



FROM ONE CASUAL SYSTEM TO ANOTHER. HOW THE UNIVERSITY OF ADELAIDE MANAGED THE CHANGE

SESSION 6076
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ADU 7-9 NOVEMBER 2018

PRESENTERS

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THE UNIVERSITY OF ADELAIDE

Established: 1874

Campuses: 4

Faculties: 5

Divisions: 3

Students: 22,000

Staff: 3,500 (excl casuals)



ORGANISATION & ORACLE

HCM, Campus & Finance
PeopleSoft HCM 9.2
PeopleTools 8.55, PUM #27
GP, Time & Labour, Profile
Mgmt, Partial Position Mgmt,
Contract Admin, Training
Admin

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OVERVIEW



WHAT WE DID

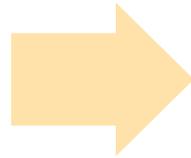
Casual System
Replacement

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WHAT WE DID

CASPA

- PeopleSoft Time & Labour
- Oracle Fusion Middleware (OFM)
- Unified



CAPS

- 100% PeopleSoft:
- SSO Forms
 - Activity Guides
 - Time & Labour

WHAT WE DID

23rd June
2018

- Engagement initiation
- Approval
- Acceptance
- Onboarding

21st July
2018

- Timesheets
- Planned vs Actual reporting

PROJECT SCOPE – CONTRACTS 2017

8528 Contract Creation

4856 Budget Approval

8528 Contract Approval

459 Visa Checks

8528 Contract Acceptance

30,899*

*Excludes Amendments, resubmissions/rework

PROJECT SCOPE — TIMESHEETS (SEPTEMBER 17)

4214 Submission/Review

4214 Validation

638 Escalations/Pushback

9066 Total for September

Annual

108,792

WHY WE DID IT

SHORT DESCRIPTION

WHY WE DID IT

Project to replace CASPA in order to achieve:

- Improved performance/system stability
- Improved support – experience within university
- Reduced maintenance costs due to:
 - reduction in support staff
 - reduced licensing fees
- Continuous Improvement – setting us up for the future. Enabling easier improvement opportunities through regular system updates.



BENEFITS

- 1 stop shop, everything accessible through SSO
- All pay related activities are now in one system
- Overall improved user experience
- Consistent and streamlined casual management processes across the University



BENEFITS

- Improved mobile and browser compatibility
- Obtaining additional information through Casual Onboarding task (Qualifications, VISA, citizenship)
- Greater visibility of where casual engagement and timesheet tasks are
- Casuals can easily see the status of their timesheets

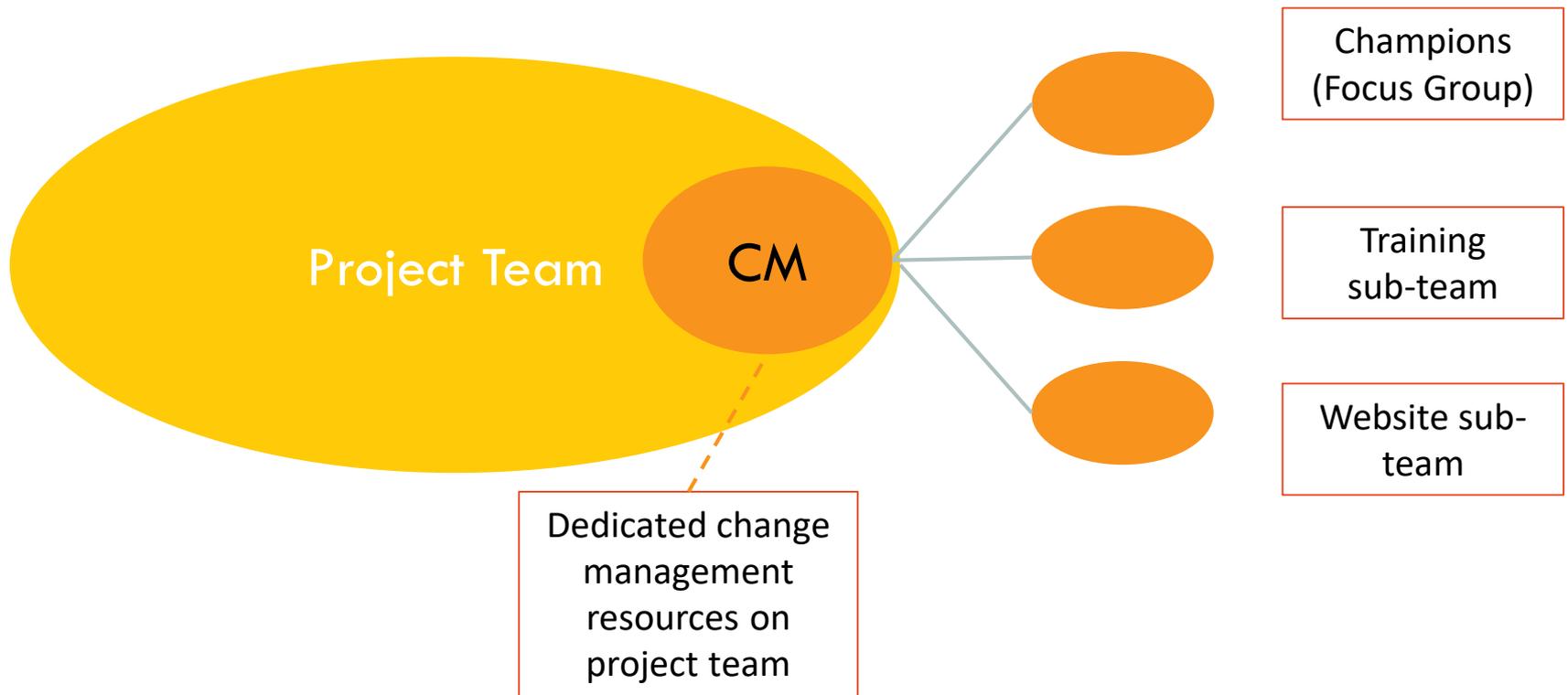


HOW WE MANAGED THE CHANGE

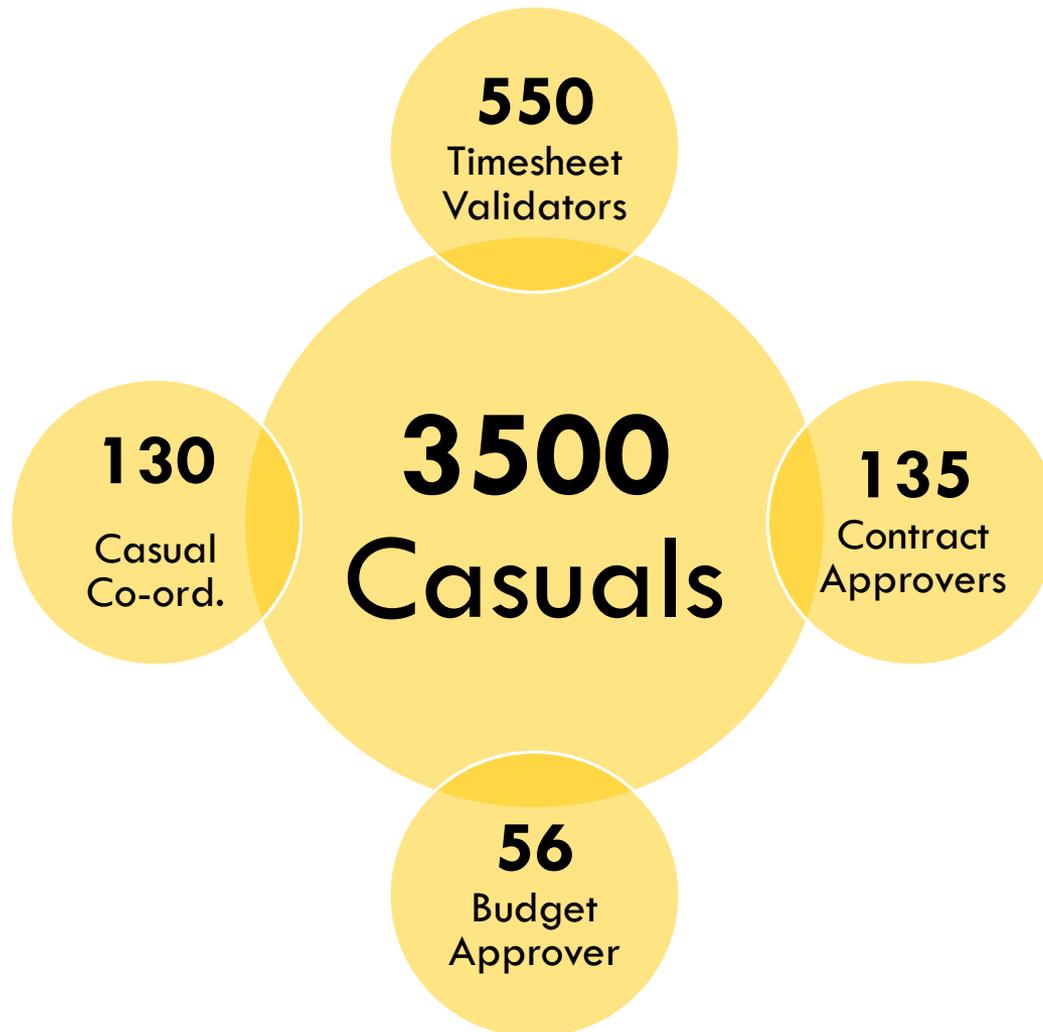
How did we manage the
change from one casual
system to another

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TEAM STRUCTURE



IDENTIFY USERS/STAKEHOLDERS



CHANGE IMPACT ASSESSMENT

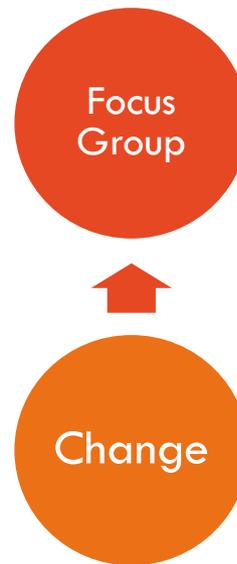
- Change Impact Assessment Register
- 57 items on the register detailing as is and to be process, who is impacted, benefits/dis benefits.

Epic	Function / Process Area	As Is Current process, current state	To Be Future process, future state	Details of Change Impact Description of changes between As-Is, To-Be	Casual	Employee	Supervisor	Casual	Coordinator	Approver	Head of	School	Recruitment	and Appt	ISA Team	HR Service	User List	Centre	Coordinator	Payroll	HR 303	Finance	Who is impacted? Roles impacted	Impact	Benefits Potential benefits to this new process or way of working e.g. cost savings through automation of manual work	Dis-Benefits	Business Change Plan (BCP) Proposed activities to manage the change impacts (incl. who owns it). Must be specific activities.
					x			x																			
1. Casual Engagement	Amendment	Contract is amended through CASPA to extend end date of the offer	In CAPS II end date is extended a new offer is required	Action is required by the casual coordinator in both current and future state, to eliminate the need for new offers too often, the end date will need to be considered carefully	x			x															Casual Coordinator and Casual	Low	Removing the concept of continued contract amendments and delay with payments	'Will need to create a new offer if date needs to be extended. This may increase the number of contracts if the date continues to change from original offer.	Discussed at Focus Group and summarised at end of 2017 to them. Need to include into training materials
1. Casual Engagement	Amendment	Contract is amended due to increase in sessions or add different types of sessions	Sessions can be amended via a new interface, no need for contract to be amended or new offer to be made	Action is required by the casual coordinator in both current and future state, however the casual does not need to go through the contract acceptance process to ensure they are paid the sessions worked in addition to their original contract	x			x															Casual Coordinator and Casual	Low	Improved engagement with the casual and agility of making changes in the system	New way of working for casual coordinator, will require training. Stronger diligence required by the supervisor/timesheet validators approving timesheets to ensure it doesn't go way over budget - the Planned vs actual report will support with this	Discussed at Focus Group and input into training materials. Covered off in VCE Paper of the budget impacts and attended Finance Operations meeting to discuss. Need to emphasise impacts within casual coordinator training
1. Casual	Amendment	Contract is amended to increase the	No amendment or new offer is required.	No need for contract amendments to	x			x															Casual Coordinator	Low	Improved engagement with the casual, assist to	Stronger diligence required by the	Discussed at Focus Group

CHANGE IMPACT ASSESSMENT

- Only trained Casual Coordinators will have access to initiate an engagement
- **Removal of Budget Approver from workflow**
- Inability to select a specific Engagement Approver, everyone with the delegation (i.e. on the User List) will get the email and task
- Engagements unable to be amended except for Timesheet Validator, Supervisor, Academic Schedules
- On-boarding mandatory for new casuals before being paid
- **No Cap on Timesheets**
- One Timesheet Validator / Engagement
- **Administrators will not be able to enter timesheets on behalf of Casuals**
- **Academics will be submitting their own timesheets through SSO**

ENGAGEMENT



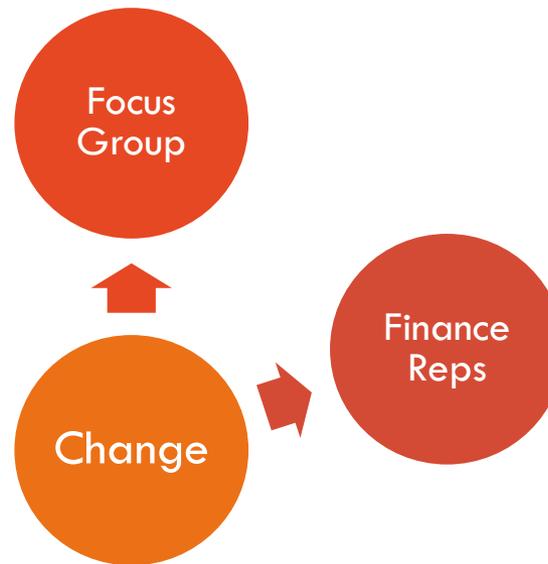
ENGAGEMENT

Focus Group

- Early 2017 invitation sent for representatives
- Monthly meetings
- Homework for group
- Help in decision making
- Local “Champions” – driver of communication
- Post implementation feedback session
- UAT



ENGAGEMENT



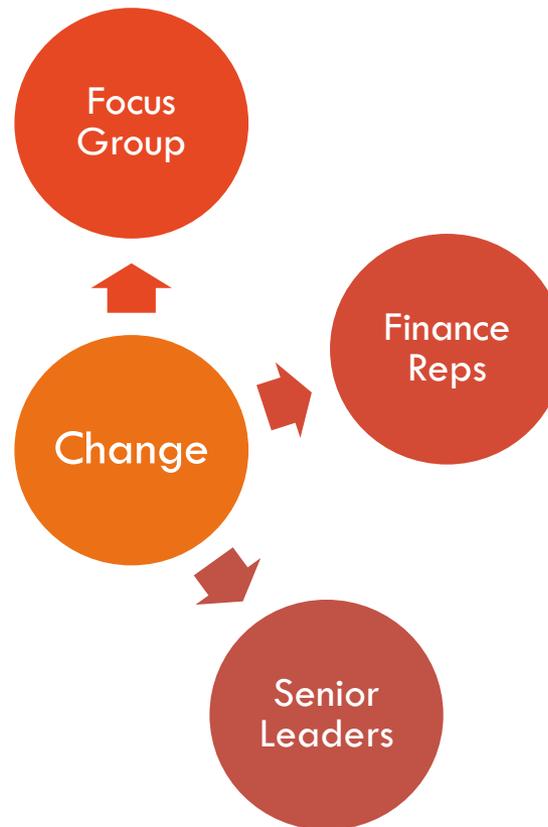
ENGAGEMENT

Finance
Reps

- Discussed financial impacts
- Worked through business process change suggestions



ENGAGEMENT



ENGAGEMENT

Senior Leaders

- Provide overview of project
- Discuss key impacts for the faculty
- Share change approach



ENGAGEMENT



ENGAGEMENT

Meetings with Areas

- Shared the changes with the biggest impact – how to reduce impact?
- Share change approach
- Help to identify where resistance may occur



TRACKING ENGAGEMENT

Tracked engagement with areas on a spreadsheet

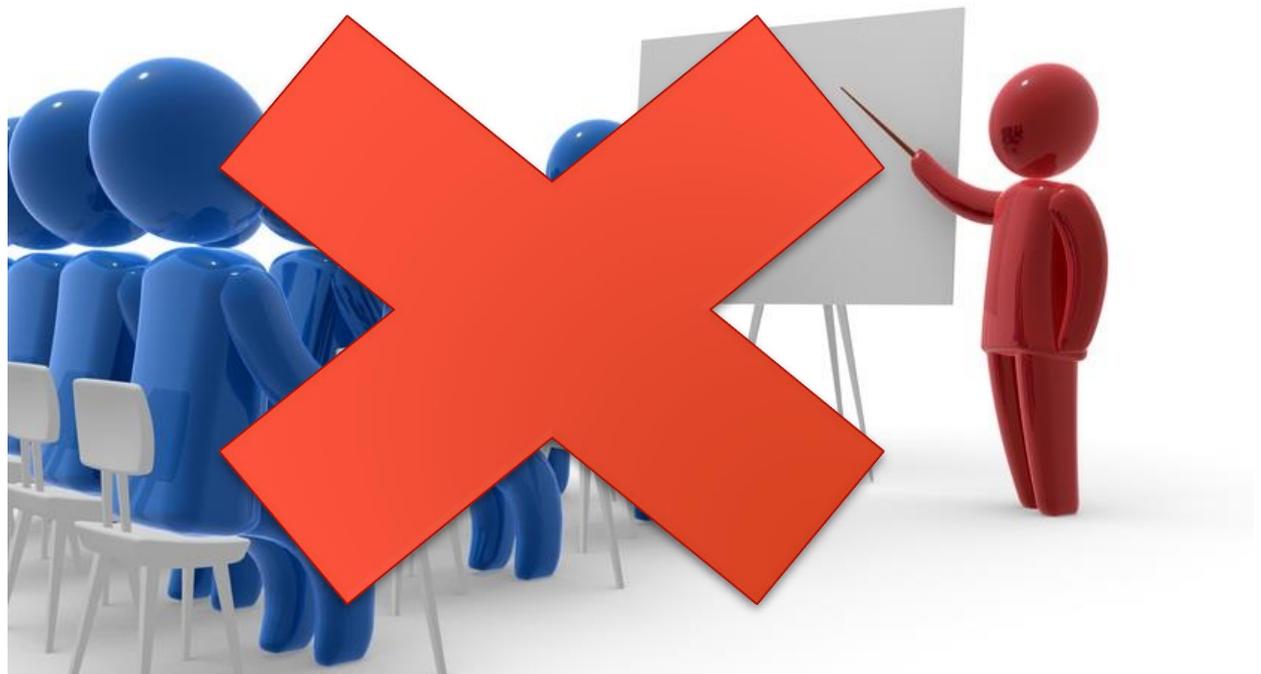
Row Labels	Ad-hoc	Default	Professional	Grand Total	Comments	Focus Group Rep?	Meeting with Area?	Meeting with HOS/Exec?	Meeting with Finance group?
Divis	505	59	784	1348				Scheduled 17/5	
Of			21	21	Small numbers. Can be managed through comms.	n/r	n/r	Scheduled 17/5	n/r
Pr			8	8	Small numbers. Can be managed through comms.	n/r	n/r	Scheduled 17/5	n/r
Pr	64		68	132				Scheduled 17/5	
Pr	44	59	264	367		Yes -	Yes	Scheduled 17/5	Yes
St	38		150	188		Yes -	Yes	Scheduled 17/5	n/r
St			70	70				Scheduled 17/5	
St	11		52	63				Scheduled 17/5	
St			56	56				Scheduled 17/5	
Ur			67	67				Scheduled 17/5	
W	348		28	376				Scheduled 17/5	
Divis	3	39	42	42	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Ac			3	3	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Ac			3	3	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
En			2	2	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
In:			1	1	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
In:	3		4	7	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Re			1	1	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Re			23	23	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Rc			1	1	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Ur			1	1	Small numbers. Can be managed through comms.	n/r	n/r	n/r	n/r
Exte			27	27					
SA			27	27	The CEO of SATAC is very new therefore was not in	Yes	Yes	n/r	Yes
Facu	516	402	269	1187	Meeting with area was re-scheduled until 17th Apri	Yes	Yes 17/4	Yes 17/4	Yes 17/4
Ar	1		25	26	Meeting with area was re-scheduled until 17th Apri	Yes	Yes 17/4	Yes 17/4	Yes 17/4
El	192	114	65	371	Meeting with area was re-scheduled until 17th Apri	Yes - Maria Dinna	Yes 17/4	Yes 17/4	Yes 17/4

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Training



ENGAGEMENT



Training

- Business Process workshop
- Roadshows across each campus
- Casual Coordinator Information Session
- Info sheet for ITDS Helpdesk
- Internal HR Training sessions
- Pop-up tutorial video for casuals and timesheet validators
- Drop-in go-live sessions for casual coordinators

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Training

- Website:
 - Quick Reference Guides (QRG)
 - Tutorial Videos
 - Help Guides
 - Checklists

[Demo](#)

- Casual Coordinator Online Training Module
 - Mandatory
 - Simulation for grading
 - QRG's, videos. help guides, Checklists

[Demo](#)

ENGAGEMENT



Training

How did we know what training materials were needed?

Have you heard of Action Mapping??

ENGAGEMENT

Training

What do they need to do?

Why aren't they doing it? What's so hard?

What will help?

COMMUNICATIONS

- Managers, Casual Coordinators to drive messages
- Monthly update to HR Branch. Progress and next steps. Their involvement?
- Emails, emails and more emails

Pre Go Live										
Date to be delivered	Spr	Stage	Event Name	Purpose	Audience/Stakeholders	Material Required	Channel/Mechanism	Status	Developer/Presenter	Communi
25-Apr-18		Build and Testing	UAT - Amendments and Termination	Test with Focus Group and representatives that the system works appropriately	Casual Coordinators, Casual Staff and SATAC, Focus Group	UAT testing environment and scripts	Set up training room with computers	Completed	Sasha MacGillivray	
30-Apr-18		Pre Go Live	Casuals	To advise all casuals of the change in system	Casual staff members as listed in PeopleSoft	Overview of CAPS and Change Impacts	Email - both campus and preferred	Completed	Sasha MacGillivray	
01-May-18		Pre Go Live	Change Impact Overview - Casual Coordinators - North Terrace	To advise Casual coordinators of the upcoming changes for Casual offers and timesheets	Casual Coordinators based around North Terrace	Presentation	Roadshow	Completed	Sasha MacGillivray	
01-May-18		Pre Go Live	Change Impact Overview - Casual Coordinators - Waite	To advise Casual coordinators of the upcoming changes for Casual offers and timesheets	Casual Coordinators based at Waite	Presentation	Roadshow	Completed	Sasha MacGillivray	
01-May-18		Pre Go Live	Change Impact Overview - Casual Coordinators - Roseworthy	To advise Casual coordinators of the upcoming changes for Casual offers and timesheets	Casual Coordinators based at Roseworthy	Presentation	Roadshow	Completed	Sasha MacGillivray	
01-Jun-18		Pre Go Live	CAPS Demonstration and Project Overview	To showcase the new system to FEDS and FEMS to highlight all upcoming changes	FEDS and FEMS	Presentation	Demonstration	Completed	Sasha MacGillivray	

TRACKING CHANGE ACTIVITIES

July 2018

Adelaide, South Australia

Today
76° F / 60° F

Tomorrow
64° F / 51° F

Wednesday
59° F / 48° F

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
25 Jun CAPS Engagement Go-Live Week; HR Projects 9:00am COMMS - Go Live notifications 2:00pm R&A CAPS training; RMP ...	26 CAPS Engagement Go-Live Week; HR Projects	27 CAPS Engagement Go-Live Week; HR Projects 9:00am Canceled: CAPS Project - Go Live Workshop; Oliphant 213 SGD Room	28 CAPS Engagement Go-Live Week; HR Projects 9:00am Canceled: CAPS Project - Go Live Workshop; Oliphant 213 SGD Room	29 CAPS Engagement Go-Live Week; HR Projects
2	3 3:30pm CAPS Go-live Celebration; Level 3 RMP Room 7 and 8; HR Projects	4	5 1:30pm CAPS Action Mapping - Planned vs Actual Report; RMP L4 Mtng Rm 11 - Large/Conference (18p); Sasha MacGillivray	6
9 9:00am COMMS - Staff News - CASPA final submission deadlines	10 Sasha Leave; HR Projects 9:00am COMMS - Email - CASPA final submission deadlines	11	12	13 Stella - Annual Leave; Martina Varga
16 9:00am COMMS - Staff News - CASPA final submission deadlines	17 9:00am Payroll CAPS training; RMP L3 Mtng Rm 8 - Large / Conference (16-p); HR Projects 9:00am COMMS - Email - CASPA final submission deadlines	18	19 8:30am CAPS Timesheet training - HRSC and HRSOS; RMP L3 Mtng Rm 8 - Large / Conference (16-p); HR Projects	20
23 CAPS Timesheet Go-Live week; HR Projects CASPA Last Submission deadline 9:00am COMMS - Timesheet Go-live	24 CAPS Timesheet Go-Live week; HR Projects	25 CAPS Timesheet Go-Live week; HR Projects CASPA Last Validation Deadline	26 CAPS Timesheet Go-Live week; HR Projects CASPA Last Escalation Deadline	27 CAPS Timesheet Go-Live week; HR Projects Stella on leave; Martina Varga 9:00am COMMS - Planned vs Actual
30 9:00am COMMS - Staff News repeat from 23rd July	31	1 Aug	2	3

WHAT WENT WELL

What were our big achievements?

WHAT WENT WELL

- Business experience of Change Manager was a benefit
- Timesheet go-live was seamless
- Used key contacts in the areas as influencers
- Pop-up training videos for Casuals and Timesheet Validators
- Online training module for Casual Coordinators

KEY LEARNINGS

What could we have done differently

KEY LEARNINGS

- Less assumptions
- Get HR Hubs more involved
- Underestimated the impact of onboarding:
 - Usability
 - Proof of identity/Citizenship
- More detailed internal HR training
- Include technical training plan in change approach
- Reassessed if the members and purpose of the focus group was still relevant
- Should have Shared the benefits more
- Drop-in sessions for casuals at go-live
- Messaging coming from the HR Director where relevant

PRESENTERS

Sasha MacGillivray

Manager HR Systems and Change

The University of Adelaide

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**ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR
DOWNLOAD FROM THE CONFERENCE SITE**



THANK YOU!



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