HCM Transformation Initiative
ABA Meeting
Date: 1/19/2018
Agenda

- HCM Transformation Initiative Overview
- High-level Timeline
- Penn Employee Solution Center
- Penn Engagement
- Workday Status
  - Supervisory Organizations
  - Academic Units
  - Cost Allocations
  - Other Functional Updates/Key Decisions
- Q&A
Overview – One Project/Two Workstreams

HCM Transformation Initiative

Workday@Penn

Penn Employee Solution Center
Human Capital Management (HCM) represents the end-to-end processes related to managing people resources and support core functions for “hire to retire” and beyond.

**Large Scale Transformation**
- New HCM Workday System
- New Work Processes
- New Service Delivery Model
- People Alignment
We will implement these standard, best-practice processes and procedures with a focus on **what is best for the Penn Community as a whole**. Through standardization we will simplify cost structures and delivery of services to our internal and external constituents and demonstrate accountability to end users.
High-Level Timeline

**Solution Center 1.0 Live**
- **July 2017**
- Plan & Architect
- Workday Wave 1 Live
- Jan. 2018
- Wave 1
- Workday Wave 2 Live
- Jan. 2019
- Wave 2
- Jan. 2020

**Initial Focus of Expertise**
- Core HCM
- Recruitment
- Compensation
- Leave Administration
  - PTO, FMLA, Disability Leaves
- Time Reporting
- Payroll
  - Change in amount, errors in payment, pay dates
- Staff and Labor
  - System usage, policy and procedure

**Wave 1**
- Core HCM
- Academic Unit
- Payroll
- Benefits
- Compensation
- Time/Attendance
- Absence
- Recruiting
- Onboarding

**Wave 2**
- Performance
- Talent
- Learning
- Effort
- Reporting
### Solution Center Timeline

- **Soft launch of 1.0** on Monday, Jan. 29, with Penn early adopters.
- During 2018, incremental releases expand scope, Solution Center 1.1+.
- In Jan. 2019, transition to support all functions within Workday@Penn.
- In 2020, expansion to provide irresistible employee experiences.

### Areas of Initial Focus of 1.0

- **Recruitment**
- **Compensation**
- **Leave Administration**
  - PTO, FMLA, Disability Leaves
- **Time Reporting**
  - eTime, PTO system
- **Payroll**
  - Questions about changes in amount, errors in payment, pay dates
- **Staff and Labor**
  - System usage, policy and procedure

### Vision

- One-stop shop providing answers to individual faculty and staff members as well as school and center business partners.
- Provide faculty and staff with best-in-class customer service and timely resolutions to their inquiries and issues.
- Build an integrated knowledge base for the Penn community.
Penn Engagement Framework

Build new capabilities
Career mobility
Workday is Iterative!

Mobility on any device
No-hassle self-service

Work across boundaries
Share knowledge

Modern, agile technology
New efficiencies

People-Centered Transformation

Continuous Learning
Collaboration
Empowerment
Innovation
Embrace change to foster excellence as a “change-agile” organization

Engage the energy and passion of Penn around a shared vision and commitment to:
- Excellence
- Inclusion
- Service

Support transformation with Change Management
- Stakeholder assessment and engagement
- Training strategy and curriculum
- Workday training materials, logistics, and execution
- Go-live activities
- Post go-live activities
- Strategic communications
Communications

Stay up to date with HCM activities

- Website
  www.hr.upenn.edu/hcm

- HCM Update, monthly e-newsletter
  Subscribe from the website!

- Email the HCM team
  hcm-announcement@upenn.edu
Timeline & Overall Status

2017

Wave One

- Plan and Kickoff: Discovery and Design
- Change Strategy and Execution
- Plan and Develop Training
- Deliver Training

2018

- Support
  - Wave One: Timeline and Scope Confirmation
  - SIT
  - UAT/Parallel
  - Gold

Service Desk 1.0

- Service Desk: Startup, Content, Build, Deploy
- Onboarding
- Change: Plan, Develop, Deliver Communications

Current Status: Green

30 Day Trend: Green
Supervisory Organizations group employees into a management hierarchy and are a required foundation for Workday HCM (Human Capital Management).

They provide the structure for how faculty and staff are organized, how HR business processes are enabled, and how HR data is connected in the system. Supervisory Organizations are not used to manage finances and financial responsibilities.
Org/Cost Center 9203 Benefits

Legacy

- ORG 9203 Benefits
  - Sue Sproat
  - Geri Zima
  - Joanne Blythe
  - Rhonda Cates
  - Tamika Graham
  - Etc....

Workday

- Benefits
  - Sue Sproat
    - Benefits - Accounting
      - Rhonda Cates
        - Eric Geiger
        - Pam Mason
    - Benefits - Retirement
      - Joanne Blythe
        - Angela Merritte
        - Lou Caccamo
    - Benefits – Health and Welfare
      - Geri Zima
        - Tamika Graham
        - Katrina Terrell
Insert sample from HR Manager
Academic Units

Allow us to:

• Track academics and their appointments
  • Primary and secondary appointments
  • Named professorships

• Track visiting scholars as affiliates

• Drives academic appointment business processes
  • Assignment of security roles (separate of security on the Supervisory Organization)

• Direct relationship with the Supervisory Organization for routing in Staff Business Processes
  • Allowing for position changes to be initiated based on changes in rank

• Academic Unit Hierarchy
  • Subtypes – Center, Department, and Institute
Cost Allocations

- The Org, Fund, Program and CREF segments of the budget code will need to be entered
  - BC will be inferred by the FUND (same as in Hyperion)
  - CNAC will be inferred by the ORG

- Object code will be determined automatically by the worker and earning type details

- Implementation of cost allocation involves custom orgs/fields so that any future implementation of Workday Financials is not impacted

<table>
<thead>
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<th>Center Net Asset Class</th>
<th>Organization</th>
<th>Budgetary Control</th>
<th>Fund</th>
<th>Object</th>
<th>Program</th>
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Other Functional Updates/Key Decisions

- All workers will be hired into a position within a supervisory organization.
- Multi-manager supervisory organizations will be allowed.
- HR Manager Hierarchy tool is being expanded for non-staff. Data will be used for supervisory org conversion/creation.
- Temporary (999) Social Security Numbers will no longer be used.
- Mail codes will be eliminated in favor or true address for work locations.
- EEO Data system of record will still be PennPeople. Federally mandated data will be collected at time of application and possibly onboarding.
- Cost Allocations (distribution lines) will only be used when the funding source has a known end date.
Stay up to date with HCM activities

- Website
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