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<b>SUBJECT</b>	INTEGRATED RENEWAL PROGRAM (IRP) - INTEGRATED SERVICE CENTRE UPDATE
<b>SUBMITTED TO</b>	FINANCE COMMITTEE
<b>MEETING DATE</b>	April 7, 2021
<b>SESSION CLASSIFICATION</b>	Recommended session criteria from Board Meetings Policy: OPEN
<b>REQUEST</b>	For information only - No action requested
<b>LEAD EXECUTIVE</b>	Peter Smailes, Vice-President Finance & Operations
<b>SUPPORTED BY</b>	Marcia Buchholz, Vice-President Human Resources Lesley Cormack, Deputy Vice Chancellor and Principal Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver Ananya Mukherjee Reed, Provost and Vice-President Academic, UBC Okanagan Jennifer Burns, Chief Information Officer & AVP Information Technology Kate Ross, Associate Vice-President Enrolment Services and Registrar Rob Einarson, Associate Vice-President Finance & Operations, UBC Okanagan Elana Mignosa, Associate Vice-President Finance & Operational Excellence Ian Cavers, Associate Dean, Computer Science Karamjeet Heer, Comptroller Alex Bayne, Managing Director, Strategic Workplace Initiatives, Learning and Engagement Harjot Guram, Senior Director, Integrated Service Centre

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#### PRIOR SUBMISSIONS

The subject matter of this submission has been considered by the Finance Committee on many occasions. The following represents the most recent: [February 2021](#)

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#### EXECUTIVE SUMMARY

The implementation of Workday Release 1 continues to proceed with issues being addressed as they arise. There have been issues encountered, but overall, the teams have been able to respond to critical items as necessary. The initial volume of service requests improved in January and February but has increased as a result of staff focusing on fiscal year-end priorities and the first post go-live Workday release. The hyper-care period concluded at the end of January and the ISC has moved into the stabilization phase. In order to assist with a backlog in the ISC and ensure a successful transition, additional resources were added to the ISC to ensure adequate coverage for the community.

The Integrated Service Centre successfully completed a significant milestone with the implementation of Workday 2021 Release 1 over the March 13-14 weekend.

This is the first release since the November HR/Finance go-live and the first of two yearly Workday delivered releases that will happen each March and September. These twice-yearly Workday releases are product driven, with timing set by Workday. In addition, each release includes both mandatory and optional items from which UBC can choose.

For this March release, UBC only adopted mandatory features that required immediate uptake to maintain the system and support stabilization of our production tenant and data. In preparation for the March 13 release, the ISC performed impact assessments of these mandatory features following a risk-based approach and partnered with the Integrated Enablement Centre (IEC) to determine there were no expected impacts to integrations or applications.

This release included many back-end items that will not be noticeable to end users. Impact assessments done by the ISC identified three changes that some end users will notice and these have been detailed on the ISC website. Along with the new web page, training and knowledge base articles have been updated and changes have been socialized through HR and Finance communication partner channels.

Despite increasing the number of temporary staff in the ISC, high volumes of calls and tickets into the ISC continues to be a risk. Although call volumes have started to trend downwards, the volume of call/tickets continues to exceed ISC teams overall capacity. In addition, employee turnover and burnout continue to put pressure on the ISC. Many members of the ISC have come from IRP and therefore have had extreme demands for an extended period of time and is not sustainable in the long term.

Mitigation work is underway to address these issues. ISC teams are triaging work based on severity of tickets and are focused on critical operational and time-sensitive tasks. The ISC leadership team is monitoring workloads closely and adjusting wherever possible, added temporary resources in an effort to increase capacity to provide a temporary relief. A review of staffing needs is underway with the expectation that additional full time employees will be added to the ISC.

While the hyper-care period has ended, there are still outstanding activities underway to finalize the HR/Finance IRP implementation.

- There remains considerable risk due to: data conversion delays; key financial year end reports that are still being worked on; and a full dry run of Financial Year Reports in Workday has not yet been run to this point. KPMG has been engaged to support the completion of this work. The remaining work has been prioritized and the ISC and operational financial teams are working diligently to ensure that Fiscal YE Reporting and related process are completed accurately and on time.
- Hyper care for Tuition Waiver continues with a focus on closing remaining tickets as we move towards stabilization and the transition to operations; work is underway with Deloitte to address the tuition waiver issues.
- All AEP application cutover activities are complete.
- AEP teams are currently getting sign off on the transition of applications to business as usual operations. Application sign off is at 54% with the remaining sign off expected by the end of March 2021.
- Work is also underway to address outstanding defects and is scheduled to be completed by the end of March 2021.
- Application retirement activities are as well underway. Governance is established and a long-term approach to ownership of the process will be finalized by the end of February 2021.

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## PRESENTATION

1. IRP Integrated Service Centre Update





# **Integrated Renewal Program (IRP) Integrated Service Centre Update**

**Peter Smailes, Vice-President Finance & Operations**

**Marcia Buchholz, Vice-President Human Resources**

**Harjot Guram, Senior Director, Integrated Service Centre**

Finance Committee - April 6, 2021



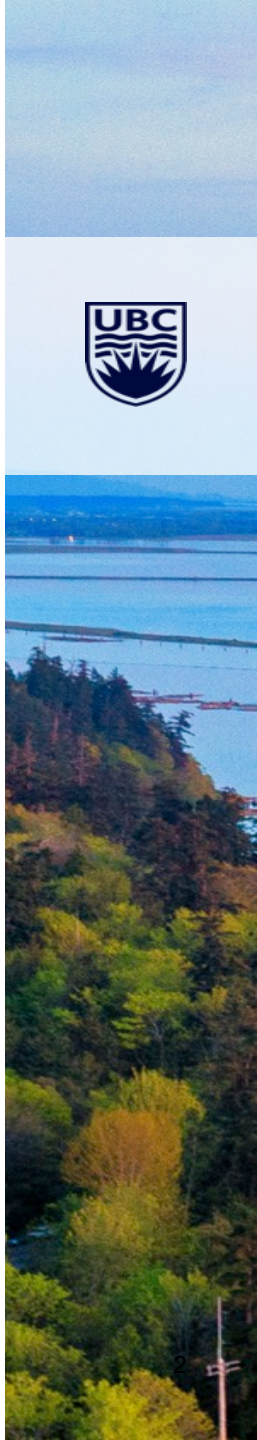


## ISC OVERVIEW

The first months of implementation have been challenging but with significant accomplishments including:

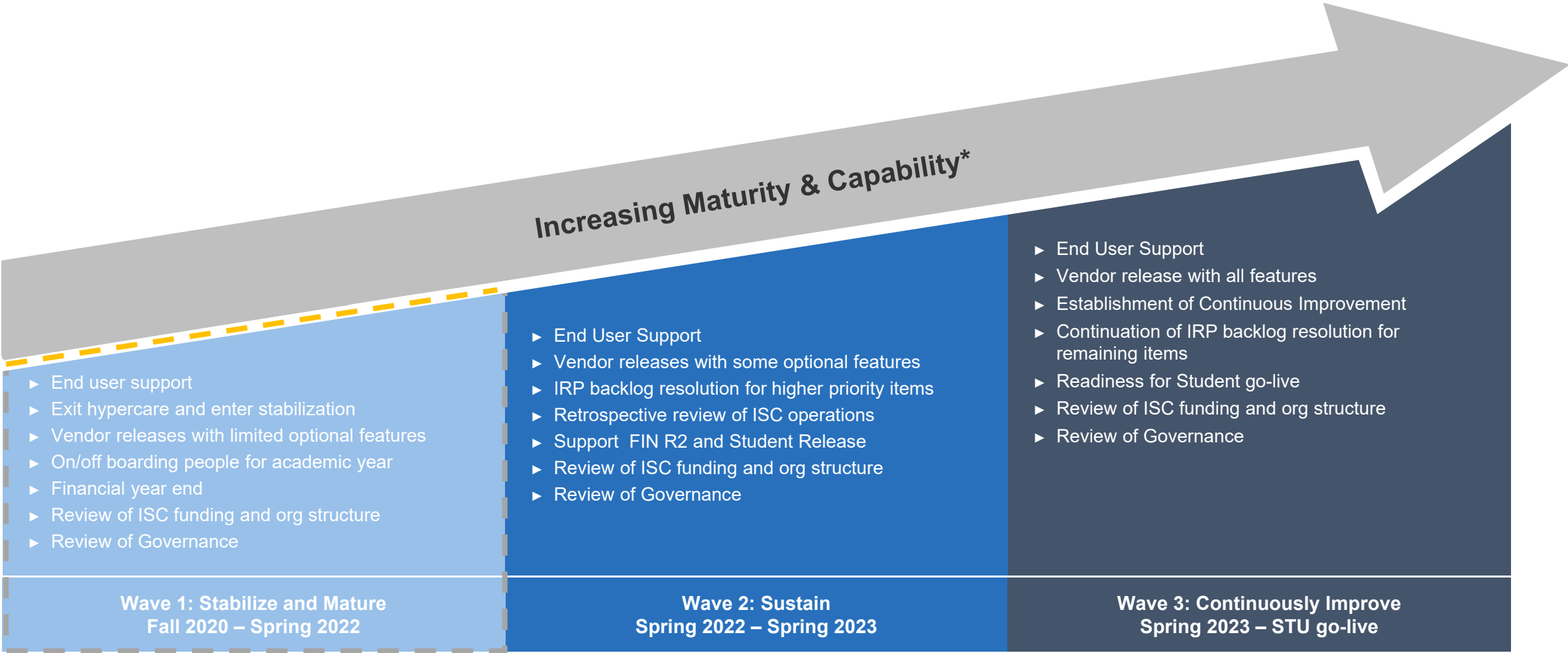
- Successful processing of 8 payrolls
- Resolution of over 15,000 Service Now tickets and 5,000+ phone calls for Workday support
- Processing of over 15,000 expense reports in December 2020
- Strong user adoption of the ISC Knowledge Base with 140,000+ views of Workday self-service materials
- On time delivery of Payroll T4/T4As and Accounts payable T4As and T5s
- Continued onsite operations of the ISC Service Desk team
- Adjusted team structure/capacity during Hypercare by additional temporary resources and extension of Workday consultants to support remaining critical post go live work.
- Successfully exited Hypercare and have entered Stabilization.
- Successfully completed the first of two yearly Workday delivered releases

Accomplishments made more significant as ISC also continues to learn a new system, create new processes and change how we all work together.



# ISC Service Delivery Roadmap

The ISC has exited Hypercare and has now entered a period of stabilization. This period, is expected to last for at least 12 months while we move through a full fiscal year of cyclical activities.

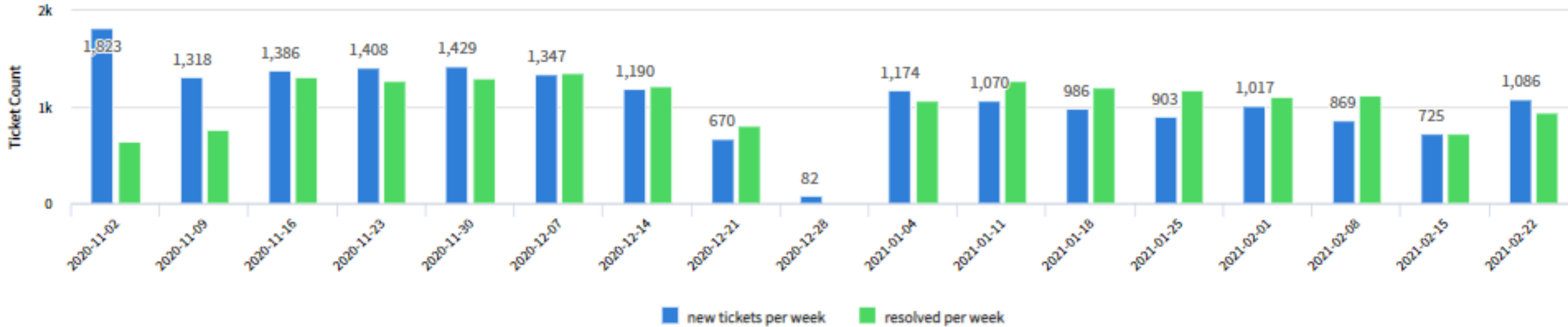


Upcoming focus (post hypercare)

\*Increasing capability will be contingent on incremental resources and funding

- **POST GO-LIVE TICKETS TRENDS AS OF FEB 26, 2021**

Weekly Trends - Tickets Created and Resolved- Column



Total # of Tickets Received = 18,400

Total # of Tickets Resolved = 15,700

Resolution rate of 85%

# RISKS

**1. Financial Year End** - UBC will be completing its first Financial Year End with Workday in March of 2021. There remains considerable risk due to: data conversion delays; key Financial YE reports that are still being worked on; and that a full dry run of Financial Year Reports in Workday has not yet been run to this point.

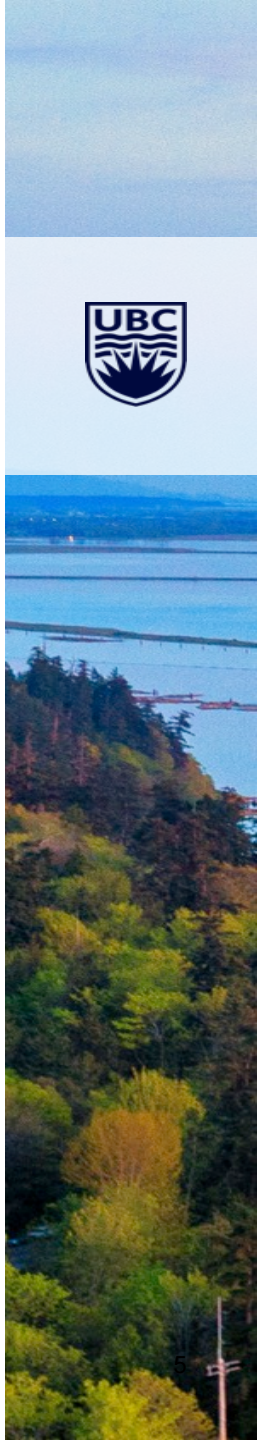
*Mitigation - KPMG has been engaged to support the completion of this work. The remaining work has been prioritized and the ISC and operational financial teams are working diligently to ensure that Fiscal YE Reporting and related process are completed accurately and on time.*

**2. High Volume of Call/ Tickets into the ISC** – although call volumes have started to trend downwards, the volume of call/tickets continues to exceed the ISC team’s overall capacity.

*Mitigation - ISC teams are triaging work based on severity of tickets and are focused on critical operational and time sensitive tasks. A review of staffing needs is underway with the expectation that the additional, full time employees will be added to the ISC.*

**3. Employee Turnover/Burnout** – Many members of the ISC have come from IRP and therefore have had extreme demands for an extended period of time and is not sustainable in the long term.

*Mitigation – ISC leadership team is monitoring workloads closely and adjusting wherever possible, added temporary resources in in a effort to increase capacity which provided temporary relief. The addition of full time employees to the ISC will support employee retention and improve workload demands.*



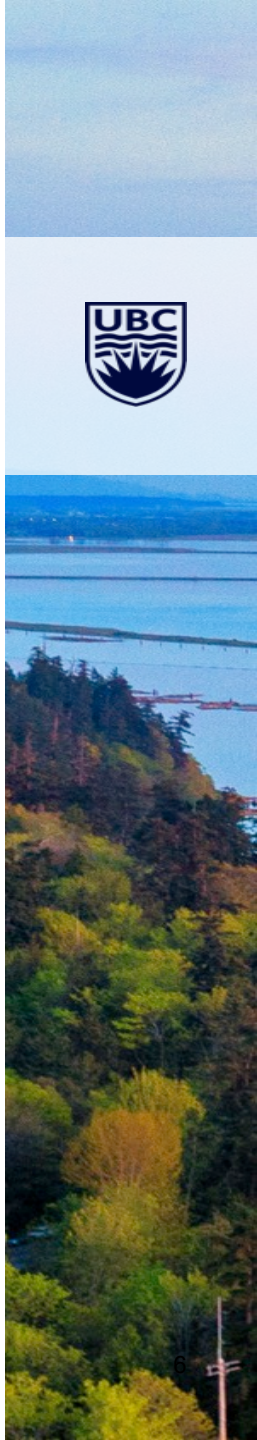
# RISKS

**4. Stakeholder expectations** - related to community desire to shift to Continuous Improvement/Change requests & System performance.

*Mitigation* - A general communication was sent to senior faculty/department leaders in January advising that we are entering a period of stabilization. A more specific communication with timelines is being developed that will be shared with broader community.

**5. Knowledge Transfer** – Workday to ISC and Cross training among internal ISC Resources. We currently have 1 in a box in many key positions and day to day workload requirements is slowing the knowledge transfer process among ISC staff

*Mitigation* – Developed formal knowledge transfer plans to ensure Workday to ISC knowledge transfer is completed prior to Workday consultants rolling off. An increase to permanent FTE will provide certainty of resourcing levels, which will enable cross training among our key positions.





Post go-live adoption is measured based on the identification and regular monitoring of overall engagement with Workday and assistance via the self-serve tools available through the Integrated Service Center.

## Initial Workday Usage YTD

	Category	Nov 23	Dec 15	Jan 19	Mar 1
Gen	Unique Faculty and Staff Logins	18,875	22,120	24,279	26,903
FIN	Approved Expense Reports	3,775	13,725	23,150	34,140
	Approved Supplier Invoices	5,350	8,751	18,000	37,675
	Supplier set up requests	913	1,440	2,360	3,780
HR	Request Time Off	14,424	21,636	29,744	49,604
	Hire	924	1,866	3,737	6,096
	Create Position	2,168	3,195	5,038	7,738
	Termination	256	1,528	3,158	3,728

## Self-Serve Resource Usage – Mar 1st

148,177 total views of the Workday knowledge base articles.

Most viewed articles:

- Workday this Week
- How do I create an out-of-pocket expense report?
- How do I create an Expense Report (Visa Reconciliation)?
- How do I enter my time (hourly staff)?
- How do I- View my Payslip?