



SUBJECT	Integrated Service Centre Update
SUBMITTED TO	Finance Committee
MEETING DATE	February 17, 2022
SESSION CLASSIFICATION	Recommended session criteria from Board Meetings Policy: OPEN
REQUEST	For input only - No action requested
LEAD EXECUTIVE	Peter Smailes, Vice-President Finance & Operations
SUPPORTED BY	Marcia Buchholz, Vice-President Human Resources Lesley Cormack, Deputy Vice-Chancellor and Principal, UBC Okanagan Jennifer Burns, Chief Information Officer & AVP Information Technology Rob Einarson, Associate Vice-President Finance & Operations, UBC Okanagan Elana Mignosa, Associate Vice-President Finance & Operational Excellence Karamjeet Heer, Comptroller Cam Gray, Executive Director, HR Operations Harjot Guram, Senior Director, Integrated Service Centre Laleh Mosadegh, Associate Director, Program Delivery, UBCIT

PRIOR SUBMISSIONS

The subject matter of this submission has been considered by the Finance Committee on many occasions, most recently in [December 2021](#).

EXECUTIVE SUMMARY

UBC has completed one full calendar year with Workday and reached the one-year anniversary of our initial go live of November 2020. The ISC service team continues to respond to critical items as they arise while supporting the broader community. As expected, the start of the academic year and return to campus activities resulted in a significant increase to incoming service requests. Volumes normalized by mid-October and the team has been able to reduce the overall back log of service requests during the past two months.

Preparation for the March 2022 Workday release has started. The next release will include an update to the user interface and home page of Workday. To ensure a successful transition for the UBC community which will also be focused on Fiscal YE at that time, initial testing and updates to existing knowledge base materials have begun. A broader communication/change plan is also being developed with partners across the community to support this change.

The ISC and IRP Student team continue to have regular meetings to plan and prepare for Workday Student module. It is expected that Implementation of Workday Student will require changes to both the HCM and Finance modules. Meeting frequency has increased in the fall to include business owners from HR and Finance to ensure all stakeholders are involved in the decision-making process. Next steps include identifying key resources in the ISC, Central HR and Central FIN that will be needed to support the implementation of Workday Student and where needed backfilling these resources to ensure day to day operational needs are met.

The completion of R1 Project has made significant progress on many time-sensitive items in both the HR and FIN streams. This includes completing 75% of outstanding HCM and FIN reports, with the remaining reports are on track for completion by March 31, 2022. The enhancements to the financial quarter and year-end close processes are well underway and

continues to be on track for completion in time to support the upcoming Fiscal YE. These streams of work are very closely aligned with the ISC to ensure the overall effectiveness of resources and to ensure that the integrity of the live Workday tenant is maintained by following the approved system change processes.

The first year of Workday has been a significant change for the UBC community and it has had considerable impact on the daily work and tasks performed by both the faculty/department administrators and central support units who support them. A key change has been moving from paper-based data entry of HR transactions to direct input into Workday. Prior to Workday, Faculty/Department administrators, along with UBC employees, would complete paper forms which were then submitted to central units for data entry. With Workday, this data is now directly entered into Workday eliminating the need to complete paper forms.

While this change created operational efficiency with the elimination of paper, it has also resulted in day-to-day challenges in how we manage onboarding, offboarding and changes to our employees.

These challenges include:

- exception processes in PeopleSoft, although very manual, were well known and documented over the prior 25 years. Some of these same exceptions are still being worked through and documented in Workday;
- central units, such as HR and Payroll, are no longer able to review complex pay impacting transactions before they are entered into the system which can result in pay errors;
- steep learning curve for department administrators, which has been further slowed by remote working conditions, as day to day knowledge sharing/transfer opportunities among colleagues has been limited;
- a broader skills gap by some employees who are used to paper based processes and do not have the technical, systems knowledge needed to navigate Workday and new related business processes;
- volume of retroactive transactions related to late entry of hiring and compensation changes and the system limitations to accommodate them.

In order to help mitigate the impact of these changes to Faculties and Departments, the ISC continues to provide the following support:

- community sessions to promote best practices in timely HR transactions;
- creation of Super User group and Community of Practice with membership from across the community to proactively identify challenges/issues wherever possible;
- Ad hoc training with Faculty/Departmental SME's to enable them to support their department or unit.

In the coming month the ISC will be engaging with Faculties and Departments to provide an update on known issues, and to further understand the challenges they are working through.

As we continue to move through stabilization and adapt to this new system, we expect the community's knowledge of Workday and the new processes to expand and grow. This should result in faster processing of administration processes and a reduction in the administrative burden currently being felt and communicated.

However, the system change has resulted in some incrementally new administrative processes which were not done in Peoplesoft. Two specific areas are the creation and processing of invoices in Research and Payroll Accounting Adjustments. In both of these circumstances, it is a Workday system limitation that is resulting in increased processing volumes. We have engaged Workday to address and are also exploring Robotic Process Automation (RPA) to limit this impact in the short term. As with all new systems, there are many changes which require a new way of doing our work, the expectation being that overtime, net efficiencies are gained.

Integrated Service Centre – Compensation History Example

BACKGROUND

The Integrated Service Centre (ISC) receives daily queries from the UBC Community. Some are answered immediately but others are more complicated and require coordinated efforts to address. One example is compensation history. Some members of the UBC Community have expressed concerns with the lack of compensation information available in Workday; there is a desire to have more clarity and understanding on the employee pay slip. It is resulting in frustration for employees and, more specifically, student workers who have multiple job (teaching assistants, academic service, graduate academic assistant, research assistant.) The ISC has investigated the issue and the pay amounts are accurate but the reporting and visibility on the payslip is an issue which is being reviewed for improvement.

ANALYSIS

There are several reasons as to why a payslip may not be clear:

1. When an employee has multiple components of pay (more than one position), earnings are grouped together;
2. Retroactive transactions with multiple positions; it becomes difficult for the employee to track which positions the retroactive pay was applied and if it is accurate;
3. Lack of understanding of the payslip, specifically, the applicability of statutory deductions to the various earning(s) they may have received.

Employees who have both a salaried position and an hourly position receive two payslips; one for each pay type. This, along with grouping of earnings together, was the same with Peoplesoft. This issue is surfacing now as part of the transition to Workday as employees are being encouraged to verify the accuracy of their pay.

Actions to Resolve the Issue

The Integrated Service team and Payroll Operations are working collaboratively to improve the pay information available to employees including:

- working with Workday and a Deloitte Consultant to review system configuration and investigate options for re-configuration of the pay slip to provide more clarity;
- investigating creating a separate report which can be accessed by employees to further breakdown components of their pay;
- working on a document to assist employees on understanding the components of the current pay slip;
- providing more information through Frequently Asked Questions (FAQ's) documents on payroll and benefits on the Finance payroll website;
- meeting with departments and facilities to identify solutions to reduce the volume of retroactive transactions.

Expected Timeline for Resolution

The creation of supporting documents and FAQs is well underway and expected to be published by mid February. Creating a customized payslip will require the engagement of Workday resources along with considerable analysis and testing. This change is targeted for an April 2022 completion, which is after the implementation of the next Workday Release and Fiscal YE.

APPENDICES

1. Integrated Service Centre (ISC) Staffing Levels and Support Statistics

Integrated Service Centre (ISC) Support Services

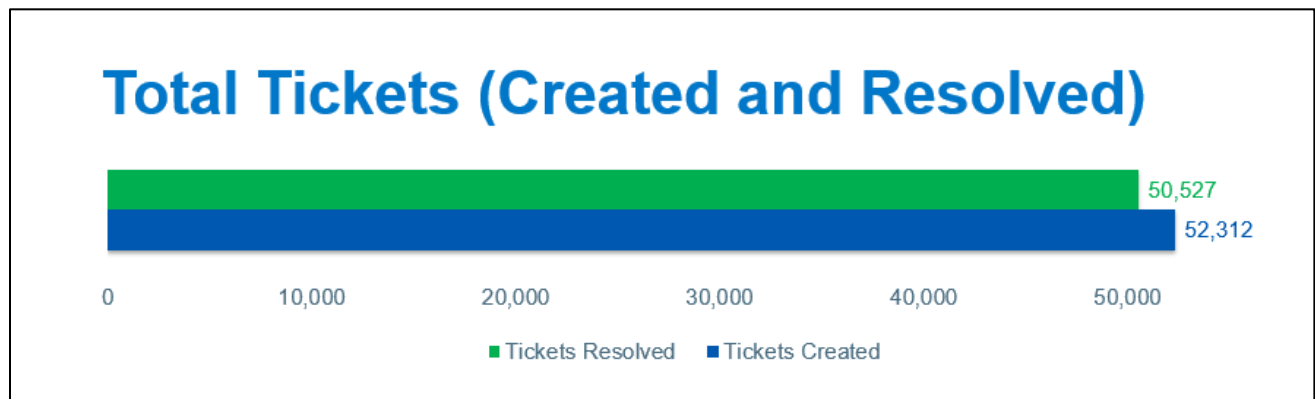
ISC STAFFING LEVELS

Total: 71 FTE Employees

Area	Number of Employees
Senior Leadership	1
Product Management	30
Application Sustainment	18
ISC Service Desk	17
Change and Communications	5
Total	71

ISC SUPPORT STATISTICS

Chart 1: Total Tickets Created and Resolved*



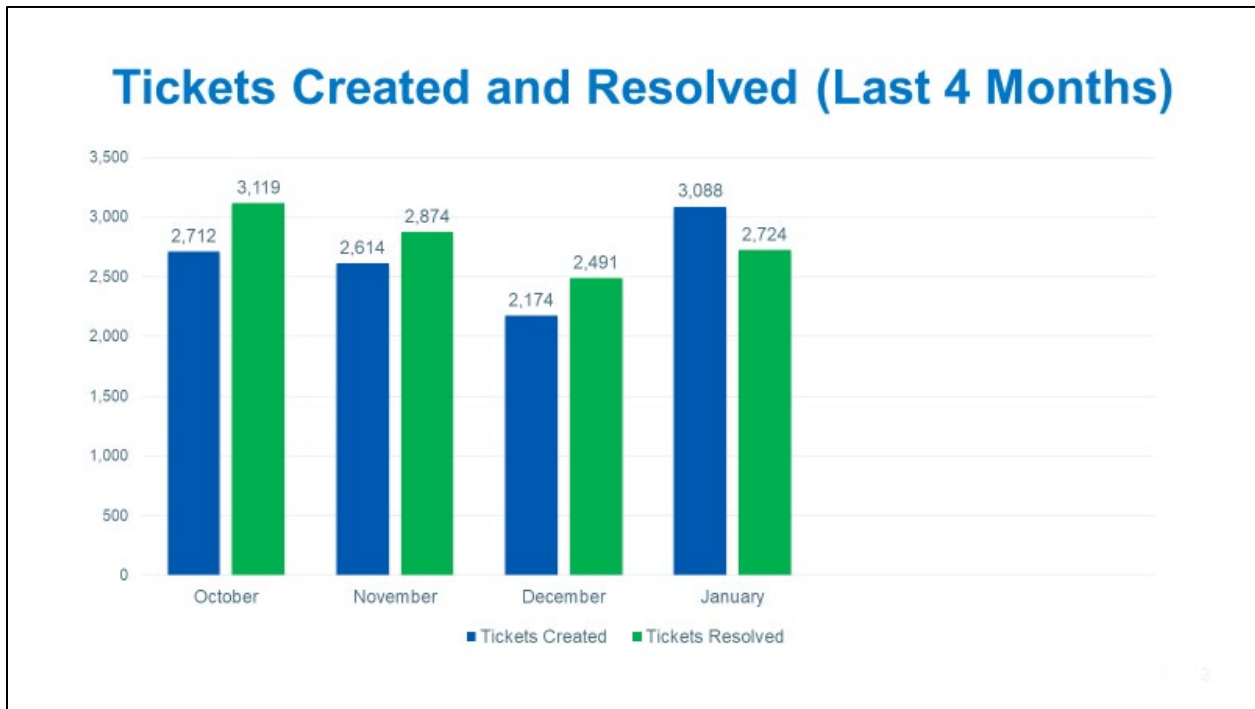
*As of January 26, 2022

Key Figures

- 52,312: Number of Workday support tickets *received* by the ISC since Go-live (November 2020)
- 50,527: Number of Workday support tickets *resolved* by the ISC since Go-live (November 2020)
- 97%: Overall Resolution Rate

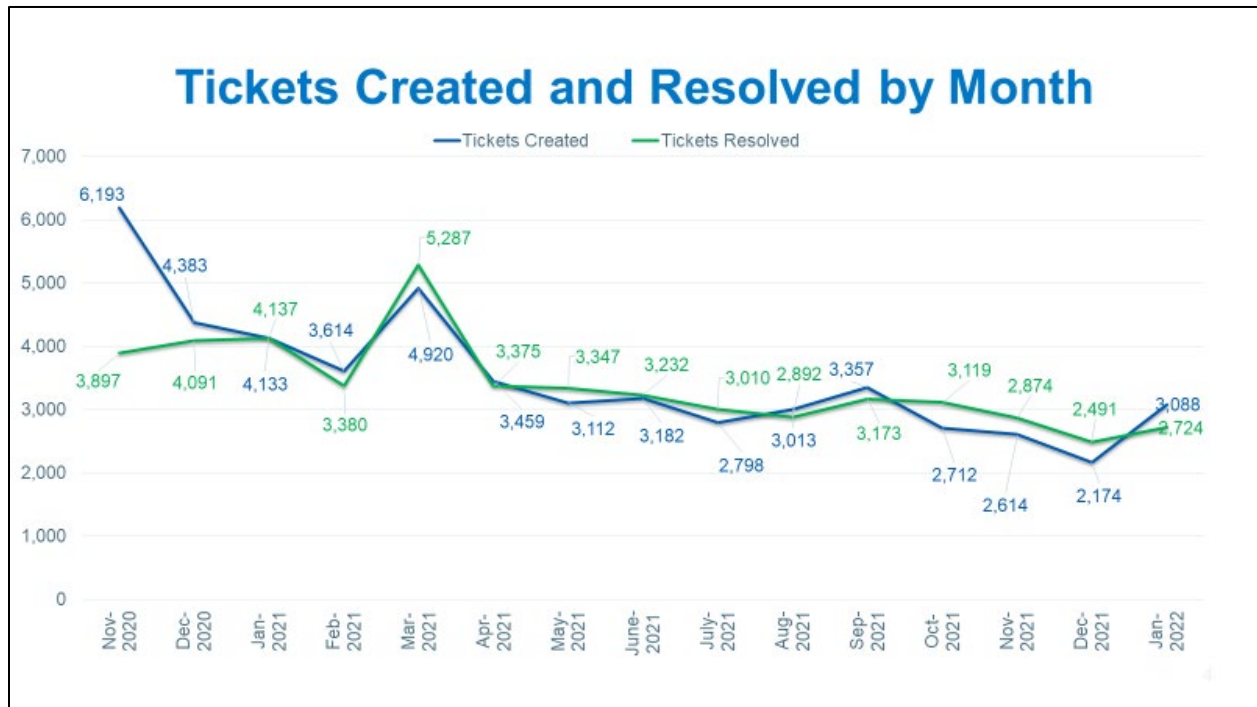
Note: At our current resolution rate there remains a rolling average of approximately 1800-2000 tickets that are unresolved.

Chart 2: Total Tickets (Created and Resolved) in the Last 4 Months



Note: Support tickets may not always be resolved within the month they were created (e.g. ticket from November 28 may be resolved December 1). Where resolved tickets exceed created tickets, this is where the ISC has made progress in reducing the overall backlog of tickets.

Chart 3: Total Tickets Created and Resolved by Month Since Go-Live



Key Figures

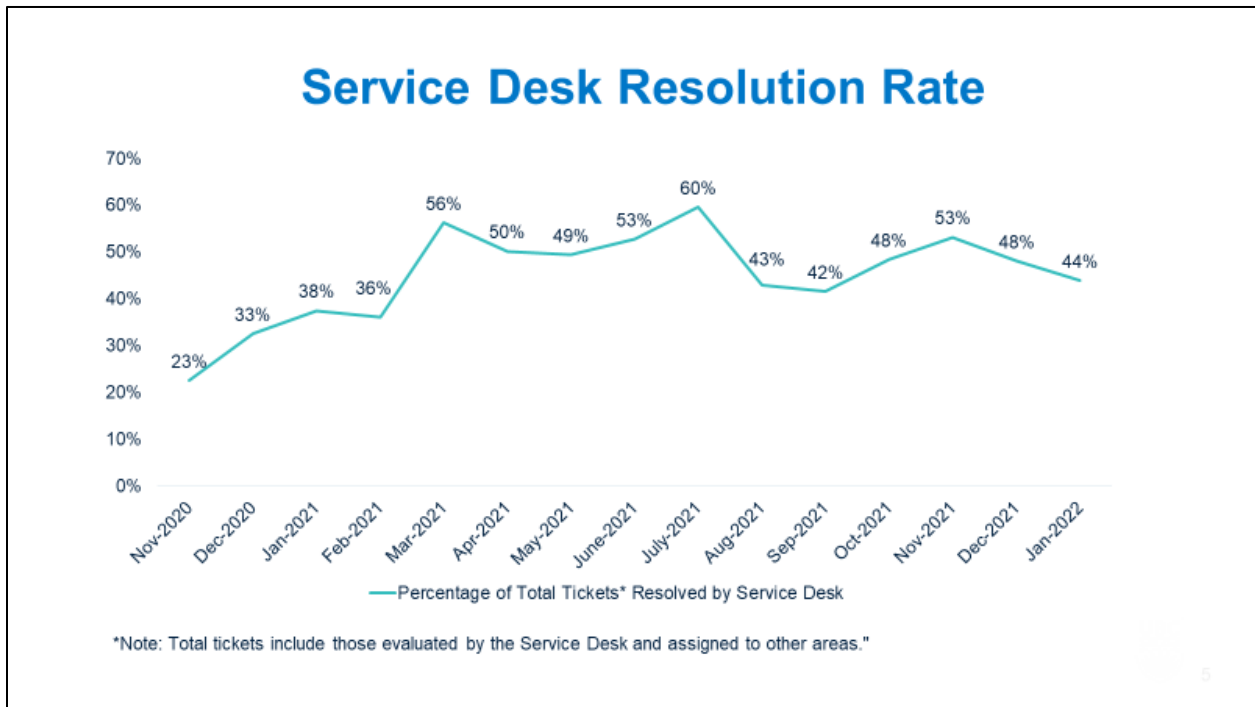
Monthly

- Highest number of tickets received in a single month in 2021: 4,920 (Mar/2021 -Fiscal Year-End)
- Lowest number of tickets received in a single month in 2021: 2,614 (November 2021)
- Average number of tickets received per month since go-live: 3,517

Overall, ticket volumes continue to stabilize with the exception of expected peak periods of Fiscal YE and Semester starts where volumes increase.

Note: Tickets volumes in December reflect a shortened month due to holiday closure.

Chart 4: Service Desk Resolution Rate



Notes:

- This reflects the percentage of call/tickets with first contact resolution in Tier 1.
- The Service Desk’s ability to resolve tickets at first contact has increased significantly since November 2020.
- Percentage decrease in September 2021 and January 2022 is attributed to substantial volume increase at the start of Academic term and the “all hands” approach by broader ISC team to support the UBC community during these peak periods.
- A key focus for this year is the continued enhancement of knowledge/skills/ability of the Service Desk team to further increase our first contact resolution rate.