Program Phases and Timeline

**Release 1 – HCM/Payroll/Faculty**
- **June 2014**: Architect
- **September 2014**: Configure & Prototype
- **April 2015**: Test
- **April 2015**: Deploy

**Release 4 - Finance**
- **March 2015**: Architect
- **June 2015**: Configure & Prototype
- **July 2016**: Test
- **July 2016**: Deploy

**Implementation**
- **HCM P1**
- **HCM P2**

**Benefits, Talent, Compensation, Payroll, Faculty Appointments & Appointment History, Academic Reporting, BI/DW Reporting**

Yale ITS Communication Channels

In addition to the communication channels featured above, Yale ITS will be engaged via the following mechanisms:

- Distributed Support Provider (DSP) Team Meeting
- Department Staff Meetings
- IT Partner Friday Forum
- ITS Leadership Meeting
- IT Town Hall
- Social Media (i.e. Yale ITS Twitter)

Lunch & Learns
Two Workday Lunch & Learns were held earlier this year, providing information and updates on the Program

Monday Morning News (MNN)
The Program Team regularly provides updates featured in the MNN

Tech Talks
The Workday@Yale Technology Team recently hosted Tech Talks around the impacts of changes to the people dimension of data.
# HCM / Payroll Components

<table>
<thead>
<tr>
<th>Workday Focus</th>
<th>Leads and Teams</th>
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</thead>
<tbody>
<tr>
<td>Integration &amp; Conversion</td>
<td>Darrell Cook, Hadar Call, Judy Offutt, HRIS, ITS and teams from other departments</td>
</tr>
<tr>
<td>Core HR</td>
<td>Jaci-Beth Ward, and staff from HRIS, Operations, Employee Services, YSM Operations and Employee Relations</td>
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<tr>
<td>Compensation &amp; Classification</td>
<td>Ron Lipkins, Julie Kimball and a cross section of Compensation, Staffing and other HR team members</td>
</tr>
<tr>
<td>Payroll &amp; Labor Distribution</td>
<td>Elizabeth Anderson and a cross section of Finance, ORA, HRIS and Payroll staff</td>
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<tr>
<td>Faculty Life Cycle</td>
<td>Anna Maria Hummerstone, Hadar Call, Kathy Schoonmaker and a cross section of academic support staff</td>
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<tr>
<td>Benefits</td>
<td>Corey Rossman, Whitney-Ann Bradshaw, Benefits Planning, and Employee Service staff</td>
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<tr>
<td>Security &amp; Controls</td>
<td>Elizabeth Burnell, the HCM teams</td>
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<tr>
<td>Training &amp; Communication</td>
<td>Dick Bascom, Christine Viele and the change management support teams</td>
</tr>
<tr>
<td>Reporting</td>
<td>Kathleen Broderick, Lourdes Reyes, Judy Offutt, Katrina Sikorski, Anna Maria Hummerstone, Gary Gravino and support from other teams</td>
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</table>
The first “go-live” will focus primarily on HCM and Payroll functionality and will include self-service functionality for all Yale employees and managers.

The following business areas and functionality is planned for the first “go-live”:

- Employee Self-Service (ESS)
  - Change Address/Personal Data
  - Benefits Enrollment
- Manager Self-Service (MSS) functionality
  - View Team Org Charts
- Faculty Specific Information (Appointments & Appointment History)
- Payroll
- Employee Profiles for Temporary Staff (Contingent Workers & Visiting Faculty)
- Integrations
- Mobile

Did You Know…

- Direct Deposit Enrollment
What Is NOT Changing

The following business areas and functionality will NOT change with the first “go-live”:

X Time Tracking
X Procurement/payment systems (*including SciQuest*)
X Budget and Expenses
X Grants Management
X Supplier Management
X Financial Accounting
X Recruiting
X Learning Systems (TMS, etc.)
What can Employees Expect?

- All Yale employees will have the ability to access their personal HR and benefit information from any computer or mobile device with Internet access, 24/7.
- Employees will have the ability to update their address, change a beneficiary, and view benefit and compensation information.
Managers can expect:

- Quick and easy access to organizational information

Managers will be able to view key information about their staff members, such as:

- Position information
- Compensation information

The system will ultimately equip managers to:

- Manage personnel
- Make budgetary decisions
- Perform merit
- Assist with talent development
Navigation: First Time Sign-In

- The first time a user signs in to Workday, they will see the following features.
- Information is displayed in tips to introduce the user to the navigation throughout the system.
Navigation: Drop-Down Menu

- The drop-down icon houses landing pages, dashboards, W:Drive and Documentation
- Users will only see options they have access to based on their role
  - For example, only employees with a Manager Role will see the My Team option

**My Team:** This page is for managers and can be configured to replace the ‘My Workday’ page.

**Workbench:** This landing page provides quick and easy access to existing tasks and reports for technical administrators.

**W: Drive:** This is a virtual drive where you can store generated reports.

**Dashboards:** This is a menu button for easy access to Compensation, Benefits, Workforce Planning. These dashboards are designed for managers.
Access your most frequently visited pages in Favorites

Access and update your personal information

View benefit information and enroll in benefits
Mobile Platforms
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
- Subscribe to the Workday@Yale newsletter at https://messages.yale.edu/Subscribe/List/ITS
- Contact the Program at Workday@Yale.edu
- Access the Workday@Yale Communications Toolkit for informational materials to share with your department, at: http://workday.yale.edu/training-resources/communications-toolkit
Phase 1 Service Groups (April 2014):
- Workforce Management
- Accuracy of Unit Financial Statements
- Information Delivery

Phase 2 Service Groups (July 2014):
- Faculty Recruitment, Appointments and Promotions
- Position & Compensation Management
- Student & Temporary Hiring & Life Cycle Management

Phase 3 Service Groups: (October 2014):
- Getting Started at Yale (Onboarding)
- Purchasing Goods & Services (External & Internal/ISPs)
- Gift & Endowment Stewardship
- Sponsored Awards Management

Phase 4 Service Groups (March 2015):
- Hiring Staff
- Unit Financial Management
- Arranging Travel, Business & Special Events (Expense Management)
As part of the broader Change Management Strategy, Service Groups, ITS Change Partners and the Workday@Yale Technology Team serve as key resources for engaging the Yale ITS Community about the Workday@Yale Program.
Next Steps

- *Workday@Yale* Program Stakeholder Survey
- IT Town Hall on September 11 from 3:00 – 4:30 pm