


**Workday@Yale
Lunch & Learn**



January 2014




Strategic Objectives




Simplify and
standardize
processes





Make it easy to get
work done and
harder to make
mistakes





Workday@Yale




Establish an
accurate, trusted
and timely reporting
environment



Minimize
administrative
overhead for faculty
and end users



Lower operating
costs and improve
effectiveness



What is Workday?

- Workday is a cloud-based, software-as-a-service (SaaS) system that supports human resources (HR), payroll and financial functions
- Fun facts:
 - Workday is the name of the company, and the product that they sell
 - Founded in 2005 by Dave Duffield (founder and CEO of PeopleSoft) and Aneel Bhusri (PeopleSoft chief strategist) following Oracle's takeover of PeopleSoft
 - Top rated vendor of human resources systems by Forrester Research
 - Publicly traded on the NYSE (WDAY) after highly successful IPO in October 2012
 - An established base in higher education (Cornell, Brown, Georgetown, NYU, Carnegie Mellon, USC, University of Rochester) and a growing pipeline

What systems will be impacted?

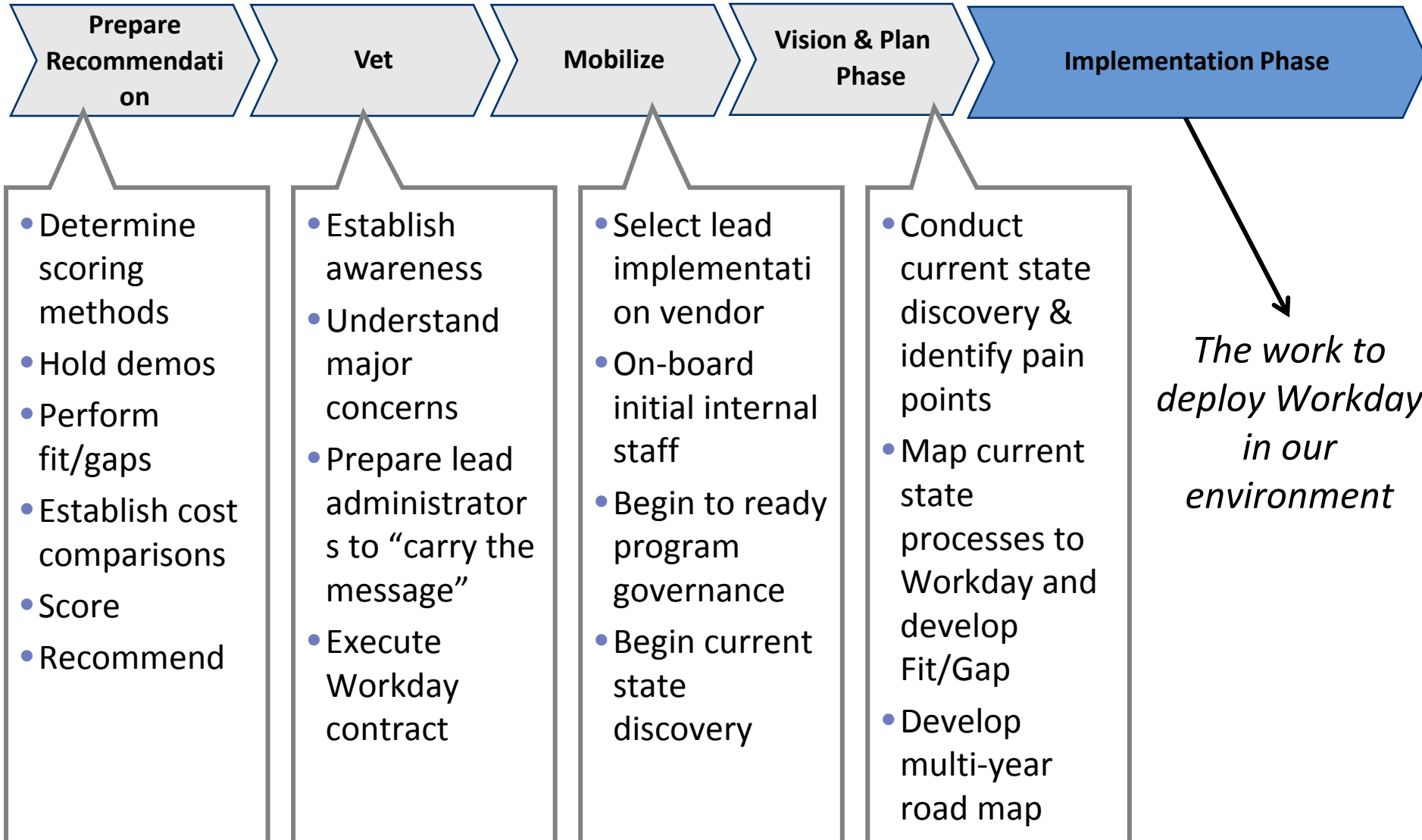
- The following will be replaced by Workday:
 - Core finance systems including general ledger, accounts receivable, asset accounting, cash receipts, accounts payable and expense management
 - Post-award grants management
 - Human resource and payroll systems including HR records (includes 4D and BMS), self-service, payroll management and costing, and compensation administration
- Yale will partner with Workday to build:
 - Advanced grants management (sub-awards, cost transfers)
 - Faculty lifecycle (e.g., appointments, profiles, leaves, committees, professorships)
- Workday may also replace other functions currently performed outside of Oracle:
 - Time keeping (e.g., Kronos/MyTime)
 - Recruiting (e.g., Kenexa/STARS)
 - Benefits Administration (e.g., Hewitt)
 - Restricted funds accounting

What other impacts can we expect?

- The user experience should be significantly improved. The Workday interface is much more intuitive and natural than Oracle
- The SaaS model limits our ability to customize the system
- While not customizable, Workday is highly configurable, which is less costly and complex to support
- We expect significant positive impact to reporting, but reporting and data challenges at the University are broader than any single system

Program Progress

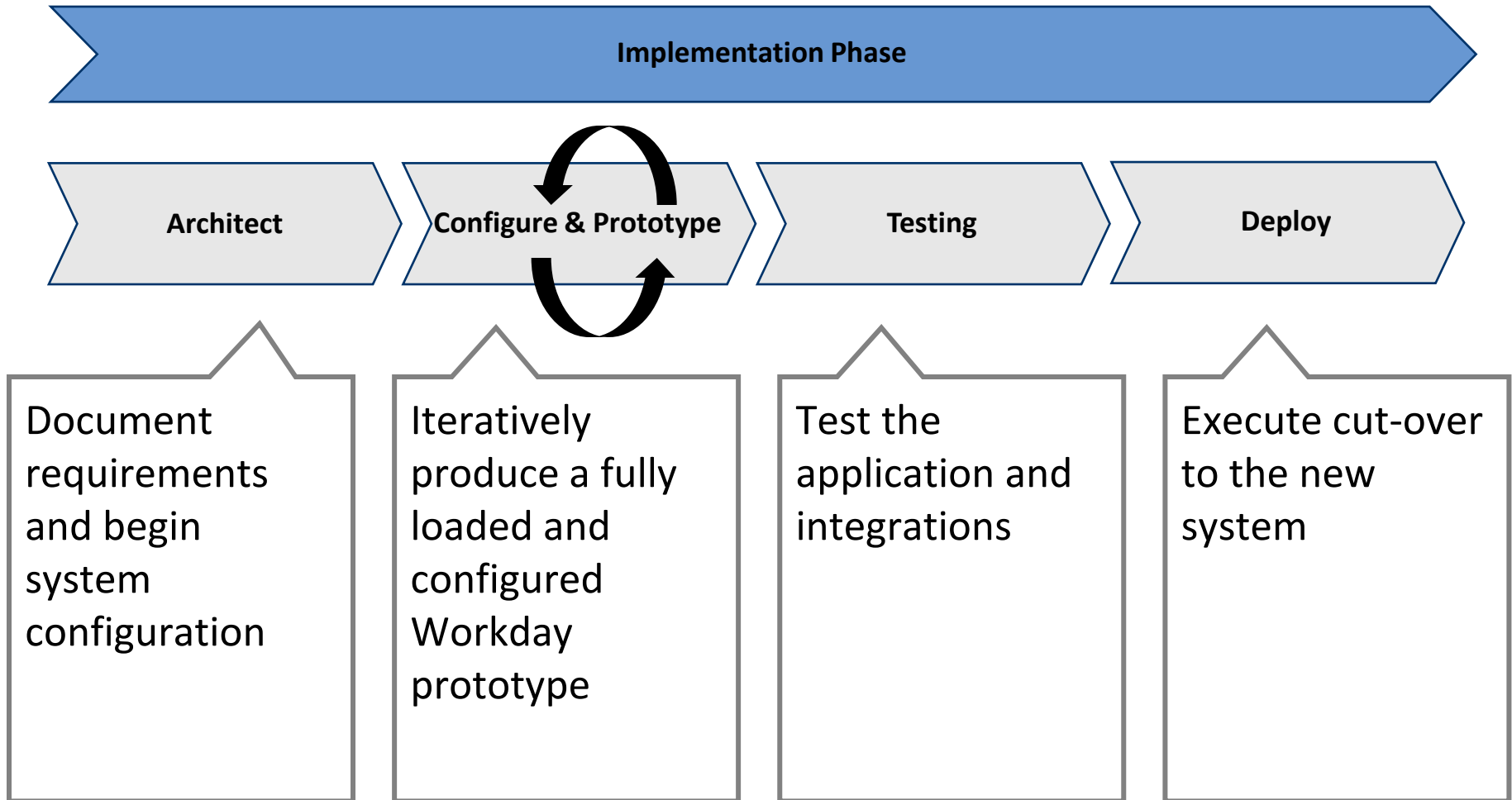
We are here



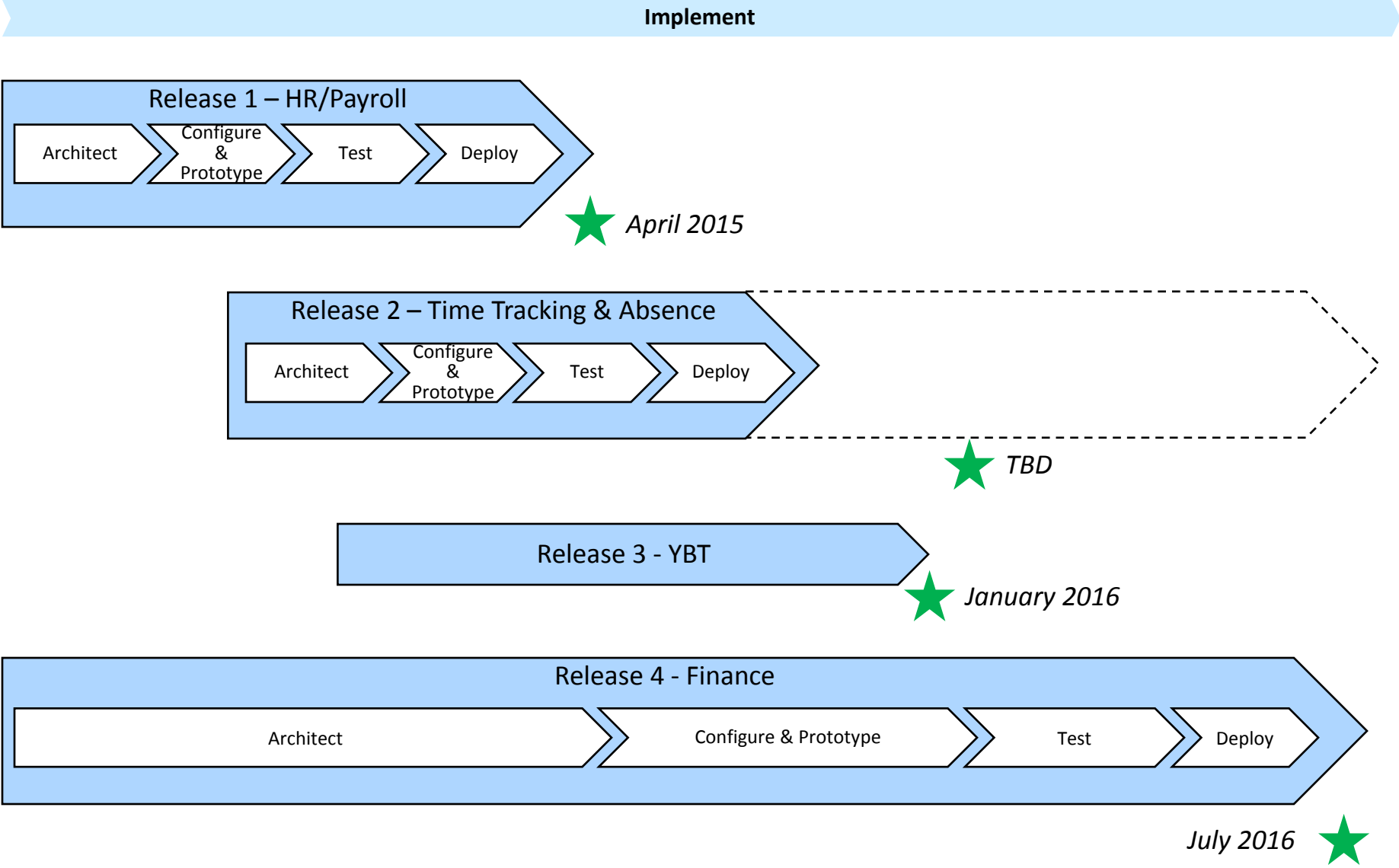
Vision & Plan Outcomes

- Conducted current state “Discovery”
- Refined Workday fit/gap
- Created Application Landscape visuals
- Catalogued Integrations
- Drafted Reporting Requirements
- Developed Community Engagement Structure
- Developed Workday Roadmap

Implementation phase



Implementation Plan



Functionality by Release

Release 1

- Core HCM
- Faculty Appointments, Academic Reporting
- Compensation
- Talent (Performance Ratings)
- Payroll (Faculty, Staff, Students)
- Benefits
- Labor Distribution?

Release 2

- Time Tracking (C&T, S&M), StuCas)
- Absence & Time Off
- Payroll (Confidential, Drama Inc.)
- Talent (Succession, Performance)

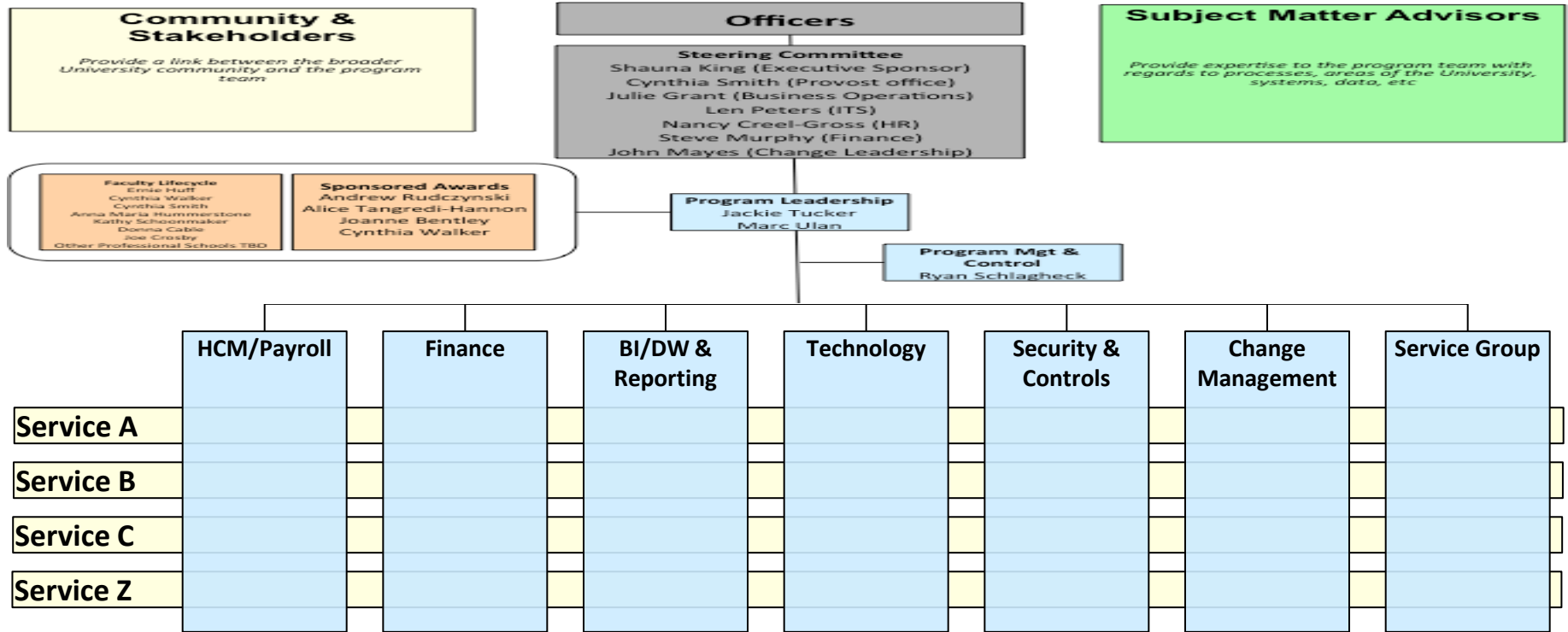
Release 3

- Prepare Yale Budget Tool (YBT) to accept new Workday Financial Data Model (FDM)

Release 4

- Recruiting (if ready)
- Expense Management
- Procurement
- Suppliers & Accounts/Contracts
- Business Assets
- Grants Management (post award)
- Endowment Accounting
- Customer Accounts
- Banking & Settlement
- Financial Accounting
- JSA

Community Engagement



Service Groups will consist of representatives from the community and will be accountable to ensure that we deliver services that are timely, accurate, cost effective, simple to use, and meet the needs of the community

Technology Impacts

- Data Conversion
 - Data Extracts, Proprietary Tools (Hoover, iLoad)
- Integrations
 - Cloud Connect, EIB, Studio, WebMethods?, Informatica?
- New Reporting Tools
 - Workday Reporting, Tableau?, QlikView?
- Data Marts?
 - As a way to bring together Workday and non-Workday data
- ETL and Metadata?
 - Informatica?, Talend?

What's Next?

- Configuration
- Process Design
- Conversion Mapping
- Integration Design / Mapping
- BI/DW Architecture & Tools
- Change Management

Opportunities for Yale Community Engagement

There are many ways to stay connected and provide input to the Workday@Yale program:

- Browse the Workday@Yale web site
 - <http://workday.yale.edu>
- Contact the Program at Workday@Yale.edu
- Join the online Workday Community
 - Go to the following URL and click on “request an account”:
<https://community.workday.com/>
- Attend Yale community presentations and Lunch & Learns featuring Workday@Yale

