Workday@Yale

August 2017

The fourth in a series of information sheets for Yale faculty

Read Volumes 1- 3 at

workday.yale.edu/ faculty

► SUMMARY

You and your staff will have access to new features including financial reporting. The Workday system improves Yale's access to data as it brings together HR, Finance, Academic and Sponsored project data.

HIGHLIGHTS

Account Holder reports have changed to Portfolio Report:

- Principal Investigators will begin to receive Portfolio Report packages in August and September of 2017

- Business Offices can schedule reports for faculty

- Business offices can view reports in Workday, drill down to the transaction level and edit in real time

- Reports can be downloaded to Excel enabling the ability to sort and filter data

- For an overview of the content in the Portfolio Report packages, see the **Portfolio Report Overview for Faculty** on the reporting resource page: (workday.training.yale.edu/workday-financials/reporting)

Expense reports will be reviewed and approved in Workday: Expense-related notifications will be delivered to the Workday inbox instead of Outlook. Approval is only required for those expenses marked personal or that result in a reimbursement

Effort reporting will transition to Workday in the Fall of 2017. More information will follow

Added support resource: All finance inquiries, including those related to Workday, will be answered by the newly created Finance Support Center (FSC)

WORKDAY PROGRAM KEY GOALS

Simplify and standardize processes	Minimize administrative work for faculty and staff	Lower operating costs and improve effectiveness

PROGRAM TEAM

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For additional information, visit
workday.training.yale.edu