04. Simplify our administrative services and processes from start to finish
06. Planning for the future ERP
07. Projects to date
  • ERP – Strategy and architecture
  • Financial and human resources data
  • Recruitment
    - 10 reasons why candidate experience is important
  • Expense Reimbursement Improvements
  • Procure-to-Pay Reengineering
  • Simplification of administrative processes
20. The impact of change
22. The commitment curve
24. Shaping change with the change agent network
26. Financial summary

TABLE OF CONTENT

PEOPLE.

ORGANIZATION.

PROCESSES.

Improving uOttawa’s financial and human services. Together.

The University of Ottawa is a vibrant, research-driven educational institution. To support its mission and long-standing reputation, the University created this unprecedented program, which aims to humanize, modernize, and streamline the delivery of financial and human resources services to faculties and services so they can focus on their core mandates.
SIMPLIFY OUR ADMINISTRATIVE SERVICES AND PROCESSES FROM START TO FINISH

The Administrative Services Modernization Program is more than just improving the University’s administrative services. Over the next few years, new ways of working will emerge that will have an impact on faculty, administrative and support staff, senior management and students.

Making travel refunds, hiring staff, buying software and filling out forms are just a few examples of administrative processes that are sometimes unnecessarily slow and complex. We’ve all gone through a frustrating, non-user-oriented process and, over time, added extra layers of complexity.

That said, many employees regularly seek to simplify and facilitate services and processes, but they do not always get the support they need to do so on a larger scale. Come into play the Program whose mandate is to make a sustained and comprehensive effort to improve financial and human resources services by placing users at the center of its approach.

Just like the efforts put forward to provide the best possible university experience for our students, we need to analyze our administrative processes through the eyes of the people who use them and even push our thinking on the added value of these processes. This perspective is the key measure that will truly define our success.

Administrative agents, analysts, advisors, managers and professors are just a few examples of employees who are committed to changing the way we do business and with whom the Program team works.

Even with the best of intentions and the implementation of this Program supported by the Transformation 2030 Strategic Plan, a reviewed process without user intervention may not meet their real needs and may not be adopted.

A considerable effort will therefore be put on the commitment of employees at all levels and functions to carry out this ambitious plan. There is no magic wand to do that, but we need to empower employers to make a difference by allowing them to actively participate in improving one or more processes, the very same ones who too often cause them headaches and make them less efficient. It is with the help of services and faculties that we will really be able to modernize.

Everyone’s participation is essential

Of course, internal administration is an organizational function that will probably never arouse passions. However, let us not forget that the more streamlined our administrative processes, the more time the faculty, administrative and support staff, senior management will have to devote to what is at the heart of our institution: teaching, conducting research and serving students.
The new Enterprise Resource Planning (ERP) Strategy and Architecture project, which will run until 2024, is undoubtedly the most ambitious project of the Modernization Program. It involves a major and necessary organizational change driven by the University’s need to improve its administrative efficiency.

The projects of the Modernization Program currently underway have a direct impact on the implementation of the new ERP. Before reaching this stage, it is crucial that data is cleaned up, the service models reviewed and policies and processes simplified.
ERP – Strategy and Architecture

The project for the company’s new resource planning system (PRE), which will run until 2024, is arguably the most ambitious of the Administrative Services Modernization Program’s projects. It implies a major and necessary organizational change that is driven by the University’s need to improve its administrative efficiency.

An important step has been taken in the process of selecting the software. Indeed, following demonstrations of PRE systems attended by more than 140 people, two technological solutions were pre-qualified, Workday and Oracle software. Now is the time for the selection committee to select a team of experts, called integrators, who will accompany the University in setting up the system.

Members of the evaluation Committee

<table>
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<tr>
<th>Area of Responsibility</th>
<th>Primary</th>
<th>Backup</th>
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<td>Suzanne Arcand</td>
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<tr>
<td>Program / IT / Human Resources</td>
<td>Cecília Gobez</td>
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</table>

A call for tenders will be launched shortly to select the team in early 2021. The project team wants to begin integrating the new system next spring. The final choice of the software will be made based on the selected integration team.

PROJECTS TO DATE

Financial and Human Resources Data

The objective of the financial and human resources data Project is to recommend a future organization of financial and human resources data that would allow data clients to use it in a standardized and efficient manner, and that would best meet their needs and those of the University.

Goals

- Facilitate data analysis and decision making based on accurate, comprehensive, easily accessible and up-to-date data.
- Provide services that are simple, user-friendly and adapted to the needs of professors, researchers, employees and students.

PROJECT ROADMAP

1. Identify the business needs
2. Analyze the organization of data
3. Agree on the desired organization of data

The project for the company’s new resource planning system (PRE), which will run until 2024, is arguably the most ambitious of the Administrative Services Modernization Program’s projects. It implies a major and necessary organizational change that is driven by the University’s need to improve its administrative efficiency.

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A call for tenders will be launched shortly to select the team in early 2021. The project team wants to begin integrating the new system next spring. The final choice of the software will be made based on the selected integration team.
I joined the University of Ottawa large team last September as a Manager of Talent Acquisition and Workforce Planning at Human Resources. In the past, I have completed a similar modernization project, including the internal and external implementation of the NJOYN system. You will understand that I am very happy to be in office at a time when the Recruitment project is in full swing! With the future employer brand, the redesign of NJOYN and new tools that will simplify the processes of hiring managers, I am confident and can already see that, thanks to the Modernization Program and the considerable participation of the Talent Acquisition and Workforce Planning team, we are on track to improve our recruitment processes and the experience of candidates and hiring managers.

Annie Ouellette, CRHA
Manager, Talent Acquisition and Workforce Planning, Human Resources

**Recruitment**

**Projects to Date**

**Status:**
Stage: Preparation for the implementation of the NJOYN

**Project start and end dates:** 2019 to 2021

**Sponsors:** Karina Adam and Jules Carrière

**Number of Program resources on the project:** 6

The Recruitment project is the largest of the Human Resources Program’s projects. For nearly a year, team members have been working to improve recruitment processes by focusing on the needs of hiring managers, attracting talent, improving the candidate experience, and simplifying and automating processes while maintaining agility.

- New dashboard to track and compare candidates in the hiring process
- Interview planner
- View of the hiring and approval process
- Artificial intelligence used to compare the candidate’s profile with the requirements of the position for talent acquisition advisors at the screening stage

Here are some of the new NJOYN features that will be useful to hiring managers:

- Interview planner
- View of the hiring and approval process
- Artificial intelligence used to compare the candidate’s profile with the requirements of the position for talent acquisition advisors at the screening stage

The team called on key players from faculties and services to fully understand the current state and thus better define the desired state of academic and administrative recruitment processes that need to be improved.

Today, several initiatives are underway. The creation of an interview question generator, the posting of positions in real-time, a new directory of generic job descriptions and a comprehensive review of the tools and documents in the Recruitment (under Management) section of the Human Resources website are just a few examples of the solutions being considered or even already begun to meet the project’s objectives.

An overhaul of the NJOYN tool for administrative recruitment and an implementation for academic recruitment

The project team is reviewing the NJOYN deployment plan for the academic and administration components. Work that began in November is expected to be completed before next spring. Optimizing and adding new features will allow us to be agile and better support recruitment processes.

A new employer brand

Another important aspect of this project is attracting the best talent. In collaboration with Envol Strategies and the Web Perspectives project team led by the Communications Branch, an employer brand will be created in the coming months. A more defined corporate identity will allow the University to distinguish itself in the market and attract potential talent. This pillar of the Recruitment project also includes an overhaul of the Careers site, which will be launched in the winter of 2021 and will focus more on the added value of working at the uOttawa.
Nowadays when recruiting, candidates’ recruitment experience is more important than ever, because it has a direct impact on the University. To increase our ability to attract the best talent, we must ensure candidates have a positive experience that creates a favorable lasting impression at every stage of the hiring process.

The Recruitment project of the Administrative Services Modernization Program aims to improve the candidate experience by not only reviewing our talent acquisition practices but also by working on a new employer branding strategy.

These numbers provide a good idea of why employees choose to work for a specific organization and why the program’s Recruitment project is so important!

Source: https://talentadore.com/candidate-experience-statistics-know/
Expense Reimbursement Improvements

The first born of the Program, the Expense Reimbursement Process Improvement Project, wrapped up this past November. Since April 2019, the project team has rolled out the revision of Policy 21, the central compliance service, the update of the Concur expense management system and a new claim type that groups together expenses of all kinds thus expanding Concur’s scope to non-travel expenses. The travel expense reimbursement forms have also been reviewed and merged into one form.

Other areas for improvement are underway and will be launched in the new year. The year 2020 will also have seen the launch of the “Conquering Concur” meetings for staff responsible for reimbursements in faculties and services and an increase in the satisfaction rate of the Concur system from 2.6 stars out of 5 (January to June 2019) and 3.8 stars (July 2020 to present).

I wanted to give you a brief overview of the success that the transition to central compliance has been for the Faculty of Social Sciences. Bottom line, our processing time for reimbursements went from an average of 18.85 days to an average of 10.3 days. Our professors also seem quite happy with the interactions they’ve had with your team. So far, we’ve only received positive feedback and no complaints. That’s quite remarkable given that people are usually quicker to complain when things don’t go well than the reverse.

Nada Nagy
Administrative Director, Faculty of Social Sciences

WOW. In my eight years here, I have never had an expense report dealt with so efficiently.

Vanessa MacDonald
Associate Professor
uOttawa Faculty of Law and Co-Director, uOttawa Public Law Centre

Working with the Modernization Program team over the past 18 months has been an effective, informative, rewarding, and above all, an enjoyable experience. The team’s mission was to improve a service and an underperforming software. Armed with a grand vision, the team had excellence as its destination. All its members were instrumental in making it happen. Thanks to this multidisciplinary team, we were able to transform a software that could only reimburse travel expenses into a software that can reimburse expenses of all kinds. This change cannot be overstated in this work-from-home era. Ultimately, only users can truly testify to the success of a project. We’re happy to report a customer satisfaction increase by 44% during this period.

Alexandre Gagnon
Manager, Travel and Expenses, Financial Resources

Time Saving
Step | Compliance Approval – Banner | Saving (in day)
--- | --- | ---
| | 5.44 | 3.16
The re-engineering project is an ambitious undertaking, started earlier this year, that looks to analyze and redesign procurement and accounting’s processes. While COVID could have easily derailed this project, I am so proud of my team and all involved stakeholders as their operational passion, dedication, and focus to “improve” has been truly commendable. Because of them, we have arrived at the next phase of our project (the implementation phase), and it is because of them that we will succeed. I have no doubt.

Monica Mendoza
Senior Director and Chief Procurement Officer, Financial Resources and co-sponsor of the Procure-to-Pay Reengineering Project

Launched at the beginning of 2020, the Procure-to-Pay (P2P) Reengineering project team partnered up with a consulting firm specialized in the field to assess the current state and document pain points related to procurement and payment processes. Various uOttawa stakeholders were invited to shed light on their experience using these processes. 17 workshops and 13 deep-dive sessions later, the project team documented 167 opportunities for improvement. Currently in its second phase, and following the recommendations identified in the previous one, the project targeted 9 to 12 quick wins to work on from now until December 2020. A first batch of improvements are already underway such as the revision of uOttawa’s procurement policy, the adoption of digital signatures for contracts and the conversion of paper forms to electronic forms.

### Projects to Date

**Status:** Deployment of the 12 initiatives
**Stage:** Deployment of the 12 initiatives
**Project start and end dates:** 2019 to 2021
**Sponsors:** Renée Guénette and Monica Mendoza
**Number of Program resources on the project:** 5

### Phase 2: 12 Initiatives

1. **Convert pCard request forms from paper to electronic**
2. **Change goods receipt requirements**
3. **Improve the visibility to Central AP on approved derogations and transgressions.**
4. **Explore virtual pCards**
5. **Implement a multi-year purchase order (PO) process**
6. **Automate wire payments**
7. **Implement an optical character recognition (OCR) software**
8. **Remove the double approval on shipping tolerance**
9. **Implement a fix for the tax issue**
10. **Improve the transfer of AP forms and documents from faculties and services**
11. **Publish the list of available vendor-of-records (VORs)**
12. **Consider a loading dock remote door unlock mechanism for the Science store**

**The re-engineering project is an ambitious undertaking, started earlier this year, that looks to analyze and redesign procurement and accounting’s processes. While COVID could have easily derailed this project, I am so proud of my team and all involved stakeholders as their operational passion, dedication, and focus to “improve” has been truly commendable. Because of them, we have arrived at the next phase of our project (the implementation phase), and it is because of them that we will succeed. I have no doubt.**

Monica Mendoza
Senior Director and Chief Procurement Officer, Financial Resources and co-sponsor of the Procure-to-Pay Reengineering Project

uOttawa.ca/pop/en
**PROJECTS TO DATE**

**Initiative Selection Criteria**
- be aligned chronologically with the ERP project;
- require urgent attention;
- be able to be automated, modified or improved independently of an ERP conversion;
- offer an attractive return on investment and a value creation proposition;
- have a cost of less than $10,000;
- be able to be delivered in 1 month or broken down into several 1-month sub-projects;
- have a positive and lasting result.

### Simplification of Administrative Processes

#### Some examples of initiatives currently in progress (as of October 31, 2020)
- Creation of the e-signature for Governance forms
- Removal of the second approver for leases in FAST LMS
- Development of a Q&A tool for the Human Resources website
- Added automated numbering on more forms
- Simplification of the retirement preparation process information provided to clients
- Creation of the R form workflow on Docushare
- Development of a new form for FDR004 report to include the amount for each FOAP
- Updated HRPC04 report to include relevant information
- Creation of the H form workflow on Docushare

#### Some examples of initiatives completed (as of October 31, 2020)
- Correction and addition of automated numbering function for A, C, D, E, F, R, S, and T forms
- Addition of the function to schedule the frequency of pinned reports for all FAST applications
- Creation of a guide for the traceability of unpaid invoices
- Simplification of the invoice approval process (after analysis, no simplification required)
- Updated FDR004 report to include the amount for each FOAP
- Updated HRPC04 report to include relevant information
- Creation of the H form workflow on Docushare

#### Unsuccessful initiatives that were transferred to other Modernization Program projects or did not meet the selection criteria

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<td>17%</td>
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<td>22%</td>
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#### Status: Continuous

- Project start and end dates: 2020 and 2024
- Sponsors: Karina Adam and Paul St George
- Number of Program resources on the project: 13

The project was officially launched in February 2020 with senior management, administrative directors, legal advisors, as well as the Registrar and Chief Archivist.

Due to the arrival of the pandemic this spring and the summer holidays, there has been little publicity to announce the project to a wide audience. Only managers, Program members and our colleagues from Financial Resources and Human Resources were solicited.

The graph visualizes the status of initiatives received as of October 31, 2020.
It is no secret that change management is an essential component to the success of the program. Among the projects underway, the replacement of the ERP system represents a major transformation that affects both systems, people and the organization.

To translate its new systems and processes into concrete transformation, we need to recognize and assess the human impact of technological deployment and the upheaval that this is likely to cause in the short to medium term. There is no point in having the best system if we fail to put the measures in place and train the people who will facilitate their adoption.

In this context, a team has been created to plan and drive this change. The strategy will be used to inform, engage, consult and enable members of the university community who will be affected by the transformation.
I am excited about the new behaviours and ways of working within the University. I am committed to supporting and sustaining the changes.

I am ready to learn how to work in the “new” administration. I know where to go for help I am ready for the change.

I see the benefits of the changes from the modernization and how they will help us. I think I can do more, and I am eager to contribute to the change.

I want to accelerate the adoption of the modernization. I want others to leverage the benefits of the modernization.

Throughout the program, it is crucial to assess the membership of impacted employees for each of the ongoing projects. This assessment of openness to change will allow us to place them on the engagement curve (illustrated below) in order to implement the right means to support them in this transformation, support and promote the modernization of our administrative services.
To meet the objectives of the modernization program and ensure that change meets the needs of our multi-faceted organization, the program will launch the Change Agent Network in the fall of 2020.

As part of its change management strategy, the network is one way the program intends to facilitate change and engage its stakeholders. The network aims to foster two-way communication by obtaining direct feedback from key stakeholders and quickly and effectively addressing problematic situations. It will facilitate adoption and help accelerate initiatives such as the implementation of the new Enterprise Resource Planning (ERP) system.

The program’s Change Agent Network will bring together employees with financial or human resource expertise, leadership skills, a desire to help their peers and to shape change in their work unit. Their hands-on experience, feedback and advice on the quality and effectiveness of the Program’s proposed services are essential to improving the uOttawa’s financial and human services.

Employees interested in becoming change agents should speak to their managers. Managers will also be invited to nominate candidates. More information to come.

SHAPING CHANGE WITH THE CHANGE AGENT NETWORK

The Network is a step forward in the consolidation of the program’s motto People. Organization. Processes, because it will bring together people with experience in cross-functionality.

Valérie Michaud-Lal
Change Management Specialist
Administrative Services Modernization Program
<table>
<thead>
<tr>
<th>PROJECT</th>
<th>BUDGET</th>
<th>ACTUAL YTD</th>
<th>FORECAST</th>
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