Project Overview
Introduction

This presentation outlines the University of Chicago’s implementation of Workday Human Capital Management (HCM). Workday@UChicago, the University’s first Human Resource Information System (HRIS) will replace the University’s current payroll and benefits administration systems, and provide enhanced functionality for Human Resources.

The following pages detail the governance, scope, timelines and guiding principles of the Workday@UChicago project. Track the background and future of Workday@UChicago, and join us on the way to Workday.
**Background (2013)**

<table>
<thead>
<tr>
<th>March 1 – March 15</th>
<th>May 1 – June 30</th>
<th>August 1-31</th>
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<tbody>
<tr>
<td><strong>Business Case</strong></td>
<td><strong>Software Selection</strong></td>
<td><strong>Project Ramp Up</strong></td>
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<tr>
<td>• Stakeholder interviews</td>
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<tr>
<td>• Found a multigenerational technology gap with peer institutions</td>
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<tr>
<td>• Identified risks and opportunities with current system</td>
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<tr>
<td>• Established a need to implement new technology to mitigate risk, better deliver core HR services, and develop the University’s talent base</td>
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<tr>
<td>• Functional/technical requirements gathered</td>
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<tr>
<td>• Software demos and selection (Workday)</td>
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<tr>
<td>• Scope defined and approved</td>
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<tr>
<td>• Implementation project plan</td>
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<tr>
<td>• Integration, reporting and conversion assessments</td>
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<tr>
<td>• Initial change management assessment and plan</td>
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<tr>
<td>• Selected integrator to assist in implementation (Deloitte)</td>
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<tr>
<td>• Set up project office and identified project resources</td>
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<td>• Documented ‘as is’ faculty hire process</td>
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<td>• Assessed legacy data and identified gaps/quality issues</td>
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<td>• Developed strategy for systems integrations</td>
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<tr>
<td>• Identified core reports required in the new system</td>
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**ON THE WAY TO:**

workday@UCHICAGO
What are the expected benefits of us implementing a new HRIS?

Mitigating risks
• Replacing technology that is outdated and no longer supported
• Remove manual processes for regulatory reporting
• Improved data security

Better delivery of core HR services
• More efficient and consistent HR processes
• Improved processes and standardization
• Improved turnaround time
• Electronic workflow and less paper
• Reduce manual processes, workarounds and exceptions
• Reduce information requests and calls – more self service

Access to better reporting and information
• Better standard and ad hoc reporting
• Cleaner and more accurate data
• Access to real-time information and history
• Ability to track positions
• View of joint appointments
Project Governance

- **Executive Sponsors**
  Rich Iorio (Human Resources), Eric Isaacs (Provost), Nim Chinniah (Finance & Administration)

- **Oversight Committee**
  Rich Iorio (Human Resources), Ingrid Gould (Provost’s Office), Klara Jelinkova (IT Services), Rowan Miranda (Senior Associate VP for Finance)

- **Project Leadership**
  Mike Knitter (Human Resources), Byron Nash (IT Services), Mark Fehlberg (Financial Services)

- **Project Team**
  35 FTEs from Human Resources, IT Services, Financial Services, the Office of the Provost, and Deloitte Consulting

- **Campus Advisory Committees**
  Business Advisory Committee, Technical Advisory Committee
So….what is Workday?

- Features of Workday include:
  - Software-as-a-Service
  - Intuitive user interface
  - Cloud-based
  - Mobile-enabled
  - Automatic updates
  - Real-time information and reporting
  - Focus on speed, usability and flexibility

- Other higher education clients include Georgetown, Brown, Cornell, Carnegie Mellon, Yale, University of Southern California
What is in scope?

• **Workday’s Human Capital Management Suite**

• **Phase I (January 1, 2015): Laying the Foundation**
  – Human Resource Management (hire, terminate, maintain records, compensation)
  – Benefits Administration
  – Payroll Solutions
  – Employee Self-Service

• **Future Phases: Additional Functionality**
  – Features from Phase I (Faculty Information, Open Enrollment, Regulatory Reporting)
  – Talent Management
  – Recruiting
  – Time Tracking
What is in scope?

- 139 Workday-delivered business processes and 107 system integrations are in scope for Phase I

Who will be impacted at UChicago?

1. All staff, faculty and other academic appointments, temporary and student workers currently being paid by UChicago and using Employee Self-Service (ESS)
2. Those with management oversight or responsibility, i.e. “approvers”
3. Central and Department HR/Payroll teams who currently manage HR transactions for the University via a PAF/MAF and add/update/view HR data using HRMS, iTrust or Business Objects
Project Guiding Principles

“Why not Workday?”
Workday embodies leading industry practices in human resource and financial management and we want to leverage these system-delivered leading practices. We will implement business practices and procedures at UChicago as delivered by Workday, even when it means changing our current business processes, unless there are significant and compelling reasons to do otherwise. Our starting point must first be ‘Why not Workday?’ This may mean that some people’s jobs may change, that some work may shift from one office to another, or that the method of accomplishing certain actions may be different.

Design for the rule, not the exception
We will use “native” Workday features and functions in all cases unless there are significant and compelling reasons to do otherwise. Workday has substantial “configuration” capabilities that will allow us to tailor Workday to the University’s requirements in most cases. We cannot “customize” Workday, and we will avoid using third-party point solutions whenever possible.

System of record
The Workday system will be the official, authoritative data source for employee information. We know that certain other systems at UChicago also contain information about employees. If there is disagreement between systems, the Workday information shall take precedence. Ideally, procedures should be established so that new and updated employee data are entered first into Workday and subsequently provided to other systems via download or other data exchange process. Where this is not possible, owners of secondary systems are responsible for validating that data in their systems matches the corresponding Workday data.

Inclusion and consensus
We are committed to making information about the project available to the UChicago community via open lines of communication and dialogue, including a project website and periodic stakeholder updates. We invite members of the community to make suggestions about the project, share their ideas, and also share their concerns. We take the needs of stakeholders seriously, and we will consider all suggestions and comments. However, we cannot promise—and there should be no expectation—that every suggestion or comment will be acted upon or adopted.

Keep an open mind to change
For UChicago, implementing Workday is more than just new technology. It will radically transform the way we manage end-to-end employee and faculty processes today, and may require changes to not only to technology, but also to mindsets and behaviors. We will take the necessary time to understand the current state and stakeholder concerns in order to develop a best-fit change approach that is tailored to our unique user community.
Deployment Approach & Timelines

<table>
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<th>Month Range</th>
<th>Duration</th>
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<tbody>
<tr>
<td>September 1-30 (1 month)</td>
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<tr>
<td>October 1 – November 30 (2 months)</td>
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<td>December 15 – June 30 (7 months)</td>
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<td>July 1 – November 30 (5 months)</td>
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<tr>
<td>December 1 – 30 (1 month)</td>
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- **Plan**
  - Review Project Scope
  - Develop Project Plan & Project Charter
  - Define Roles & Responsibilities
  - Define Communication Plan
  - Initial Prototype (P0)
  - Project Kickoff

- **Architect**
  - Current Business Practice Discovery
  - Conceptual Design Sessions
  - Detailed Business Process Design
  - Solution/Gap Analysis
  - Update Project Charter & Plan
  - Document Design Decisions

- **Configure & Prototype**
  - Configuration Prototype (P1)
  - Develop Reports & Integrations
  - Communicate Tenant Strategy
  - Develop Testing & Training Strategy
  - Final Configuration Prototype (P2) & Full Data Conversion

- **Test**
  - End to End Testing
  - Prototype 3 (P3)
  - User Acceptance Testing
  - Parallel Testing

- **Deploy**
  - Training and Roll-Out
  - Gold Tenant
  - Production Data Conversion & Configuration
  - Transition to Production Services
  - Project Close

Knowledge Transfer & Just-in-Time Training

- September 2013
- 2014
- January 1, 2015 (Phase I)

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<table>
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<tr>
<th>Year</th>
<th>Phase</th>
<th>Activities</th>
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<tr>
<td>2013</td>
<td>Set up Project Office Preliminary Work Plan Project KickOff</td>
<td>Finalize Master Test Plan</td>
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<td>2014</td>
<td>Business Process Design Functional Configuration/Prototyping</td>
<td>UAT/UAT/Parallel Conversion</td>
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<td>2015</td>
<td>As-Is Faculty ID Areas of Clean Up for Faculty and OAA</td>
<td>Go-Live Conversion</td>
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**Functional Team**

- Reporting Matrix
- Key Resources for Reporting Governance
- Identify Departmental Systems and Functionality
- Integration Strategy
- Assess State of Legacy Data
- Identify Gaps and/or Data Quality Issues
- Determination of ID
- Develop Data Cleansing Plan
- Draft Conversion Strategy
- Final Conversion Strategy
- Conversion Design
- Final Integration Strategy
- Draft Integration Strategy
- Final Legacy System Strategy
- Draft Legacy System Strategy
- Final Reporting Strategy
- Draft Reporting Strategy
- Reporting Design
- Technical Development and Prototyping
- Technical Test Cycles
- Technical Unit Testing
- Functional Unit Testing
- UAT/Parallel Conversion
- Cutover

**Technical Team [Conversion, Integrations, and Reporting]**

- As-Is Faculty ID Areas of Clean Up for Faculty and OAA
- Reporting Matrix
- Key Resources for Reporting Governance
- Identify Departmental Systems and Functionality
- Integration Strategy
- Assess State of Legacy Data
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- Draft Reporting Strategy
- Reporting Design
- Technical Development and Prototyping
- Technical Test Cycles
- Technical Unit Testing
- Functional Unit Testing
- UAT/Parallel Conversion
- Cutover

**Change Management, Communication, Training**

- Share Change Impact Report
- ID Member of Change Team
- Solidify Roles/Resp
- Finalize Change Management and Comm Plan
- Project Team Training
- Develop End User Training
- End User Training

**Project Communications**

- Internal Project Kick Off
- Cutover Checklist
- Go-Live
Questions, comments or concerns?

Please contact projectworkday@uchicago.edu for more information.

We’re on the way to workday@UCHICAGO!