



**Workday Update**

**March 4, 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.



The banner features a sunflower graphic on the right side. The text is arranged as follows:

- Top left: **Workday@Yale**
- Left column (three lines): *Accurate, trusted & timely reporting*, *Simplify & standardize processes*, *Improve effectiveness*
- Center: **workday.** logo
- Right column (three lines): **Human Resources & Payroll will roll-out first**, **We are just getting started!**, **Stay tuned for more information**
- Bottom: **Yale's new administrative business software for HR, payroll & finance**

## 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?

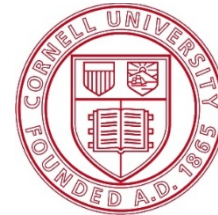
- Collaborative design approach (Yale is a Workday Strategic Design Partner)
- Modern technology with an intuitive interface
- Architecture allows services to reach customers with a minimal number of servers, thus reducing energy needs
- Modern data centers pool large quantities of processing power and 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 Advisors
  - 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





**Carnegie Mellon**




# 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



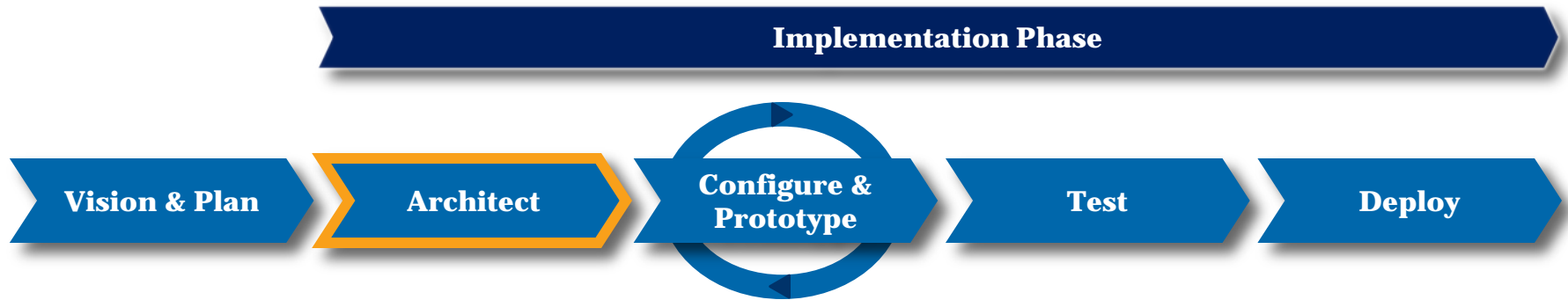
# *Workday@Yale* Vision Statement

*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?

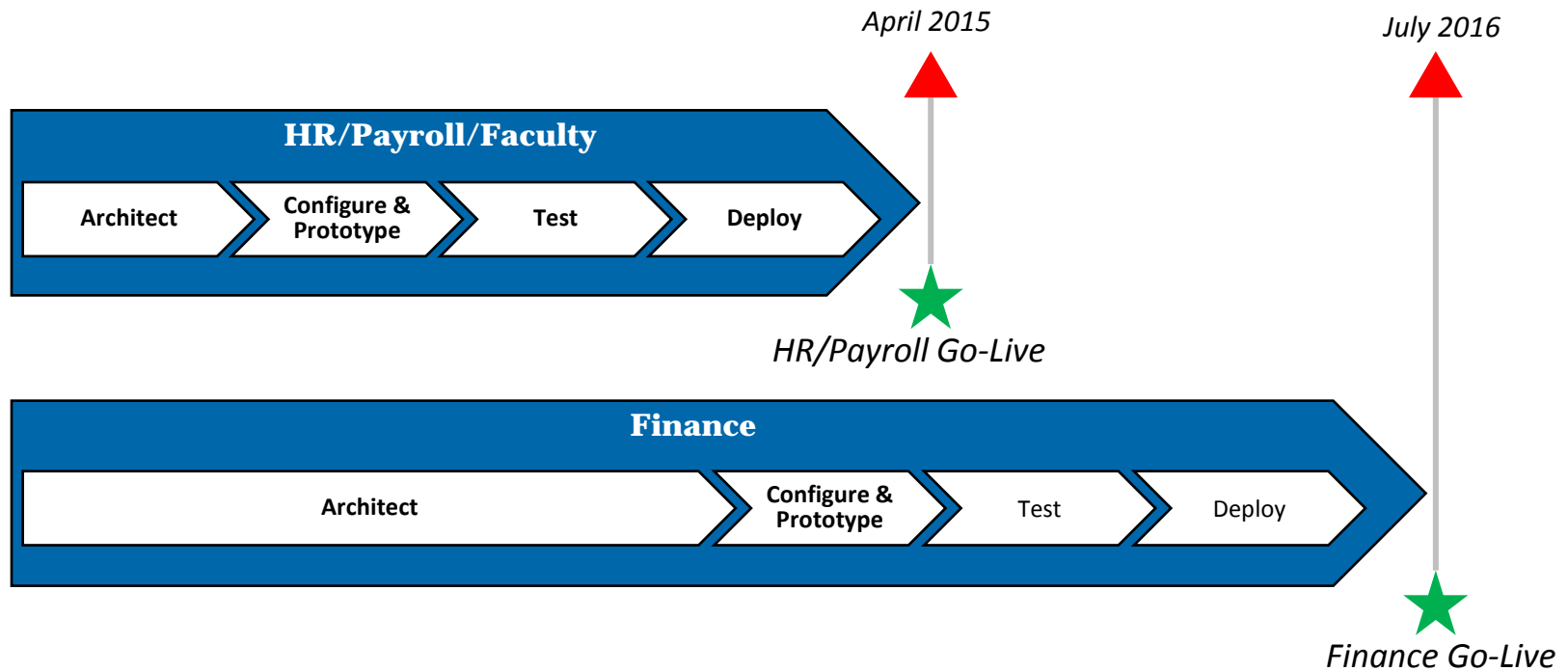


- During the Architect stage of a Workday deployment, the Program Team works to identify a shared understanding of Yale's business requirements
- Activities include:
  - Business Process Review
  - Integrations
  - Reports
  - Conversion
  - Design Considerations

# Workday@Yale Implementation

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

## Implementation Phase





# 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 " <i>Faculty Lifecycle</i> ".
<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 " <i>Organization</i> " 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

# New User Interface (UI)

**Sneak Peek at the New User Interface  
(UI)**

# What is a User Interface?

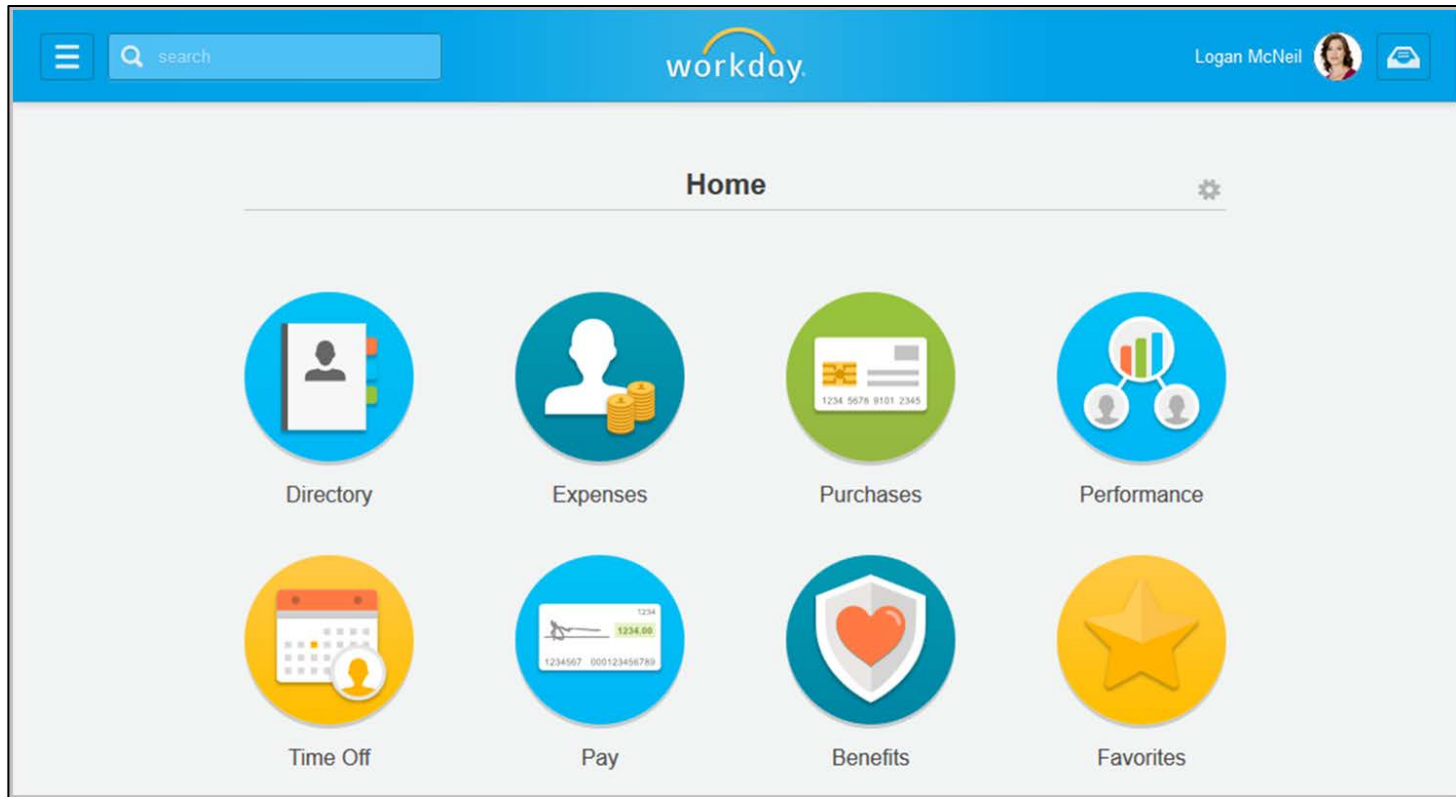
- A *user interface* is the means by which the user and a computer system interact, and the commands and mechanisms the user employs to control its operation and input data
- *Two times* a year, Workday delivers updates with *enhanced functionality*
- On January 23rd, Workday officially unveiled *Update 21*
  - Designed in partnership with Workday customers, the new UI introduces a *cleaner visual interface* that's built on an *HTML5 foundation*
  - The redesign provides a *more engaging, intuitive, and fluid experience* for customers

## Workday 21 Mobile Platforms



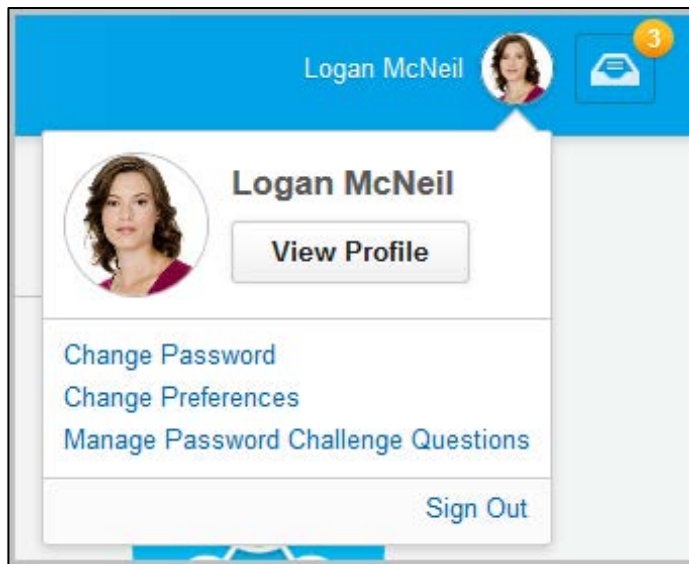
# Home

- 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



# Application Header

The Application Header will always display while you navigate throughout Workday and includes the Main Menu, search bar, Workday logo, your name and photo and the new Inbox icon



- When you select your image, the following account options display:
  - View Profile
  - Change Preferences
  - Change Password
  - Manage Challenge Questions
  - Switch Account
  - Sign Out
- This new menu replaces the current My Account menu and Switch User option

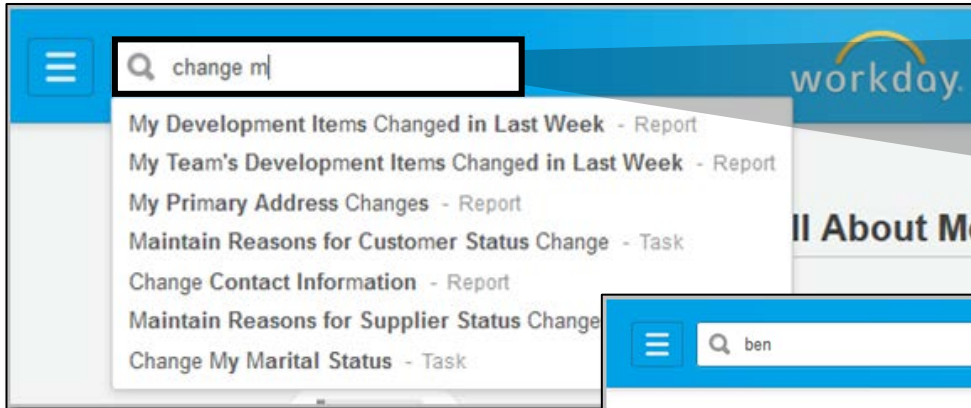
# All About Me

- 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 displays the Workday 'All About Me' page. At the top, there is a blue navigation bar with a search bar on the left, the Workday logo in the center, and the user's name 'Logan McNeil' and profile picture on the right. Below the navigation bar, the main content area is titled 'All About Me' with a settings gear icon. Four circular icons represent different worklets: 'Directory' (a person icon), 'Expenses' (a person icon with coins), 'Purchases' (a credit card icon), and 'Performance' (a bar chart icon). Below these icons, the 'Performance' worklet is expanded, showing a list of actions and reviews. The 'Actions' section includes 'Get Feedback'. The 'View' section includes 'Goals', 'Reviews', 'Skills', 'Personal Goal Alignment', 'Organization Goal Alignment', and 'Navigate Goal'. The 'My Reviews' section includes '2012 Performance Appraisal', '2011 Performance Appraisal', '2010 Performance Appraisal', and '2009 Performance Appraisal'.

Section	Items
Actions	<a href="#">Get Feedback</a>
View	<a href="#">Goals</a> <a href="#">Reviews</a> <a href="#">Skills</a> <a href="#">Personal Goal Alignment</a> <a href="#">Organization Goal Alignment</a> <a href="#">Navigate Goal</a>
My Reviews	<a href="#">2012 Performance Appraisal</a> <a href="#">2011 Performance Appraisal</a> <a href="#">2010 Performance Appraisal</a> <a href="#">2009 Performance Appraisal</a>

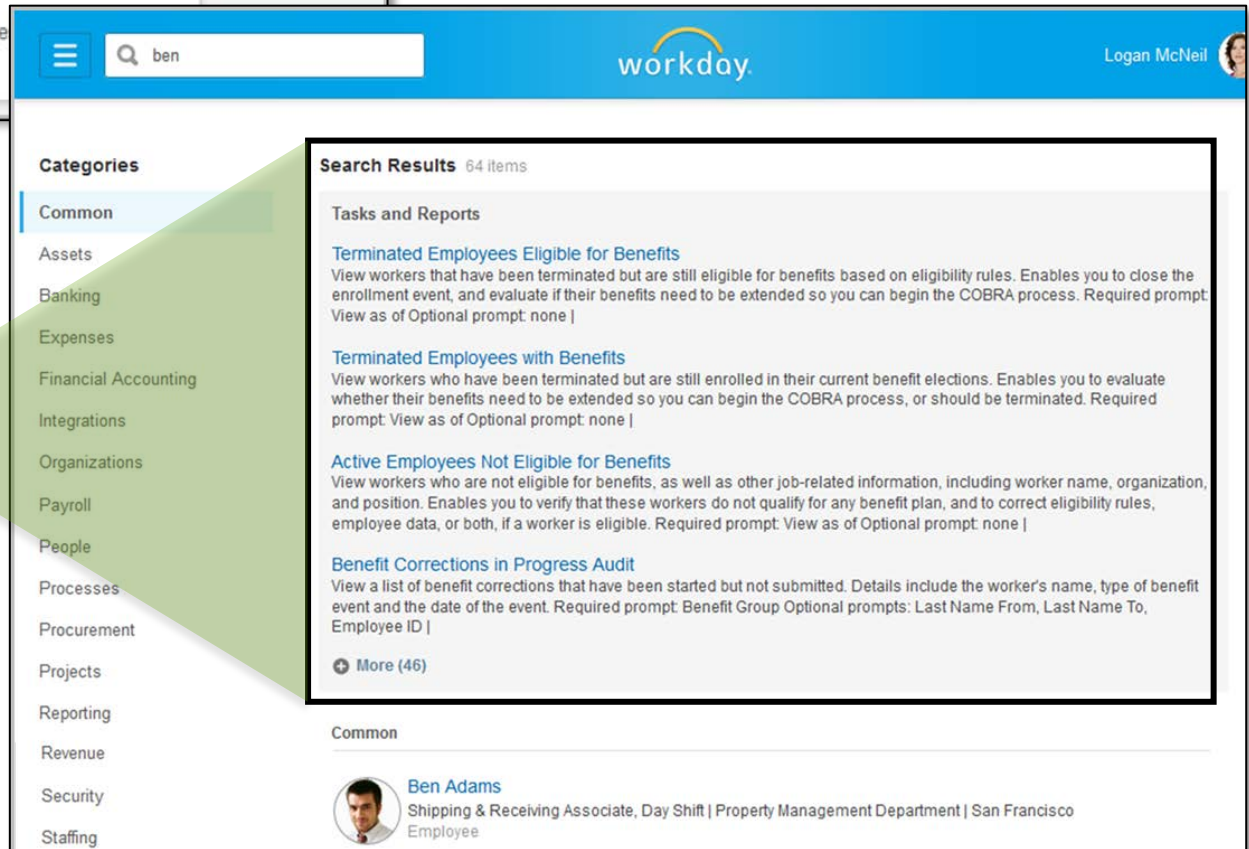
# Search Features



A screenshot of the Workday search interface. The search bar contains the text "change m". Below the search bar, a list of type-ahead suggestions is displayed, including "My Development Items Changed in Last Week - Report", "My Team's Development Items Changed in Last Week - Report", "My Primary Address Changes - Report", "Maintain Reasons for Customer Status Change - Task", "Change Contact Information - Report", "Maintain Reasons for Supplier Status Change", and "Change My Marital Status - Task". The Workday logo is visible in the top right corner of the interface.

Returns type-ahead predictive results

Displays full-page search results



A screenshot of the Workday search results page. The search bar contains the text "ben". The page displays a list of search results under the heading "Search Results 64 Items". The results are categorized into "Tasks and Reports" and "Common". The "Tasks and Reports" section includes items such as "Terminated Employees Eligible for Benefits", "Terminated Employees with Benefits", "Active Employees Not Eligible for Benefits", and "Benefit Corrections in Progress Audit". The "Common" section includes a profile for "Ben Adams", a Shipping & Receiving Associate, Day Shift, Property Management Department, San Francisco Employee. A "Categories" sidebar is visible on the left, listing various organizational categories like Assets, Banking, Expenses, Financial Accounting, Integrations, Organizations, Payroll, People, Processes, Procurement, Projects, Reporting, Revenue, Security, and Staffing.



**Ben Adams**  
Shipping & Receiving Associate, Day Shift | Property Management Department | San Francisco  
Employee



# Slide-Outs and Dashboard

- Access to your Dashboard through the existing Dashboard slide-out has been moved to the Workday Main Menu icon as part of the new Application Header

The screenshot shows the Workday application interface. At the top is a blue header bar with the Workday logo, the user's name 'Logan McNeil', and a notification icon with '172'. Below the header is an 'Inbox' section with tabs for 'Actions (772)', 'Notifications (0)', and 'Archive (6)'. The main content area displays a form titled 'Assign Matrix Organizations' for 'JL Test Worker 18'. The form includes fields for 'Job' (P-04503 Accountant - JL Test Worker 18), 'Effective Date' (07/05/2013), and 'Proposed Organizations' (with a search field). There are 'Submit', 'Save for Later', and 'Cancel' buttons at the bottom of the form.

Users can access all Dashboards in the Main Menu icon

The screenshot shows the Workday Main Menu, which is a vertical list of navigation options. The menu is open, showing a search bar at the top and a list of items. The 'Dashboards' item is highlighted with a blue bar and a right-pointing arrow. The menu items are: 'All About Me', 'My Team', 'My Workday 2.0', 'Dashboards >', 'Sitemap', 'Favorites', 'Audit', 'W:Drive', and 'Documentation'. On the right side of the menu, there is a list of dashboard categories: 'Big Data - Sales Performance', 'Compensation and Benefits', 'Contingent Worker Management', 'Custom Dashboard', 'Expense Management', 'Feature Dashboard', and 'Financials'.

# Worker Profile

- In the new Worker Profile, items are visually separated and related actions are removed, freeing up space and reducing clutter
- The profile group icons have been removed, giving the page content more real estate to include information most valuable to you

The main, orange “Actions” button remains for you to directly take action

The screenshot displays the Workday interface for a worker's profile. At the top, there is a blue navigation bar with the Workday logo and a search bar. Below this, the profile for Logan McNeil is shown. On the left, there is a circular profile picture and a name card with a three-dot 'Actions' button. The name card includes contact information: telephone numbers (+1 (415) 441-7842 and +1 (415) 789-8904) and an email address (lmcneil@workday.net). Below the name card are tabs for 'Job', 'Contact', 'Personal', and 'Compensation'. The 'Job' tab is active, showing a 'Professional Profile' section with 'Experience' listed. The 'Available Actions' list in the center includes: Benefits, Business Asset, Business Process, Calendar, Compensation, Expenses, Job Change, Manage Work, Organization, Payment, Payroll, Payroll Interface, Personal Data, Procurement, Provisioning Groups, and Reports. On the right, the 'Worker Logan McNeil' section includes a contact card with phone and email details, a 'Work Address' section with the address: 3939 The Embarcadero, San Francisco, CA 94111, United States of America, and social network icons for Facebook, LinkedIn, and Twitter. An orange arrow points from the text box above to the 'Actions' button in the profile card.

# Buttons

- Button names have been revised to:
  - Use consistent, concise language and standards across applications where appropriate
  - New button colors create a consistent standard across applications:
    - » **Green** = Primary Action (moving the process to the next step and completing your action)
    - » **Orange** = Secondary Action (primary action on the page, but not necessarily moving the business process forward)
    - » **Gray** = all other supported actions and/or options

The screenshot displays a Workday interface with an "Expense Report Line" form and a "View Talent Pool" modal. The form includes a table of expense items and a form for details. The modal has a search field and "OK" and "Cancel" buttons. A blue circle highlights the "Attachments" and "Receipt Image" sections of the form, and another blue circle highlights the "Submit", "Save for Later", and "Cancel" buttons at the bottom.

Date	Amount	Expense Item
01/02/2014	0.00	Lodging
11/13/2013	773.25	Meals
11/01/2013	550.79	Airfare
11/13/2013	863.76	Lodging
11/13/2013	137.96	Car Rental & Gas
11/13/2013	14.99	Mobile Phone

**Expense Report Line**

Date: 01/02/2014  
Credit Card Transaction:   
Travel Booking Record:   
Expense Item: Lodging  
Quantity: 1  
Per Unit Amount: 0.00  
Total Amount: 0.00  
Charge Description:   
Memo:   
Personal:   
Receipt Included:   
Billable:   
Worktags:

**View Talent Pool**

Talent Pool:

OK Cancel

**Attachments**  
Add  
**Receipt Image**  
Add

Submit Save for Later Cancel

# Error Messages

The screenshot shows the Workday 'Hire Employee' form. The header includes a search bar with 'hire employee', the Workday logo, and the user 'Logan McNeil'. The form title is 'Hire Employee AML Test 2 Marketing'. Fields include 'Hire Date' (01/17/2014), 'Reason' (search), and 'Job Details' (Position, Employee Type: Regular, Job Profile, Time Type: Full time, Location). On the right, there are two notification boxes: 'Errors: 3' and 'Alerts: 1'. The 'Errors' box lists three messages: 'The field Position is required and must have a value.', 'The field Job Profile is required and must have a value.', and 'The field Location is required and must have a value.'. The 'Alerts' box contains one message: 'Select a Hire Reason.'. A magnifying glass icon is present next to the first error message.

- Updated error messages help you by indicating what is wrong on the page AND instructing you on how to fix the problem
- When applicable, a magnifying glass icon will appear, and, when selected, jumps your cursor to the issue location so you can fix the problem quickly

# 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...

# Expense Reporting

workday

Logan McNeil

## Create Expense Report

Pay To: Employee: Logan McNeil

0.00 USD Personal   0.00 USD Company Paid   2,340.75 USD Reimbursement   2,340.75 USD Total

**Instructional Text**  
Expense guidelines can be found on the Finance website. Controller approval is required for any expense report greater than \$5,000 that does not have a pre-approved spend authorization. Any expense reports that exceed the pre-approved spend authorization must be approved by the Chief Financial Officer.

**Expense Report Information**  
Company: Global Modern Services, Inc. (USA)  
Expense Report Date: 01/02/2014  
Business Purpose: search

**Expense Report Reference Information**  
Reimbursement Payment Type: Direct Deposit  
Spend Authorization: search  
Memo:

**Expense Report Lines**   Attachments

Add   Import   Viewing: [List Icon]

Date	Amount	Description
11/13/2013	773.25	Meals
11/01/2013	550.79	Airfare
11/13/2013	863.76	Lodging
11/13/2013	137.96	Car Rental & Gas
11/13/2013	14.99	Mobile Phone

**Expense Report Line**   Itemize

Date: 11/13/2013

Credit Card Transaction

Travel Booking Record

Expense Item: Mobile Phone

Quantity: 1

Per Unit Amount: 14.99

Total Amount: 14.99

Charge Description

Memo: Mobile internet

Personal:

Receipt Included:

Billable:

Worktags: search

Cost Center: 40000 Office of CHRO  
Location: San Francisco  
Region: Headquarters - Corporate

Attachments: Add

Receipt Image: AT&T Automatic Data Plan Receipt

Submit   Save for Later   Cancel

Users can select an item in a list on the left column and **edit all details directly** in a preview pane on the right-hand side, **eliminating pop-ups** blocking content and **minimizing clicks**

**Expense Report Lines**   Attachments

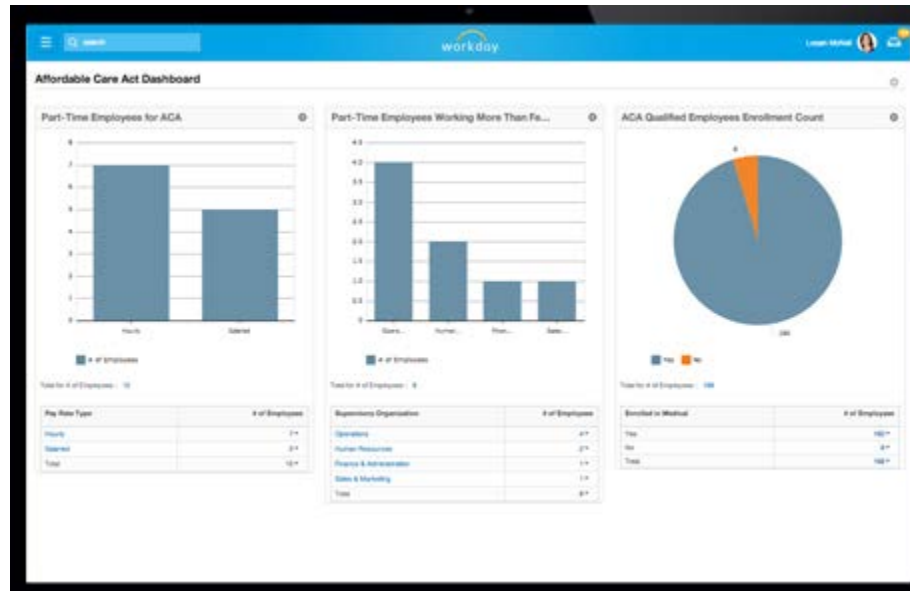
Add   Import   Viewing: [List Icon]

Expense Report Lines: 6 items

	Date	Expense Item	Total Amount				Memo
[-]	01/02/2014	Lodging	0.00				
[-]	11/13/2013	Meals	773.25				Team lunch
[-]	11/01/2013	Airfare	550.79				United
[-]	11/13/2013	Lodging	863.76				Four Seasons
[-]	11/13/2013	Car Rental & Gas	137.96				Avis
[-]	11/13/2013	Mobile Phone	14.99				Mobile internet

Submit   Save for Later   Cancel

# Control Over Compliance



- Global workforce laws and regulations are consistently in flux—Workday will help Yale manage compliance in advance of these changes
- Workday 21 features:
  - Dashboard and worklets to help prepare for employer requirements of the Affordable Care Act law in the U.S. well ahead of the 2015 deadline
  - New reports to support compliance with recent U.S. law requiring federal contractors to adopt benchmarks for hiring and employing veterans and other individuals with disabilities
  - Option for users to select default information related to Form 1-9 Section 1 employee data

# Business Operations Service Groups

- Service Groups will become the community engagement vehicle to *champion new processes* and define value and service levels
- Members will *enable a formal review of services*, create an understanding of the integration and overlap of processes (how the work is done) and the services that are provided
- Service Groups Objectives:
  - *Better administrative service*: End-to-end services that are efficient, high quality, and reduce the cost of administration
  - *Greater community adoption of common business processes*: Partner with the community to reduce the number of unique processes inherent in a service
  - *Improved training*: Build a broad understanding for “why” work is done, not just “how” work is done
  - *Shared ownership of outcomes*: Two-way dialogue between process owners and the community will develop and strengthen end-to-end services

## List of Service Groups

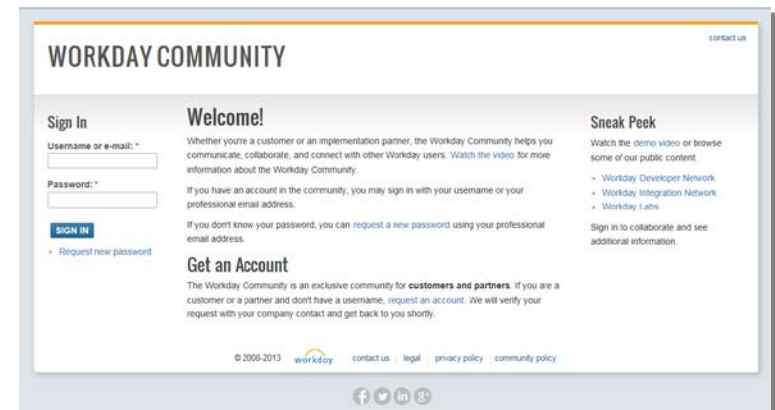
- Workforce Management
- Accuracy of Unit Financial Statements
- Information Delivery
- Getting Started at Yale University Faculty Recruitment, Appointments and Promotions
- Position and Compensation Management
- Hiring Staff
- Unit Financial Management
- Gift & Endowment Stewardship
- Purchasing Goods & Services
- Arranging Travel, Business & Special Events
- Sponsored Awards Management
- Student & Temporary Hiring & Life Cycle



# 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

