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Elevate Program Update

Senate

February 7 2023

Jack Blanchard
Associate Provost for Enterprise Resource Planning

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Agenda :

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

Overview

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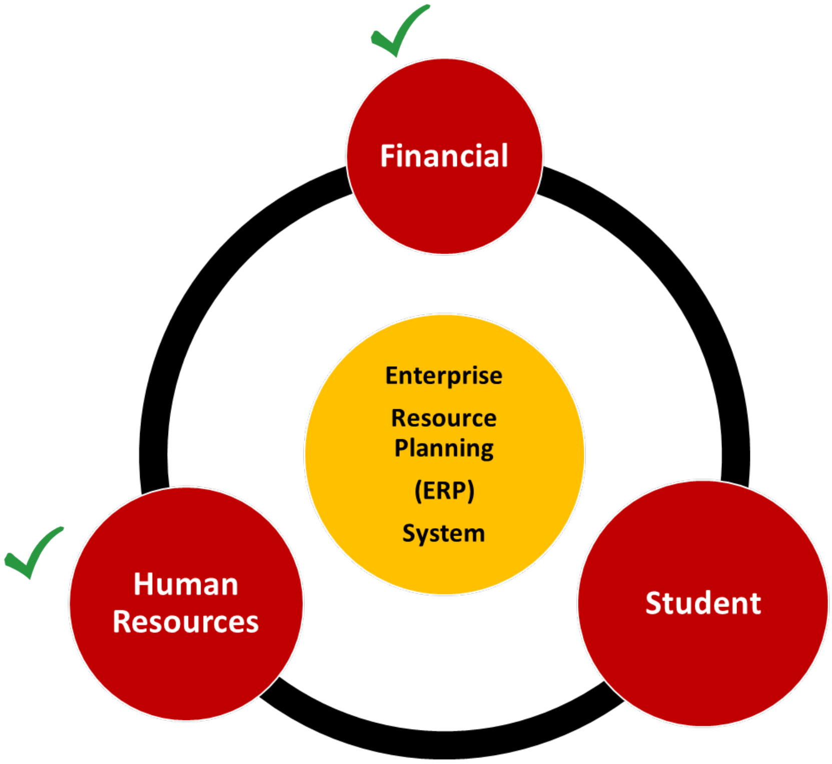
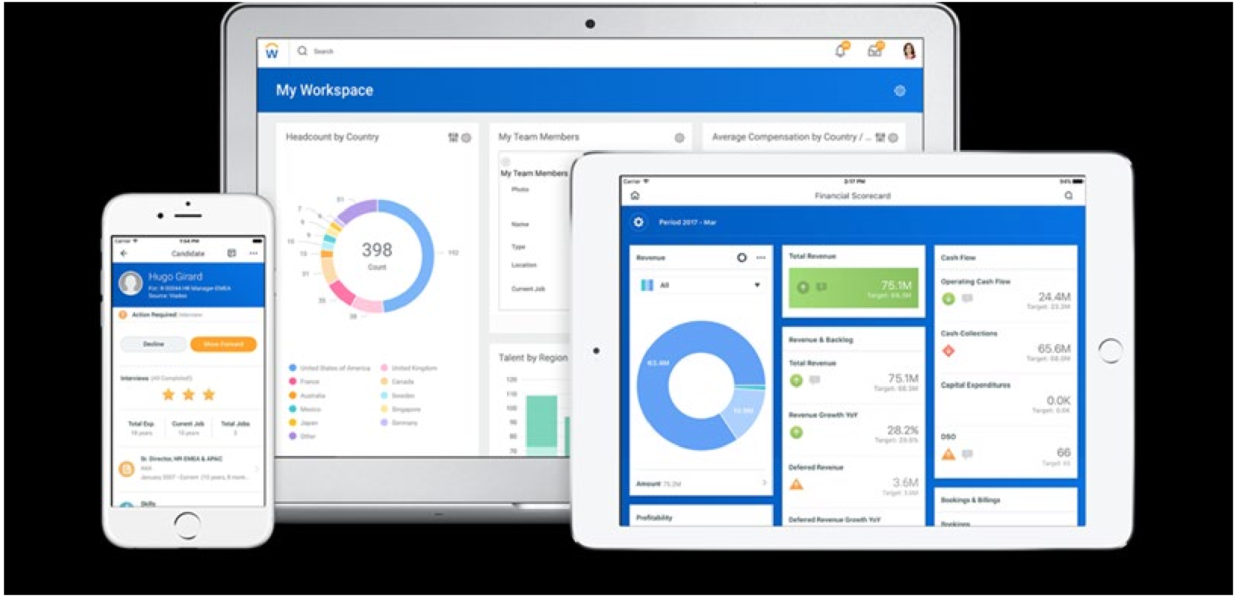
Purpose of Elevate

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



Elevating our ERP to the cloud with Workday.



workday.

Built for the future.™

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

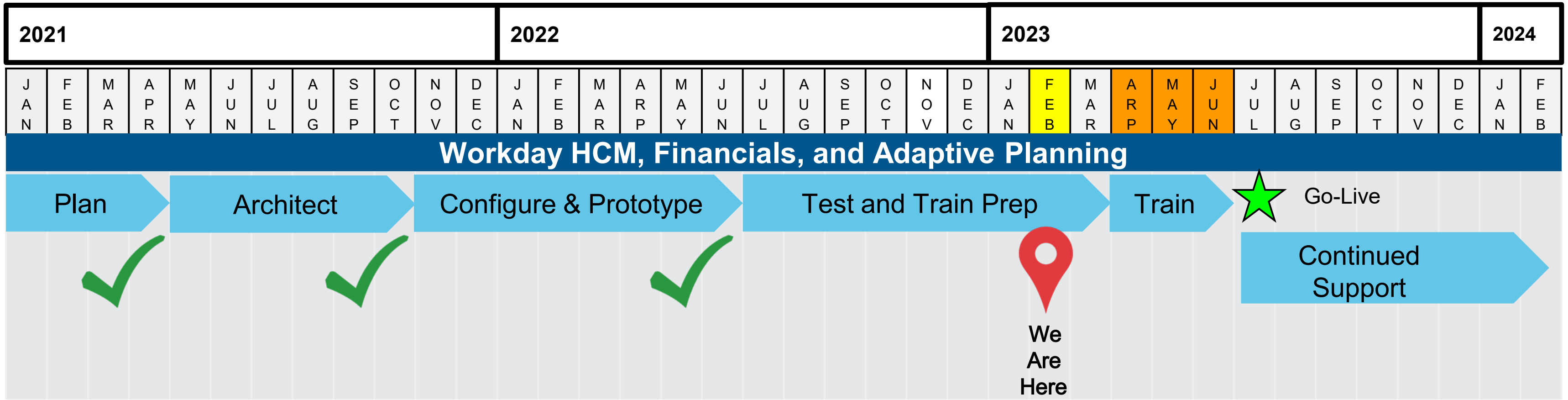
- Twenty faculty from T/TT and PTK.
- Represents diverse roles including instructional, research, Chairs and Directors.

Thank You!

Progress & Next Steps

Elevate Program Timeline - Phase I

HCM and FIN



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Go/No -Go Decision

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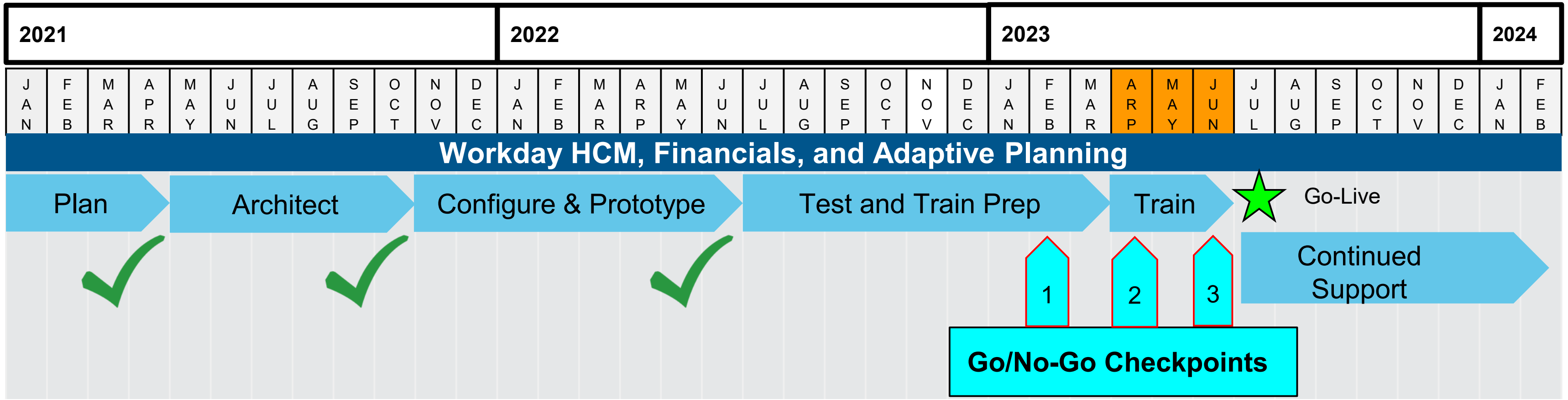
What goes into a Go/No-Go Assessment?

- **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 → ESC → Sponsors → 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

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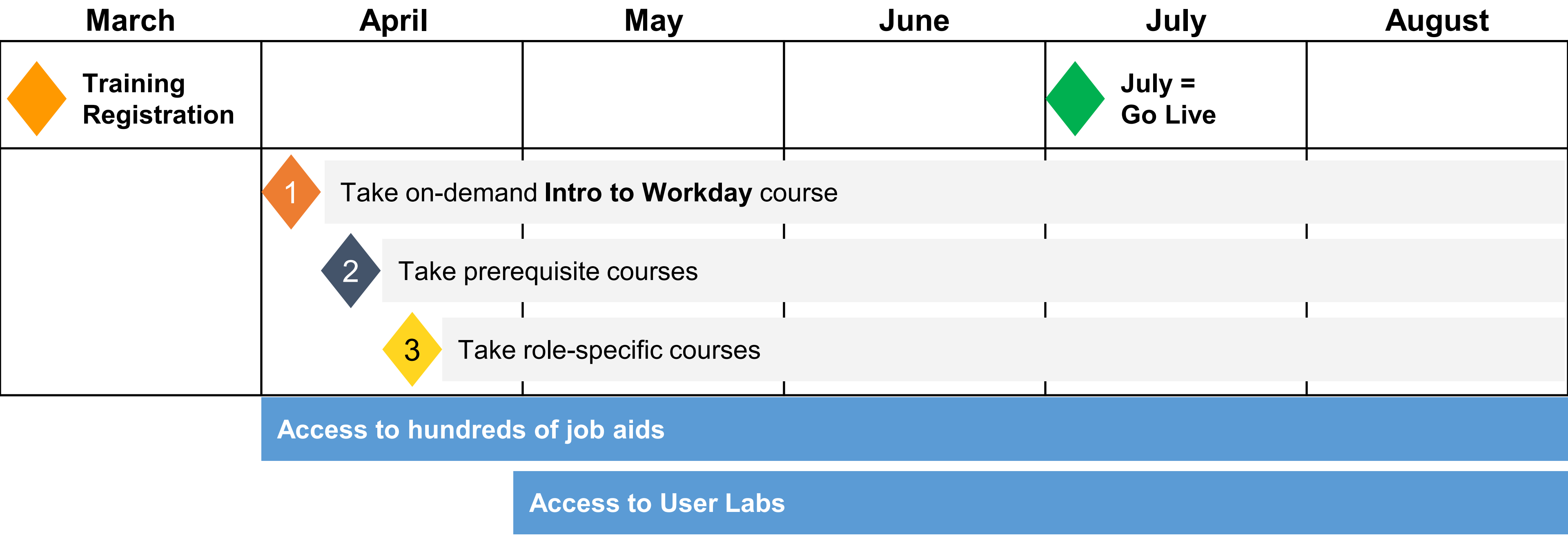
Timing of Training

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
	Average = 45 mins minutes + Job Aids	**Average = 6 hours**	**Average = 5.25 hours**

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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.

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Add or Change Emergency Contacts

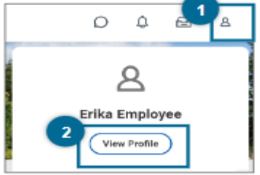
This job aid instructs users to add or change emergency contacts in Workday.

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

Approver: Approval is not required.

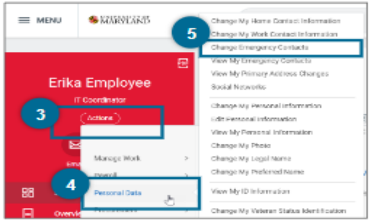
Add or Change an Emergency Contacts

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



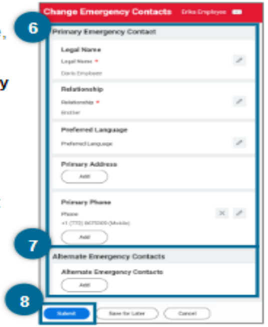
1. Click **Profile**.
2. Click **View Profile**.
3. Click **Actions**.
4. Hover over **Personal Data**.
5. Click **Change Emergency Contacts**.

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



On Change Emergency Contacts page:

6. 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**.



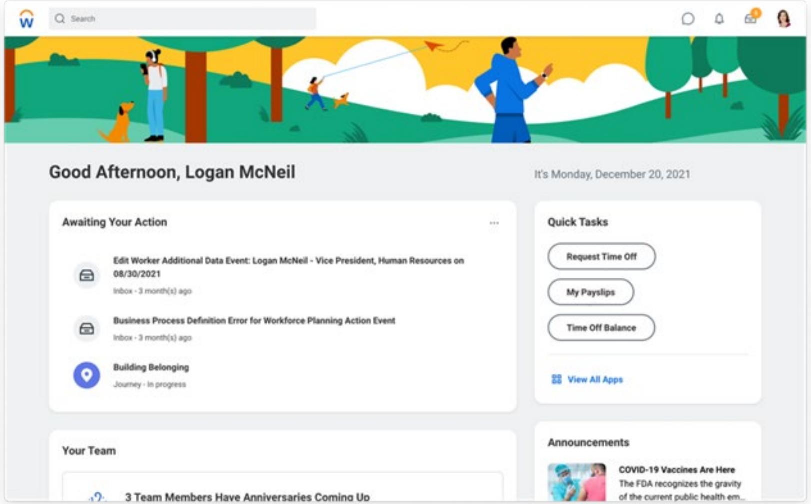
Next Steps

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

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

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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).

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Workday Student System

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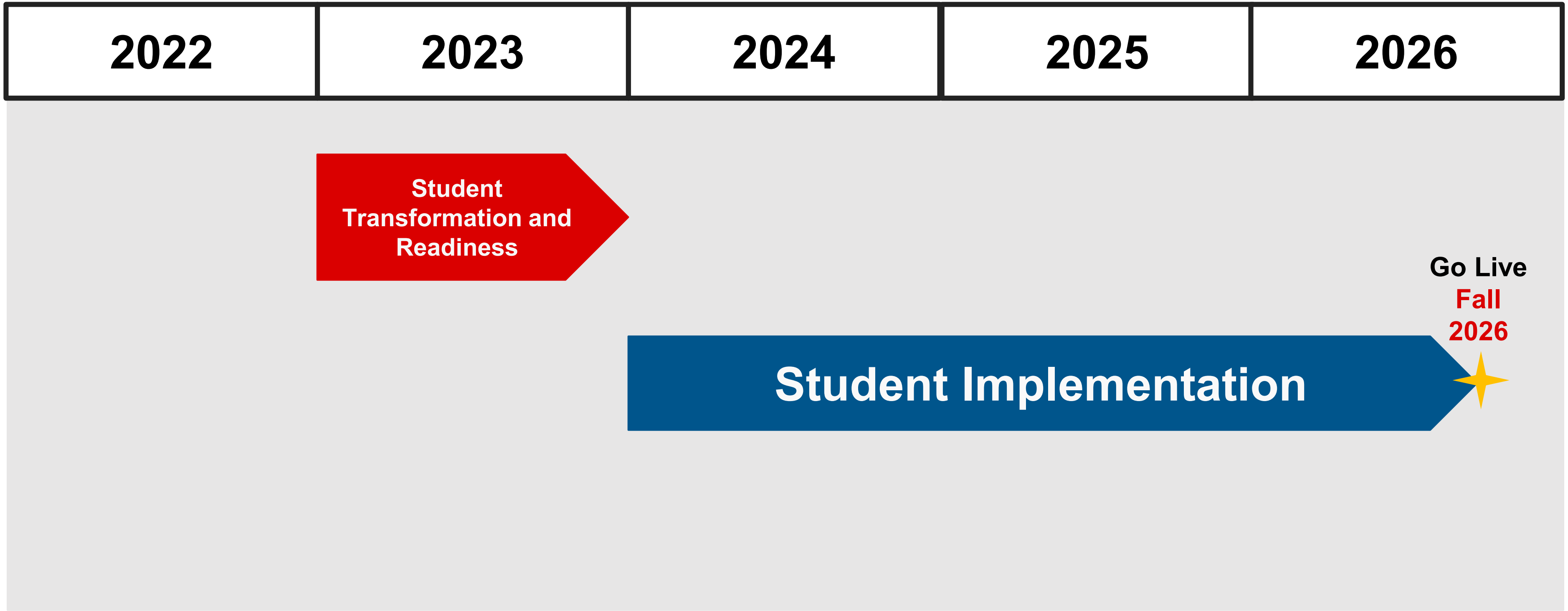
Getting Ready for Workday Student



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.

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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**

Agenda to include:

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

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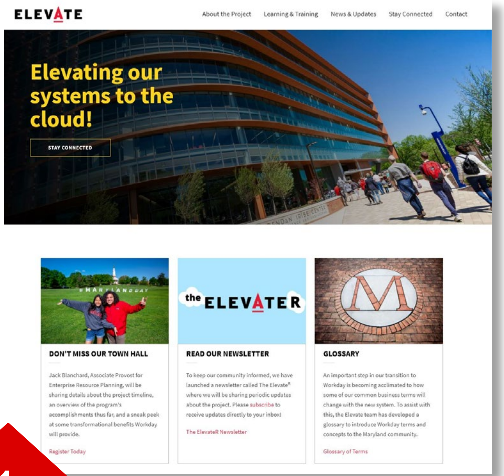
Stay Connected with Elevate



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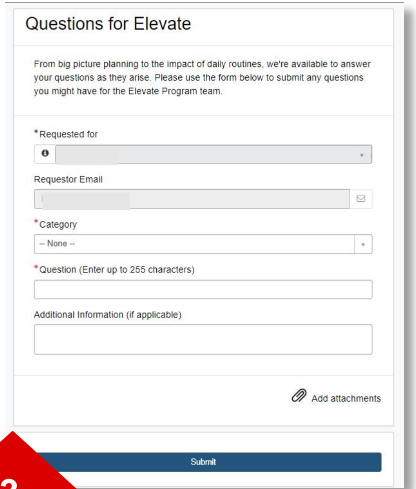

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Ask us a question:
elevate.umd.edu/contact

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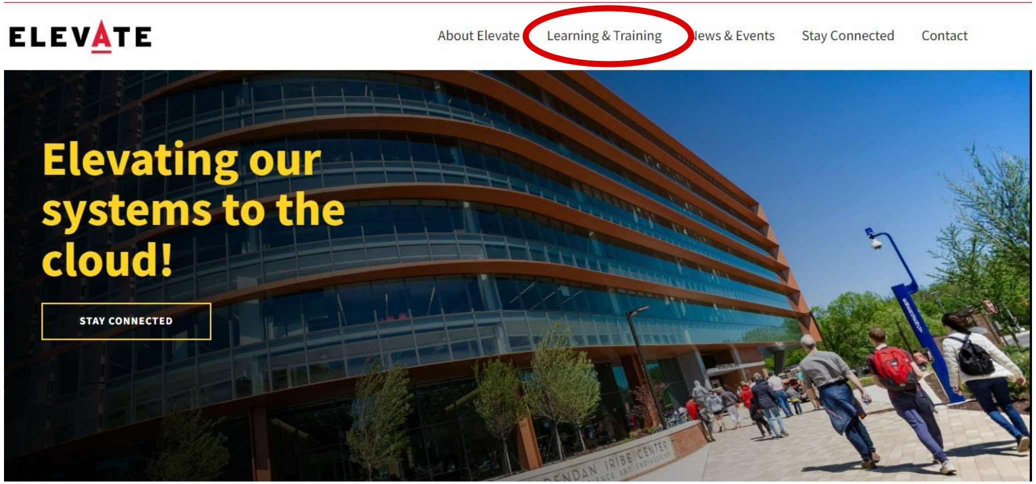
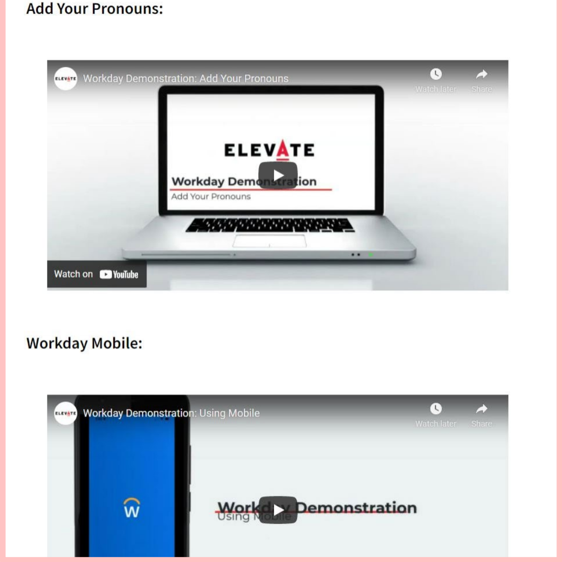
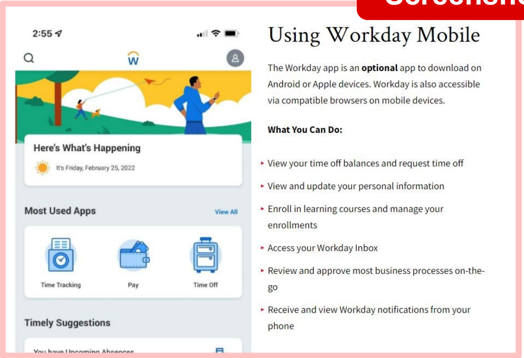
Browse Elevate website for videos, newsletters, FAQs, glossary, other material: elevate.umd.edu



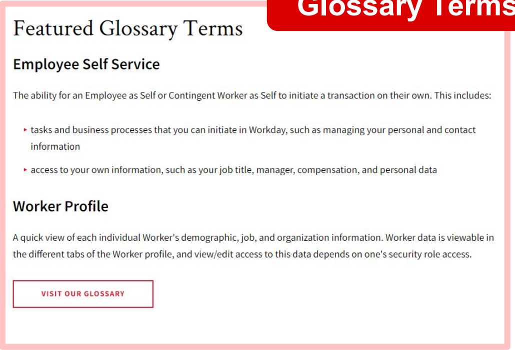
Demonstrations



Screenshots



Glossary Terms



McKeldin Mall - University of Maryland - College Park

Question & Answer

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