

To: Nancy Creel-Gross, Assistant Vice-President, HR Operations & Workday @ Yale

From: Brian Rebesch
Information Delivery Service Group Lead

Date: November 26, 2014

Re: Information Delivery Service Group Recommendation Memo #1

This memo outlines the recommendations from the Information Delivery Service Group (IDSG) on Workday Business Processes functionality anticipated in Release 1.

These recommendations are based upon the primary focus that departments will be able to continue to meet their operational data needs when we transition to Workday in April 2015. These are 'Day 1 Data Requirements'. Please note that we reached out the Yale community (other Service Groups, Operating Group, etc.) regarding identification of data requirements, and the Workday Reporting Workstream has also been engaged in this discussion.

As these are our first set of recommendations, it is likely that additional recommendations will be made once Workday reporting is reviewed, additional Workday functionality is shared with the service group, and as service groups collaborate with each other on areas with overlapping responsibility.

Standard reports and/or User Interfaces that adequately meet the Day 1 Data Requirements:

1. Employee Demographics
2. Birthday Worklet
3. Worker Emergency Contacts
4. Onboarding Status Summary
5. U.S. New Hires Missing an Electronic Form I-9
6. Bonus and One-time Payments
7. Direct Report Compensation

Standard reports that need enhancements to meet the Day 1 Data Requirements:

8. Headcount and FTE by month
9. Hires and Terminations by Quarter
10. Active Employee
11. Roles for Organization and Subordinates
12. View Worker History by Category > Compensation History
13. Timeline
14. Out of the box Organization Chart feature
15. YTD Payroll Totals for Workers
16. Compensation Spreadsheet
17. Compensation Changes Report
18. Out of Order Compensation Changes

19. My Recent Job Requisitions

Custom reports that are not available in Workday but are needed to meet the Day 1 Data Requirements:

- 20. Fixed Term Appointments
- 21. Onboarding Action Items for Managers
- 22. System Access Review

Post Release 1 Recommendations:

- 23. Business Offices will need to continue to use the Payroll Preview report, which will be available in data warehouse, until Workday financials go live. The IDSG will be ready to provide a recommended report that will meet this data need prior to release 4 of Workday.

Attached you will find a spreadsheet that provides details of the identified reports and corresponding recommendations.

Please let us know when we can discuss the implementation of these recommendations in further detail, as well as the team's rationale for our recommendations. Our next area of focus will be Day 1 Data Requirements for faculty reporting.

Thank you for your anticipated support.

cc: BOLT, Sandy Stein

| What are the data requirements for business offices? | Why are the data requirements needed? | How are the data requirements delivered to business offices today (name of report or system that provides data)? | Will ALL data requirements be available in Workday Release 1? | If "no" how do we meet data requirements for Workday Release 1? | If yes, which Workday Report Type meets the data requirement need? | What is the name of the Workday report? | Recommendation Summary | Other questions/ concerns/ future state recommendations | Crosswalk with Memo |
|--|--|--|---|---|--|---|--|--|---------------------|
| Diversity (gender, ethnicity, age) | Information used for salary equity and diversity hiring goals | Business offices do not have access to information; must work with HRG | Yes | | Standard | Employment Demographic | Employment demographic report meets data requirement needs. Currently managers must gain access to diversity info via the HRG. Diversity info should be available to managers in Workday. | Are there calculated statistics available? | 1 |
| Birthday for all active workers in a manager's supervisory org | Employee recognition and appreciation | BUG604a - Birthday List | Yes | | User Interface | Birthday Worklet | Birthday Worklet adequately meets data requirement needs for business office. | | 2 |
| Emergency contact information of all active workers in a manager's supervisory org (employee name, emergency contacts, relationship, emergency contact phone number) | Have ready access to emergency contact info when needed | BUG104a Employee Address List | Yes | | Standard | Worker Emergency Contacts | Worker Emergency Contacts report adequately meets data requirement needs for business office. | | 3 |
| New Employee Onboarding Information | Need to track the status of onboarding a new employee | Not delivered at this time. Units develop their own checklist for tracking this | Yes | | Standard | Onboarding Status Summary | Onboarding Status Summary adequately meets data requirement needs for business office. | How can this checklist be available in WD with access for updating? | 4 |
| Completion of I-9 form | Want to ensure workers complete their I-9s | DWH Report - Portal22: HR4 I-9 Authorizations Expired or Missing | Yes | | Standard | U.S. New Hires Missing an Electronic Form I-9 | US New Hires Missing an Electronic Form I-9 adequately meets data requirement needs for business office. | | 5 |
| FTE and Headcount | Need to know who is here, what department the worker is a part of; report should represent both staff and/or faculty | DWP: HR6 Dept. Salary Report; YBT | Yes | | Standard Modify | Headcount and FTE by month | -Data should be displayed by job class (staff [C&T M&P casuals]; student/ intern workers; faculty by tenure, rank, and appointment type; associates; affiliates); display totals by job class. -Have "job family group" filter available in both reports. -A "time" filter should be available; this report should display data for the fiscal year. | Future enhancement should combine Headcount and FTE by month with Hire and Terminations by Quarter reports; also we need to understand the definition of FTE to ensure these reports provide the right information (such as 37.5 vs. 40 hours) | 8 |
| Hires and Terminations | Want to know who joined and who left the department; report should represent both staff and/or faculty | Must be requested from HR; Departments currently maintain this information manually or through YBT | Yes | | Standard Modify | Hires and Terminations by Quarter | -Data should be displayed by job class (staff [C&T M&P casuals]; student/ intern workers; faculty by tenure, rank, and appointment type; associates; affiliates); display totals by job class. -Have "job family group" filter available in both reports. -A "time" filter should be available; this report should display data for the fiscal year. | Future enhancement should combine Headcount and FTE by month with Hire and Terminations by Quarter reports; also we need to understand the definition of FTE to ensure these reports provide the right information (such as 37.5 vs. 40 hours) | 9 |
| Work related basic contact info for all active workers in a manager's supervisor org (name, title, employee type, email address, location, phone) | Have ready access to a list of all active workers | BUG104a Employee Address List | Yes | | Standard Modify | Active Employees | Worker phone number, Yale UPI ID, Net ID, should be listed in the Active Employees report. | | 10 |
| Workday roles for access review | Need to be able to see who has which role assigned to them within Workday | Not applicable | Yes | | Standard Modify | Roles for Organization and Subordinates | Report needs to display roles that have been delegated to a designee. | | 11 |

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|---|--|--|---|--|--|---|--|--|---------------------|
| Salary history changes for an individual worker. Report should include types of salary increases, including union/ contractual, steps, shift differentials, lump sums | Want to know the type of salary changes for a worker | Oracle: BUG103a Salary History Report | No | History won't be in WD, but it will be accumulating in WD quickly, so should need to be updated for WD info to be useable as well. | Standard Modify | - View Worker History by Category > Compensation History - Bonus and One-Time Payments | -Compensation History report needs to ensure the report captures the many types of salary increases at Yale (one time payments, lump sums, shift differential, steps) and union/ contractual. - Bonus and One-Time Payments adequately meets data requirement needs for business office. | This report is very difficult to locate in Workday. | 12 |
| Salary history information for an individual worker over time (salary, rank / grade / title; years of service) | Want to know how much a worker has been paid over time | Oracle: BUG103a Salary History Report | No | History won't be in WD, but it will be accumulating in WD quickly, so should need to be updated for WD info to be useable as well. | Standard Modify | Timeline | - Report needs to be displayed by fiscal year - Add to job section: Yale position title, Supervisory Org, job code, fringe code, Job grade or rank, total yrs of service at each job, # of years in grade - Add to compensation section: Dept Pct Fulltime (% time), FTE Annual Salary, Individual's actual base pay - takes % time into account, % salary increase year over year | | 13 |
| Org Charts - supervisor department job title job grade | To know who reports to whom | Not delivered at this time; departments create and maintain their own visual charts. | Yes | | Standard Modify | Out of the box Organization Chart feature | Org chart needs to include job grade | -Other tools like matrix reporting and/ or multiple managers should be able to note dual reporting relationships. -Need to know if a single person can show up under two managers in the organization chart. | 14 |
| Summary report that provides year-to-date salaries for all workers within a manager's supervisory organization | Want to know how much everyone in a manager's supervisory organization has been paid year to date within the fiscal year | DWP: Account Holder Reports with trends, without summarized salaries; many different financial BRIOS. | No | History will not be in Workday but it will begin to accumulate once Workday goes live | Standard Modify | YTD Payroll Totals for Workers | - Report needs to be displayed by fiscal year - Table should include job category (Faculty / MP / SM) - Table should include base pay, extra compensation, overtime, supplement, on call pay, shift differential, etc. - Table should include fringe associated with pay. - We need to be able to tell someone in training if the report includes all payments made to an individual or only those items charged or scheduled by your own org. Ex. a faculty member's pay is split between 2 units. How will this look in this report? | | 15 |
| Aggregate summary report that provides <u>expected</u> annual salaries for workers within a manager's supervisory organization (this summary should break out base salary, fringe rate) | Want to know how much a worker is expected to make for the fiscal year. | DWP: HR6 Dept. Salary Report and | Yes | | Standard Modify | - Compensation Spreadsheet; Direct Report Compensation | - Compensation Spreadsheet report needs to be displayed by fiscal year and should include job category, compensation grade, extra compensation, overtime, term dates, Dept Pct Fulltime (this is the exact Oracle field now and reflects a person's % time), FTE annual salary - Direct report compensation adequately meets data requirement needs for business office. | Current Employee Detail Report - might be a better report once we have financials in WD (has cost center, funds, etc.) and can be searchable by custom organization, or organization role but needs to calculate yrs of service, not just include dates. | 16, 7 |
| Aggregate summary report that provides changes to worker pay within a manager's supervisory organization (extra compensation, one-time payments) | Want to know types of changes to a worker's salary | A custom BRIO is created then the expenditure type is searched for to locate any special payments; BUG109a C&T Salary Projection | Yes | | Standard Modify | - Compensation Changes Report - Out of Order Compensation Changes | - Report should include types of salary increases, including union/ contractual, steps, shift differentials, lump sums | | 17, 18 |

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| Track job requisitions | Be able to see which jobs requisitions were created and be able to see which jobs requisitions are open, closed, filled. | Business offices receive a report from HR on a monthly basis | Yes | | Standard Modify | My Recent Job Requisitions | We need to be able to see job requisitions that were created. | | 19 |
| Fixed duration staff term position - length of term and end date | Be able to track pending end-of-term appointment dates for staff. Need to know when to end an assignment or to extend an assignment so that we can generate a 90 day end date letter. | BUG 107A | Yes | | Custom | Fixed Term Appointments (Cornell U Report) | This report is not available in WD. This report should show the end employment date, expected end date, compensation and job related information for staff. This report should be automatically "scheduled" so that departments can receive this information 120 days prior to letter being issued. | Great for dashboard. | 20 |
| New Employee Onboarding Actions for Managers (e.g., net ID, pin, email account set up, building access, training, provide employee directory information) | Want managers to be able to track the actions that need to be taken to ensure new employees have most of the things they need to successfully begin employment | Not delivered at this time. | No | | | | Managers should be required to complete an onboarding checklist when a new employee is hired (action items to complete include: Phone (including reset passcode authorization), Keys, Computer, Building access, Workspace, Work area introductions, Department Orientation, Work schedules, System Access, Safety Overview, Labor Schedule Entered, P-Card, Effort Reporting, Request Net ID and PIN, E-Mail) | | 21 |
| Payroll information for all workers within supervisory organization | Ensure workers are paid appropriately | Payroll Preview Report | No | Use Payroll Preview until financials go live (release 4) | | | Business Offices will need to continue use of Payroll Preview report, which will be available in data warehouse, until Workday financials go live. | Subgroup should be ready with a report that meets this need prior to release 4 | 22 |
| System access review | Want to know all of the systems a staff member has access to (including systems outside of Workday), building access, etc. | Oracle: Access Review Report | No | Business offices will need to continue using standard operating procedures | | | Managers need to have a report that provides a list of staff's system access outside of WD. This is important because when an employee leaves Yale or when they change positions, the manager needs to know which systems the staff needs to be removed from and/or added to. | Can we tie in training & position access to R4? | 22 |