What is Workday?

- **Workday** is a cloud-based, software-as-a-service (SaaS) business system that supports human resources, payroll and financial functions, and will replace what we know today as “Oracle” (in addition to some other systems).

- **About Workday**
  - Workday is the name of the company, and the product that they sell.
  - Founded in 2005 by former PeopleSoft leaders (Dave Duffield, founder and CEO and Aneel Bhusri, chief strategist).
  - Quickly became top rated vendor of human resource systems (per Forrester Research).
  - Has 450+ global clients, including an established and growing base in higher education (examples include Brown, Cornell, NYU, Georgetown, Univ of Rochester, Syracuse).
Yale selected Workday for many reasons, including:

- Less expensive & easier to support
- Modern technology
- Continuous innovation & improvements (2x year updates)
- Has an intuitive, consumer-like interface
- Designed to facilitate business processes, not just for back-office processing
- Commitment to meeting the needs of higher education – they WANT this market
- Collaborative design approach (Yale is a Workday Strategic Design Partner)
- It supports Yale’s strategic objectives
Workday@Yale Strategic Objectives

- Simplify and standardize processes
- Establish an accurate, trusted and timely reporting environment
- Minimize administrative overhead for faculty and end users
- Make it easy to get work done and harder to make mistakes
- 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, research and practice, 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 Journey Overview

**Prepare Recommendation**
- Determine scoring methods
- Hold demos
- Perform fit/gaps
- Establish cost comparisons
- Score
- Recommend

**Vet**
- Establish awareness
- Understand major concerns
- Prepare lead administrators to “carry the message”
- Execute Workday contract

**Mobilize**
- Select lead implementation vendor
- On-board initial internal staff
- Begin to ready program governance
- Begin current state discovery

**Vision & Plan Phase**
- Conduct current state discovery & identify pain points
- Map current state processes to Workday and develop Fit/Gap
- Develop multi-year road map

**Implementation Phase**
- Implement Workday over 2 – 3 years using a multiple “Release” approach

*We are here*
The Implementation Phase will include concurrent work on multiple “releases” of functionality.
Workday@Yale Program Structure Overview

Officers

Steering Committee
Shauna King (Executive Sponsor)
Cynthia Smith (Provost office)
Julie Grant (Business Operations)
Len Peters (ITS)
Nancy Creel-Gross (HR)
Steve Murphy (Finance)
John Mayes (Change Leadership)

Advisory Groups

- Faculty Lifecycle
- Sponsored Awards

Program Leadership

Program Management & Control

- Deloitte Advisory Team

HCM / Payroll Workstream
- Finance Workstream
- BI/DW & Reporting Workstream
- Technology Workstream
- Security & Controls Workstream
- Change Management Workstream
- Service Group Leadership
Vision & Plan Phase

The primary purpose of the Vision & Plan Phase is to develop a plan for the work ahead. Key activities include:

- Conducted current state “Discovery” with broad community engagement
  - 80+ sessions, 2xx+ participants from xxxx schools and divisions
- Identified key areas for improvement in our processes
- Performed a more refined fit/gap between our requirements and Workday
- Developed a multi-year roadmap to implement Workday over multiple releases
- Developed a structure for ensuring community engagement throughout the project
## Vision & Plan Phase

### HR, PAYROLL & FACULTY DISCOVERY SESSIONS

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**Vision & Plan Phase**

**BI / DW (REPORTING) DISCOVERY SESSIONS & INTERVIEWS**

**Objectives**

- "Why are we here?"
  - Document current state functionality for Yale Organizations
  - Shed light on people, process, and technology impacts along with current pain points, aspirations and goals around Yale reporting
  - Lay foundation for future state

- "What are we working towards?"
  - Validate what we know about your area
  - Capture any gaps, problem statements and pain points
  - Inform the future state reporting requirements and technical and data strategy

Establish an accurate, trusted and timely reporting environment

**Workshops**

- BI/DW & Reporting Discovery workshops are scheduled for the following areas:
  - Institutional Sponsored Award Management Reporting
  - External and Regulatory Reporting
  - Procurement Reporting
  - Human Resources & Payroll Reporting
  - Financial Management Reporting
  - Management Reporting
  - Power Users Reporting

Focus groups with lead administrators from:

- School of Law
- School of Management
- School of Music
- School of Forestry
- School of Medicine
- Business Operations
- Yale College

**Total Attendees: 91**
A Sneak Peek at Workday.....
Workday features a graphical and configurable “landing page” that is “All About Me”

**Worklets** are groupings of related tasks
Workday is also about your team...
And Workday is also about the work you and your team do everyday day...

The **Workfeed** is a single view of all tasks, notifications and alerts.
Workday has robust reporting and dashboard capabilities.
Workday organizes key information with “Worktags” and helps us collect them more easily and consistently with prompts, defaults and business rules.

### Organization Worktags
- Company
- Project
- Grant
- Fund
- Program
- Business Unit
- Cost Center
- Gift
- “Custom”
- Division

We can create our own Worktags, too.

### Flat Worktags
- Ad Hoc Payee
- Applicant
- Bank Account
- Contingent Worker
- Corp Credit Card
- Customer
- Deduction Recipient
- Employee
- Expense Item
- Intercompany Affiliates
- Job Profile
- Location
- Object Class
- Opportunity
- Pay Component
- Paygroup
- Project Phase
- Project Task
- Prospect
- Purchase Item
- Spend Category
- Revenue Category
- Supplier
- Sales Item
- Tax Category
- Tax Code
Workday Engagement

Consistent with the strategy to make as much information as possible to the community, there are many ways to get involved and stay connected with the Workday@Yale program:

- Browse the Workday@Yale web site
- Attend community presentations and Lunch & Learns
- Join the online Workday Community
- Take some online training
- Volunteer for a Service Group
Browse the **Workday@Yale** Website

http://workday.yale.edu/
Join the Workday Community

Go to the following URL to request an account and click on “request an account”

https://community.workday.com/
Join the Workday Community

http://community.workday.com

• Take a few training courses, view the online videos
• View the Brainstorms, join a Group
Workday Basics

Posted by ckaufman from Workday | August 13, 2012 - 12:45pm | 41493 reads
Type: Community Reference

Are you a new Workday user? The collection of free courses below from Workday Knowledge Management team will provide you with the foundation you need to become familiar with the basic functions of Workday before you begin your deployment.

- Workday Community Overview
- Navigation
- Staffing Models Overview
- Business Process Overview
- Organizations and Security
- Configurable Security Overview
- Report Writer Overview
- Workday Web Services Overview
- Workday Integration Overview

Additional Training

Workday offers additional free training videos on Community here. Classroom and virtual classroom instruction, along with additional On Demand Education modules, are available in the Workday Learning Center. Contact your Training Coordinator or sign in to the Workday Learning Center to register for classes.

The training catalog contains details on all of our courses.
What are Service Groups?

Service Groups are community-led workgroups that will help ensure that Yale’s new business processes meet the community’s needs and expectations. These groups will also serve as a focal point for building a stronger community understanding of the Workday solution.

Sandy Stein, Service Group Director, is in the process of developing the Service Group structure

More information soon!
Next Steps

December:

• Finish Vision / Plan Phase
• Finalize the Implementation Roadmap
• Finalize Service Group structure

January:

• Identify program team for the Implementation phase
• Convene the first Service Groups
• Launch the Architecture phase for Release 1