Workday Update

March 19, 2014

Introduction

- Workday is the **leader** in cloud-based, enterprise applications that combine a **lower cost of ownership** with an **innovative approach** for global businesses

- Workday **provides unified Human Capital Management and Financial Management applications** designed for today's organizations and the way people work.

- Cloud-based Software As A Service (SaaS)

- Enterprise-class security, built for the global enterprise

- Consumer Internet-like user experience

- Embedded real-time analytics

- Modern and adaptive technology foundation

- Commitment to customers

Why Workday?

Key Benefits

- 24/7 access to information over a secure network

- Improved HR, Payroll, Finance, and ITS productivity

- Continuous innovation & improvements

- Higher user adoption and empowerment (employee and manager self-service)

Workday@Yale

Accurate, trusted & timely reporting — Human Resources & Payroll will roll-out first

Simplify & standardize processes — We are just getting started!

Improve effectiveness — Stay tuned for more information

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

Why did Yale Select Workday?

- Collaborative design approach (Yale is a Workday Strategic Design Partner)

- Modern technology with an intuitive interface

- Architecture allows services to reach customers with a minimal number of servers, thus reducing energy needs

- Modern data centers pool large quantities of processing power and can be dramatically optimized for energy efficiency

- Commitment to meeting the needs of higher education – they WANT this market

What will Workday mean for Yale?

- Pace of innovation allows *rapid addition of new functionality*

- Will not be able to customize, but highly configurable

- Strong analytics with *one-click reporting*

- Over 200 pre-built integrations to/from Workday and 3rd party systems

- Higher Education Strategic Advisor: Yale is joining *Brown, Georgetown, Cornell, USC*, and *Carnegie-Mellon* on Workday's *Higher Education Advisory Board* to guide the design and features of the higher education version of the Workday system

Workday@Yale supports all four focus areas of President Salovey's vision for Yale:

"a more *unified* Yale, a more *accessible* Yale, a more *innovative* Yale, and a more *excellent* Yale"

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 Program Progress: Where Are We?
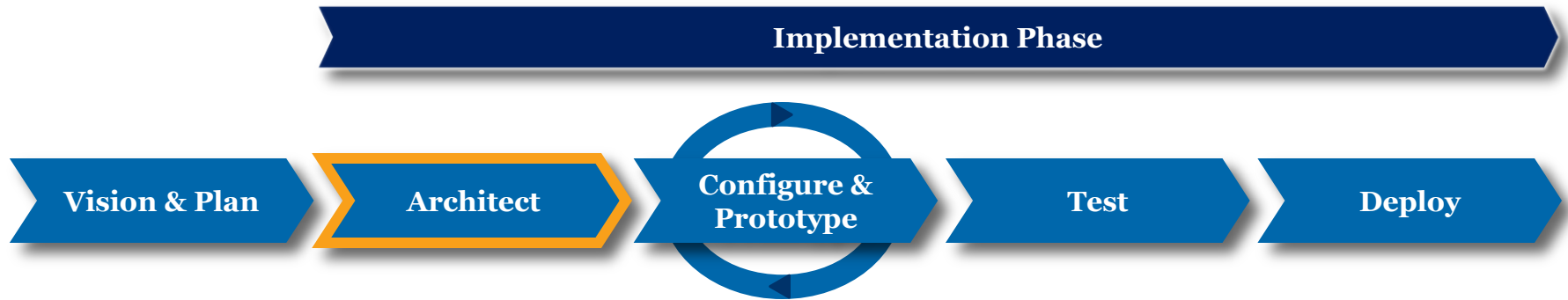
- During the Architect stage of a Workday deployment, the Program Team works to identify a shared understanding of Yale's business requirements

- Activities include:

  - Business Process Review

  - Integrations

  - Reports

  - Conversion

  - Design Considerations

Workday@Yale Implementation

The Implementation Phase includes concurrent work on multiple "releases" of functionality

Implementation Phase

April 2014   July 2014   April 2015   July 2016

HCM/Payroll/Faculty

| Architect | Configure & Prototype | Test |

P1   P2

HCM/Payroll Go-Live

Finance

| Architect | Configure & Prototype | Test | Deploy |

Finance Go-Live
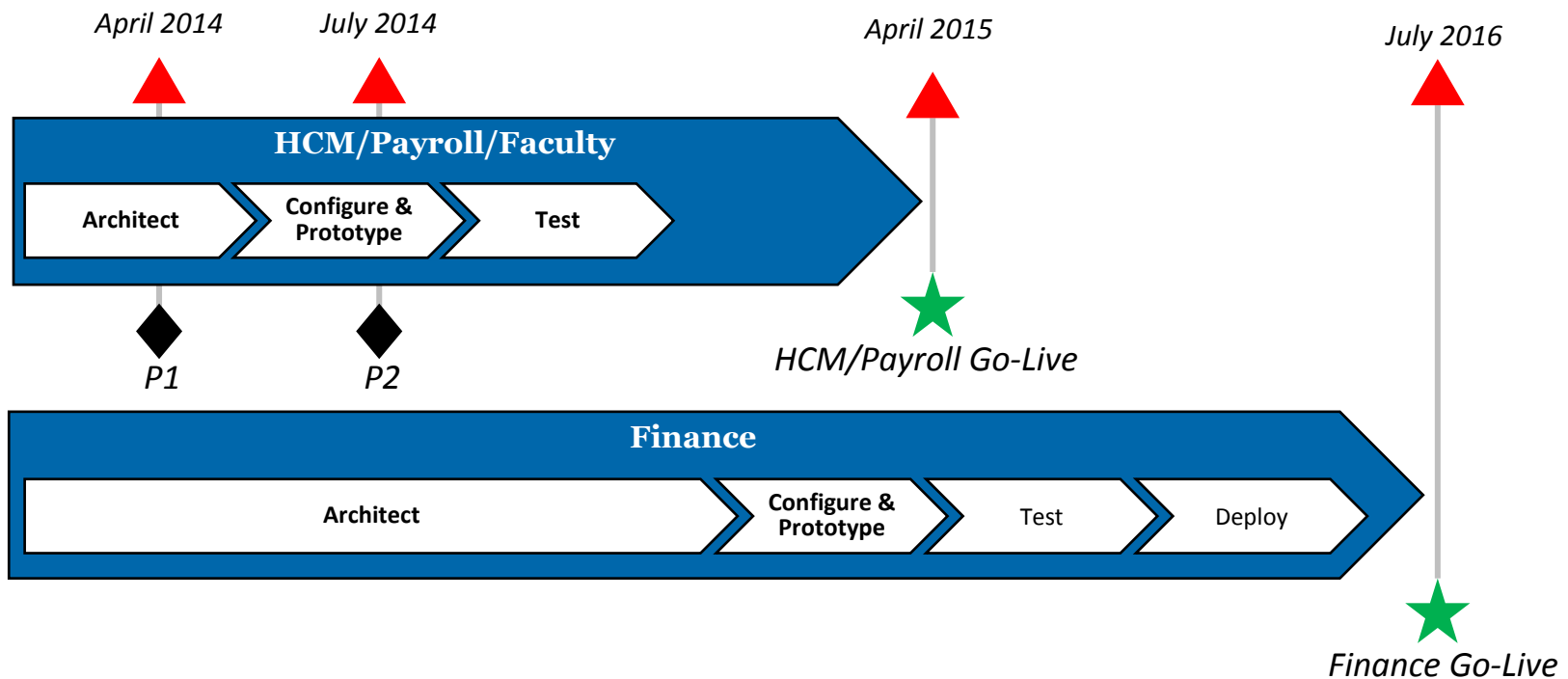
What systems will be impacted?

- The following will be replaced by Workday:
  - Release 1 – April 2015
  - Human resource and payroll systems including HR records (includes 4D and BMS), self-service, payroll management and costing, and compensation administration
  - Release 4 – July 2016
  - Core finance systems including general ledger, accounts receivable, asset accounting, cash receipts, accounts payable and expense management
  - Post-award grants management

- 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)

What other impacts can we expect?

- The user experience will 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

Workday Terminology

Workday Term	Definition
Human Capital Management (HCM)	Workday's HCM application unifies Human Resources, Benefits, Talent Management, Recruiting, Payroll, and Time Tracking into one system-of-record.
Academic Staffing	The HCM staffing model unique to faculty or scholarly workers at a university or college. In Workday, Academic Staffing is comprised of "Academic Appointments", "Academic Pay", and "Period Activity Pay". Academic Staffing will encompass much of what is currently referred to as "***Faculty Lifecycle***".
Supervisory Organization	Foundational, hierarchical position-to-position structure. Departments can have multiple supervisory organizations (one per unique manager). Related to the Workday concept of "Cost Center"—Supervisory Organizations will help Yale more accurately reflect the way they operate in the Workday system.
Business Process	A sequence of one or more tasks that accomplishes a desired business objective (i.e., hiring an employee, paying an invoice). Workday delivers a powerful business process configuration tool that enables you to define organization-wide or local business processes and rules.
Workflow	Application logic applied to a business process to make it controlled, repeatable, secure, and easy to perform. Workflow defines who can perform each task and in what way, and provides a routing mechanism to "flow" the information and task execution from one user to another.
Cost Center	Used to track financial and HR transactions with a financial impact, i.e., hiring. Employees are assigned a Cost Center when hired. Cost Centers can be rolled up into hierarchies, which can only store for reporting purposes. Cost Center equates to "***Organization***" in PTAEO/current Oracle environment and structure.

Workday Adoption Toolkit (WAT)

- The WAT is a collection of tools and resources designed to accelerate the Workday rollout and quickly train end users on how to use Workday

- The *Workday@Yale* Program Team will customize and employ many of the tools and resources contained within the Toolkit to meet the training needs and interests of the Yale end user community

WAT Components

Videos
Short and easy-to-digest role-based videos that cover a wide variety of topics

FAQs
Detailed screen shots with step-by-step answers to common questions from users

Facilitator Guides
In-depth guides assist trainers to conduct a wide variety of live training sessions

Marketing Materials
Sample internal communications that can be leveraged for change management activities

Screencast Scripts
Transcripts can be used to customize videos and build job aids or quick reference guides

Workday User Interface (UI)

Sneak Peek at Workday

What is a User Interface?

- A *user interface* is the means by which the user and a computer system interact

- *Two times* a year, Workday delivers updates with *enhanced functionality*

- Past Go-Live, Yale will become part of the group receiving Workday updates twice per year

Workday Mobile Platforms

Home

- All landing pages display icons in a tiled format, providing a more intuitive experience as this mimics our natural way of reading

- Clicking on an icon opens content beneath the image title

- Users now have the ability to change their primary landing page to a different default landing page based on their individual preference
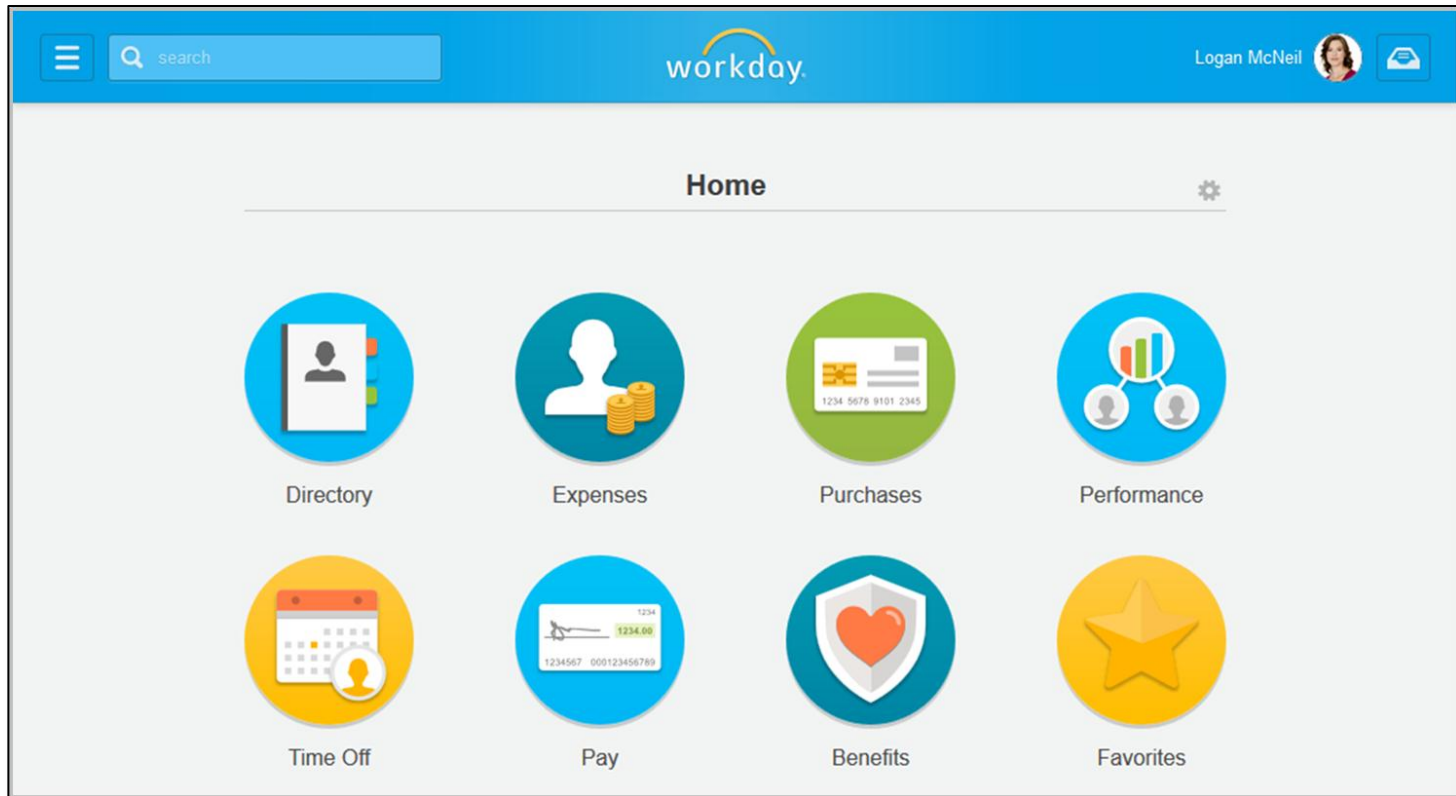
All About Me

- The All About Me page is a one-stop-shop for all worker self-service and informational needs
- The icons on your All About Me page provide access to groups of related tasks, reports, and links called worklets

Onboarding

- The onboarding checklist is now incorporated into the unified Inbox, so a new hire no longer needs to go to two separate places to complete tasks

- The checklist worklet on the Onboarding landing page now highlights the number of onboarding items to do in the new inbox, along with instructional text

Control Over Compliance
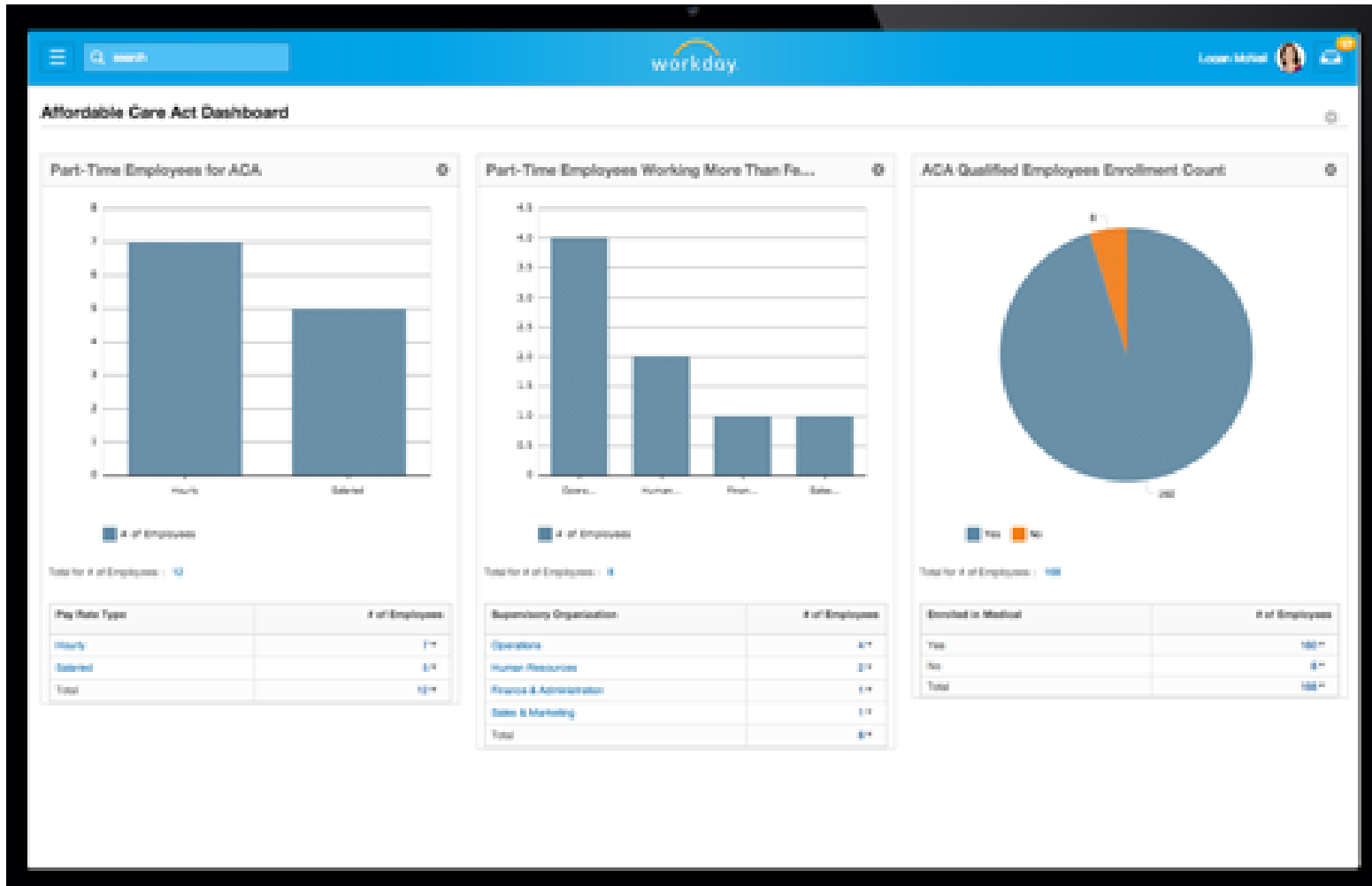
Service Groups Concept
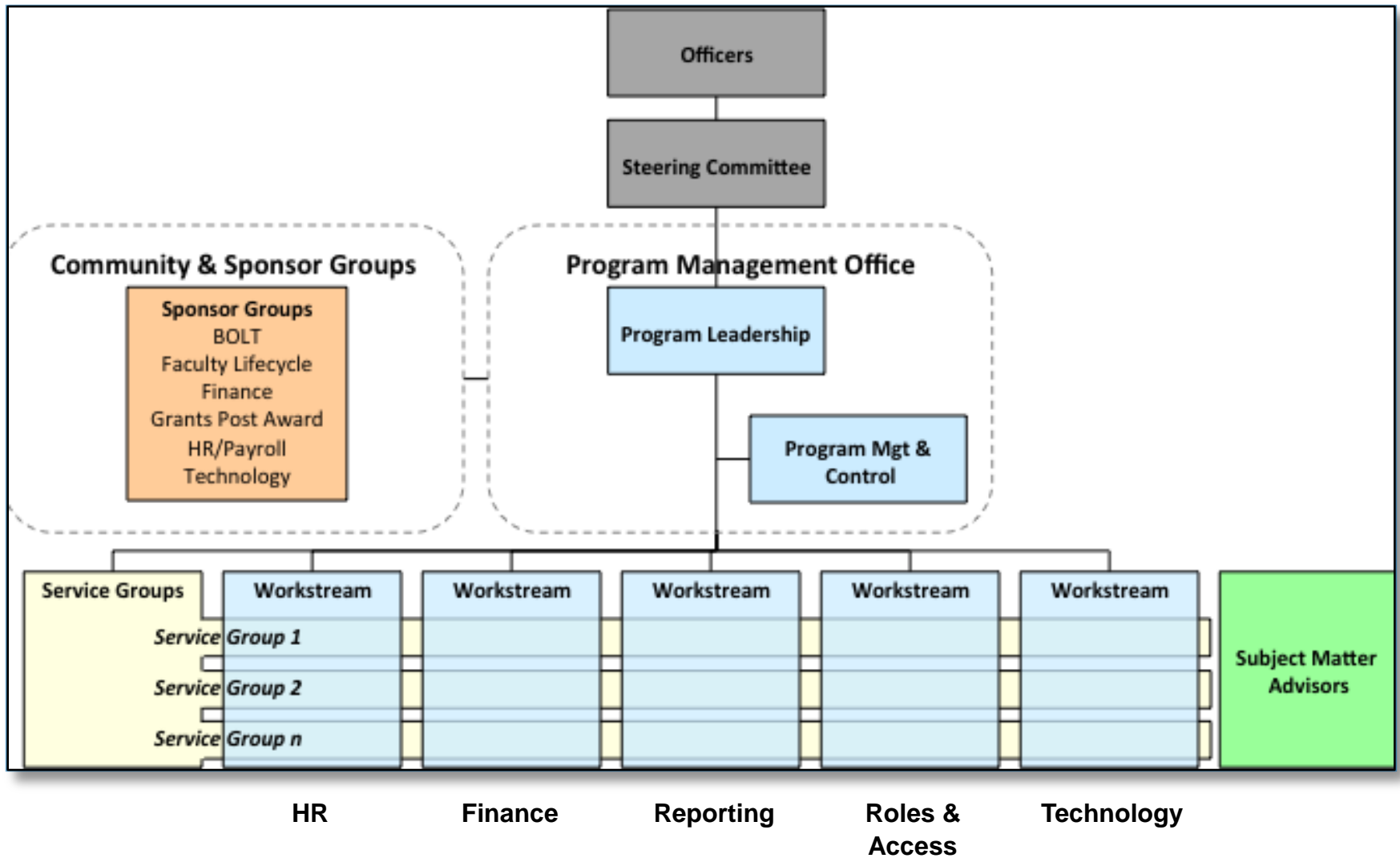
Service Groups

1. **Workforce Management** (Supervisor Self Service/Merit/Talent Development)

2. **Accuracy of Unit Financial Statements** (Labor Distribution/JSA/Monthly Close)

3. **Information Delivery**

Phase 2

4. **Faculty Recruitment, Appointments and Promotions**

5. **Position & Compensation Management**

6. **Student & Temporary Hiring & Life Cycle Management**

Phase 3

7. **Getting Started at Yale** (Onboarding)

8. **Purchasing Goods & Services** (External & Internal/ISPs)

9. **Gift & Endowment Stewardship**

10. **Sponsored Awards Management**

Phase 4

11. **Hiring Staff**

12. **Unit Financial Management**

13. **Arranging Travel, Business & Special Events** (Expense Management)
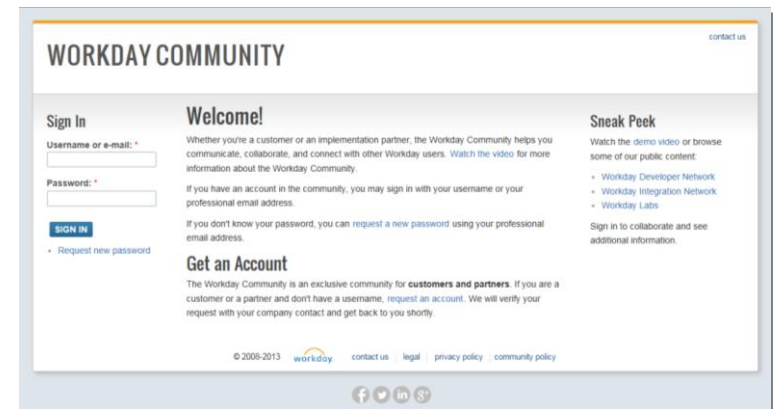
Advisory Groups

Faculty Services

Employee Self-Service (Faculty, Staff, Post-Docs)

Opportunities for Yale Community Engagement

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

- Volunteer or nominate a colleague to be a member of a Service Group

- 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

- 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*

Questions

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