



Workday Community Update


December 2013

- Workday is a cloud-based, software-as-a-service (SaaS) business system that supports human resources, payroll and financial functions, and will replace what we know today as “Oracle” (in addition to some other systems)
- About Workday
 - Workday is the name of the company, and the product that they sell
 - Founded in 2005 by former PeopleSoft leaders (Dave Duffield, founder and CEO and Aneel Bhusri, chief strategist)
 - Quickly became top rated vendor of human resource systems (per Forrester Research)
 - Has 400+ global clients, including an established and growing base in higher education



Yale selected Workday for many reasons, including:

- Less expensive & easier to support
- Modern technology
- Continuous innovation & improvements (2x year updates)
- Has an intuitive, consumer-like interface
- Designed to facilitate business processes, not just for back-office processing
- Commitment to meeting the needs of higher education – they WANT this market
- Collaborative design approach (Yale is a Workday Strategic Design Partner)
- It supports Yale's strategic objectives


Workday@Yale 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



Workday@Yale Vision Statement

The Workday@Yale vision statement identifies where we're trying to go and how, collectively, we'll get there.

Workday@Yale will support Yale's mission with excellent administrative services that mirror Yale's excellence in teaching and research, making it easier for faculty, students and staff to get their work done.

Developed with broad community engagement, Workday@Yale will be defined by easy to use systems that lower the administrative burden for all, deliver trusted information and reduce overall costs.

Workday@Yale Journey Overview

We are here



**Prepare
Recommendation**

Vet

Mobilize

Vision & Plan Phase

Implementation Phase

- Determine scoring methods
- Hold demos
- Perform fit/gaps
- Establish cost comparisons
- Score
- Recommend

- Establish awareness
- Understand major concerns
- Prepare lead administrators to “carry the message”
- Execute Workday contract

- Select lead implementation vendor
- On-board initial internal staff
- Begin to ready program governance
- Begin current state discovery

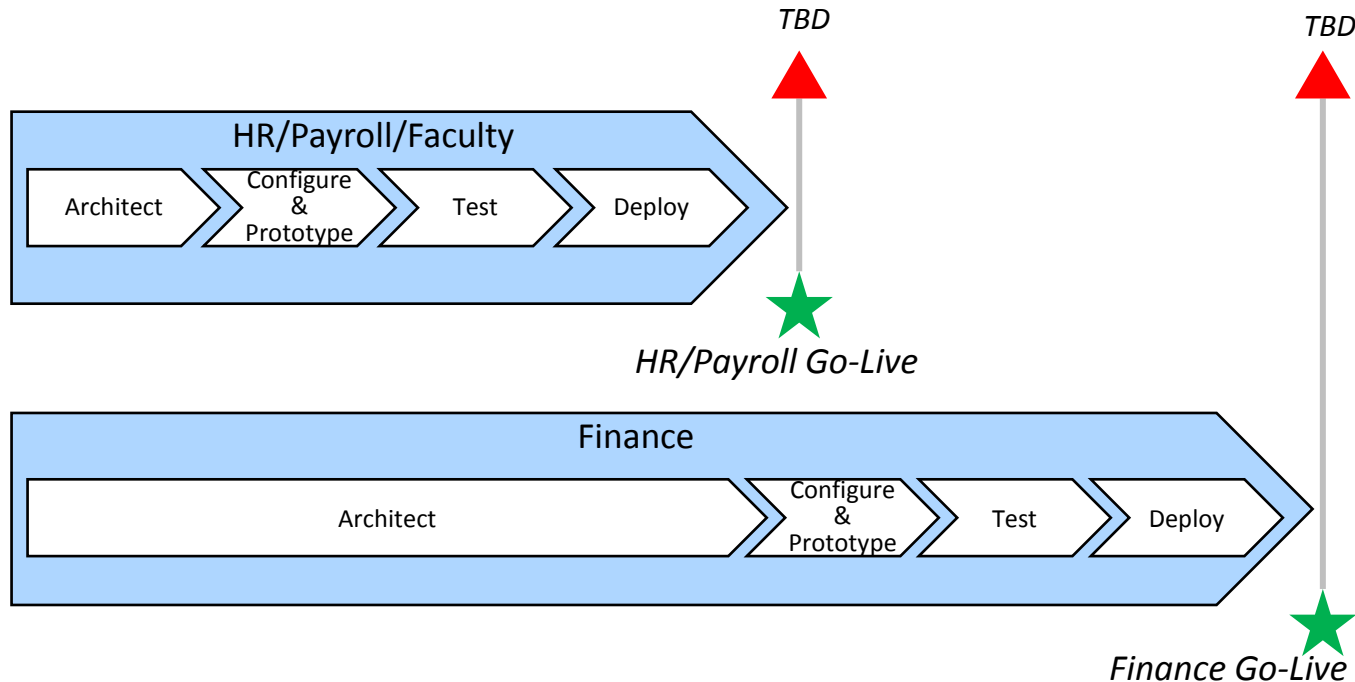
- Conduct current state discovery & identify pain points
- Map current state processes to Workday and develop Fit/Gap
- Develop multi-year road map

- Implement Workday over 2 – 3 years using a multiple “Release” approach

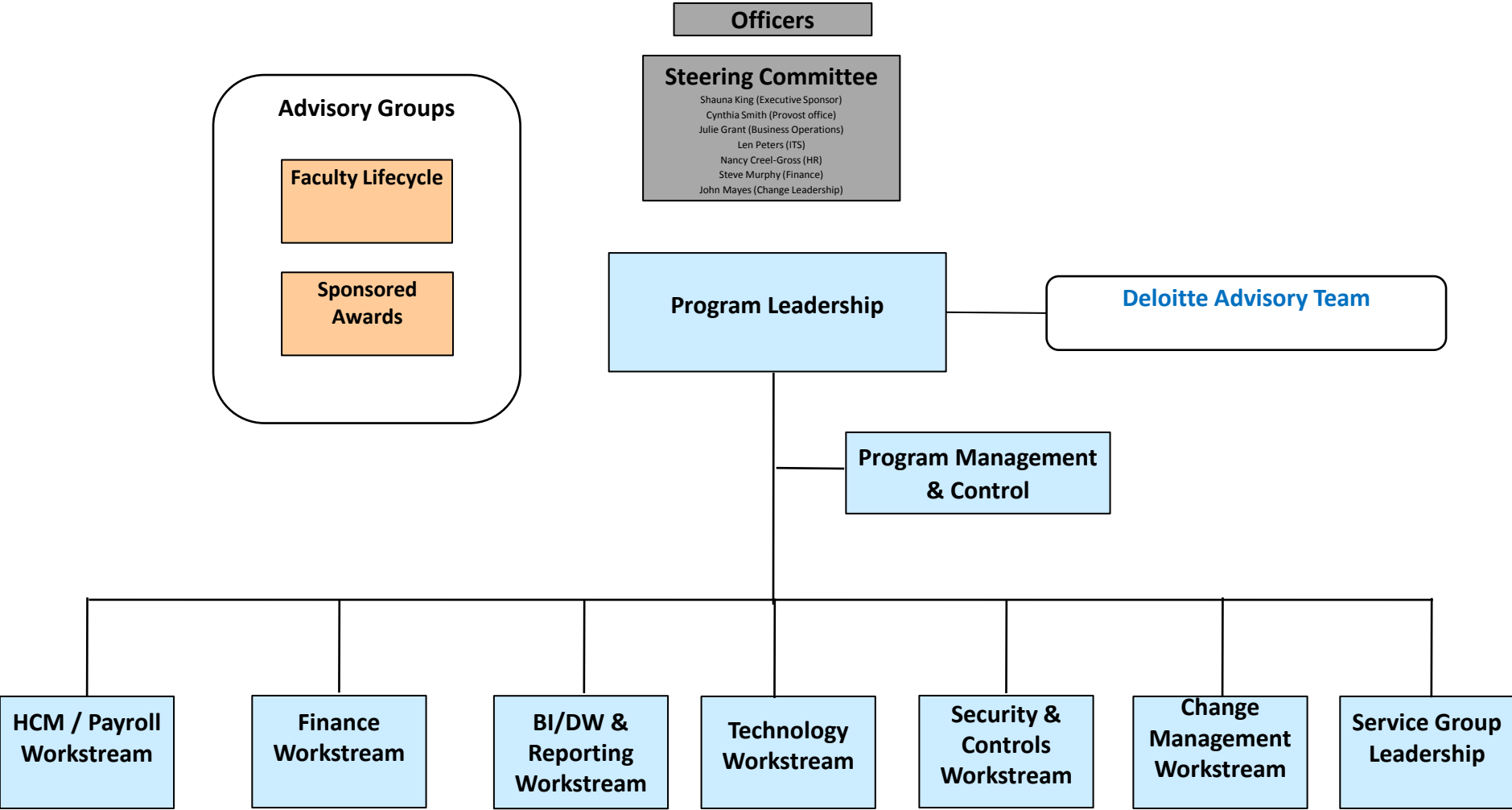
Workday@Yale Journey Overview

Implementation Phase Illustration

The Implementation Phase will include concurrent work on multiple “releases” of functionality



Workday@Yale Program Structure Overview



Vision & Plan Phase

The primary purpose of the Vision & Plan Phase is to develop a plan for the work ahead. Key activities include:

- Conducted current state “Discovery” with broad community engagement
 - 80+ sessions, 2xx+ participants from xxxx schools and divisions
- Identified key areas for improvement in our processes
- Performed a more refined fit/gap between our requirements and Workday
- Developed a multi-year roadmap to implement Workday over multiple releases
- Developed a structure for ensuring community engagement throughout the project

Vision & Plan Phase

HR, PAYROLL & FACULTY DISCOVERY SESSIONS

Absence	Faculty Post Doc	Payroll Foundations
Agencies	Faculty Reporting	Payroll Processing P1
Benefits Part 1	Faculty Search & Post Docs	Payroll Processing P2
Benefits Part 2	Faculty Slots Management	Payroll Reconciliation
Compensation - Bus Ops	Faculty Votes, Appts & Reappts	Recruiting Bus Ops
Compensation P1	GSPS Planning Session	Recruiting Part 1
Compensation P2	HR Systems & Tools	Recruiting Part 2
Confidential Payroll	Jobs & Positions - Bus Ops	Self Service
Drama Production Inc. - Payroll	Jobs & Positions S1 P1	Self Service - Bus Ops
Drama Student Payroll	Jobs & Positions S1 P2	Staff Core HR - Bus Ops
Environmental Health & Safety	Jobs & Positions S2 P1	Staff Core HR P1
Faculty Committees, Service and Leaves	Jobs & Positions S2 P2	Staff Core HR P2
Faculty Compensation - Bus Ops	Organizations - Bus Ops	Student Employment / Hiring / Compensation
Faculty Compensation Part 1	Organizations S1 P1	Talent & Performance Business Ops
Faculty Compensation Part 2	Organizations S1 P2	Talent & Performance Mgmt Session 1
Faculty Core - Bus Ops	Other Payroll Topics	Talent & Performance Mgmt Session 2
Faculty Core - Compensation Part 1	Payroll - Bus Ops	Time Tracking
Faculty Core - Compensation Part 2	Payroll Accounting	Time Tracking - Bus Ops

Vision & Plan Phase

FINANCE DISCOVERY SESSIONS


Banking and Settlement	Procurement	Sponsored Awards 1A- Award Setup & Terms/Conditions
Business Assets Part 1	Departmental Purchasing Systems	Sponsored Awards 1B - Post Award Financial Controls
Business Assets Part 2	Supplier Accounts	Sponsored Awards 1C - Sub-Awards
Business Information Model- Departments and Sponsored Awards	Expenses	Sponsored Awards 2 - Customers
Business Information Model - Leadership	Financial Accounting	Sponsored Awards 3 - Costing, Internal Services & Billing
Customer Accounts - Non-Sponsored Part 1	Gifts and Endowments	
Customer Accounts - Non-Sponsored Part 2	Projects / Work Management	Tax and International Issues

Vision & Plan Phase

BI / DWH (REPORTING) DISCOVERY SESSIONS & INTERVIEWS

Objectives

- **“Why are we here?”**
- Document current state functionality for Yale Organizations
- Shed light on people, process, and technology impacts along with current pain points, aspirations and goals around Yale reporting
- Lay foundation for future state
- **“What are we working towards?”**
- Validate what we know about your area
- Capture any gaps, problem statements and pain points
- Inform the future state reporting requirements and technical and data strategy



Establish an accurate, trusted and timely reporting environment

Workshops

▪ BI/DW & Reporting Discovery workshops are scheduled for the following areas:

- ✓ Institutional Sponsored Award Management Reporting
- ✓ External and Regulatory Reporting
- ✓ Procurement Reporting
- ✓ Human Resources & Payroll Reporting
- ✓ Financial Management Reporting
- ✓ Management Reporting
- ✓ Power Users Reporting

Focus groups with lead administrators from:

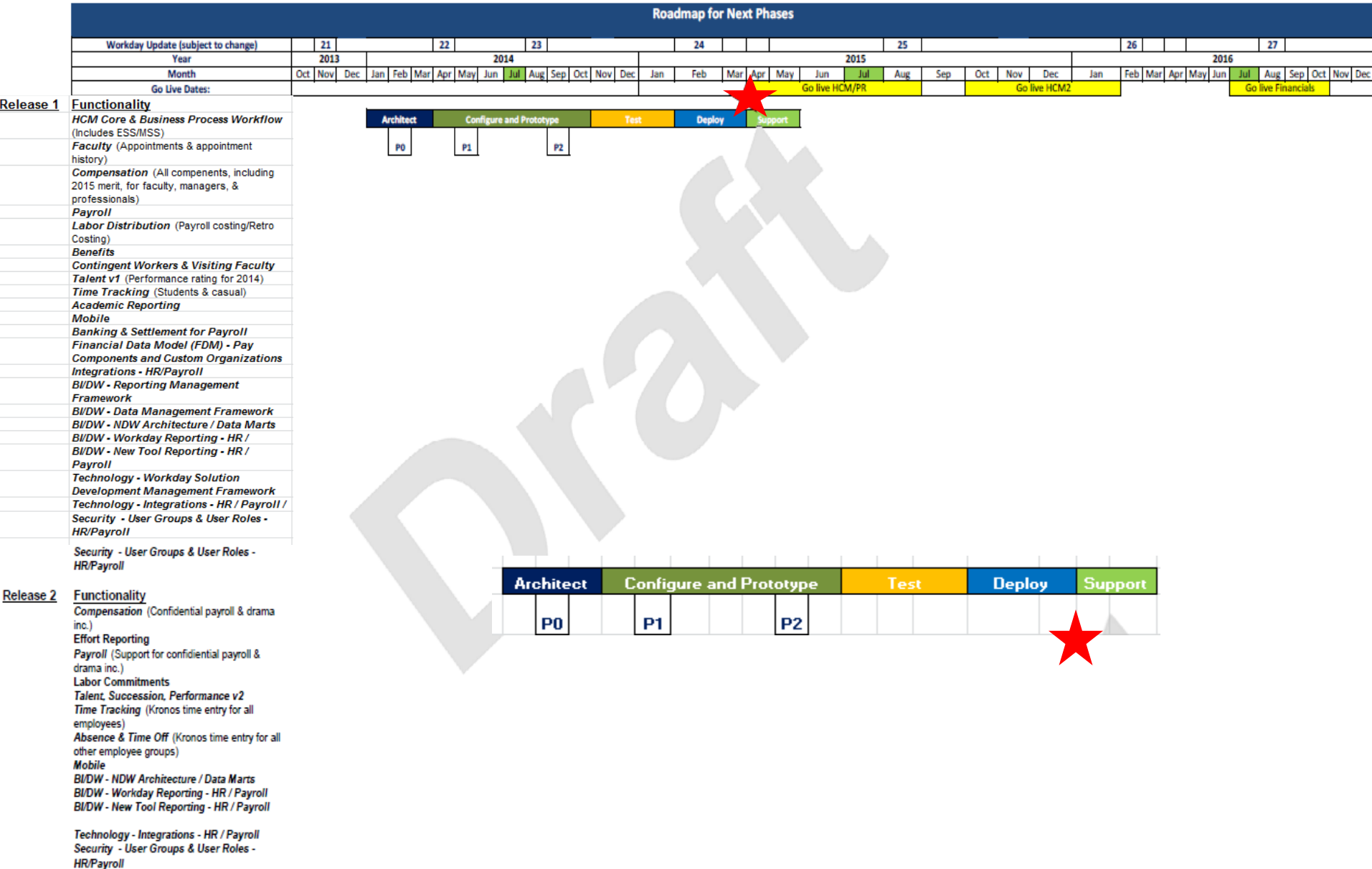
- ✓ School of Law
- ✓ School of Management
- ✓ School of Music
- ✓ School of Forestry
- ✓ School of Medicine
- ✓ Business Operations
- ✓ Yale College

Total Attendees: 91

Emerging Implementation Roadmap

DRAFT

Roadmap for Next Phases



A Sneak Peek at Workday.....



Workday Landing Page & Worklets

Workday features a graphical and configurable “landing page” that is “All About Me”

Worklets are groupings of related tasks

The screenshot displays the Workday landing page interface. At the top, a navigation bar includes the 'All About Me' link (circled in red), 'My Team', 'Dashboards', and a search box. Below this, a grid of worklets is shown: Benefits, Workfeed (with a notification badge of 5), Personal Information, Pay, Time Off, Directory, ABC Links, and Favorites. A callout box on the left provides a detailed view of the 'Personal Information' worklet, which contains sections for 'Time Off', 'Pay', and 'Actions' (including Withholding Elections, Payment Elections, and Create Timesheet). Blue arrows indicate the relationship between the text and the interface elements.

Workday Landing Page & Worklets

Workday is also about your team...

The screenshot displays the Workday landing page interface. At the top, the Workday logo is on the left, and a green banner indicates the version: "Implementation (IMPL) 20.0.18.287 (XORC revisi)". The navigation bar includes "All About Me", "My Team" (circled in red), "Dashboards", and "Common". A search bar contains the text "Find reports, tasks & more". The user's name, "Dr. Audrey Hodges", and links for "My Account", "Documentation", and "Sign Out" are visible.

The main content area features several worklets: "Headcount", "Hiring", "Compensation", "Workfeed", and "Time Off". The "My Team" worklet is highlighted with a blue box and a blue arrow pointing to it. A callout box labeled "Expanded Worklet" points to the expanded view of the "My Team" worklet.

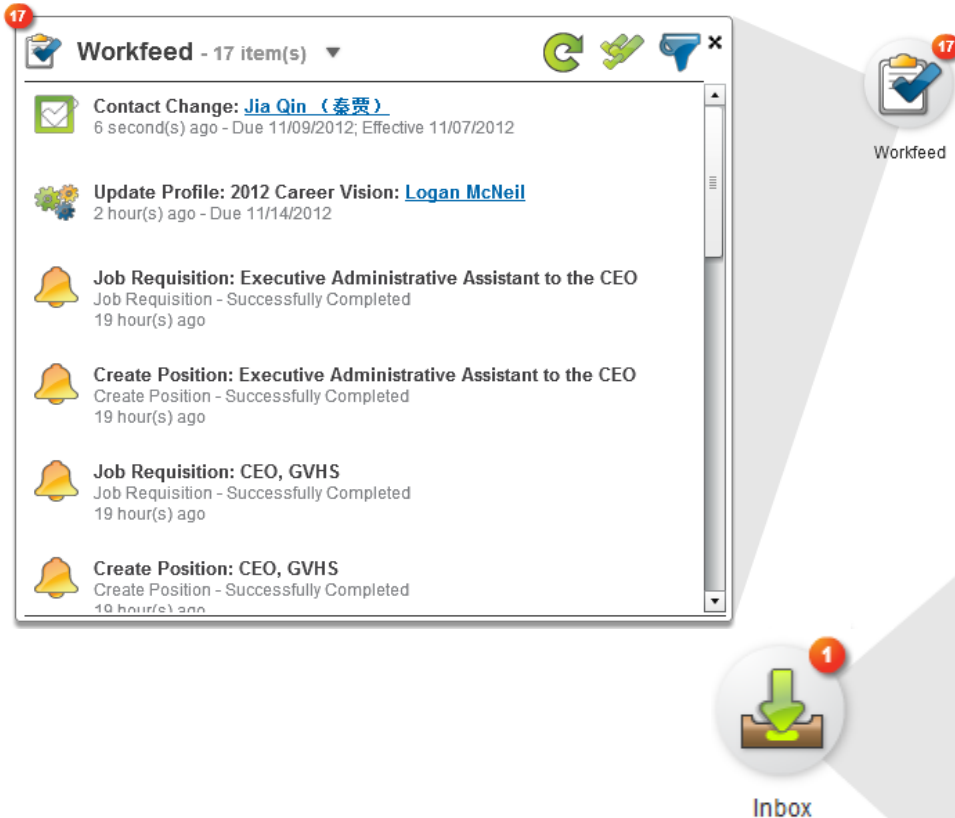
The expanded "My Team" worklet is titled "My Team" and contains two columns of information:

- Direct Reports:** A list of team members with dropdown arrows: Brian Prince, Dr. Fred Hong, Kim Nguyen, Meg Atkinson, Noah Woods, Peter Warren, and Sunil Pawar.
- Actions:** A list of actions: Transfer, Promote or Change Job; Change Location; Business Title Change; Create Job Requisition; and a "View All 8" button.
- View:** A list of views: Workers to Watch; My Team's Retention Risk Prediction; My Org Chart; and a "View All 25" button.

At the bottom left, there is a link: "CONFIGURE THIS PAGE >>".

Workday Workfeed & Inbox






The Workfeed and Inbox are the central locations for finding tasks that require attention.



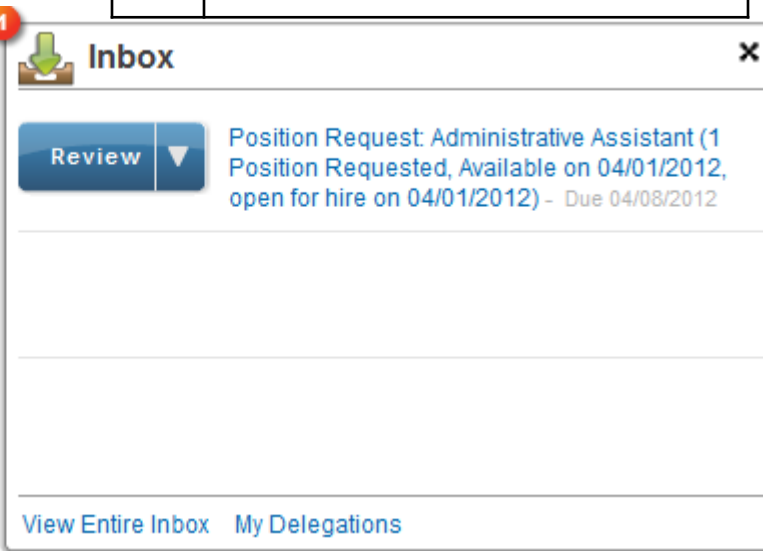
The Workfeed interface displays a list of tasks with the following items:

- Contact Change: Jia Qin (秦贾)**
6 second(s) ago - Due 11/09/2012; Effective 11/07/2012
- Update Profile: 2012 Career Vision: Logan McNeil**
2 hour(s) ago - Due 11/14/2012
- Job Requisition: Executive Administrative Assistant to the CEO**
Job Requisition - Successfully Completed
19 hour(s) ago
- Create Position: Executive Administrative Assistant to the CEO**
Create Position - Successfully Completed
19 hour(s) ago
- Job Requisition: CEO, GVHS**
Job Requisition - Successfully Completed
19 hour(s) ago
- Create Position: CEO, GVHS**
Create Position - Successfully Completed
19 hour(s) ago

The legend for the Workfeed icons is as follows:

	Click to refresh Workfeed
	Bulk Approval
	Filter Items in Workfeed
	Keep at top of the list
	Comment History

The Workfeed is a single view of all tasks, notifications and alerts.



The Inbox interface displays a task card for a position request:

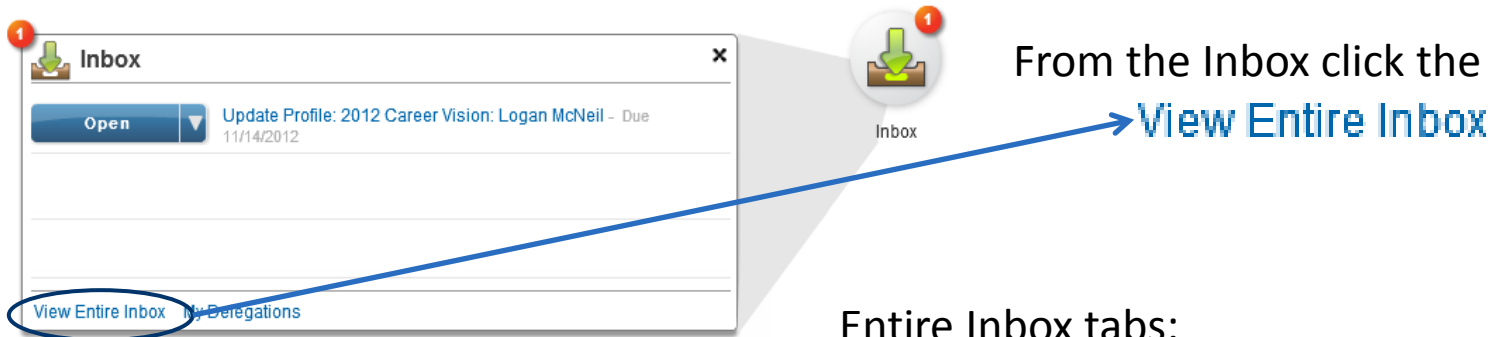
- Review** (button)
- Position Request: Administrative Assistant (1 Position Requested, Available on 04/01/2012, open for hire on 04/01/2012) - Due 04/08/2012**

At the bottom of the inbox, there are links for [View Entire Inbox](#) and [My Delegations](#).

The Inbox contains not only tasks, but can be viewed in an expanded view to include business process events either initiated or completed, as well as notifications

Inbox

Use the Inbox to find tasks assigned to you, to view business process events you initiated, or view business process which you are to monitor (but did not initiate)



From the Inbox click the [View Entire Inbox](#)

Entire Inbox tabs:

The screenshot shows an 'Inbox' window with a red notification badge. A blue arrow points from the 'View Entire Inbox' link in the bottom left of the window to the text 'View Entire Inbox' on the right. Another blue arrow points from the 'Inbox' icon in the top right of the window to the text 'View Entire Inbox' on the right. Below the window, the text 'Entire Inbox tabs:' is followed by a list of tabs: 'My Tasks', 'Delegated To Me', 'My Requests', 'Process Status', and 'Notifications (336 unread)'. A red arrow points from the 'Filter to refine task list' text to the right of the 'Notifications' tab. Another red arrow points from the 'Click any column heading to sort' text to the 'Subject' column heading in the table below.

My Tasks	Delegated To Me	My Requests	Process Status	Notifications (336 unread)	Filter to refine task list
Total Tasks	8				
8 items					
Awaiting Me	Business Process	Subject	Due Date	Date Received	Skip

My Tasks: workday business process activities assigned to you

Delegated To Me: business process activities assigned to you by another workday user

My Requests: show all of the business process events you initiate

Process Status: business processes that you are have security access to monitor

Notification (# unread): receive messages about the status of business process events

Workday Information – “Worktags”

Workday organizes key information with “Worktags” and helps us collect them more easily and consistently with prompts, defaults and business rules

Organization Worktags

- Company
- Project
- Grant
- Fund
- Program
- Business Unit
- Cost Center
- Gift
- “Custom”
- Division

We can create our own Worktags, too.

Flat Worktags

- Ad Hoc Payee
- Applicant
- Bank Account
- Contingent Worker
- Corp Credit Card
- Customer
- Deduction Recipient
- Employee
- Expense Item
- Intercompany Affiliates
- Job Profile
- Location
- Object Class
- Opportunity
- Pay Component
- Paygroup
- Project Phase
- Project Task
- Prospect
- Purchase Item
- Spend Category
- Revenue Category
- Supplier
- Sales Item
- Tax Category
- Tax Code

Workday Engagement

There are many ways to get involved and stay connected with the Workday@Yale program:

- Browse the Workday@Yale web site
- Attend community presentations and Lunch & Learns
- Join the online Workday Community
- Take some online training
- Volunteer for a Service Group

Browse the *Workday@Yale* Website

<http://workday.yale.edu/>

The screenshot shows the Workday@Yale website homepage. At the top, there is a dark blue header with the Yale University logo on the left, the text "Yale University" in the middle, and a search bar on the right. Below the header is a navigation menu with links for HOME, ABOUT, NEWS, CALENDAR, TRAINING & RESOURCES, FAQ, FEEDBACK, NEWSLETTER, and RSS. The main content area features a large banner with the Workday@Yale logo and a sunflower image. The banner includes the text "Accurate, trusted & timely reporting", "Simplify & standardize processes", "Improve effectiveness", "Human Resources & Payroll will roll-out first", "We are just getting started!", and "Stay tuned for more information". Below the banner, there is a section titled "Yale's new administrative business software for HR, payroll & finance" with a paragraph of text. To the right of the banner, there is a section titled "Internal News and Resources" with a sub-section "For Internal Use Only" and another section titled "Awareness opportunities" with a paragraph of text.

Yale University

Search this site

Workday@Yale

HOME ABOUT NEWS CALENDAR TRAINING & RESOURCES FAQ FEEDBACK NEWSLETTER RSS

Workday@Yale

Accurate, trusted & timely reporting

Simplify & standardize processes

Improve effectiveness

Human Resources & Payroll will roll-out first

We are just getting started!

Stay tuned for more information

workday.

Yale's new administrative business software for HR, payroll & finance

The administrative software (Oracle eBusiness) that Yale currently uses to manage its core financial and human resources systems is being replaced with software named Workday.

Our draft vision statement: *Workday@Yale will support Yale's mission with excellent administrative services that mirror Yale's excellence in teaching, research, and practice, making it easier for faculty, students and staff to get their work done.*

Developed with broad community engagement, *Workday@Yale will be defined by easy to use systems that lower the administrative burden for all, deliver trusted information and reduce overall costs.*

News & Updates

Internal News and Resources

For Internal Use Only

Awareness opportunities

To raise awareness and help us get to know Workday better, please review a brief video of Workday located at: [Workday Manager User Experience](#). Also, you may find it helpful to check out the training videos and presentations available.

Join the Workday Community

<https://community.workday.com/>

[contact us](#)

WORKDAY COMMUNITY

Sign In

Username or e-mail: *

Password: *

SIGN IN

- [Request new password](#)

Welcome!

Whether you're a customer or an implementation partner, the Workday Community helps you communicate, collaborate, and connect with other Workday users. [Watch the video](#) for more information about the Workday Community.

If you have an account in the community, you may sign in with your username or your professional email address.

If you don't know your password, you can [request a new password](#) using your professional email address.

Get an Account


The Workday Community is an exclusive community for **customers and partners**. If you are a customer or a partner and don't have a username, [request an account](#). We will verify your request with your company contact and get back to you shortly.

Sneak Peek

Watch the [demo video](#) or browse some of our public content:

- [Workday Developer Network](#)
- [Workday Integration Network](#)
- [Workday Labs](#)

Sign in to collaborate and see additional information.

© 2008-2013  [contact us](#) | [legal](#) | [privacy policy](#) | [community policy](#)

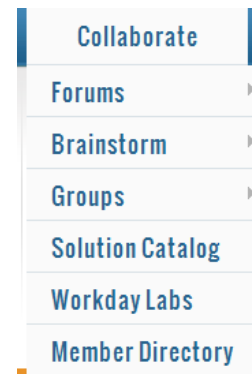
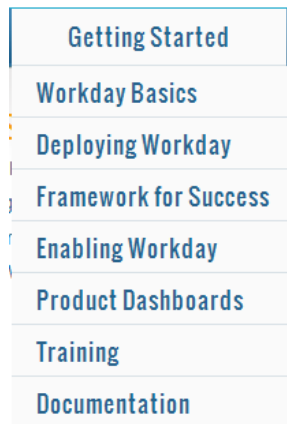
[f](#) [t](#) [in](#) [g+](#)

Videos & Free Training on the Workday Community

- Join the Workday Community

<http://community.workday.com>

- Take a few training courses, view the online videos
- View the Brainstorms, join a Group



Videos & Free Training on the Workday Community


Getting Started

Workday Basics

Deploying Workday

Workday Basics

Posted by ckaufman from Workday | August 13, 2012 - 12:45pm | 41493 reads

Type:  Community Reference

Are you a new Workday user? The collection of free courses below from [Workday Knowledge Management](#) team will provide you with the foundation you need to become familiar with the basic functions of Workday before you begin your deployment.

- [Workday Community Overview](#)
- [Navigation](#)
- [Staffing Models Overview](#)
- [Business Process Overview](#)
- [Organizations and Security](#)
- [Configurable Security Overview](#)
- [Report Writer Overview](#)
- [Workday Web Services Overview](#)
- [Workday Integration Overview](#)

Additional Training

Workday offers additional free training videos on Community [here](#). Classroom and virtual classroom instruction, along with additional On Demand Education modules, are available in the Workday Learning Center. Contact your Training Coordinator or sign in to the [Workday Learning Center](#) to register for classes.

The [training catalog](#) contains details on all of our courses.

Business Operations Service Groups

What are Service Groups?

Service Groups are community-led focus groups that will help ensure that Yale's new business processes meet the community's needs and expectations. These groups will also serve as a focal point for building a stronger community understanding of the Workday solution.

Sandy Stein, Service Group Director, is in the process of developing the Service Group structure

More information soon!

Next Steps

December:

- Finish Vision / Plan Phase
- Finalize the Implementation Roadmap
- Finalize Service Group structure

January:

- Identify program team for the Implementation phase
- Convene the first Service Groups
- Launch the Architecture phase for Release 1

