


An ERP Success Story: Implementation of a New HR and Financial Enterprise Resource Planning System Across Multiple Campuses
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Making Waves

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About the FAU Presenters



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David Tomanio, Assistant Vice-President – Human Resources. Thirty-nine years experience in HR. Four years in Higher Education. Resides at Boca Raton Campus

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Background

In 2014, ERP system upgraded

Three phases:

- 1. Change Management program**
- 2. Training opportunities**
- 3. Constant communication**

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Purpose


Florida Atlantic *University* (FAU) dealt with the challenges of change in:

Implementation of new Integrated
Financial & Human Resource Platforms

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Significance

Prior to Implementation Institution Faced:

- Issues of time **Finance and IT teams** spent on
 - Reconciling
 - Reporting
 - Driving strategic value
- Now we put people at the center of enterprise software.
- Ensures real time reporting and ad-hoc query capabilities with on-line analytics.

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Significance


Enterprise software:

- Ensures real time reporting and ad-hoc query capabilities with on-line analytics.

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Review of Related Literature

Workday Enterprise Software

- A single system for finance and human resource management.
- Allows one to “see the full picture”,
- Allows for total visibility so that data based decisions can be made.

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Review of Related Literature


- “Is engaging”;


And,

- Allows one to “be ready for anything”. (e.g., complying with new regulations, shifts in workforce, etc.).

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Review of Related Literature

Organizational Change Management

- Approach to transitioning individuals, teams, and organizations.
- Uses methods intended to re-direct the use of resources, business processes, budget allocations, or other modes of operation that significantly reshape a company or organization.
- Guides and/or eventually disrupting and displacing an existing way of doing things.

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Change and Disruption


Disruptive leaders –

- **Change the way people think, or the way things are done.**
- **Can destroy or change an existing way of doing things by implementing a better or alternative to the existing way.**

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Change and Disruption


- ***Disruptive leadership*** is always looking for better solutions, and ways to improve processes and the business enterprise, overall,

And,

- Isn't afraid to shake things up to get the necessary results.
- Steve Jobs was a famous disruptor.

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Review of Related Literature


Training and Development


- Knowles (1984), adult learning principles.

- Adult Learning is:
 - Self Directed
 - Use Prior knowledge & life experiences
 - Goal oriented
 - Relevancy-oriented
 - Highlights practicality
 - Encourages collaboration

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Review of Related Literature


Training and Development

Knowles (1984), adult learning principles.

- There is a need to explain the reasons specific things are being changed and therefore, taught.
- Learning activities should be in the context of common tasks to be performed.
- Instruction should take into account different levels/types of previous experience with computers.
- Since adults are self-directed, instruction should allow learners to discover things and knowledge for themselves and be provided guidance and help when mistakes are made.

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Review of Related Literature


Communication

- Key
- Is a transactional process (Bennis & Goldsmith, 2010)
- Can make the difference between success and failure

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Implementation Highlights

- In early 2014, Florida Atlantic University began the process of upgrading its Human Resources/Financial to Workday replacing Banner.
- The implementation process took 18 months with a go live date of July 1, 2015.

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Implementation Highlights

- 82 employees in the areas of OIT, HR, Finance, Grants, Academic Affairs, etc., who were dedicated to the implementation.
 - 6 employees dedicated 40+ hours per week.
 - 34 employees at FAU spent up to 20% of their time on the project.

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Implementation Highlights

- Consulting firm of Sierra-Cedar, Inc.
- 37 consultants and 16,500 of hours were billed to FAU by the consultants.
- 150 business processes used in the structure of select modules.

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Implementation Highlights

- There were over 100 hands-on training sessions held at the university at all campus locations from March 1 - 2015 through June 30 – 2015.
- The sessions were conducted by FAU employees.
- 132 job aids have been developed to support the training efforts.

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FAU Workday Governance Team Workday Rising Event – 2015 – San Francisco



Welcome Citizens of the Cloud

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Workday Features

- Every data element is searchable
- 1000+ delivered standard reports
 - Ability to write customized reports
- 2 updates per year
 - Requires retesting of all business processes in WD Preview
- Weekly updates – maintenance
- Every customer on the same version

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Change Management

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Change Management – A Scholarly View (Kotter, 2012)

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graph TD; A[Kotter's Eight Stage Change Process (Kotter, 2012)] --- B[1. Establishing a sense of urgency]; A --- C[2. Creating a guiding coalition]; A --- D[3. Developing a vision and strategy]; A --- E[4. Communicating the change vision]; A --- F[5. Empowering employees broad based action]; A --- G[6. Generating short-term wins]; A --- H[7. Consolidating gains and producing more change]; A --- I[8. Anchoring new approaches in the culture];
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Change Management

“Any approach to transitioning individuals, teams, and organizations using methods intended to re-direct the use of resources, business process, budget allocations, or other modes of operation that significantly reshape a company or organization.”

Innovation and Organizational Change, Management Institute

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Current State	Change	New State
		

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Change Management

- Process of Change
 - Where you are today: Current database
 - Where you want to be: Implementation of new database
 - The process of change: Transition between current and new databases
- Successful organizational change
 - Clear direction
 - Consensus design
 - Engaged leadership and employees
 - Strong connection to strategic goals

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Introducing Change Management


- Establishing a Change Ambassador Network
- Change Ambassador's Responsibilities

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Change Readiness Assessment

- Provides information about your organization so that we can develop plans to suit your needs.
 - Monitors Risks
 - Provides Metrics
- Change Readiness Assessment users were identified by two criteria
 - Level of Employee
 - Demographics
- Content of Questions
 - Polarity Maps

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Job Aids - HCM

Request Compensation Change


Use this process to request a compensation change for an Administrative, Managerial and Professional (AMP) position.

The Request Compensation Change business process must be initiated by the HR Partner.


HR PARTNER STEPS

From the Home Screen:


1. Type Request Comp Change in the search bar and press ENTER.
2. Click Request Compensation Change.



3. Enter the Effective Date of the change.
4. Use the prompt icon (ⓘ) to select the appropriate Reason for the Compensation Change.




5. To select the employee who is receiving the Compensation Change, use the prompt icon (ⓘ) and then select the employee name.



Administrative, Managerial, and Professional (AMP)

This may be done by either typing the employee name and press ENTER or using one of the various search features.




6. Click OK.

Compensation tab:

7. Scroll down to the Salary section and click the Edit icon (✎).
8. Enter the new Salary Amount, Amount Change, or Percent Change (amount must be within the pay range) in the pop-up window.
9. Currency and Frequency should remain defaulted at USD and Annual.
10. The system will automatically calculate the other fields.
11. If Position is Regular (Fixed Term), open the Additional Details section to add the "Actual End Date."
12. Click SAVE icon when done.

Your interests and processes may vary from those described here.



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Job Aids - Finance

Travel Create Spend Authorization

Access the Create Spend Authorizations

1. Type Create Spend Authorization in the search bar.
2. Select Create Spend Authorization from the search results.



3. First, review important instructions section. This section is included for your reference at the top of the form.
4. Check Company name, change as needed.
5. Enter the trip Start Date.
6. Enter the trip End Date.
7. Enter the Description of the trip.
8. Enter the Business Purpose.



9. Move over to the Justification box, type justification for the trip.



10. Under Spend Authorization Lines tab, click "+" sign next to the word "Item."
11. Click prompt button on the expense item box and select "By Expense Item Group."
12. Select "Travel."
13. Select an Expense Item you wish to include in the report.



14. Type in quantity and per unit amount for your expense item.
15. Skip Memo and Billing section unless you want something in the Memo field.
16. Check the Cash Advance Requested box if this Spend Authorization is for a Cash Advance.
17. Type in SmartTag. This will populate r, p, n, Lost Center, Lease, Project, and Additional Working fields as applicable.



18. Tab over to Expense Treatment column and select prompt button to the right of the Expense treatment box and select "Worktag" and then "Expense Treatment."
19. Select appropriate "Expense Treatment" for this line item.

In-State Travel | Out-of-State Travel | International Travel



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Ongoing Training

- Annual reboot sessions – 2016, 17.
- Ad hoc training based on department's request.
- Annual training offered for Performance Appraisal process.

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Communication

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Workday/FAU Website

workday at FAU

What you need to know.

Getting Started. Workday has a new look and feel. This new page will be changing the layout, color palette, and fonts. Along with some new information on the site and additional options for our users. The new look is a result of our partnership with Oracle. Please visit [Workday](#) for more information. Thank you for being a part of the Workday family and for your support.

Job Reqs have moved! They can be accessed directly from Workday via the FAU Job Req ID Number on your home page.

- Where to find the new and updated version of the job reqs
- Where to find a where you go to see if something is up with Workday

NEW TRAINING CLASSES

What's new.

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Workday Tips and Tricks

File Message Tell me what you want to do

Ignore Delete Archive Reply Reply Forward All More

Meeting 11 - 11A - 11:14 To Manager Done Reply & Delete Create New

Rules OneNote Assign Mark Categorize Follow Up Translate Find Related Select Zoom

Policy Unread Tags Editing Zoom

Workday Tips <noreply@fau.edu> [wdtips] **Workday News 4-27-18** 2:43 PM

workday News

Tips and Tricks

HCM


Applying for Jobs as a Current Employee

Due to the implementation of Workday Recruiting, current employees at FAU will apply for jobs within Workday. This applies to all employees (Faculty, AMP, SP, OPS, Adjunct and Student).

The new Career Toolkit in Workday (pictured below) is now available to all FAU employees to assist in applying for an opportunity within the University. For additional instructions on how to apply as an internal candidate, please review the [Internal Applicants Current FAU Employees Tutorial](#).

Career

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Workday Application

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Workday Home Screen

Welcome, Dave Tomanio ()

Messages


Applications


- FAU Job Aids
- Career
- Payroll Accounting
- My Team
- Personal Information
- Pay
- Time Off
- Time
- Benefits
- Performance
- Expenses
- FAU Reporting Dashboard
- Budget
- Payroll Process Status
- Reporting
- Reports
- Accountancy & Changebook

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The screenshot shows the FAU Recruitment Module interface. At the top left is the 'cupa-hr' logo with the tagline 'WAYS OF CHANGE OCEANS OF OPPORTUNITY'. To the right is the 'FLORIDA ATLANTIC UNIVERSITY. FAU' logo. The main heading reads 'Recruitment Module Added – 3-31-2018'. Below this is a search bar with the text 'Find Open Jobs' and a search button. A sidebar on the left contains filters for 'Current Search', 'Full/Part-time', and 'Job Category'. The main content area displays '44 Results' with a list of job openings, including 'Research Coordinator', 'Barista and Customer Service Student Assistant', 'Math Computer Lab PT', 'Barista Supervisor', 'Business Manager', and 'Biological Scientist'. At the bottom, the 'Making Waves' logo is visible.

The screenshot shows the FAU Sandbox interface. At the top left is the 'cupa-hr' logo with the tagline 'WAYS OF CHANGE OCEANS OF OPPORTUNITY'. To the right is the 'FLORIDA ATLANTIC UNIVERSITY. FAU' logo. The main heading reads 'Sandbox'. Below this is a search bar. The main content area features a 'Welcome, Dave Tomanio (223318276)' message with an 'Info' icon and a list of 'Applications' including 'FAQ Job Aids', 'Career', 'Payroll Accounting', 'My Team', 'Personal Information', 'Flag', 'Total Pay', 'Time', 'Benefits', 'Performance', 'Expenses', 'HR Reporting Dashboard', 'Budget', 'Form 13 Process Tracker', 'Accounting', 'Reports', and 'Auxiliary Fees & Charges'. At the bottom, the 'Making Waves' logo is visible.



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Workday Demo


Sandbox

HCM

- Request compensation change.
- Terminate employee.
- Report: Compensation Spreadsheet

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Workday Demo

Sandbox


FINANCE

- Budget report
- Spend authorization
- Expense report

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Q & A



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