## Agenda

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<th>Topic</th>
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<tr>
<td>Overview of Project and Timeline</td>
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<td>June Town Hall and Playback Sessions</td>
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<td>Your Change Agent Network</td>
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<td>How to Stay Current</td>
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<td>Q&amp;A</td>
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HCM Transformation Initiative

A University-wide effort to improve how we manage the broad range of faculty affairs, human resources, payroll, and related processes.

The HCM Initiative is more than just a technology-replacement project. It will transform how we deliver HCM-related services, such as recruitment, personnel and benefits administration, payroll, time management, and more.

The result will be simplified processes that allow staff to work more efficiently, supported by a modern system built on the industry-leading Workday platform that will enable more informed decision-making at all levels.
Penn Employee Solution Center

Areas of Initial Focus

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

Tel 215-898-7372
Email hcmsolutioncenter@upenn.edu
www.hr.upenn.edu/hcm/penn-employee-solution-center

Hours:
9:00 am - 5:00 pm ET, Mon–Wed, Friday
9:00 am - 4:30 pm ET, Thursday

Questions on health and welfare benefits and from retirees or on retirement will continue to be serviced by PENN BEN and PENN RET during this initial phase although the Solution Center will help transfer questions to those service centers.

Penn Benefits Center: 1-888-PENN-BEN, 1-888-736-6236
Retirement Call Center: 1-877-PENN-RET, 1-877-736-6738

Vision

- Build a hub providing answers to the Penn community
- Provide optimal customer service and timely resolutions
- Build an integrated knowledge base for the Penn community
- Deliver an irresistible customer experience
Companion projects are needed to cover functionality outside of Workday’s scope and therefore outside applications are needed to integrate into our Workday solution.
What Penn Systems Will Workday Affect?

Workday will fully or partially replace many “legacy systems.” Unifying these systems will work to simplify and standardize processes for all Penn employees.

Legacy Systems (fully or partially replaced):

- Payroll/UMIS
- PennWorks (Core and Additional Pay)
- eTimesheets
- U@Penn Apps
- PeopleAdmin Staff & Faculty
- HR Manager
- HR Application Portal
- Requisitions
- Faculty Information System (FIS)
- PennPeople
- Additional local systems and applications

In 2020, Wave 2 will include:
- Performance
- Talent Management
- Learning
- Effort Reporting
Workday Project Timeline and Key Activities

2017 2018 2019


Architect

Configure & Prototype

Test

Deploy

Prototype 1

Prototype 2

Prototype 3

End-to-End Technical Testing

User Acceptance Testing (UAT)

Training

Go-Live

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

*In 2020, Wave 2 will include: Performance, Talent Management, Learning, Effort Reporting

Architect Activities
• Document business requirements and processes
• Design business processes in Workday

Configure & Prototype Activities
• Build data conversions
• Prototype technical infrastructure
• Legacy Data Cleanup
• Playback sessions
• Town halls and engagement activities

Test Activities
• End-to-end technical testing
• UAT testing
• Payroll testing
• Develop training materials

Deploy Activities
• Prepare for go-live
• Execute system and business cutover to Workday
• Training

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

*In 2020, Wave 2 will include: Performance, Talent Management, Learning, Effort Reporting
June 7th Town Hall and Core Concepts

HCM Town Hall Workday Core Concepts Recording (June 7, 2018)

Recordings Available (Pennkey required)

Summary of June’s Town Hall and Playback Sessions

**Actual Attendance**

Attendance was tracked at each event. The Town Hall was open to the larger Penn community, while key stakeholders were invited to Playback Sessions.

<table>
<thead>
<tr>
<th>Session</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 19 AM</td>
<td>80</td>
</tr>
<tr>
<td>June 19 PM</td>
<td>83</td>
</tr>
<tr>
<td>June 20 AM</td>
<td>88</td>
</tr>
<tr>
<td>June 20 PM</td>
<td>96</td>
</tr>
<tr>
<td>Town Hall (June 7)</td>
<td>290</td>
</tr>
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</table>

**Audience Feedback**

Attendees were surveyed following Playback Session completion. Select quotes below highlight key comments from Playback participants across the sessions.

- "[There was an] obvious amount of work and time put into this project-- very professional presentation with opportunity for questions/feedback."
- "I enjoyed the system demo and listening to the many Q&As it prompted."
- "It was a great chance to see the system!"
- "My favorite thing about the Playback Session was engaging practitioners beyond the HCM team to gain understanding of their issues and business requirements."
- "I enjoyed the Q&A w/ Colleagues."
- "Clear communication and content from presenters and consistent presentation format."

**Audience Satisfaction**

Attendees were also invited to share their satisfaction levels regarding Playback Session scheduling (date & time), session location (Fitts Auditorium), and presentation format (standardized Workday module overview, live-demonstration, and Q&A structure). Almost 130 survey responses were received, and attendees indicated a high level of satisfaction with Playback Session date, time, location, and presentation format.
Legacy Data Cleanup Examples

PennWorks support, the Workday project team, and departmental users are working together to update a variety of data cleanup items.

**Centralized/Systematic Cleanup**

**Owners:** PennWorks support and Workday Project Team

**Examples:**
- Prefix and Suffix for employee name no longer free-form text, values match Workday
- Emergency contact name prefix and suffix removed, relationship no longer free-form text, values match Workday
- Job Class Codes with no current employees frozen (can no longer be used)
- Mail codes for non-existent locations disabled

**Departmental/Manual Cleanup**

**Owners:** Departmental users

**Examples:**
- Annual Salary and distribution lines don’t match in PennWorks
- Job Class Entry Dates earlier than Employment Dates
- Disable roles in PennWorks that have expired
- Cleanup of Clinical Associate Appointments that are the only role and are unpaid
- Cleanup of acting rates
- Cleanup of Faculty Admin Appointments
Legacy Data Cleanup Overview

Legacy Data Cleanup is an effort to resolve a number of data conversion issues originating in Penn’s legacy data systems. Improving the quality of data in these systems creates a smooth transition into Workday.

There are two types of Data Cleanup in progress:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Process to Complete</th>
<th>Timing</th>
</tr>
</thead>
</table>
| 1 Systematic      | Data was managed and updated systematically by PennWorks support and Workday  | • Batch updates to data in PennWorks  
| Cleanup           | project team                                                                 | • UI changes and validation rules to prevent future issues in PennWorks and U@Penn apps | Data and system have been updated   |
| 2 Manual          | Data is reviewed and updated manually by departmental users                  | • Instructions will be sent to Departmental Users  
| Cleanup           |                                                                              | • Users will run reports in Business Objects to show data issues  
|                   |                                                                              | • Users will correct data                                                          | Instruction details will be distributed in mid-July |

Deloitte.  

University of Pennsylvania
## Supervisory Organization Update

Current status of School/Centers providing supervisor relationships:

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Supervisor Identified</th>
<th>Percent Complete</th>
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</thead>
<tbody>
<tr>
<td>Administrative/Professional</td>
<td>7,754</td>
<td>7,474</td>
<td>96%</td>
</tr>
<tr>
<td>Faculty</td>
<td>13,682</td>
<td>9,040</td>
<td>66%</td>
</tr>
<tr>
<td>Non-employees</td>
<td>967</td>
<td>367</td>
<td>38%</td>
</tr>
<tr>
<td>Student</td>
<td>5,700</td>
<td>3,228</td>
<td>57%</td>
</tr>
<tr>
<td>Support Staff</td>
<td>2,413</td>
<td>2,393</td>
<td>99%</td>
</tr>
<tr>
<td>Temporary Staff</td>
<td>3,691</td>
<td>2,000</td>
<td>54%</td>
</tr>
<tr>
<td>Unionized Staff</td>
<td>1,133</td>
<td>1,018</td>
<td>90%</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td>35,416</td>
<td>25,543</td>
<td>72%</td>
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</table>
Supervisory Organization Naming Convention

- Description should follow the format of a Department “-“ Organization Purpose.

- Organization codes and manager name are automatically displayed and should not be included in the description.

- Descriptions do not need to be unique across the University.

- Examples:
  - Department of English – Graduate Administration
  - Benefits – Retirement
  - Benefits – Health and Welfare

- HR Manager hierarchy tool now includes the ability to name the Workday Supervisory Org.

- Descriptions will default to the legacy org of the supervisor and can be updated in HR Manager (preferred) or post go-live.
# Penn’s Change Agent Network

## Schools/Centers

**Trudi Sippola**  
**Point of Contact**

<table>
<thead>
<tr>
<th>School of Dental Medicine</th>
<th>School of Nursing</th>
<th>School of Vet Medicine</th>
<th>School of Design</th>
<th>SEAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peter Kauderwood</td>
<td>Pat Adams</td>
<td>Sandra Mancini</td>
<td>Chris Cataldo</td>
<td>Karen Brann</td>
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<tr>
<td>Kim Wolcott</td>
<td>Jim Dorn</td>
<td>Stephanie Mahan</td>
<td>Karyn Tufarolo</td>
<td>Christopher Bristow</td>
</tr>
<tr>
<td>Richard Le</td>
<td>Christine Eisler</td>
<td>Cerie O’Toole</td>
<td></td>
<td>Bernadette Foster</td>
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<tr>
<td>Keith Robert Wells</td>
<td>Holly Marrone</td>
<td>Robert Sadoff</td>
<td></td>
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<tr>
<td>Jane Marie Schultz</td>
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</tr>
</tbody>
</table>

**SAS**  
Pat Burns  
Brian Clark  
Mary Costigan  
Kathy Fey  
Christine Gehman  
Corinn Harrell  
Elyse Saladoff  
Cathy Von Elm

**SP2**  
Regine Metellius  
Laura Nickrosz

**School of Nursing**  
Pat Adams  
Jim Dorn  
Christine Eisler  
Holly Marrone

**School of Design**  
Chris Cataldo  
Karyn Tufarolo

**The Wharton School**  
Anna Loh  
Maureen McGinness  
Denise Mount  
Ann Perch

## Central Offices

**Gary Truhlar**  
**Point of Contact**

<table>
<thead>
<tr>
<th>Annenberg Center</th>
<th>Division of Finance</th>
<th>Division of HR</th>
<th>Division of Public Safety</th>
<th>Division of Recreation</th>
<th>EVP</th>
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</thead>
<tbody>
<tr>
<td>Stuart Jasper</td>
<td>John Rudolph</td>
<td>Gary Truhlar</td>
<td>Konstantinos</td>
<td>Lawrence Boggs</td>
<td>Pat Guinan</td>
</tr>
<tr>
<td></td>
<td>Paul Weidner</td>
<td>Katrina Terrell</td>
<td>Giannopoulos</td>
<td>Ufoma Pela</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Gene Janda</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Audit & Compliance**  
Frank Tresnan

**Budget & Planning**  
Dan Katzenberg  
Fran Seidita

**School of Vet Medicine**  
Dan Katzenberg  
Fran Seidita

**Business Services**  
Bruce Friedman  
Paul Kilbride  
Carolyn McIntyre

**DAR**  
Gretchen Ekeland  
Jail Shafi

**SEAS**  
Karen Brann  
Christopher Bristow  
Denise Mount  
Ann Perch

**Sponsors**

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- Jack Heuer, Division of Human Resources
- Trevor Lewis, Budget & Management
- Mary Frances McCourt, Division of Finance
- Tom Murphy, ISC

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- Anita Allen
- Jeanne Curtis
- Bruce Friedman
- Kim Hoffiezer
- John Horn
- Marilyn Jost
- Matt Lane
- Jackie Lowry Golding
- Chris Masotti
- Maureen McGinness
- Jason Presley
- Tom Slavinski
- Gary Truhlar

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Elizabeth Hansen  
Carole Mercaldo  
Chereese Martin

**ICA**  
Shannon Freitas

**ISC**  
Jeanne Curtis  
Denise Lay

**Penn Global**  
Drew Cahan

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Stacey Lopez  
Janet Dwyer

**Provost Centers**  
Susan Curran

**University Libraries**  
Kim Hoffiezer

**University Museum**  
Melissa Smith

**VPUL - College House & Academic Services**  
Gina Marziani  
Patricia Ravenell
Stay up to Date with HCM Activities…

- **Website**
  [www.hr.upenn.edu/hcm](http://www.hr.upenn.edu/hcm)
  *Improved and expanded websites coming in Fall 2018!*
  - HCM Primer
  - FAQs
  - Team Member Bios
  - Penn Employee Solution Center

- **HCM Update**, monthly e-newsletter and archives. Subscribe from the website [https://www.hr.upenn.edu/hcm/news/hcm-update](https://www.hr.upenn.edu/hcm/news/hcm-update)

- Contact your local Change Agent Network [https://www.hr.upenn.edu/hcm/resources/change-agent-network](https://www.hr.upenn.edu/hcm/resources/change-agent-network)

- Email the HCM team [hcm-announcement@upenn.edu](mailto:hcm-announcement@upenn.edu)
Questions?

Thank you!