



**Workday Update**

**March 19, 2014**

# Introduction

## What is Workday?

- 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.



A banner for Workday@Yale. The top left corner has the text "Workday@Yale" in white on a dark blue background. The top right corner features a close-up image of a sunflower. The banner is divided into three horizontal sections. The top section is light blue and contains the text "Accurate, trusted & timely reporting" on the left and "Human Resources & Payroll will roll-out first" on the right. The middle section is white and contains "Simplify & standardize processes" on the left, the Workday logo (a blue arc above the word "workday" in blue) in the center, and "We are just getting started!" on the right. The bottom section is dark blue and contains "Improve effectiveness" on the left and "Stay tuned for more information" on the right. At the very bottom, a dark blue bar contains the text "Yale's new administrative business software for HR, payroll & finance" in white.

## What does Workday offer?

- 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)



A banner for Workday@Yale. The top left corner says "Workday@Yale" in white text on a dark blue background. The top right corner features a close-up image of a sunflower. Below the header, there are three lines of text on the left: "Accurate, trusted & timely reporting", "Simplify & standardize processes", and "Improve effectiveness". In the center is the Workday logo, which consists of a blue arc above the word "workday" in lowercase blue letters. To the right of the logo, there are two lines of text: "Human Resources & Payroll will roll-out first" and "We are just getting started!". At the bottom right, there is a line of text: "Stay tuned for more information". The bottom of the banner is a dark blue bar with the text "Yale's new administrative business software for HR, payroll & finance" in white.

## 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

Yale


CarnegieMellon





*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





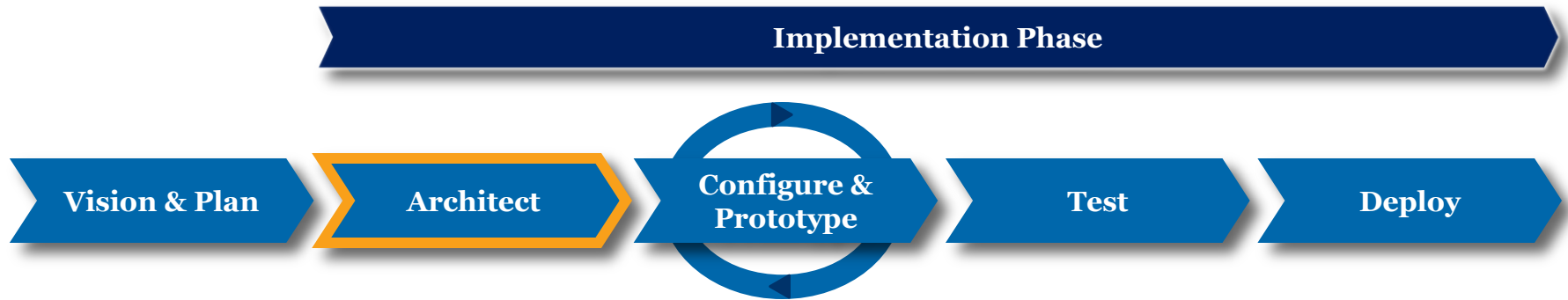
# *Workday@Yale* Vision Statement

*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?

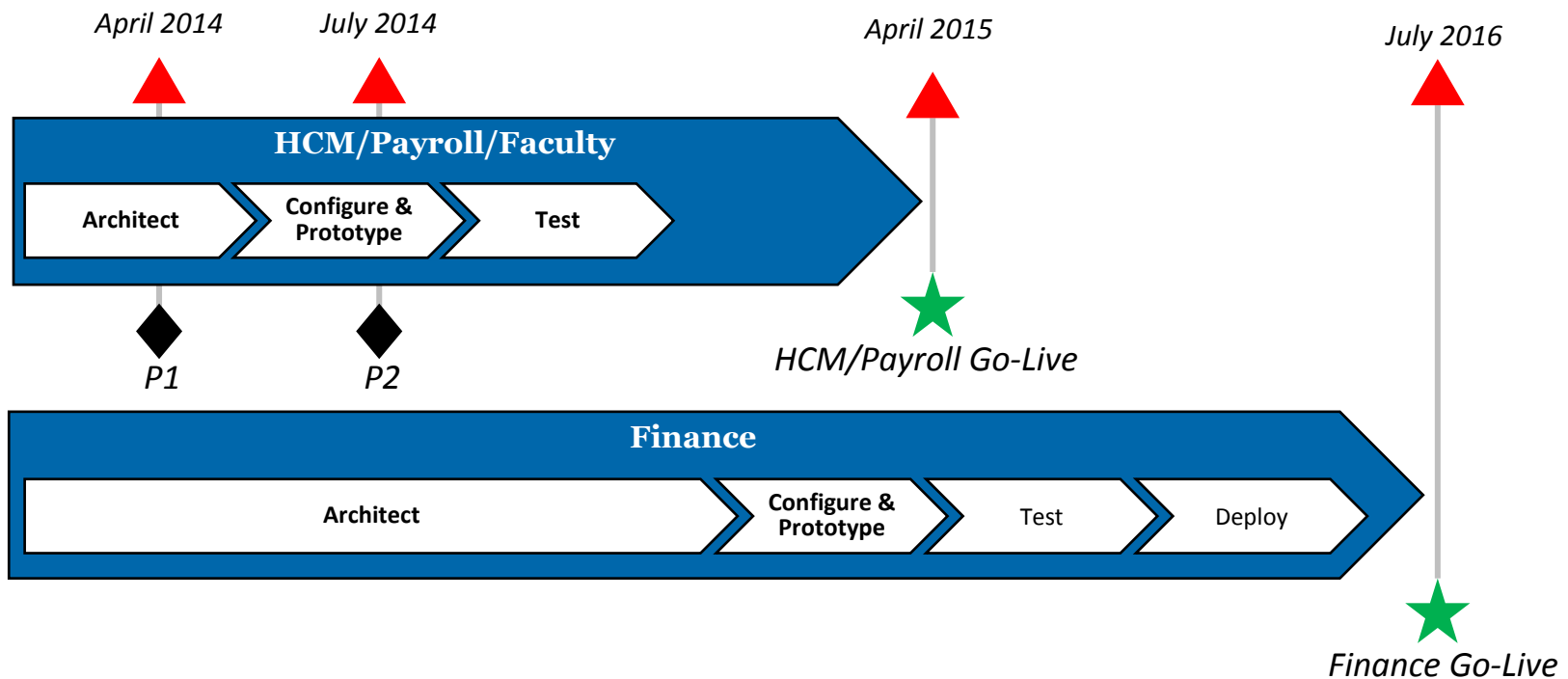


- During the Architect stage of a Workday deployment, the Program Team works to identify a shared understanding of Yale's business requirements
- Activities include:
  - Business Process Review
  - Integrations
  - Reports
  - Conversion
  - Design Considerations

# Workday@Yale Implementation

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

## Implementation Phase





# 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
<b>Human Capital Management (HCM)</b>	Workday's HCM application unifies Human Resources, Benefits, Talent Management, Recruiting, Payroll, and Time Tracking into one system-of-record.
<b>Academic Staffing</b>	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 " <b>Faculty Lifecycle</b> ".
<b>Supervisory Organization</b>	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.
<b>Business Process</b>	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.
<b>Workflow</b>	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.
<b>Cost Center</b>	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 " <b>Organization</b> " in PTAE0/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

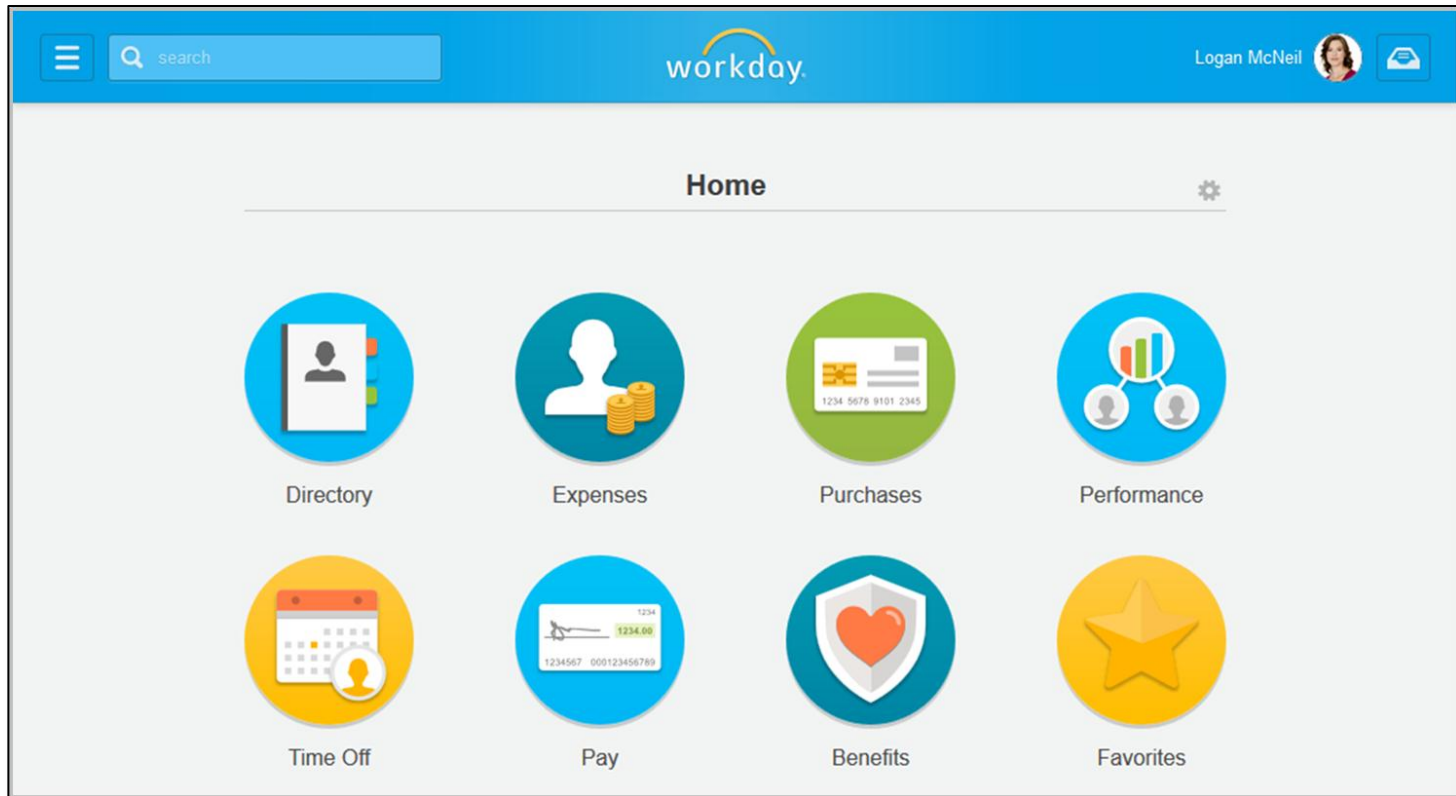
## Workday Mobile Platforms





# 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

The screenshot shows the Workday 'All About Me' dashboard. At the top, there is a blue header with the Workday logo, a search bar, and the user's name 'Logan McNeil'. Below the header, the title 'All About Me' is centered. Four circular icons represent different worklets: 'Directory' (a person icon), 'Expenses' (a person icon with coins), 'Purchases' (a credit card icon), and 'Performance' (a person icon with a bar chart). The 'Performance' icon is highlighted with a blue circle. Below the icons, a list of actions is displayed, including 'Get Feedback', 'View', 'Goals', 'Reviews', 'Skills', 'Personal Goal Alignment', 'Organization Goal Alignment', 'Navigate Goal', and 'My Reviews' with a list of performance appraisals from 2009 to 2012.

**Actions**  
[Get Feedback](#)

**View**  
[Goals](#)  
[Reviews](#)  
[Skills](#)  
[Personal Goal Alignment](#)  
[Organization Goal Alignment](#)  
[Navigate Goal](#)

**My Reviews**  
[2012 Performance Appraisal](#)  
[2011 Performance Appraisal](#)  
[2010 Performance Appraisal](#)  
[2009 Performance Appraisal](#)

# 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

## Welcome Aboard!

We're excited you are now part of our team. It's time to get started on your new hire tasks. There are Checklist items that you need complete such as updating your contact information, completing your Form I-9 within 72 hours of your hire date, entering your benefit elections and signing some company handbooks. Check out some of the company announcements about our culture, benefit offerings and more.




### Checklist

You have onboarding actions to complete in your inbox. Items remaining:






[Go To Inbox](#)

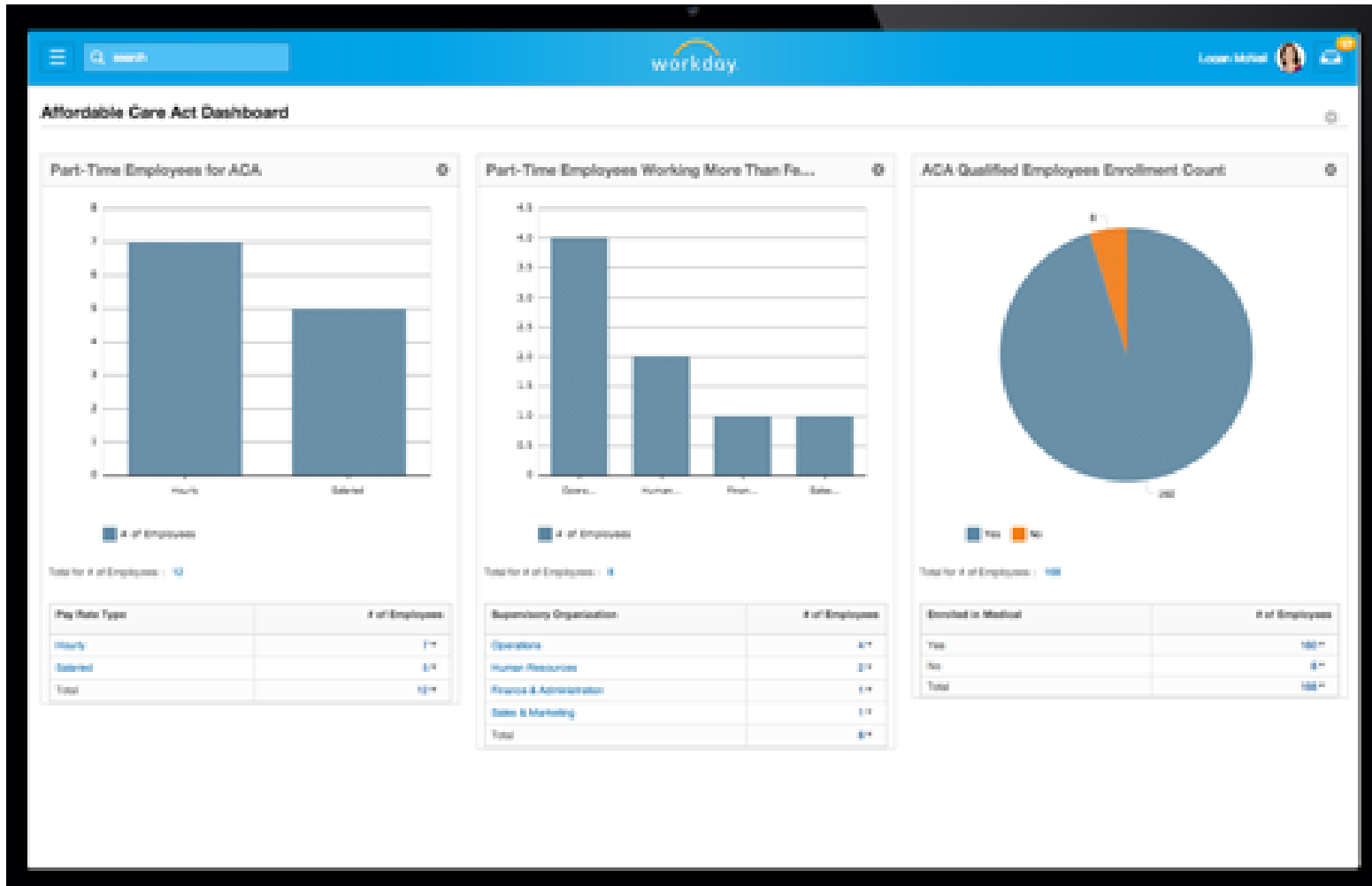
### New Employee Messages

-  **Steve Morgan says:**  
Let me be the first to welcome you to Global Mo...
-  **Logan McNeil says:**  
What to expect your first day.....
-  **Benefits Snapshot**  
Benefits Snapshot 2012 ...

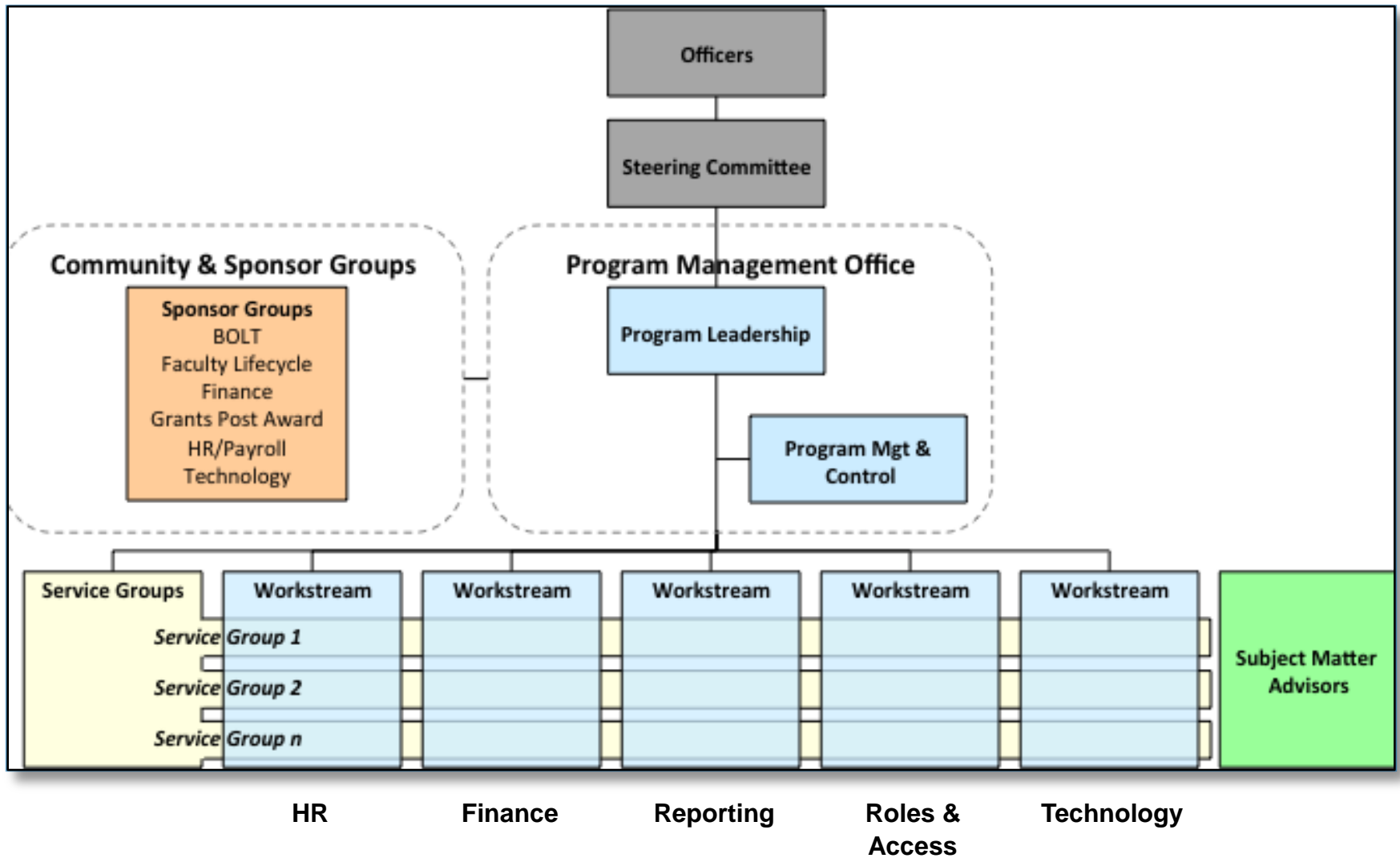
### The GMS Experience

-  **Our Core Values**  
The following core values and beliefs define what...
-  **Robert Hsing says:**  
Do you have questions about your new hire acti...
-  **Team & Clubs**  
Interested in a game of hoops, or maybe cycling...

# 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**
4. **Faculty Recruitment, Appointments and Promotions**
5. **Position & Compensation Management**
6. **Student & Temporary Hiring & Life Cycle Management**
7. **Getting Started at Yale** (Onboarding)
8. **Purchasing Goods & Services** (External & Internal/ISPs)
9. **Gift & Endowment Stewardship**
10. **Sponsored Awards Management**
11. **Hiring Staff**
12. **Unit Financial Management**
13. **Arranging Travel, Business & Special Events** (Expense Management)

Phase 2

Phase 3

Phase 4

## Advisory Groups

Faculty Services

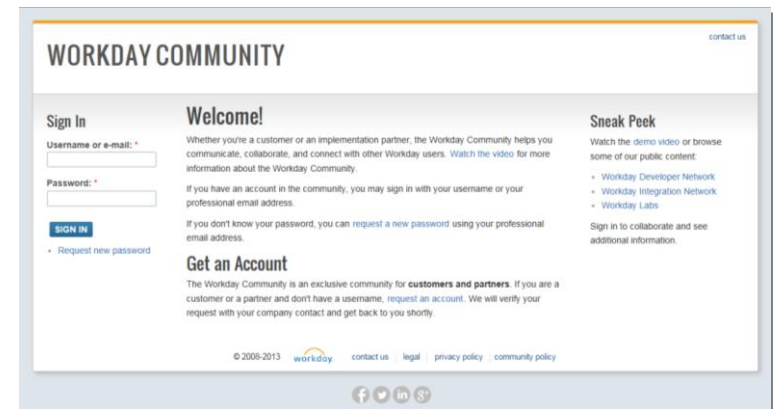
Employee Self-Service  
(Faculty, Staff, Post-Docs)



# 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](http://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

