



Senate Meeting

February 7, 2023



Senators and Deans

- Log in to **PointSolutions** on your mobile device or web browser (<https://ttpoll.com>).
- Enter the Session ID: **winter23**
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Go to **PointSolutions** on a mobile device or at <https://tppoll.com/>

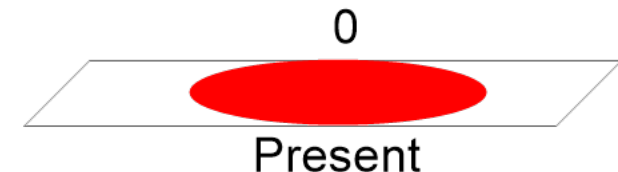
Session ID: winter23

Quorum: 87

Senators & Deans: Press **1** in PointSolutions to indicate that you are present for quorum purposes.

The meeting will start once we reach the Quorum number above.

1. Present





Agenda

1. Call to Order



Agenda

2. Announcing new Executive Secretary & Director of the University Senate (Information)



Announcing new Executive Secretary & Director of the University Senate (Information)

- Please join me in welcoming Veronica Marin. Veronica has been appointed to the position of Executive Secretary and Director of the University Senate!





Agenda

3. Approval of the December 7, 2022 Senate Minutes (Action)



Approval of the December 7, 2022 Senate Minutes (Action)

- One correction was received by Senate Office staff to the December 7th minutes.
- The correction is on page 4 of the minutes.
- "Senator Gandhi, PTK, BSOS, ~~asked if~~ **noted that** APAS had consulted **with** the Counseling Center..."
- Are there any additional corrections or additions to the minutes as distributed?



Agenda

4. Report of the Chair



Chair's Report – Senate Elections

- The candidacy period for the staff, student, and single-member constituency elections for the 2023-2024 Senate ended on February 3, 2023. **Elections for these constituencies will begin on February 20, 2023.** If you are a member of one of these constituencies, we encourage you to vote for your Senators at that time.
- February 3rd was also the deadline for the Deans to report the results of their faculty elections. Newly-elected faculty Senators will be eligible for nomination for our elected committees and councils and leadership positions for the 2023-2024 academic year.



Chair's Report – Nominations for Elected Committees and Councils

- The Nominations Committee started its work last week. It is tasked with identifying potential nominees for the Senate's elected committees and councils, including the Senate Executive Committee, the Committee on Committees, the Athletic Council, and the Council of University System Faculty.



Chair's Report – Nominations for Elected Committees and Councils

- Senators will receive an email in the coming days soliciting self-nominations and nominations of their colleagues. It is important to continue to have strong nominees running in all of these elections, and I encourage you to consider running or nominating your colleagues for these important positions.



Agenda

5. Technical Revisions to the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (Senate Document #22-23-17) (Information)



Technical Revisions to the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (Senate Document #22-23-17) (Information)

- On November 9, 2022, Patrick O'Shea, Chair, Conflict of Interest Committee, and Beth Brittan Powell, Director, Conflict of Interest Office, sent the Senate Office a proposal to update the Procedures on Conflict of Interest and Conflict of Commitment (II-3.10[B]) to reflect the current Conflict of Interest review procedures. (Senate Document #22-23-17).



Technical Revisions to the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (Senate Document #22-23-17) (Information)

- The procedures had been converted from paper and form submissions to an electronic process through the Kuali Conflict of Interest (KCOI) disclosure system.
- The electronic system now allows faculty and staff to disclose their outside activities and/or Significant Financial Interests in outside organizations related to their University Responsibilities by submitting a timely disclosure.



Technical Revisions to the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (Senate Document #22-23-17) (Information)

- These new processes made the references to forms and paper submissions in the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (II-3.10[B]) obsolete. The policy's out-of-date web links were also in need of being updated to reference the new system.
- The revisions to the procedures included removing the word "forms," incorporating terminology to align with the current practice through the KCOI system, and updating the title for an Office of Research administrator. Additional revisions addressed removing outdated and typographic errors.



Technical Revisions to the University of Maryland Procedures on Conflict of Interest and Conflict of Commitment (Senate Document #22-23-17) (Information)

- The revisions were all non-substantive and technical. Without the proposed revisions, the procedures caused confusion for campus community members who are required to comply with the procedures.
- The Senate Executive Committee was advised of the proposed technical revisions at its November 16, 2022 meeting. President Pines approved the revisions on December 16, 2022.



Agenda

6. Special Order

Jack Blanchard

Associate Provost for Enterprise Resource Planning

Elevate Project Update

Elevate Program Update

Senate

February 7 2023

Jack Blanchard

Associate Provost for Enterprise Resource Planning

Agenda:

1. Overview of Elevate
2. Timeline and progress
3. Go/No-Go decision
4. Training
5. Support
6. Student System

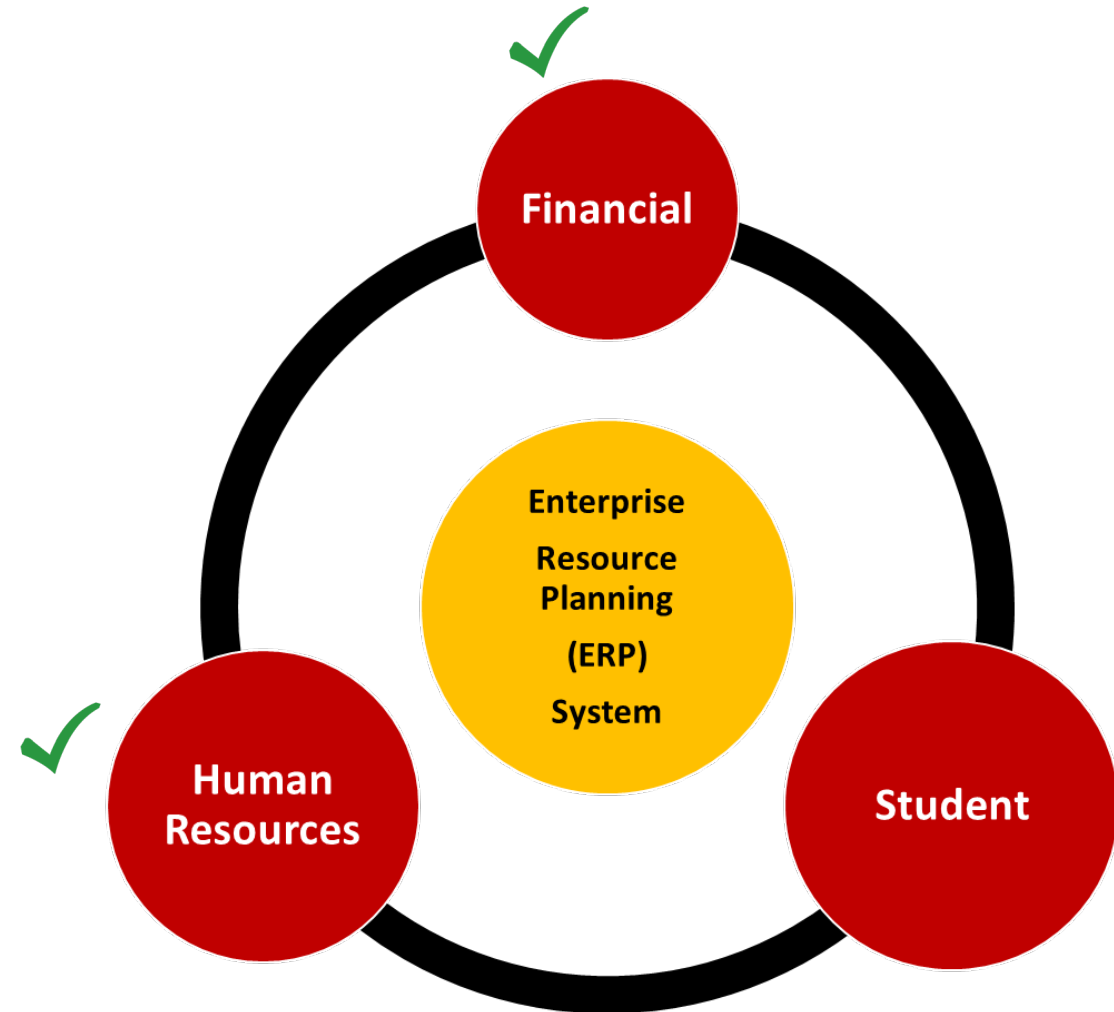


Overview

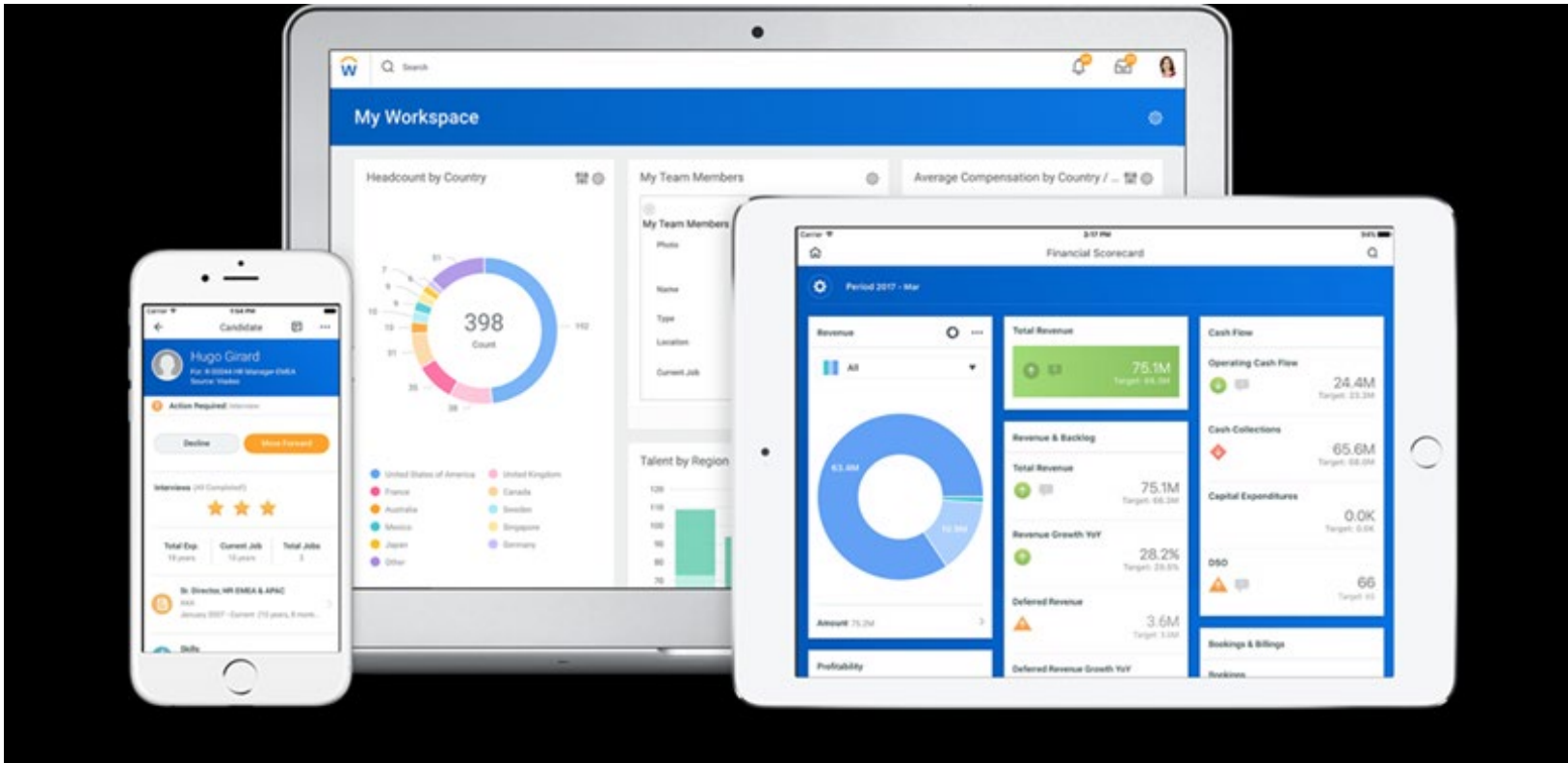


Purpose of Elevate

To modernize our obsolete ERP system to better meet the complex needs of a flagship research university.



Elevating our ERP to the cloud with Workday.



Ensuring Workday will work for Maryland.

Over 360 staff with direct input to Elevate:

- Project Implementation Teams (PIT Crews)
- From across campuses (UMCP, UMES, UMCES, UMSO)
- Representing diverse perspectives from Divisions, Colleges, Institutes, Centers and Departments.
- Contributing *thousands of hours* of time to confirm configuration decisions, provide critical input, and communicate with their home units.

Faculty Advisory Committee

- Twenty faculty from T/TT and PTK.
- Represents diverse roles including instructional, research, Chairs and Directors.

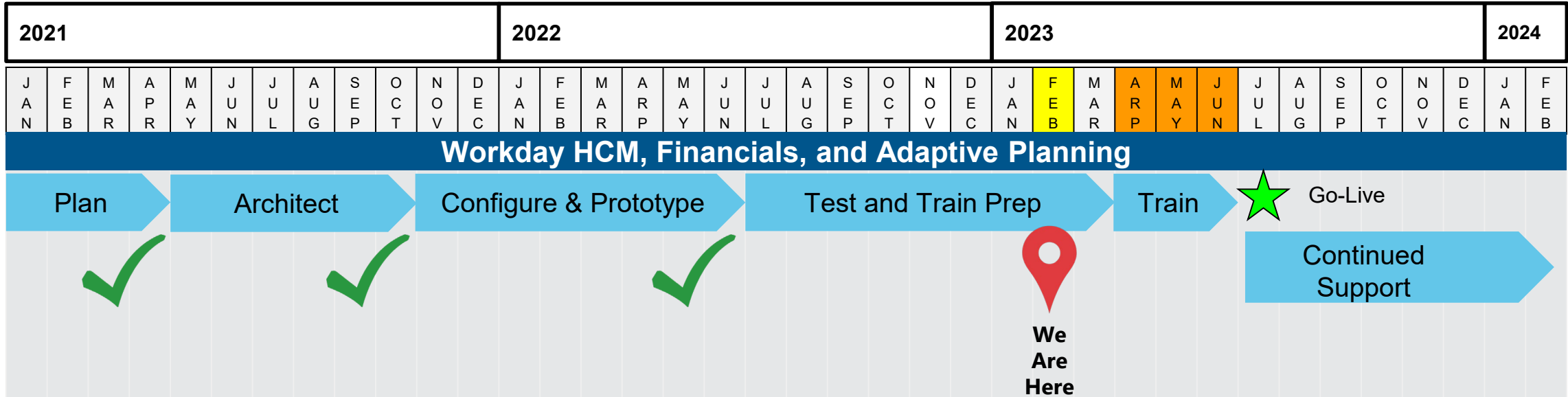
Thank You!



Progress & Next Steps

Elevate Program Timeline - Phase I

HCM and FIN





Go/No-Go Decision

What goes into a Go/No-Go Assessment?

- **Critical evaluation of key technical metrics (e.g., payroll testing with CPB), readiness of business units, and plans for cutover (from PHR/KFS to Workday).**
- **Go/No-Go Checklist covers eight categories and 278 items:**
 1. Workday Readiness - Functional Areas and Systems
 2. Process and Change Management Readiness
 3. Technical System Readiness
 4. Testing
 5. UMD Division and Tenant Partner Preparedness
 6. Service Team Preparedness
 7. Operational/Process Readiness
 8. Cutover



July

2023 **Calendar**

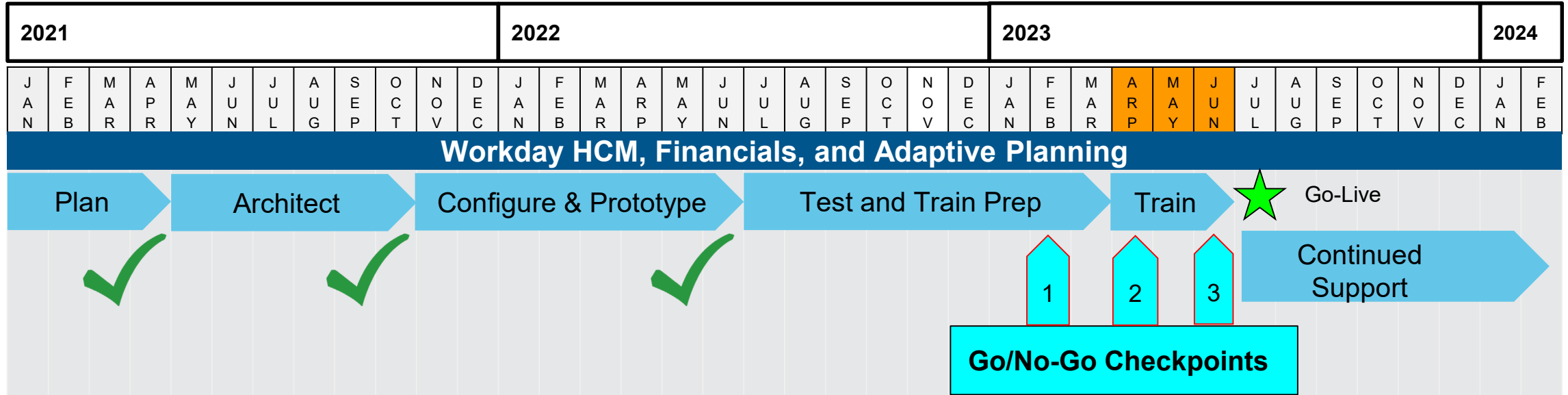
SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Go/No-Go Decision

- **First key assessment in mid-February**
 - Based on metrics, Elevate Program team → ESC → Sponsors
→ President Pines
- **Impact of Decision - what would happen next?**
 - **GO**: Proceed as planned! Next check point in April.
 - **NO-GO**: Would mean not able to go live July. Elevate team and leadership would re-evaluate and determine new go-live date.



Elevate Program Timeline - Phase I


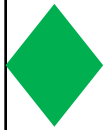







Training

Timing of Training

Users will be able to take training starting in April.

March	April	May	June	July	August
 Training Registration				 July = Go Live	
	 1 Take on-demand Intro to Workday course				
	 2 Take prerequisite courses				
	 3 Take role-specific courses				
	Access to hundreds of job aids				
	Access to User Labs				

How will staff and faculty be trained?



**On-Demand Computer-
Based Training**



**Instructor-Led
Training (Zoom)**



**User
Labs (Zoom)**

Average Time for Training (est.)

Amount of training will differ by user.

	General User	HCM User	Finance User
General Course	~45 minutes	~45 minutes	~45 minutes
Prerequisites Courses	N/A	~2.25 hours	~1.5 hours
Role-Specific Curriculum <i>(includes both required and optional courses)</i>	N/A	Average: ~3 hours Shortest: ~1 hour Longest: ~10 hours	Average: ~3 hours Shortest: ~1 hour Longest: ~10.5 hours
	Average = 45 mins minutes + Job Aids	Average = 6 hours	Average = 5.25 hours

Job aids will complement training

- Job aids are **simple, clear instructions** on how to do a task.
- The most up-to-date job aids will be available **anytime, in one repository, for all users.**
- Over 400 job aids will be available.

Sample Job Aid

Add or Change Emergency Contacts

This job aid instructs users to add or change emergency contacts in Workday.

Initiator: All Workday users can add/change emergency contacts.

Approver: Approval is not required.

Add or Change an Emergency Contacts

To add or change emergency contacts, log in to Workday and complete the following steps:

1. Click **Profile**.
2. Click **View Profile**.
3. Click **Actions**.
4. Hover over **Personal Data**.
5. Click **Change Emergency Contacts**.

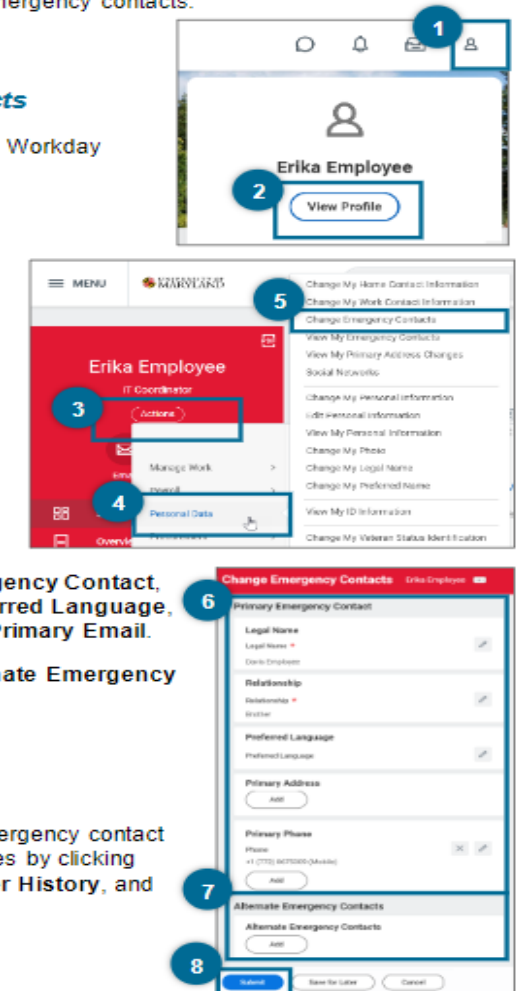
Note: You can also search and select the **Change Emergency Contacts** task from the Workday search bar.

On Change Emergency Contacts page:

6. Complete information under **Primary Emergency Contact**, including **Legal Name, Relationship, Preferred Language, Primary Address, Primary Phone** and/or **Primary Email**.
7. *Optional:* Complete information under **Alternate Emergency Contacts** to add an additional contact(s).
8. Click **Submit**.

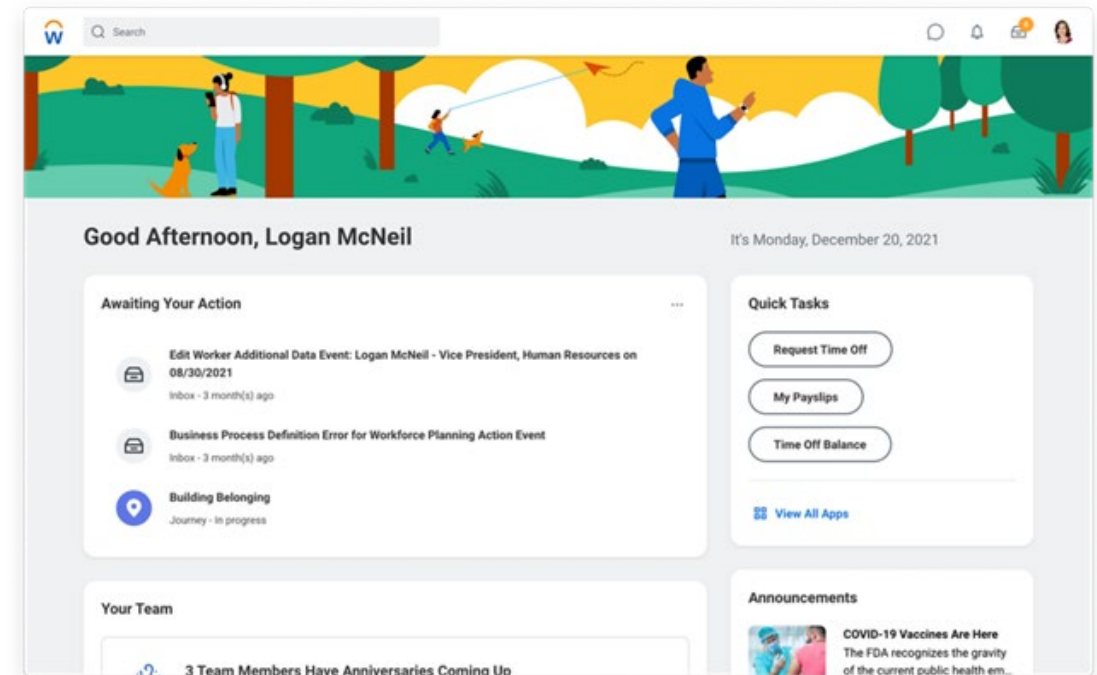
Next Steps

You have successfully added/changed your emergency contact information. You can view worker history changes by clicking **Actions** from your profile, hovering over **Worker History**, and selecting **View Worker History**.



Early Piloting with campus PIT Crews

- Key stakeholders eager for “hands on keyboard” experience with the Workday system.
- Providing early access to Workday readiness tenant to **explore and familiarize**.
- Pilot training modules to get early exposure to training and provide feedback.



Post Go-Live Support

Support for New Users is Critical.

- Prior experience with implementing new technology confirms that **easy access to helpful support is essential.**
- Must ensure ability to address all user needs **long-term.**
- Also need to accommodate increased user requests during **initial months.**



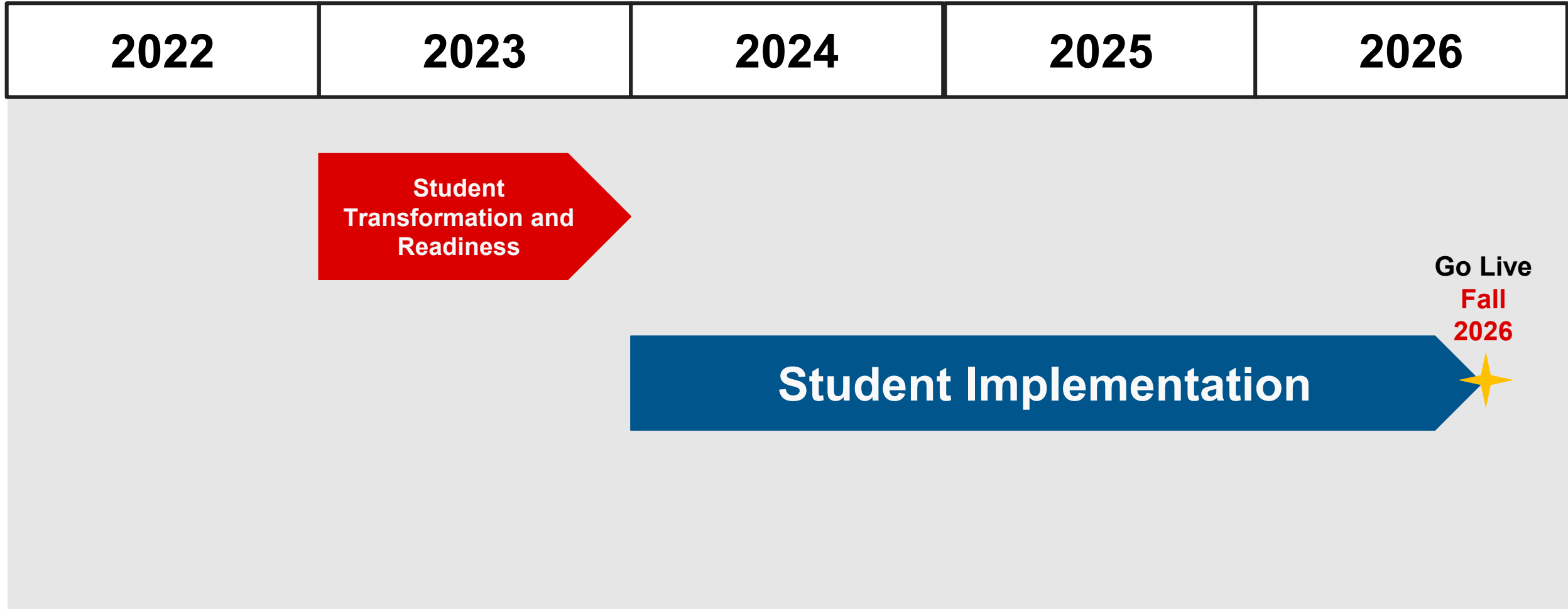
Levels of Support for Workday

1. New Workday Services Team
 - 32 new staff positions in DIT
Dedicated exclusively to Workday support.
 - In place prior to go-live (20 hired to date)
2. Hypercare
 - To assist during stabilization phase
additional Huron resources to be available for 6 months post-go-live (July – December).



Workday Student System

Getting Ready for Workday Student



Phase II: Student Transformation and Readiness

- **Student-Centered**
 - a. Students as key stakeholders.

- **Initiating early work:**
 - a. Work began in January and will continue through end of 2023.
 - b. Initial meetings held with GSG and SGA.
 - c. Will engage every college's Student Advisory Council.
 - d. Scheduling with Administrators and Staff involved with undergraduate and graduate programs.



Phase II: Student Transformation and Readiness

- **Individual and small group discussion underway . . .**
 - a. Assessing pain points in current Student Information System.
 - b. What do students and other stakeholders want in the new Workday system?
- Assessing current academic processes and policies to understand implications for new Workday system.
- Develop communication strategy for continuous engagement of students and other stakeholders throughout project lifespan (2024 – 2026)
- Results ready by end of calendar year and used to inform the start of the Student Implementation for January 2024.





Stay Informed

Next Elevate Update

All-campus Zoom Town Hall Meeting (two options – also recorded)

- Wednesday **February 22**
- Thursday **February 23**

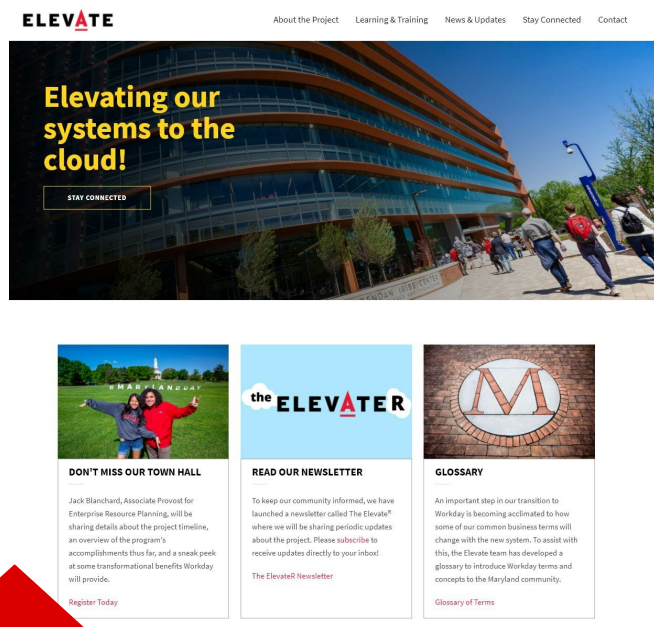
Agenda to include:

- Go/No-Go decision outcome
- Training and readiness
- July transition specifics



Town Hall Meeting

Stay Connected with Elevate



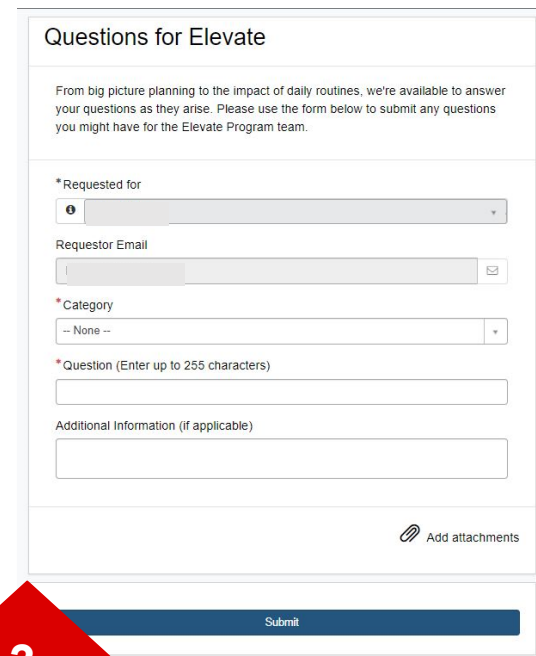
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Visit our website:
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2

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3

Ask us a question:
elevate.umd.edu/contact

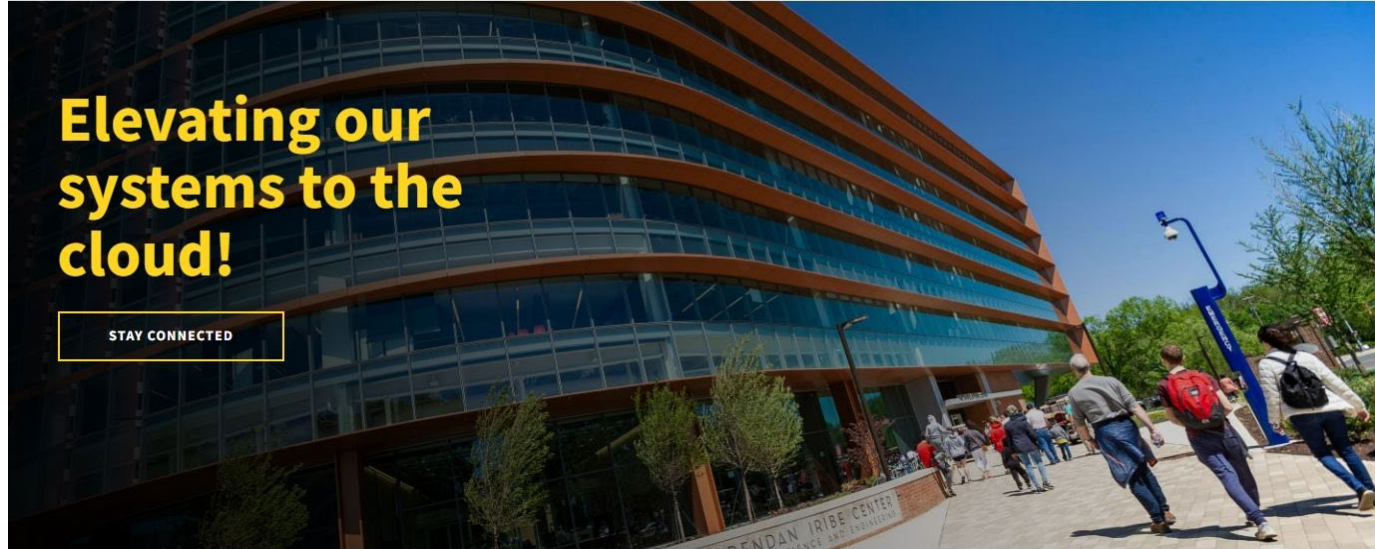
Browse Elevate website for videos, newsletters, FAQs, glossary, other material: elevate.umd.edu

Demonstrations

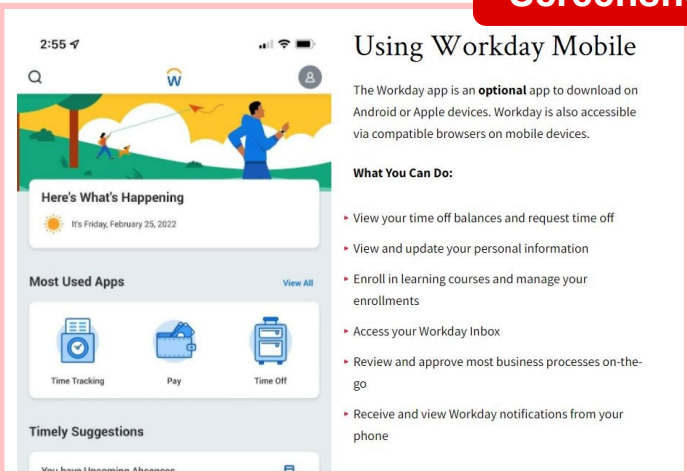
Add Your Pronouns:



Workday Mobile:



Screenshots



Glossary Terms

Featured Glossary Terms

Employee Self Service

The ability for an Employee as Self or Contingent Worker as Self to initiate a transaction on their own. This includes:

- tasks and business processes that you can initiate in Workday, such as managing your personal and contact information
- access to your own information, such as your job title, manager, compensation, and personal data

Worker Profile

A quick view of each individual Worker's demographic, job, and organization information. Worker data is viewable in the different tabs of the Worker profile, and view/edit access to this data depends on one's security role access.

[VISIT OUR GLOSSARY](#)



Question & Answer



Agenda

6. Special Order

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Elevate Project Update



Agenda

7. Discussion of Zoom or Hybrid Modality for 2023-2024 Senate Meetings



Agenda

7. Discussion of Zoom or Hybrid Modality for 2023-2024 Senate Meetings





Agenda

8. New Business
9. Adjournment