

The University's Technology Landscape and User Learning & Support Strategy

Presenters

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Agenda

- Concordia University fast facts
- Role of change management
- Technology landscape integrated with TTS
- Scenario 1: Change management
- Scenario 2: Performance improvement

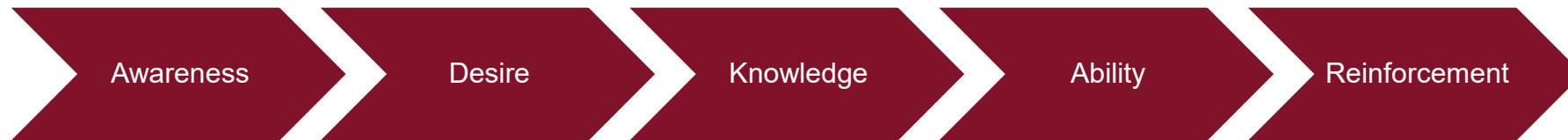
Concordia University Facts and Figures 2023

- **51 500** Students
- **6 500** Faculty and Staff
 - **2 177** Faculty
 - (Full time & Part time)
 - **4 323** Staff
 - (Permanent & Casual)
- **2** Campuses



Role of Change Management

- Role of Change Management in emphasising the importance of learning and performance support.
- How by using the ADKAR model of change we were able to present the learning approach.



- We incorporate messages on the impact of using the authoring tool to enable digital transformation during change

Technology Landscape integrated with TTS

- **Oracle PeopleSoft**
- **SAP**
- **Sodales**
- **Moodle**
- **Blackbaud**
- **Curriculum Management System** (Application built-in-house)
- **Qualtrics**
- **MS Office 365**
- **Power BI**



In addition to the above, we offer compliance, security and environmental health & safety training.



Scenario 1: Change Management

Updates in SuccessFactors Interface

- Updates in SuccessFactors interface
- Utilize the Notifications in TTS and an additional communication forum to inform the users about the change and where to go for instructions

The screenshot shows the 'Edit notification' interface. At the top, there is an orange header with the text 'Edit notification' and a small orange icon. Below the header, there is a language dropdown menu set to 'English (US)'. The main form contains the following fields:

- Title***: A text input field containing 'SuccessFactors: New User Interface/ Nouvelle interface utilisateur'.
- Description***: A text area containing 'May 3: Launch of new user interface for My HR in UNITY.'.
- Context***: A text input field containing 'SuccessFactors Home pzg9cg7'.
- Contexto Alternativo**: An empty text input field.
- Edit status**: A dropdown menu set to 'Released'.
- From**: A text input field with a small square icon to its right.
- To**: A text input field with a small square icon to its right.

At the bottom left of the form, there are two buttons: 'OK' and 'Cancel'.

Notification

The screenshot shows the SuccessFactors Home page in a browser. The browser address bar displays the URL: `hcm17.sapsf.com/sf/home?bplte_company=universitc&_srb=Bqm0z8TPmai1FSim95Pwpb7Gow%2fiyHmnnQPv%2b%2f3kOW4%3d`. The page header includes the "CONCORDIA" logo, a "Home" dropdown, and a search bar with the placeholder text "Search for actions or people". The main content area features a large banner with the text "Good morning!" and a "Quick Actions" section with seven buttons: "Leaves of Absence", "My Profile", "Org Chart", "My Learning", "Learning Administration", "Reminders", and "Favorites". Below the quick actions are two featured tiles: "Job Opportunities" and "University Policies". A notification box in the bottom right corner, titled "SuccessFactors: New User Interface/ Nouvelle interface", contains the text "May 3: Launch of new user interface for My HR in UNITY. QuickAccess" and two buttons: "Do not show again" and "More Details". A red dashed arrow points from the notification box towards the "University Policies" tile.

QuickAccess Menu (New Section)

The screenshot displays the QuickAccess interface for a user named 'SuccessFactors'. At the top, there is a blue header with the title 'QuickAccess', a 'SYNC' toggle set to 'OFF', and a close button. Below the header is a search bar containing the text 'SuccessFactors' and icons for search, fingerprint, and notifications. The main content area is divided into three sections: 'NEW', 'STEP-BY-STEP', and 'DETAILED INFORMATION'. Each section contains a list of items with corresponding icons. The 'NEW' section includes 'Manage Recurring Payment and Deductions', 'Manage tuition deductions', 'Modify recurring deduction', and 'Manage address'. The 'STEP-BY-STEP' section includes 'Manage direct deposit information', 'Manage pension plan beneficiaries', 'New Hire Data Review (Onboarding)', and 'View org charts'. The 'DETAILED INFORMATION' section includes 'Manage Recurring Payment and Deductions', 'Manage tuition deductions', 'Modify recurring deduction', and 'Manage direct deposit information'. Each item has a 'MORE...' link below it. A vertical scrollbar is visible on the right side of the menu.

QuickAccess SYNC OFF

SuccessFactors

NEW

- Manage Recurring Payment and Deductions
- Manage tuition deductions
- Modify recurring deduction
- Manage address

MORE...

STEP-BY-STEP

- Manage direct deposit information
- Manage pension plan beneficiaries
- New Hire Data Review (Onboarding)
- View org charts

MORE...

DETAILED INFORMATION

- Manage Recurring Payment and Deductions
- Manage tuition deductions
- Modify recurring deduction
- Manage direct deposit information

MORE...

More details are also linked to training on Moodle and SuccessFactors LMS

The screenshot shows a web browser window with the URL `universitc.plateau.com/learning/use...`. The page header includes the Concordia logo and navigation links for 'My Learning' and 'My Classes'. The breadcrumb trail is 'My Learning / Library / Introduction to UNITY / Online Content'. The main heading is 'Introduction to UNITY' with the identifier 'IITS_ITEM_018'. A sidebar on the left shows a 'Content' menu with 'English (1)' and 'French (1)' options. The 'Introduction to UNITY' item is selected. Below the sidebar, a message states: 'This content displays in a new window. After launching must complete the content or exit properly before performing or you may lose completion status or progress.' A 'Launch Content' button is positioned at the bottom right of the sidebar area.

The screenshot displays the 'Project UNITY Self-Service eLearning' interface. At the top right, there is a blue ribbon graphic with the text 'Project UNITY Self-Service eLearning'. Below this, a section titled 'UNITY Employee Self-Service eLearning (ESS)' is visible. A navigation menu on the left includes 'Announcements' and 'UNITY Self-Service eLearning Introduction'. The main content area features a section for 'Introduction to UNITY' with a play button icon. The text below this section reads: 'For all staff, managers, and faculty. Duration: approximately 15 minutes. This course introduces UNITY, Concordia's integrated administration solution. You will learn about:' followed by a bulleted list: 'UNITY's key features', 'the complete training program', 'the role-based approach', and 'what systems are being replaced.' A note follows: 'NOTE: For your own personal tracking, please check the individual module progress bars after you Enter the course package. All other indicators may take time to update and not reflect your actual status accurately.' At the bottom, there are two items in a list: 'Introduction to UNITY' and 'Présentation du projet UNITÉ', each with a play button icon.



Scenario 2: Performance Improvement

Challenges with submitting expense reports on time

- Challenges with submitting Expense Reports on time
- Utilized the notification in TTS to push reminders few days before the deadline for the submission of the expense report

The screenshot shows a web form titled "Edit notification" with an orange header bar. In the top right corner of the header is a small orange circle icon with a white leaf. Below the header, there is a language dropdown menu set to "English (US)". The form contains the following fields:

- Title***: A text input field containing "IMPORTANT: The University's fiscal year-end is on April 30, 2023".
- Description***: A large text area containing the text "In order for Concordia University to close the 2022-2023 fiscal year, the following deadlines will apply to all accounts/funds.".
- Context***: A text input field containing "Concur n82o9nn".
- Contexto Alternativo**: An empty text input field.
- Edit status**: A dropdown menu set to "Released".
- From**: A text input field with a calendar icon on the right.
- To**: A text input field with a calendar icon on the right.

At the bottom left of the form are two buttons: "OK" and "Cancel".

Notification

The screenshot shows the SAP Concur home page. At the top, there is a navigation bar with 'SAP Concur', 'Expense', and 'App Center'. On the right, there are links for 'Profile' and 'Help'. Below this is a dashboard with 'CONCORDIA' and several key metrics: 'Start a Report', 'Cash Advance', 'Upload Receipts', 'Available Expenses', 'Open Reports', and 'Cash Advances'. The 'MY TASKS' section contains three cards: 'Open Requests' (00), 'Available Expenses' (00), and 'Open Reports' (09). The 'Open Reports' card lists several reports with dates and amounts. A red dashed arrow points from the bottom of the page towards the notification overlay. The notification overlay is a dark box with an orange icon and text about the fiscal year-end. At the bottom of the notification are two buttons: 'Do not show again' and 'More Details'.

Home

conkursolutions.com/home.asp

SAP Concur Expense App Center

Profile Help

CONCORDIA

- + Start a Report
- + Cash Advance
- + Upload Receipts
- 00 Available Expenses
- 09 Open Reports
- 00 Cash Advances

MY TASKS

- 00** Open Requests
You currently have no active requests.
- 00** Available Expenses
You currently have no available expenses.
- 09** Open Reports
24/10 CAD 500.00
24/10
24/10 CAD 250.00
28/09 CAD 1,328.47
22/09 CAD 10.00

IMPORTANT: The University's fiscal year-end is
In order for Concordia University to close the 2022-2023 fiscal year, the following deadlines will apply
QuickAccess

Do not show again More Details

Information
posted on the
internal site

IMPORTANT: The University's fiscal year-end is on April 30, 2023

The screenshot shows a web browser window with the URL `hub.concordia.ca/cunews/offices/cfo/fs/2023/02/07/important--the...`. The page header includes the Concordia University logo and the word "Carrefour". A navigation menu contains links for "MY CU ACCOUNT", "SERVICES & RESOURCES", "PROJECTS & INITIATIVES", "NEWS", "EVENTS", and "ABOUT". The main content area features a "NOTICE" section with the following text:

IMPORTANT: The University's fiscal year-end is on April 30, 2023

February 7, 2023 | By Financial Services

In order for Concordia University to close the 2022-2023 fiscal year, the following deadlines will apply to all accounts/funds. Please refer to the information below the table for further details.



Wrap Up

- Importance of working closely with Change management and/or Project management teams
- We shared with you our technology landscape and how we have integrated them with TTS
- We shared with you two scenarios from our experience with TTS at Concordia

Thank you!

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