

Workday@Yale

May 2017



The second in a series of information sheets for Yale faculty

Read Vol. 1 at

workday.yale.edu/faculty

SUMMARY

Beginning July 3, Yale’s new administrative system, Workday, will support all buying and paying transactions. Purchase requisitions will be created in Workday with access to SciQuest content. P-Card and out-of-pocket expenses will be processed using Workday expense reports. Examples of expenses are travel, conference fees, business meals, social events, supplies. Staff members who support you in these transactions will be fully trained before Workday goes live.

HIGHLIGHTS

Submit expenses anytime, anywhere: Use the Workday Mobile App to photograph receipts, create and submit expenses, or approve your own expense report 24/7 from any smart phone or tablet.

New expense report approval process: Expense-related notifications will come through the Workday inbox instead of Outlook. Cardholder approval is only required for those expenses marked personal or that result in a reimbursement.

Charging instructions will change: Oracle PTAEs and VIP numbers will change to Workday charging instructions. Business offices have been engaged in mapping and converting financial information, and are able to provide guidance.

Purchasing methods remain the same: Purchase requisitions (SciQuest catalogs and preferred vendors) and P-Cards (business and travel expenses) remain the two primary purchasing methods for the Yale community.

Real-time status updates: For reimbursement of out-of-pocket expenses, you can track status of approval and payment as they occur.

One source for support: Beginning in July, Purchasing Services support will be provided by the new Finance Support Center staffed by Yale Shared Services. The ITS Help Desk will no longer support iExpense, eShip Global, or SciQuest.

PROGRAM TEAM

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WORKDAY PROGRAM KEY GOALS

Simplify and standardize processes

Minimize administrative work for faculty and staff

Lower operating costs and improve effectiveness

Questions? Contact Workday@yale.edu

For additional information, visit Workday.yale.edu