Establish new HR Technology vision, roadmap and targeted improvements.

2017

2018

Plan enterprise transformation, leverage technologies for collaboration, launch analytics centre of excellence.

2019

Implement new LME, AskHR services, KPI dashboards, new business process efficiencies.

Transform recruitment/performance management, leverage paperless technologies, launch predictive analytics.

2020

2021

Continue the journey – modernizing the HRIS systems and implementing the digital workplace.

UNIVERSITY OF TORONTO

HR TECHNOLOGY ADVISORY COMMITTEE (TAC)

PROGRESS REPORT

CATHY EBERTS
UNIVERSITY OF TORONTO

Contents

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

Recruitment → On-boarding → HR payroll → etc.

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

Recent Program Highlights:

- Selected the implementation partner for **SAP SuccessFactors Talent Management Suite**. Held program kick-off with key sponsors in February to begin implementation of the first three modules: Learning Management, Performance and Goals, and Recruitment. Funding model and plan to roll-out SAP SuccessFactors and the SAP HANA platform for the Administrative Management Systems over five years approved by senior leadership.

- Launched **new FTE count tableau dashboard** for HR professionals allowing for FTE counts by employee group sourced from HRIS.

- Creating team-specific **HR SharePoint sites**, including a Labour Relations Database and Consistent JD Project specific sites. Launched a **new HR Projects Centre and a new HRIS Training and Support Centre in Q1 2019.**

- Selected the implementation partner for ServiceNow in order to establish **a modern HR portal and service desk platform** for the division. Project kick-off completed in March and Phase 1 workshops now underway with implementation scheduled for Q2/3 2019.

- **Increased the number of employees on Kronos Time and Attendance software to 2,600**. Currently implementing UTM FMP scheduler (new module), Faculty of Dentistry, OISE, and Robarts Library Flex Time (new module).

- **Released the pilot version of ESS and MSS leave requests** to central ITS, HR and Finance in January 2019. Opt in roll-out of ESS leave request (without manager substitution) now available to all remaining divisions at the university.

- Completing acceptance testing of the **new Safety Incident reporting application (Medgate/Cority) for EHS and H&W.** Targeting implementation of administrative view in May 2019 and public Incident portal view in June 2019.

- Development of the new **Academic Administrative Appointment Process on SAP underway.** Revised target of Q4 2019 for implementation based on user feedback.

- Completed the pilot of the new **JDX standardised Job Description database** with EASI, UTM and Research Services. University wide roll-out started scheduled Q1 – Q3 2019.

Introduction

A highly modern HR division uses technology to maximise the mutual benefit of employment for both the employee and employer and matches workforce skills/numbers to meet institutional opportunities and challenges. High-impact projects which create innovation in future service delivery and productivity tools for employees and administrators have been situated within four areas of focus in our plan:

1. **Enterprise Systems Modernization**
2. **Knowledge and Service Management**
3. **Reporting and Analytics**
4. **Targeted Process Improvements**

Enterprise Systems Modernization

Several very large system investments have now been approved to modernize the main Human Resources enterprise systems at the U of T over the next 2 – 5 years. These include a full upgrade of our HRIS system to the new version of SAP and talent management products (SuccessFactors), along with the continued roll-out of a centrally supported time and attendance application (Kronos) for hourly paid employees.

SAP Modernization program:

In October 2018, the University approved a 3–5 year modernization program of the SAP Administrative Management Systems. Improvements to the system include an upgrade of the entire HR Talent Management Suite (SAP SuccessFactors), an upgrade of the core HR and Finance systems to the new version of SAP (S4) and an upgrade in core technology to an in-memory database (HANA). To enable the upgrade, all infrastructure supporting the new versions of SAP software will be upgraded and moved to a more robust cloud platform allowing for 24/7 support of this investment for the university.

The implementation of our new HR Talent Suite, SAP SuccessFactors, is an important step in fully modernizing the main HRIS systems at U of T. SuccessFactors is an integrated cloud solution built for a better user experience. These new applications will allow for personalized training, focused career development, an improved candidate and onboarding experience, and provide for better decision making about hiring, diversity, performance and more. Modules currently slated for implementation include: Staff Learning, Performance and Goals, Succession Planning, Recruitment and Onboarding, and Employee Central.

Outcomes:
- A new "one-stop shop" with an integrated, flexible, and easy to use HR technology suite.
- A complete package from hire to retire that includes Recruitment and Onboarding, Learning Management, Performance and Goals, and Succession Planning.

- Improved talent acquisition through advanced branding, marketing and on-boarding career sites.
- Cutting-edge workforce analytics allowing managers improved visibility into UofT talent pools.
- Ability to link learning to employee personal and development goals using dynamic online material or links to external online learning sources.
- Ability for staff to conveniently register for courses and record completion of mandatory courses.
- A self-service experience that will increase engagement and reduce administration.

Status:
- Roadmap defined for next 3-5 years starting with Learning Management, Performance & Goals & Recruitment in 2019-2020
- SuccessFactors implementation partner selected and requirements workshops underway for first three SF products
- RFP for S4 Finance to be issued April 2, 2019

Kronos Time and Attendance Software

Kronos is a cloud-based time and attendance system for use with our Human Resources Information System (HRIS) – Payroll. Kronos eliminates the use of paper timesheets and the need to forecast employee hours through convenient, online approval processes. The software provides electronic timesheets, timeclocks, or mobile check-in for hourly paid or casual employees. Approved for central funding, the system has been rolled out to 12 departments since May with over 2,600 employees using the system and more than 2,000 employees in line to join Kronos in 2019.

Outcomes:
- Centrally supported electronic Time and Attendance system for hourly paid employees.
- Convenient, online approval process for managers.
- Integration of system interfaces with HRIS payroll.

Status:
- Central Funding made available for on-going employee/manager license costs (Jan 2018 forward).
- Work underway for UTM FMP scheduler (new module), Faculty of Dentistry, OISE, Engineering, and Robarts Library Flex time.
- Interest expressed (and next in queue): Pharmacy, Law, and Communications

Knowledge and Service Management

Technologies which allow for more seamless collaboration between teams and sharing of information and services are expected to provide the foundation for the new digital HR. Two critical projects have been identified as a priority in this domain for the HR division – implementation of new Sharepoint Document Management hubs and implementation of ServiceNow service desk software and portal for administrators and employees.

Document Management Sites for Division of HR & Equity

The HR&E Documents Hub is a new, internal SharePoint Online site that has replaced the Blackboard portal. This site allows HR&E staff to efficiently and securely track, modify, store, organize and share critical documents. The new portal leverages SharePoint's search, document versioning capabilities and mobile-ready interface for an enriched user experience. During the first phase of the project, the team analyzed and reduced 1,700 pre-existing documents to 520 that were critical for business processes. This project represents phase one of a multi-year strategy to improve document management within the Division.

Outcomes:
- New HR document management hub available for team-specific areas of interest, example: Administrative HR, Labour Relations, VP-HR, etc.
- Best practices for records retention, document management, etc. for the division as a whole.

Status:
- Creation of team-specific HR SharePoint sites underway, including a Labour Relations Database and Consistent JD Project specific site.
- Recently launched the new HRIS Training and Support Centre and an HR Projects Centre sites
- Document management hub for VP HR in progress, targeted completion of Q1 2019
- Hubsite currently being built to tie together all team-specific SharePoint sites with the HRE Portal; target launch Q2 2019
- New SharePoint site for the Uniforum survey in progress; target launch March 2019

Enterprise Service Center (ServiceNow)

The HR Service Desk software (ServiceNow) will help to streamline over 40,000 annual HR service requests, through a central, shared services unit. The system is expected to eventually manage and track approximately 70% of all standard HR inquiries, and empower staff to complete basic HR functions – ultimately allowing HR practitioners to perform more strategic tasks.

Outcomes:
- Deployment of Shared Services Help desk streamlining all inquiries. Potential for one contact point for all employee HR 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.
- RFP for implementation services complete. Selected vendor to begin implementation workshops in April 2019.
- Detailed analysis of payroll issues and central forms for implementation complete.
- Change management and consultation activity planning is underway; several Functional User Groups have been established to validate requirements and progress throughout the project
- Analysis and determination of central HR email channels to be linked to ServiceNow is complete
- Content analysis and migration of content to ServiceNow from the HR & Equity website is underway
- Estimated launch Service Desk proof of concept by Q3 2019

Reporting and Analytics Dashboards

The HR Reporting and Analytics Centre of Excellence is a key element of the new HR digital workplace, providing just-in-time analytics and deeper insights into HR trends. It will use best practices for data management, reporting automation and analytical insights, and features a new self-serve hub, and extensive reports and dashboards.

In December 2017, a suite of three data dashboards were launched on Tableau visualization software for divisional human resources staff to access key performance indicators, trends and changes in employee headcount, recruitment and upcoming retirements in an accessible and illustrative format. Continuous improvement has meant that these dashboards are not refreshed daily, automatically. This new capability provides critical business intelligence insights that will help multiple divisions across the university make strategic decisions about their workforce that are based on clear and concise data.

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

Status:
- Prototype of Key Performance Indicators for Divisional HR Offices (Health Index) in progress
- New FTE count dashboard now available to users of the HR Tableau site
- Second HR Reporting Analyst added to team in February 2019, increasing capacity for HR reporting and analytics initiatives
- Exploration and prototyping of HR machine learning applications scheduled for summer 2019
- Environmental scan of divisional reporting needs, intake mechanisms, training, and documentation needs to commence shortly in order to better serve the university community.

Targeted Process Improvements

Implementation of large system improvements which reduce administrative overhead within divisions will continue through most of fiscal year 2018-19. Of significance are the following projects:

Manager/Employee Self-Service Leave Requests

Manager Self-Service (MSS) was rolled out starting in January 2018 to a full launch in June to help supervisors view information about their team in a convenient and secure way. More than 1,700 managers now have the ability to view vacation and absence data, supervisory relationships and university training information for their teams via a new module in the existing Employee Self-Service (ESS) suite of online services. A vacation and leave request component is now in pilot with several central units with full roll-out for the university slated for 2019. By using MSS, the University is projected to save over $550,000 in people hours during the first year and over $970,000 in three years.

Outcomes:
- Convenient access to self-service leave requests (vacation, sick, personal, training, bereavement leave) for USW, Confidential, PM 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:
- Manager (MSS) vacation and team calendar reports released to all managers & supervisors at U of T (1700+ individuals) in July 2018
- New structured position creation process implemented in June 2018 to prevent future system hierarchy errors
- Solution identified for allowing MSS access to "casual" employee managers; proof of concept underway with anticipated fix launching in Q1 2019.

- Pilot of Employee Self Serve leave request underway in Q1 2019 with central ITS, Finance and HR
- Opt-in roll-out of ESS leave request (without manager substitution) now available to all remaining divisions at the university

Consistent Job Description Project

The Consistent JD Project is aimed at transitioning the University to a new, consistent form of job description, which will become an integral part of a more efficient and effective United Steelworkers (USW) job evaluation process. Using advanced software, called JDXpert, managers and HR staff will choose from a bank of pre-written, pre-evaluated job class description templates. The application will help managers create and reclassify USW job descriptions more quickly, accurately and consistently. It will also streamline the USW hiring workflow from position creation to approval and posting. The new job description format will not change the pay band, classification or responsibilities of any job – it will simply alter the way in which the work is described. A key goal of this project is to bring clarity and consistency to how similar work is described across the University.

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 launched 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.
- Systems and process training for other areas of the university began in October 2018
- Full phased roll-out to other areas of the university scheduled February 2019 and will be complete by June 2019

Incident Management and Workplace Safety Software

This project will streamline incident reporting at the university and ensure issues are quickly and appropriately directed to Environmental Health & Safety, and Health & Wellness/Workplace Safety and Insurance Board for investigation, as regulated by the province. Budget was acquired and the vendor for this application (Medgate/Cority) was confirmed in April 2018. This is a joint project between HR&E and the Vice-President, Research & Innovation, and it will eliminate the need for duplicate systems or modules.

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

Status:
- User acceptance testing underway
- Testing public view of new Safety Incident Form with User Experience Design team
- Integration with HRIS in progress
- Revised implementation date: May/June 2019

Academic Administrative Appointment Process

The purpose of this project is to build a University-wide 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. With enhancements to HRIS, the solution aims to establish a single interface for AAAs that will enable simplified maintenance of positions, vastly improved data quality and improved accuracy and facility for reporting of current, future and past AAAs.

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:
- Business requirements completed and signed off
- Technical solution design complete and build commenced
- Revised implementation target: Q4 2019

Research and Study Leave Calculator

The Research and Study Leave Calculator will fully automate the faculty leave request process across the University through ESS. It will eliminate the current manual process, allowing individual faculty members to check their RSL eligibility online and submit a request 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, it will provide reports through HRIS to divisional Business Officers to verify potential research leave requests.

Outcomes:
- Consolidated and accurate faculty 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 faculty leaves within HRIS once approved.
- Future:

  - o Ability for faculty to easily check eligibility and request research leaves online.
  - o 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.
- System requirements analysis started

HRIS Operational Improvements

Due to the launch of the new SAP Modernization project, the establishment of a new HRIS Change Advisory Board (CAB) was put on hold in 2018 but will now be considered again in Q1 2019. The purpose of this new committee is to assist the IT project team in establishing priorities for improving the current operations of the HRIS systems through initiatives such as data quality improvements, new training programs, improved interfaces to related systems, or new operational reports which may be of value to the divisions. The board will operate on a model of collaborative governance and will include tri-campus functional representatives (mostly HR representatives and business officers) and technical leads and managers from EASI. Members of the HRIS CAB are front line users of the HRIS systems.

Examples of projects which this team may be requested to provide feedback on include:

- Improvements in training material
- New system error checks
- Operational reports of value to the divisions
- Improvements to HRIS in preparation for SuccessFactors Employee Central

<u>Other activity:</u>

- Updates are now complete to approximately 250+ HRIS reports/interfaces, to enable "Known As" name as part of the Gender Inclusivity Phase 2 project
- A review of the requirements to track PDF Unit 5 vacation on HRIS is now underway