Workday@Yale

Workday Community Update

December 2013

What is Workday?

- Workday is a cloud-based, software-as-as-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

Why Workday?

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 (Vision & Plan Phase)

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

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

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

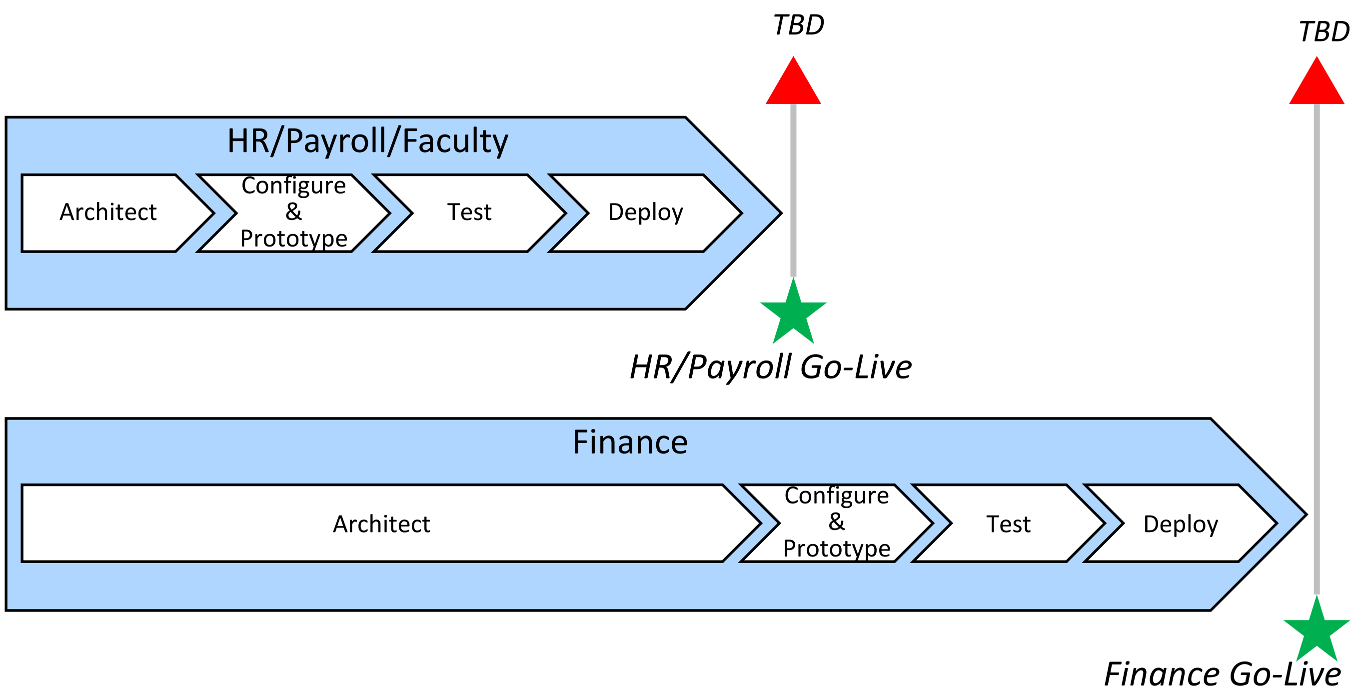
Vision & Plan Phase
- Conduct current state discovery & identify pain points
- Map current state processes to Workday and develop Fit/Gap
- Develop multi-year road map

Implementation Phase
- Implement Workday over 2 – 3 years using a multiple "Release" approach

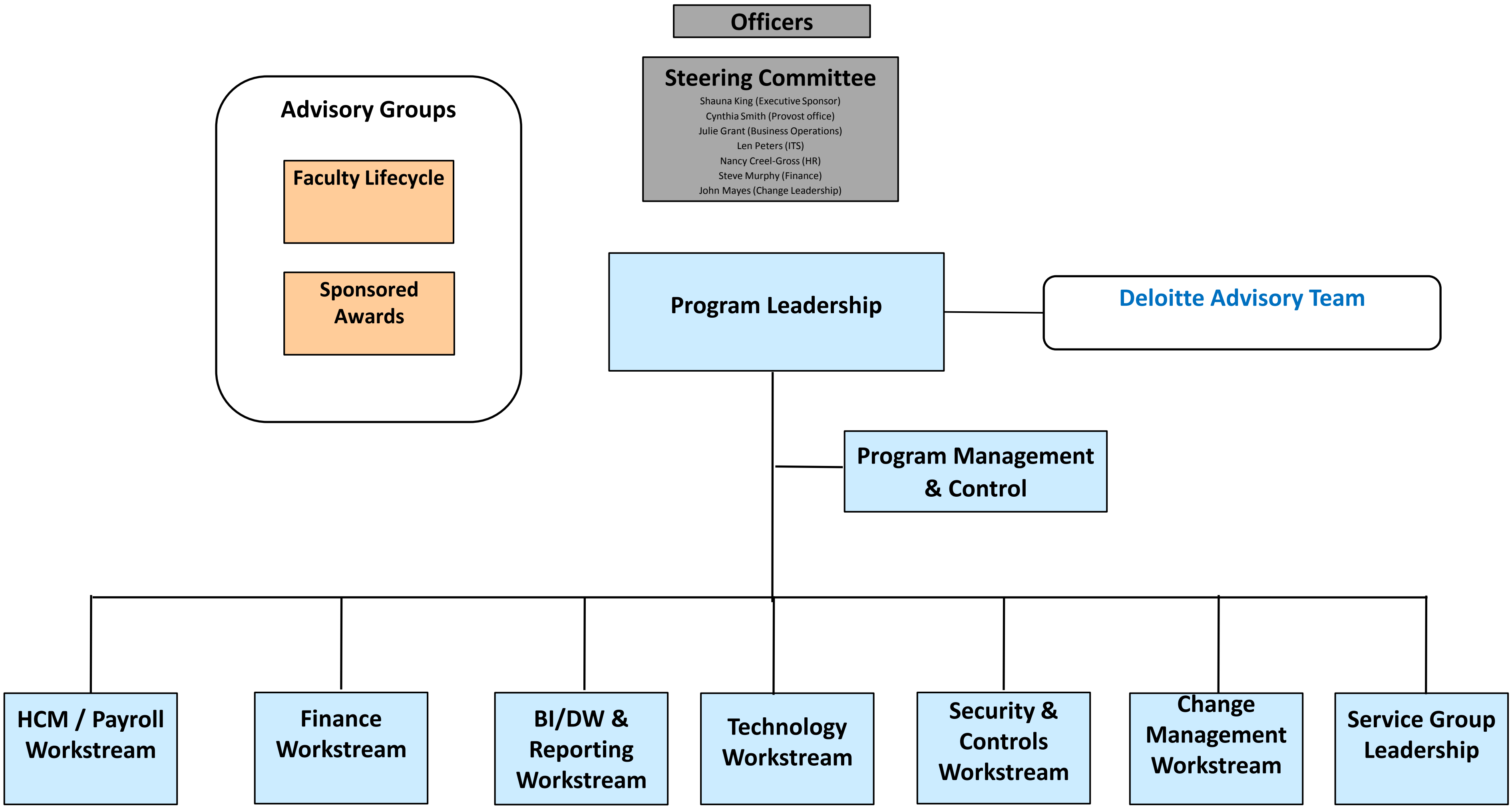
Workday@Yale Journey Overview

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

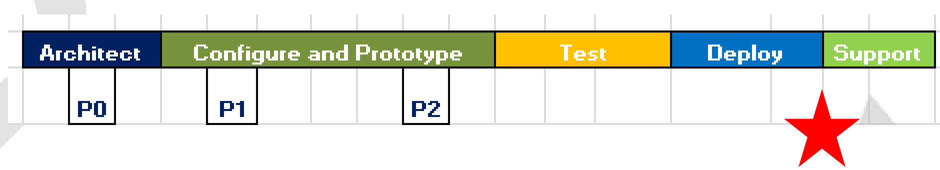
Roadmap for Next Phases

Workday Update (subject to change)		21					22					23					24						25						26						27				
Year	2013			2014												2015												2016											
Month	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Go Live Dates:																			Go live HCM/PR						Go live HCM2									Go live Financials					

Release 1 — **Functionality**

- ***HCM Core & Business Process Workflow*** (Includes ESS/MSS)
- ***Faculty*** (Appointments & appointment history)
- ***Compensation*** (All compenents, including 2015 merit, for faculty, managers, & professionals)
- ***Payroll***
- ***Labor Distribution*** (Payroll costing/Retro Costing)
- ***Benefits***
- ***Contingent Workers & Visiting Faculty***
- ***Talent v1*** (Performance rating for 2014)
- ***Time Tracking*** (Students & casual)
- ***Academic Reporting***
- ***Mobile***
- ***Banking & Settlement for Payroll***
- ***Financial Data Model (FDM) - Pay Components and Custom Organizations***
- ***Integrations - HR/Payroll***
- ***BI/DW - Reporting Management Framework***
- ***BI/DW - Data Management Framework***
- ***BI/DW - NDW Architecture / Data Marts***
- ***BI/DW - Workday Reporting - HR /***
- ***BI/DW - New Tool Reporting - HR / Payroll***
- ***Technology - Workday Solution Development Management Framework***
- ***Technology - Integrations - HR / Payroll /***
- ***Security - User Groups & User Roles - HR/Payroll***

Security - User Groups & User Roles - HR/Payroll

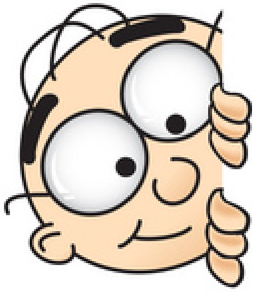


Release 2 — **Functionality**

- *Compensation* (Confidential payroll & drama inc.)
- **Effort Reporting**
- *Payroll* (Support for confidential payroll & drama inc.)
- **Labor Commitments**
- *Talent, Succession, Performance v2*
- *Time Tracking* (Kronos time entry for all employees)
- *Absence & Time Off* (Kronos time entry for all other employee groups)
- *Mobile*
- *BI/DW - NDW Architecture / Data Marts*
- *BI/DW - Workday Reporting - HR / Payroll*
- *BI/DW - New Tool Reporting - HR / Payroll*

- *Technology - Integrations - HR / Payroll*
- *Security - User Groups & User Roles - HR/Payroll*

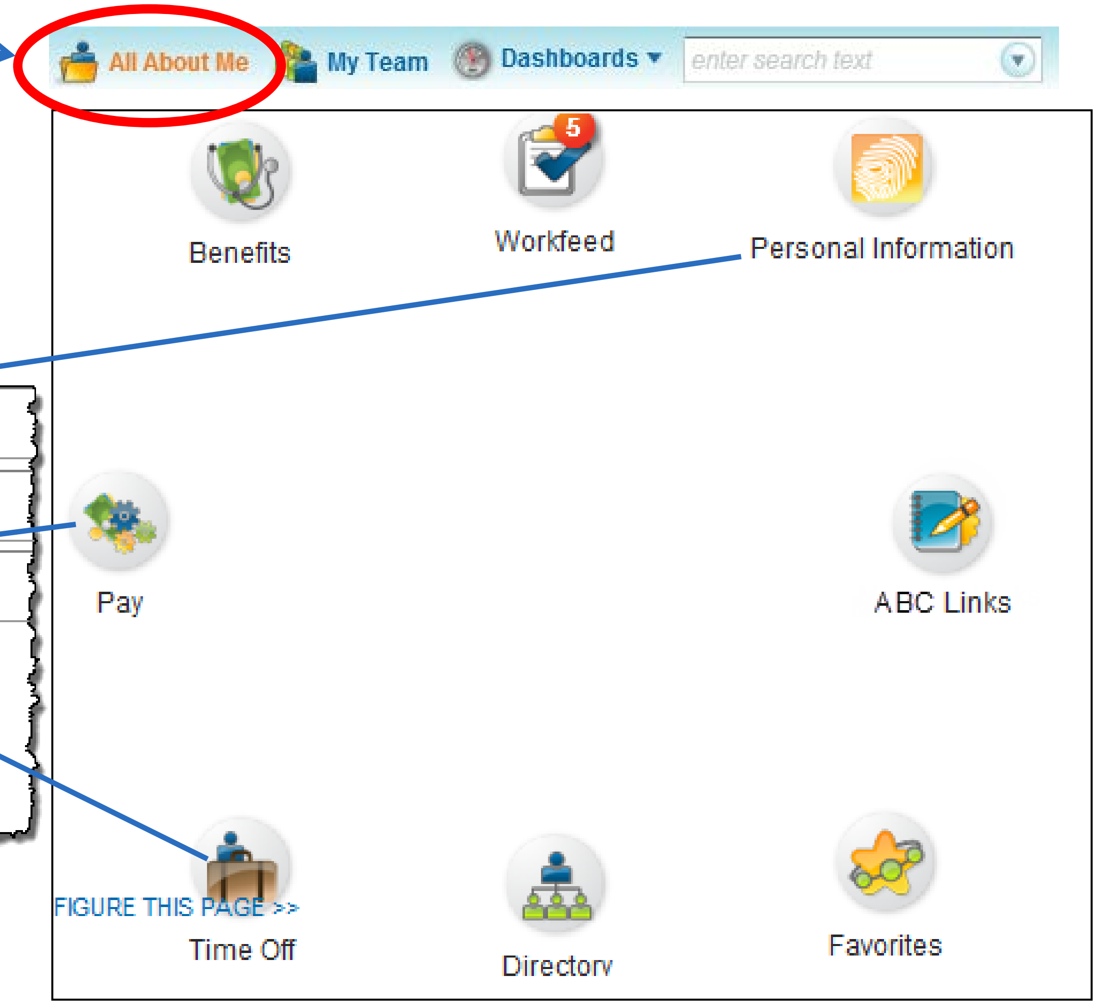
A Sneak Peek at Workday…..



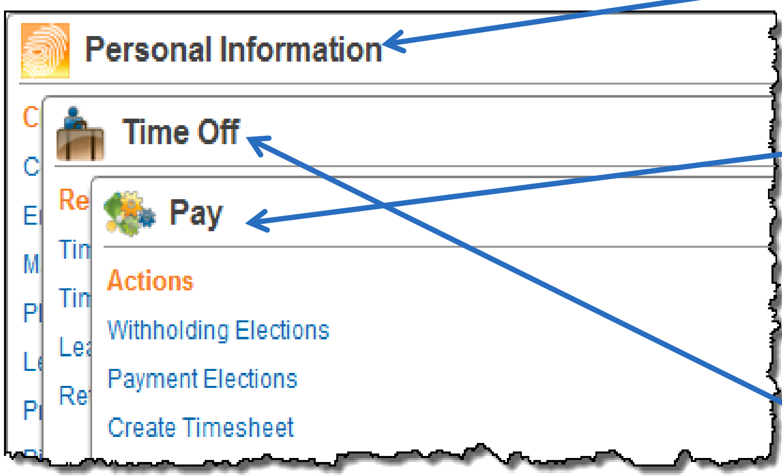
workday.

Workday Landing Page & Worklets

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



<u>Worklets</u> are groupings of related tasks



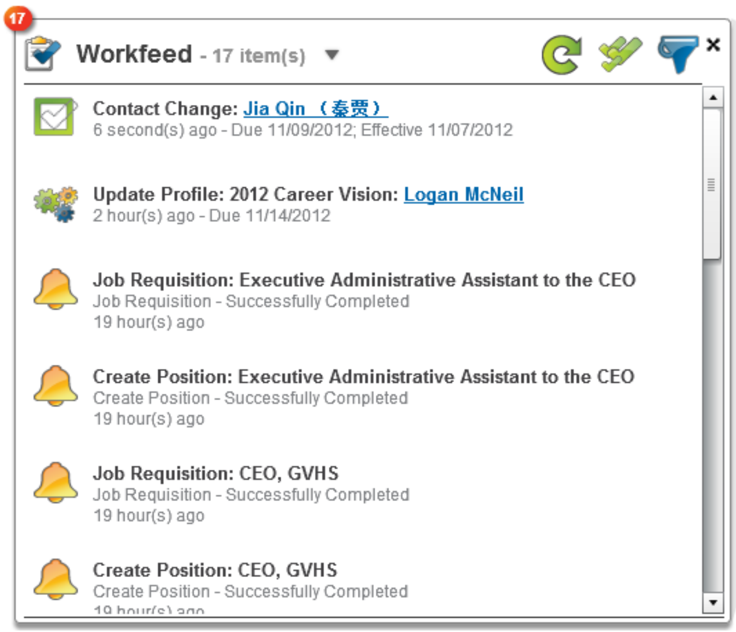
Workday Landing Page & Worklets

Workday is also about your team…

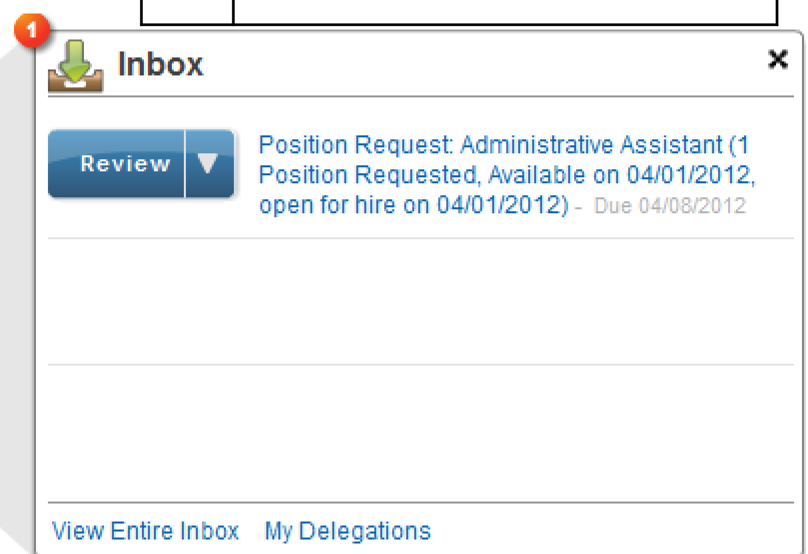
Workday Workfeed & Inbox

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

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



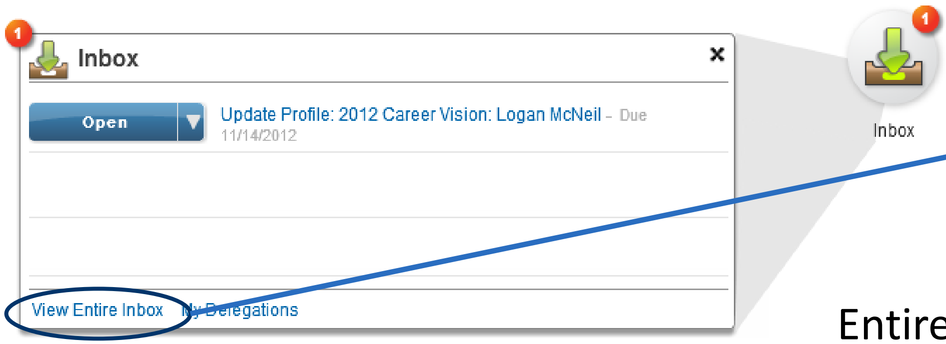
	Click to refresh Workfeed
	Bulk Approval
	Filter Items in Workfeed
	Keep at top of the list
	Comment History



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

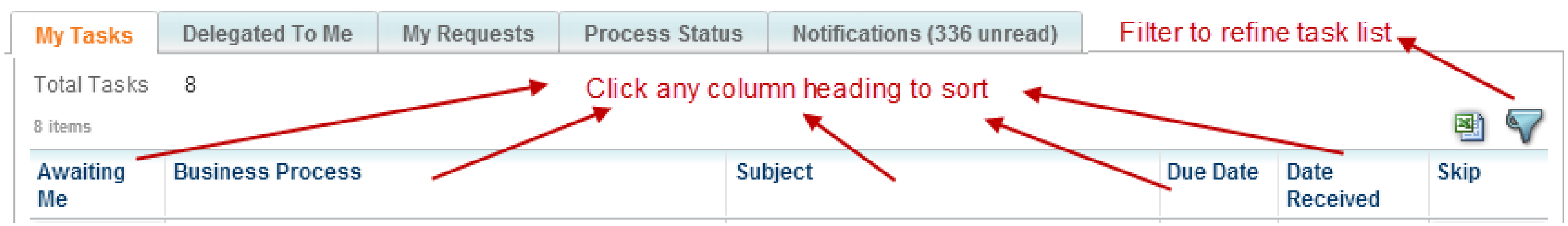
Inbox

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:



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:

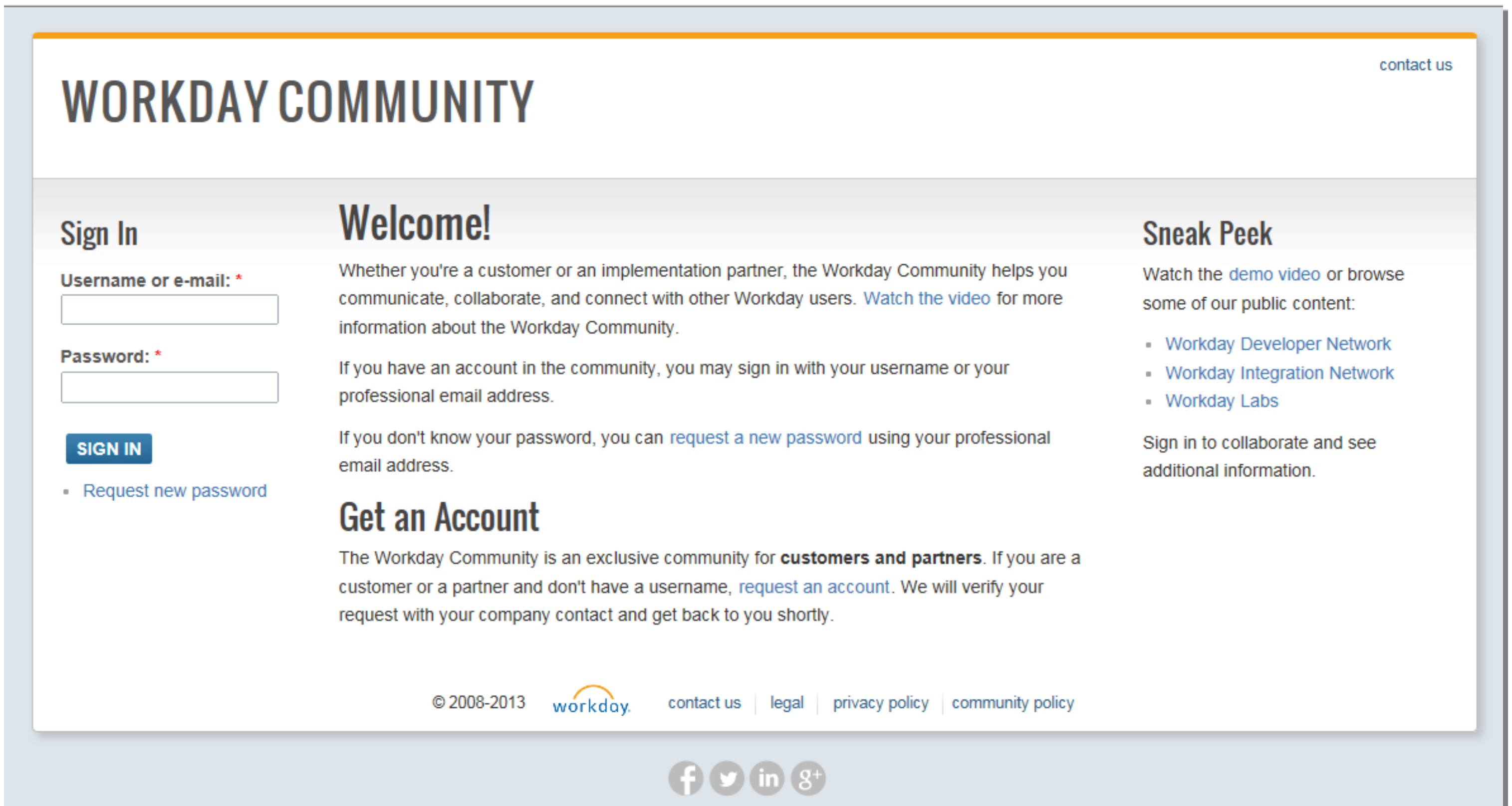
- Browse the Workday@Yale web site
- Attend community presentations and Lunch & Learns
- Join the online Workday Community
- Take some online training
- Volunteer for a Service Group

Browse the *Workday@Yale* Website

http://workday.yale.edu/

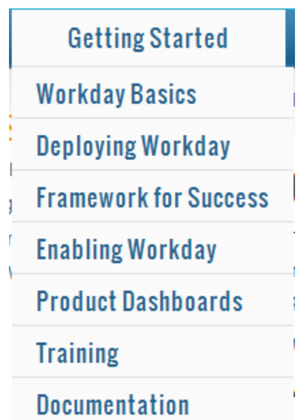
Join the Workday Community

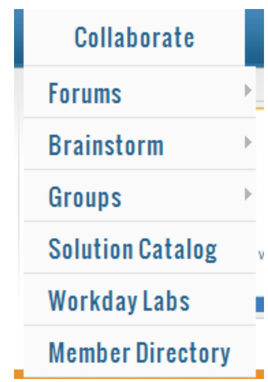
https://community.workday.com/



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

Questions

?