Association of Business Administrators
1/29/2019 Meeting

Julie Shuttleworth, HCM Program Director, Functional Lead
Claudia Quinton, HCM Service Delivery Lead
## Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Facilitator</th>
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</thead>
<tbody>
<tr>
<td>Workday Project Update</td>
<td>Julie Shuttleworth</td>
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<tr>
<td>Workday Training</td>
<td>Julie Shuttleworth</td>
</tr>
<tr>
<td>Onboarding Center</td>
<td>Claudia Quinton</td>
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</tbody>
</table>
Workday@Penn Project Update and Timeline

### 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

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

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

Prototype 1
Prototype 2
Prototype 3

End-to-End Technical Testing
User Acceptance Testing (UAT)
Training
Go-Live

July 2019
Update to PennWorks
Term Change in PennWorks

When entering salary data, PennWorks users are currently able to select a term of “other.” As of February 19, any employee whose term is not updated and remains “Other” will be converted to a 12/12 term to support Workday data conversion.

Moving forward, as you update or enter new pay, pick a term and adjust annual salary to achieve the appropriate amount for the that term.

For Example:

- 12 month employee paid over 12 months (12/12)
  - Annual Salary = Monthly Amount x 12
- 10 month employee paid over 10 months (10/10)
  - Annual Salary = Monthly Amount x 10
- 9 month employee paid over 9 months (9/9)
  - Annual Salary = Monthly Amount x 10

Additional information will be shared with payroll administrators to communicate this change and associated requests.
Cutover Updates
# Cutover Calendar

## June – July 2019

<table>
<thead>
<tr>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 16</td>
<td>June 17 WEEKLY PAYROLL LEGACY</td>
<td>June 18 MONTHLY PAYROLL LEGACY</td>
<td>June 19 LEGACY SYSTEM FREEZE</td>
<td>June 20</td>
<td>June 21</td>
<td>June 22</td>
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<tr>
<td>June 23</td>
<td>June 24 WEEKLY PAYROLL LEGACY</td>
<td>June 25</td>
<td>June 26 MOVE TO PRODUCTION</td>
<td>June 27</td>
<td>June 28</td>
<td>June 29</td>
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<td></td>
<td>G<strong>OLD</strong> BUILD/DA REVIEWS</td>
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<td>G<strong>OLD</strong> BUILD</td>
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<td>LEGACY BLACK OUT PERIOD</td>
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<tr>
<td>June 30</td>
<td>July 01 GO-LIVE 7/1 TRANSACTIONS</td>
<td>July 02</td>
<td>July 03</td>
<td>July 04</td>
<td>July 05</td>
<td>July 06</td>
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<tr>
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<td>WEEKLY PAYROLL LEGACY</td>
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<td>C<strong>ATCH-UP</strong> TRANSACTIONS</td>
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<tr>
<td>July 07</td>
<td>July 08</td>
<td>July 09 WD WEEKLY PAYROLL</td>
<td>July 10</td>
<td>July 11</td>
<td>July 12</td>
<td>July 13</td>
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- **LEGACY SYSTEM FREEZE**: June 18/19
- **Blackout Period**: June 19 to July 1
- **Cutover Calendar**
- **Go-Live**: July 1
- **Final System Check**: June 30
- **Move to Production**: June 26
- **CATCH-UP TRANSACTIONS**: June 26
- **Convert Payroll Balances**: July 02
- **LEGACY BLACK OUT PERIOD**: June 23 to June 29
- **LEGACY BLACK OUT PERIOD**: June 30 to July 06
- **LEGACY BLACK OUT PERIOD**: July 07 to July 13
## Cutover Payroll Processing Dates

### Payroll Processing

<table>
<thead>
<tr>
<th>Pay Cycle</th>
<th>Pay Period</th>
<th>Payroll Run</th>
<th>Check Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Monthly Pay in Legacy</td>
<td>6/1 – 6/30</td>
<td>6/18 (Tuesday)</td>
<td>6/28</td>
</tr>
<tr>
<td>Last Weekly Pay in Legacy</td>
<td>6/24 – 6/30</td>
<td>7/1 (Monday)</td>
<td>7/5</td>
</tr>
<tr>
<td>First Weekly Pay in Workday</td>
<td>7/1 – 7/7</td>
<td>7/9 (Tuesday)</td>
<td>7/12</td>
</tr>
<tr>
<td>First Monthly Pay in Workday</td>
<td>7/1 – 7/30</td>
<td>TBD</td>
<td>7/31</td>
</tr>
<tr>
<td>Activity</td>
<td>Cutoff Date</td>
<td>More Information</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>----------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Legacy System Freeze</td>
<td>6/18/19</td>
<td>Beginning with run of monthly payroll cycle</td>
<td></td>
</tr>
<tr>
<td>Blackout Period</td>
<td>6/19/19 to 7/1/19</td>
<td>Only key transactions allowed in legacy (e.g., time reporting)</td>
<td></td>
</tr>
<tr>
<td>Workday in Production for Core Team</td>
<td>6/26</td>
<td>Activities for core team begin, manual updates, validation, etc.</td>
<td></td>
</tr>
<tr>
<td>Catch-Up Transactions</td>
<td>6/27 - 6/29</td>
<td>Replay key transactions that occurred during blackout period</td>
<td></td>
</tr>
<tr>
<td>Go-Live</td>
<td>7/1</td>
<td>Workday available</td>
<td></td>
</tr>
<tr>
<td>Payroll Balance Catch-Up</td>
<td>7/2 - 7/6</td>
<td>Convert balances from final legacy payroll run</td>
<td></td>
</tr>
</tbody>
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Workday Training

Julie Shuttleworth
Training Strategy: Elements of Learning

Workday@Penn training provides the Penn community with a learning experience tailored to their use of Workday.

**Communications & Stakeholder Engagement**

Utilize a variety of communication vehicles and engagement activities to disseminate information to build awareness and baseline Workday knowledge.

**Just-In-Time Training**

Train the right **people** with the right **resources** at the right **time**, prior to the deployment phase.

**Accessible Training Materials**

Utilize diverse methods, tools, and platforms to ensure training is easily accessible to all faculty and staff.

**Support Network & Resources**

Leverage the Penn Employee Solution Center and additional resources to **provide a direct support link across the Penn community**.
Please keep in mind that training provides Penn users knowledge related to functions within the Workday system and is not focused on specific job duties.

**Purpose**
- Training covers Workday processes to help users understand tasks, key changes, and the future state of Workday@Penn.

**Content**
- Training includes details on terms, concepts, before / after comparisons, examples, and select hands-on activities, etc.

**Schedule and Support**
- We are in the process of developing a training schedule to help learners understand the interconnectedness of the system.
- There will be ongoing support and sustainment efforts post Go-Live.
Training Timeline

Workday@Penn Implementation Training Timeline

<table>
<thead>
<tr>
<th>Test</th>
<th>Deploy</th>
<th>Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan’19</td>
<td>Feb’19</td>
<td>Mar’19</td>
</tr>
<tr>
<td>Apr’19</td>
<td>May’19</td>
<td>Jun’19</td>
</tr>
<tr>
<td>Jul’19</td>
<td>Aug’19</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>

- **Test:**
  - Jan’19: Continue to Build & Refine Training Materials
  - Feb’19: Establish Training and Delivery Logistics
  - Mar’19: Publish Schedule & Send Invites

- **Deploy:**
  - Apr’19: Execute Training Program
  - May’19: Assess Training & Adopt As Needed

- **Support:**
  - Jun’19: Go-Live

Note: The timeframes of these major activities are estimates and are subject to change.
### Training Strategy: End User Training Delivery Methods

A blended learning approach is supported by user-friendly and accessible training materials. The best delivery method for each course has been established by analyzing the audience security roles and responsibilities in Workday.

<table>
<thead>
<tr>
<th>Delivery Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Classroom Instructor-Led Training (ILT)</strong></td>
<td>- Classroom-based training for subjects that require detailed documentation and process learning. This includes Instructor-led demos, system exercises, etc.</td>
</tr>
<tr>
<td><strong>Virtual Instructor-Led Training (vILT)</strong></td>
<td>- Online training event with an instructor driving the course in real-time</td>
</tr>
<tr>
<td><strong>Tip Sheets</strong></td>
<td>- Easy to use tools that quickly provide relevant information on key concepts and step-by-step instructions for completing business processes</td>
</tr>
<tr>
<td><strong>Computer Based Learning (CBL)</strong></td>
<td>- Online, self-paced learning webinars that range from 30 min to 2 hours</td>
</tr>
<tr>
<td><strong>Practice Labs and Office Hours</strong></td>
<td>- Open hours to provide additional hands-on training assistance before and after Go-Live</td>
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</table>
Human Capital Management Transformation Initiative: Onboarding Center

Claudia Quinton
Project Lead, Service Delivery

Association of Business Administrators
January 29, 2019
Onboarding Center Current Status

- Project approved by sponsors
- Space located
- Launch April 29, 2019
- Staffing search underway
Current State of Decentralized Onboarding

Critical Compliance
- E-Verify
- I-9
- Social security number
- Documentation for non-resident aliens

New Hire Experience
- Processes vary widely
- Administrative burden
- Work-readiness and productivity delays

Vision of One-stop Onboarding for New Hires

- Increased compliance
- Positive first impression
- Manager readiness to engage new hires
- Earlier productivity
- Efficient, user-friendly online presence
- Centrally located physical location
- Expansion of administrative services
- Prepared for Workday go-live
Onboarding Center Benefits

- Compliance
- Employee Engagement
- Productivity
- Capacity for Additional Onsite Employee Services
<table>
<thead>
<tr>
<th>Function</th>
<th>Advance of Workday@Penn Go-live</th>
<th>At Workday@Penn Launch</th>
<th>Potential Expansion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete I-9 (Part 2)</td>
<td>✦</td>
<td>✦</td>
<td></td>
</tr>
<tr>
<td>Perform E-Verify</td>
<td>✦</td>
<td></td>
<td>✦</td>
</tr>
<tr>
<td>Collect W-4</td>
<td>✦</td>
<td></td>
<td></td>
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<tr>
<td>Validate SSN</td>
<td>✦</td>
<td></td>
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</tr>
<tr>
<td>Collect immigration and work authorization documents and transfer securely to Payroll, Payroll Tax, ISSS</td>
<td>✦</td>
<td>✦</td>
<td></td>
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<tr>
<td>Confirm addresses</td>
<td>✦</td>
<td>✦</td>
<td></td>
</tr>
<tr>
<td>Answer general questions</td>
<td>✦</td>
<td>✦</td>
<td></td>
</tr>
<tr>
<td>Escalate complex questions to Penn Employee Solution Center</td>
<td>✦</td>
<td>✦</td>
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<tr>
<td>Assist with new hire orientation registration</td>
<td></td>
<td>✦</td>
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<tr>
<td>PA 153 onsite fingerprinting</td>
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<td></td>
<td>✦</td>
</tr>
<tr>
<td>Assist with parking / transportation services</td>
<td></td>
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<td>✦</td>
</tr>
<tr>
<td>Offer onsite services for schools during high volume</td>
<td>✦</td>
<td>✦</td>
<td></td>
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</table>
The Transition

Best Practices

- Choose a Start Date
- Keep in Touch
- Complete Forms in Advance
- Complete Payroll Record
- Ensure I-9 Compliance

For detail, go to [www.workday.upenn.edu/home/engagement/best-practices-for-new-hires](http://www.workday.upenn.edu/home/engagement/best-practices-for-new-hires)
Onboarding Center Timeline for Launch

### 2018

**Milestones**

- **Planing**
  - Iterative Config and Review

**Testing**

- SIT
- End2End
- UAT

**Change**

- Plan and Develop Training
- Deliver Training

**Deploy**

- Cut-Over
- Go-Live

### 2019

**Onboarding Center**

**Milestones**

- Engaged Stakeholders
- Target start for staff
- Go-Live 4/29/2019

**Planning**

- Define Scope
- Kick-Off
- Process and Policy Development

**Physical Space**

- Identify, Design and Build
- Begin Move In

**Staffing**

- Develop PIQs
- Recruit and Hire
- Train

**Website**

- Design and Develop
- Launch

**Change**

- Communications Development and Distribution

**Deploy**

- Go-Live/Open
Questions?