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## HR TECHNOLOGY ADVISORY COMMITTEE (TAC)

## PROGRESS REPORT

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## EXECUTIVE SUMMARY

The development of a new HR Technology Plan for the University with the targeted goal of modernizing the HR systems and launching new tools which create a more cohesive and efficient digital workplace for employees continues to build momentum. Objectives for this new program include new shared services and self-service delivery channels, allowing for increased collaboration and integration of HR processes across portfolios, lower administrative costs, and improved evidence-based decision making.

An important and distinguishing feature of this new technology plan is our stated vision to build new tools and processes that consider the needs of our employees and administrators holistically across technology domains. Projects identified target improvements within both the enterprise systems and desktop technology domains, allowing for more seamless collaboration between teams and new workplace efficiencies - the foundation for a strategic HR. The new **strategic HR** aims to create an **engaging** experience for the employee, deliver **efficient** and convenient services, and offer **insightful** information to senior leadership to meet institutional goals.

**Renew** Enterprise Systems: Engage, Simplify, Integrate



**Implement**

Common Service Desks  
HR Document Management sites  
Collaboration Tools  
Business Intelligence and Insights

*The HR Technology Plan considers user needs across both enterprise & desktop technology domains*

### Significant Milestones to date:

- **Secured funding through budget submissions** for new Business Intelligence Centre of Excellence, new Sharepoint data hub, new service desk software, new safety incident software and new staff learning module.
- Released **first HR Analytics Dashboard** (Tableau) to Divisional HR Offices and hired new HR BI specialist. On target to release divisional health index for draft feedback to divisions in July 2018.
- Completed analysis of HR Blackboard portal content and currently migrating all relevant documents to **new HR Sharepoint site (July 2018)**. Currently interviewing for a new Document Management specialist for the division.
- Completed contract negotiations with **ServiceNow for HR portal service desk software**. Completing analysis of payroll operations, developing RFQ for implementation services, and posting for a new ServiceNow support position.
- Secured **central funding for Kronos** for all divisions and continuing full **institutional roll-out** to interested divisions.
- **Released new Manager (MSS) vacation and team calendar reports** to over 1,238 managers and on target for full release to over 1,700 managers by July 2018.
- Completed contract negotiations with Cority (Medgate) and held project kick-off session with EHS and H&W in May 2018 to implement **new safety incident software** for the St. George campus.

- Completed functional and design specifications for components of the **Academic Administrative Appointment Process**.
- Launched the **new HR Employee Recognition platform** university wide in May 2018. Over 1,742 recognitions have been sent with over 2256 unique logons to the system recorded.
- Completed system interfaces and system design for the **new JDX standardised Job Description database** for launch in June 2018 to three pilot groups.

## HR Technology Projects at a Glance

### HR Reporting and Analytics Centre of Excellence

This project will jump start the formation of a Reporting and Analytics Centre of Excellence for the Division of HR & Equity. The Centre of Excellence will be a foundational element of the new digital workplace for HR, allowing just-in-time analytics and deeper insight into HR trends.

#### *Outcomes*

- HR Reporting and Analytics Centre of Excellence, including a new self-serve hub.
- HR focused reports and dashboards that meet the needs of senior leadership.
- Best practices for data management, reporting automation, and analytical insights.
- Cross-training and succession planning for critical data processes.

#### **Status:**

- New dashboards for Recruitment, Pay Scale Analysis and basic KPIs released Dec 2017 to all Divisional HR Offices.
- Prototype of Key Performance Indicators for Divisional HR Offices (Health Index) underway.
- Prototype of FTE count dashboard underway.

### Launch new Document Management Sites for HR Division

This project will implement Sharepoint as the document management product of choice in order to enable file sharing of critical documents within the Division of HR & Equity. Sharepoint, along with Office 365, will be a foundational element of the new digital workplace for HR, reducing barriers for collaboration among Divisional HR Offices and streamlining virtually all business processes within the division.

#### *Outcomes*

- New HR document management hub for common documents such as letters of offer, policies, meeting minutes, etc. accessible to all HR divisional offices.
- New document management hub for VP HR for senior leadership.
- Best practices for records retention, document management, etc. for the division as a whole.

#### **Status:**

- Recruitment underway for a new Document Management Specialist for the HR division.
- HR needs assessment survey and phased implementation plan of Sharepoint sites complete.
- Currently migrating HR Blackboard portal site to Sharepoint. Analysis complete - of 1700 documents, 520 will be migrated. New Sharepoint site design ready for user feedback week May 2018.
- On track to migrate all HR Portal content from Blackboard to new Sharepoint site by July 2018.

## Launch AskHR Service Desk

Over 40,000 HR service requests are received annually by the Division of HR & Equity through various email addresses and contact phone lines. This project envisions the installation of a new service desk application for HR, streamlining all HR inquiries through a central shared services unit to manage, respond and track approximately 70% of the standard HR inquiries.

### *Outcomes*

- Deployment of Shared Services Help desk streamlining all inquiries. Potential for AskHR – one email address for employee inquiries.
- Online knowledge base allowing for convenient, self-service help.
- Conversion of approximately 80+ PDF forms to fillable online forms routed to the appropriate HR unit for resolution.
- Investigation of options to use Service Desk software for high risk Case Management for HR.

### **Status:**

- Completed vendor review and selected ServiceNow (SN) for Human Resources.
- Security review of SN for high risk case management underway.
- Finalised contract costs and licensing requirements – submitting for VP approval June 2018.
- Developing and issuing RFQ for implementation services June 2018.
- Completed new JD for Service Desk support/workflow designs – ready for posting.
- Detailed analysis of payroll issues and central forms for implementation underway.
- On track to start Phase 1 Service Desk project – June/July 2018.

## ESS/ MSS Leave Requests

This project will expand Employee/Manager self-service options to include leave requests for most salaried staff (vacation, sick, personal days), eliminating a multitude of paper based processes currently in place across the university. The new automated services are expected to deliver extremely high efficiencies/savings once fully in place and will be one of the most substantial improvements to HR processes in 2017-18.

### *Outcomes*

- Convenient access to self-service leave requests (vacation, sick, personal) for USW, Confidentials, PMs and RA/SRA staff in the first phase.
- Ability for managers to approve requests online.
- Automated recording of leave requests in HRIS.
- New vacation reports and team calendars (displaying absences for team) for managers.

### **Status:**

- Released new and improved vacation tracking & absence summary reports to employees (Oct 2017).
- Released new Manager (MSS) vacation and team calendar reports to pilot group (165 managers) in Rotman, EASI, two depts in Medicine, Architecture, HR and Central Finance (Jan. 2018).
- On track to fix all employee reporting relationships and release all MSS vacation and team calendar reports, to over 1,700 managers university wide by July 2018.
- On track to implement new structured position creation process to prevent future system hierarchy errors in June 2018.
- Release new automated Leave Approval via ESS/MSS to pilot group (Summer 2018).

## ESS/MSS On-line Benefits Enrolment

This project will expand Employee/Manager self-service options for appointed staff to include online benefits enrolment services eliminating the current highly manual paper based processes. This new automated service is expected to deliver extremely high efficiencies/savings once fully in place and will be one of the most substantial improvements to HR processes in 2017-18

### *Outcomes*

- Ability for employees to electronically fill and submit benefits enrolment form.
- Ability for central and divisional HR office to review, validate and update the HRIS.
- Improved data integrity of benefits information.
- Focus on performing value-added work by central and divisional the benefits administrators

### **Status (on hold):**

- A prototype of possible screen designs and options for intuitive processes has been completed.
- Development effort for customization and implementation will be assessed in spring 2018.
- Project on-hold until ServiceNow is implemented in the event this new platform is a better match for the business need.

## Roll-out Kronos Time and Attendance Software

Kronos Time and Attendance software provides for electronic timesheets, timeclocks, or mobile check-in for hourly paid or casual employees at U of T. The product is integrated with HRIS eliminating the need for paper based systems to capture this information. Kronos was recently approved for central funding (licenses) allowing for more units to take advantage of the application.

### *Outcomes*

- Centrally supported electronic Time and Attendance system for hourly paid employees.
- Online approval process for managers.
- Integration of system with HRIS payroll.
- F&S Trades Services: Time and Attendance integrated with Service Orders system (time charged by employees to service orders).

### **Status:**

- Central Funding made available for on-going employee/manager license costs (Jan 2018 forward).
- Recent implementations include: DUA, Provost, and Nursing. Work is currently underway with STG F&S, UTM FMP, OISE, Rotman, Dentistry and central ITS.
- This project is extremely successful. Co-op student has been hired to assist with implementations.

## Incident Management and Workplace Safety Software

This project will streamline incident reporting on campus and ensure issues are quickly and appropriately directed to Environmental Health & Safety (EHS) and Health & Wellness (H&W)/Workers Compensation (WSIB) for investigation as regulated by the province. This is a joint project between the VPHRE and VPRI eliminating the need for duplicate systems or modules within H&W and EHS performing the same function.

### *Outcomes*

- New incident reporting form integrated with main systems on campus (Medgate/HRIS) eliminating duplicate entry.
- Upgraded and supported system to meet provincial safety regulations and WSIB claims.
- Consolidated incident reporting (EHS & HW).

### **Status:**

- DAC project budget approved for 2018-19.
- Vendor selection, security risk assessment, vendor statement of work, and implementation cost estimates complete. Contract complete.
- Project kick-off held May 2018.
- Estimated implementation – Fall 2018.

## Consistent Job Description and Posting

The Consistent JD project will produce consistent Job Descriptions for USW positions which are created from pre-evaluated statements. Once fully rolled out, managers and HR Consultants will start the JD creation process by selecting a template from a catalog of pre-written, pre-evaluated JDs rather than starting with a blank page thereby eliminating the guesswork and many of the manual steps currently required. The new processes are expected to deliver extremely high efficiencies/savings once fully in place and will be one of the most substantial improvements to HR processes in 2018-19.

### *Outcomes*

- A centralized inventory of consistent job descriptions for all appointed USW staff.
- Ability for Managers/HR professionals to search the inventory for job content.
- Ability for Managers/HR professionals to create JDs by selecting pre-written and evaluated content.
- Streamlined processes for JD creation, classification and posting.

### **Status:**

- Pilot implementations scheduled for EASI, UTM and VPRI in June 2018.
- Cross divisional Risk Assessment committee currently advising on training & implementation strategies.
- New Sharepoint site configured with training material, user tips, communication schedule, etc.
- Full roll-out to other areas of the university scheduled end of October 2018.

## Recognition Program Application

HR Recognition programs at U of T are designed to foster and inculcate a culture of recognition and appreciation for faculty and staff who contribute to the success of the institution. This project implements a new software package to automate many aspects of the formal recognition processes now in place at the University.

### *Outcomes*

- Electronic nominations and application management.
- Single sign on and email notification.
- Consolidated and automated reports and analytics.
- Peer to peer recognition.

- Integrated gift catalogue for awards programs.

**Status:**

- Confirmed software vendor “Fraser & Hoyt Incentives Ltd” to automate ETIA, True Blue and basic awards nominations.
- System successfully roll-out for True Blue and ETIA in May 2018.

### Academic Administrative Appointment Process

The purpose of this project is to build an enterprise level solution that will simplify the Academic Administrative Appointment (AAA) process and create a single, easily accessible and authoritative source of data concerning all Academic Administrators (Deans, Chairs, Directors) and AAA positions within HRIS. The solution aims to establish a single interface for AAA’s with enhancements to HRIS that will enable simplified maintenance of AAA positions, vastly improved data quality relative to AAA’s and improved accuracy and facility for reporting of current, future and past AAA’s.

*Outcomes*

- Generate reliable, enterprise level, searchable data relative to all faculty in academic leadership positions in support of multiple purposes.
- Simplify the nomination and on-lining of approved AAA’s (currently very labour intensive, repetitive).
- Facilitate off-lining (removal of AAA’s on completion of term – avoiding confusion, overpayment etc.)

**Status:**

- Project budget and scope confirmed.
- Project commenced in January 2018. First draft of business requirements complete.

### Research and Study Leave Calculator

This project is intended as the first step towards creating a Research and Study Leave calculator through the ESS portal. The ultimate goal is to fully automate the leave request process across the University, eliminating the current manual process, allowing individual faculty members to check their RSL eligibility online and submit a request for RSL for approval. In Phase I, adjustments will be made to HRIS to accommodate all data relating to leaves, creating a single, consolidated, and authoritative source of data reflecting existing individual faculty entitlements. Once records for all data have been reconciled across central and Divisional/Departmental offices, provide reports through HRIS to divisional Business Officers to verify potential research leave requests.

*Outcomes*

- Consolidated and accurate leave records maintained in a central authoritative system (HRIS) allowing for risk analysis at any level and a myriad of other reports.
- Online Research and Study leave eligibility calculator for faculty.
- Ability to automatically record leaves within HRIS once approved.
- Future:
  - Ability for faculty to easily check eligibility and request research leaves online.
  - Ability for departments, Dean’s Offices and VP FAL to approve leaves online.

**Status:**

- High level scope and solution design complete.



- Data clean-up of current RSL information underway.
- Formal system requirements analysis to begin August/Sept 2018.

## Data Quality Review Project

This purpose of this project to identify and implement targeted strategies which improve the overall quality of HRIS data. Tactics to meet this requirement will include new system error checks, end-user training programs, fast entry screens and better audit reports.

### *Outcomes*

- Establish Data Quality baseline and ongoing monitoring and metrics.
- Determine root causes of data errors with attention to error prevention.
- Rate severity of errors and implement mitigation strategies.
- Integrate data quality activities into other projects.
- Engage divisions and management in data quality process.

### **Status:**

- Initial meetings and consultations carried out with Payroll, FAL, Internal Audit, P&B, & Medicine.
- Analysis of current HR Data Integrity report – unique errors, warnings, basic dashboard underway.
- Initial improvements will be targeted to academic information.

## Staff Learning Module

The implementation of a new Learning Management module for Staff is suggested as the first step in fully modernizing the main HRIS systems at U of T due to the broad appeal and value of this module across the university.

### *Outcomes*

- A new “one-stop shop” inventory of learning opportunities for staff at U of T.
- Ability to create dynamic online learning material or links to external online learning sources.
- Ability for staff to conveniently register for courses, and record external certifications and record completion of mandatory courses (e.g. F&S, EH&S, Athletics, AODA).
- Integration of acquired learning with future HRIS modules such as Performance and Talent Management.

### **Status:**

- Project budget approved for 2018-19.
- License negotiations underway with vendor.
- RFP for implementation services under development.
- Estimated project start – August/September 2018.

## HRIS – Operational Improvements

Gender Inclusivity Phase 2 (analysis underway)

- Audit remaining 600+ HRIS reports/interfaces, implementing “Known As” changes where possible
- Explore options to request changes to “known as name” and form of Address through ESS
- 80% of requirements now defined for Phase 2.

New Payroll Spinifex Reports (Complete: March 2018):

- Release five new payroll audit reports for divisional Business Officers

USW Step Increase (Complete: May 2018):

- Streamline USW step increase on HRIS

Search by Student Number (Complete: April 2018):

- Fix all student numbers on HRIS and implement new search function. Add new student # lookup table to prevent future errors

Bill 148 Implementation (2018)

- Set new minimum wage rate - \$15 (\$14 for Work Study), automate vacation accrual after 5 years, automate vacation payout after 5 years