

- Twenty faculty from T/TT and PTK.
- Represents diverse roles including instructional, research, Chairs and Directors.

## Thank You!



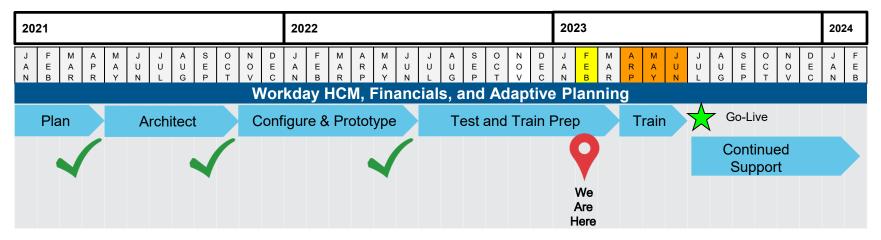


## **Progress & Next Steps**





## Elevate Program Timeline - Phase I HCM and FIN







## Go/No -Go Decision





## What goes into a Go/No-Go Assessment?

- Critical evaluation of key technical metrics (e.g., payroll testing with CPB), readiness of business units, and plans for cutover (from PHR/KFS to Workday).
- Go/No-Go Checklist covers eight categories and 278 items:
  - 1. Workday Readiness Functional Areas and Systems
  - 2. Process and Change Management Readiness
  - 3. Technical System Readiness
  - 4. Testing
  - 5. UMD Division and Tenant Partner Preparedness
  - 6. Service Team Preparedness
  - 7. Operational/Process Readiness
  - 8. Cutover









## **Go/No-Go Decision**

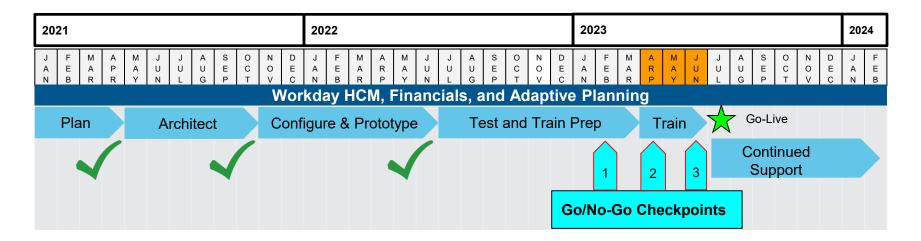
- First key assessment in mid-February
  - Based on metrics, Elevate Program team  $\rightarrow$  ESC  $\rightarrow$  Sponsors
    - $\rightarrow$  President Pines
- Impact of Decision what would happen next?
  - **GO**: Proceed as planned! Next check point in April.
  - NO-GO: Would mean not able to go live July. Elevate team and leadership would re-evaluate and determine new go-live date.







### Elevate Program Timeline - Phase I







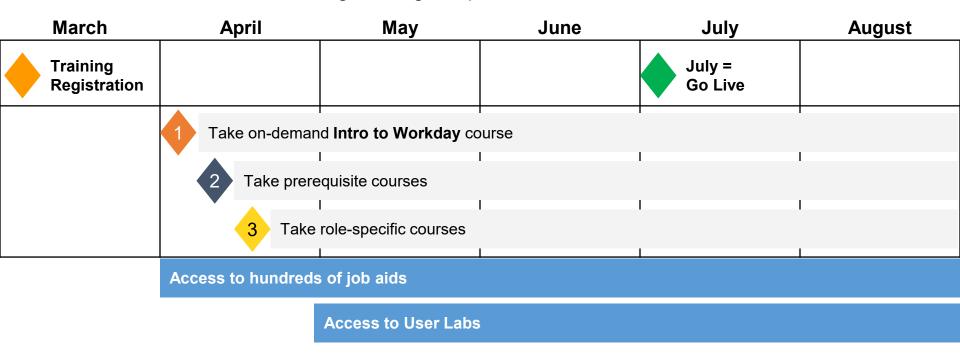
## Training





## **Timing of Training**

Users will be able to take training starting in April.





### How will staff and faculty be trained?







On-Demand Computer-Based Training Instructor-Led Training (Zoom) User Labs (Zoom)





## Average Time for Training (est.)

Amount of training will differ by user.

	General User	HCM User	Finance User
General Course	~45 minutes	~45 minutes	~45 minutes
Prerequisites Courses	N/A	~2.25 hours	~1.5 hours
Role-Specific Curriculum (includes both required and optional courses)	N/A	Average: ~3 hours Shortest: ~1 hour Longest: ~10 hours	Average: ~3 hours Shortest: ~1 hour Longest: ~10.5 hours
	<b>Average = 45 mins</b> minutes + Job Aids	Average = 6 hours	Average = 5.25 hours



## Job aids will complement training

- Job aids are simple, clear instructions on how to do a task.
- The most up-to-date job aids will be available anytime, in one repository, for all users.
- Over 400 job aids will be available.

#### ELEVATE

#### Add or Change Emergency Contacts

This job aid instructs users to add or change emergency contacts in Workday.

Initiator: All Workday users can add/change emergency contacts.

Approver: Approval is not required.

#### Add or Change an Emergency Contacts

To add or change emergency contacts, log in to Workday and complete the following steps:

- 1. Click Profile.
- 2. Click View Profile.
- 3. Click Actions.
- 4. Hover over Personal Data.
- 5. Click Change Emergency Contacts.

Note: You can also search and select the Change Emergency Contacts task from the Workday search bar.

On Change Emergency Contacts page:

- Complete information under Primary Emergency Contact, including Legal Name, Relationship, Preferred Language, Primary Address, Primary Phone and/or Primary Email.
- 7. Optional: Complete information under Alternate Emergency Contacts to add an additional contact(s).
- 8. Click Submit.

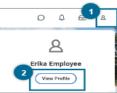
#### Next Steps

You have successfully added/changed your emergency contact information. You can view worker history changes by clicking Actions from your profile, hovering over Worker History, and selecting View Worker History.

#### Sample Job Aid

ELEV







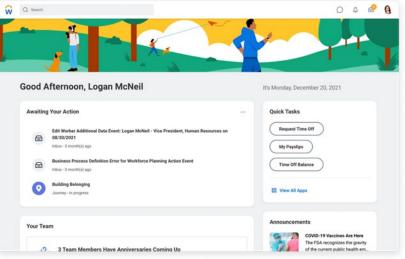
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#### Early Piloting with campus PIT Crews

- Key stakeholders eager for "hands on keyboard" experience with the Workday system.
- Providing early access to Workday readiness tenant to explore and familiarize .
- Pilot training modules to get early exposure to training and provide feedback.









## **Post Go - Live Support**





#### Support for New Users is Critical.

- Prior experience with implementing new technology confirms that easy access to helpful support is essential
- Must ensure ability to address all user needs long -term .
- Also need to accommodate increased user requests during initial months .









## Levels of Support for Workday

- 1. New Workday Services Team
  - 32 new staff positions in DIT Dedicated exclusively to Workday support.
  - In place prior to go-live (20 hired to date)
- 2. Hypercare
  - To assist during stabilization phase additional Huron resources to be available for 6 months post-go-live (July – December).



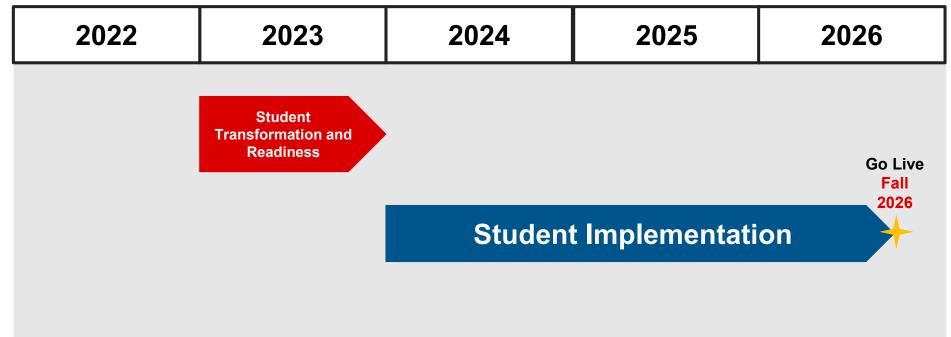


## **Workday Student System**





## **Getting Ready for Workday Student**







## Phase II: Student Transformation and Readiness

- Student-Centered
  - a. Students as key stakeholders.

#### • Initiating early work:

- a. Work began in January and will continue through end of 2023.
- b. Initial meetings held with GSG and SGA.
- C. Will engage every college's Student Advisory Council.
- d. Scheduling with Administrators and Staff involved with undergraduate and graduate programs.









## Phase II: Student Transformation and Readiness

- Individual and small group discussion underway . . .
  - **a.** Assessing pain points in current Student Information System.
  - **b.** What do students and other stakeholders want in the new Workday system?
- Assessing current academic processes and policies to understand implications for new Workday system.
- Develop communication strategy for continuous engagement of students and other stakeholders throughout project lifespan (2024 – 2026)
- Results ready by end of calendar year and used to inform the start of the Student Implementation for January 2024.









## **Stay Informed**





### Next Elevate Update

All -campus Zoom Town Hall Meeting (two options – also recorded)

- Wednesday February 22
- Thursday February 23

Town Hall Meeting

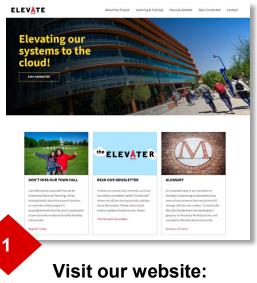
Agenda to include:

- Go/No-Go decision outcome
- Training and readiness
- July transition specifics

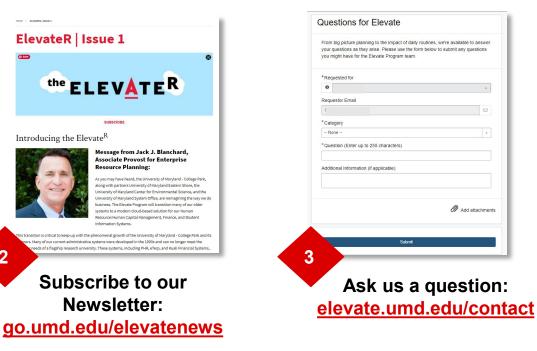




#### **Stay Connected with Elevate**



elevate.umd.edu



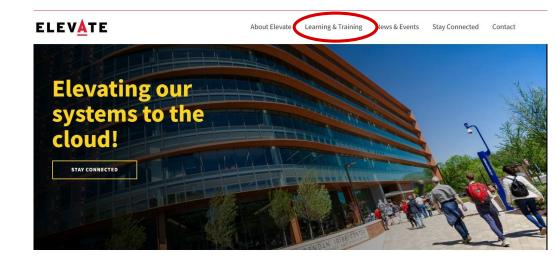


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**Browse Elevate website for** videos, newsletters, FAQs, glossary, other material: elevate.umd.edu





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#### shots

#### **Glossary Terms** Featured Glossary Terms **Employee Self Service** The ability for an Employee as Self or Contingent Worker as Self to initiate a transaction on their own. This includes: + tasks and business processes that you can initiate in Workday, such as managing your personal and contact information · access to your own information, such as your job title, manager, compensation, and personal data Worker Profile A quick view of each individual Worker's demographic, job, and organization information. Worker data is viewable in the different tabs of the Worker profile, and view/edit access to this data depends on one's security role access.

VISIT OUR GLOSSARY



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# Question & Answer

