Workday@Yale

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.

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)

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

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

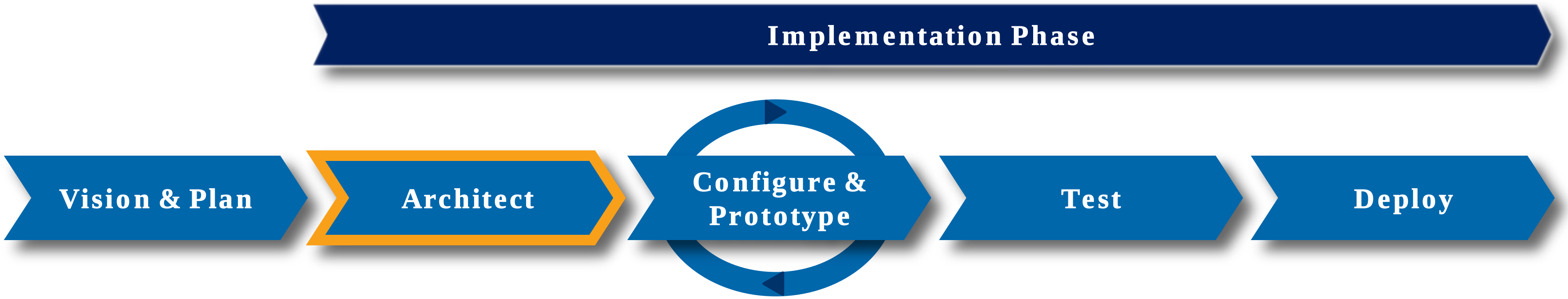
Workday@Yale Vision Statement

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.

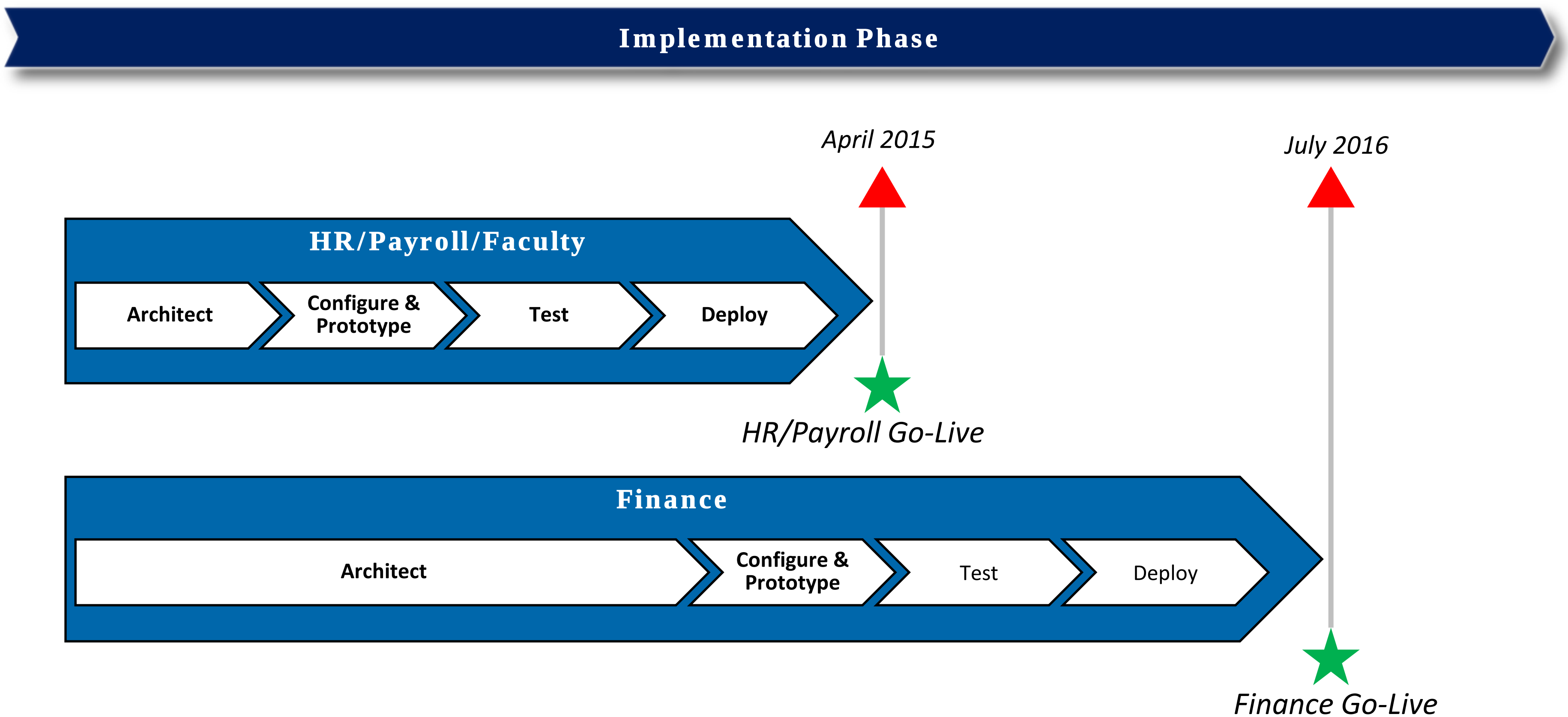
Workday@Yale Program Progress: Where Are We?



- 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



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

New User Interface (UI)

Sneak Peek at the New User Interface (UI)

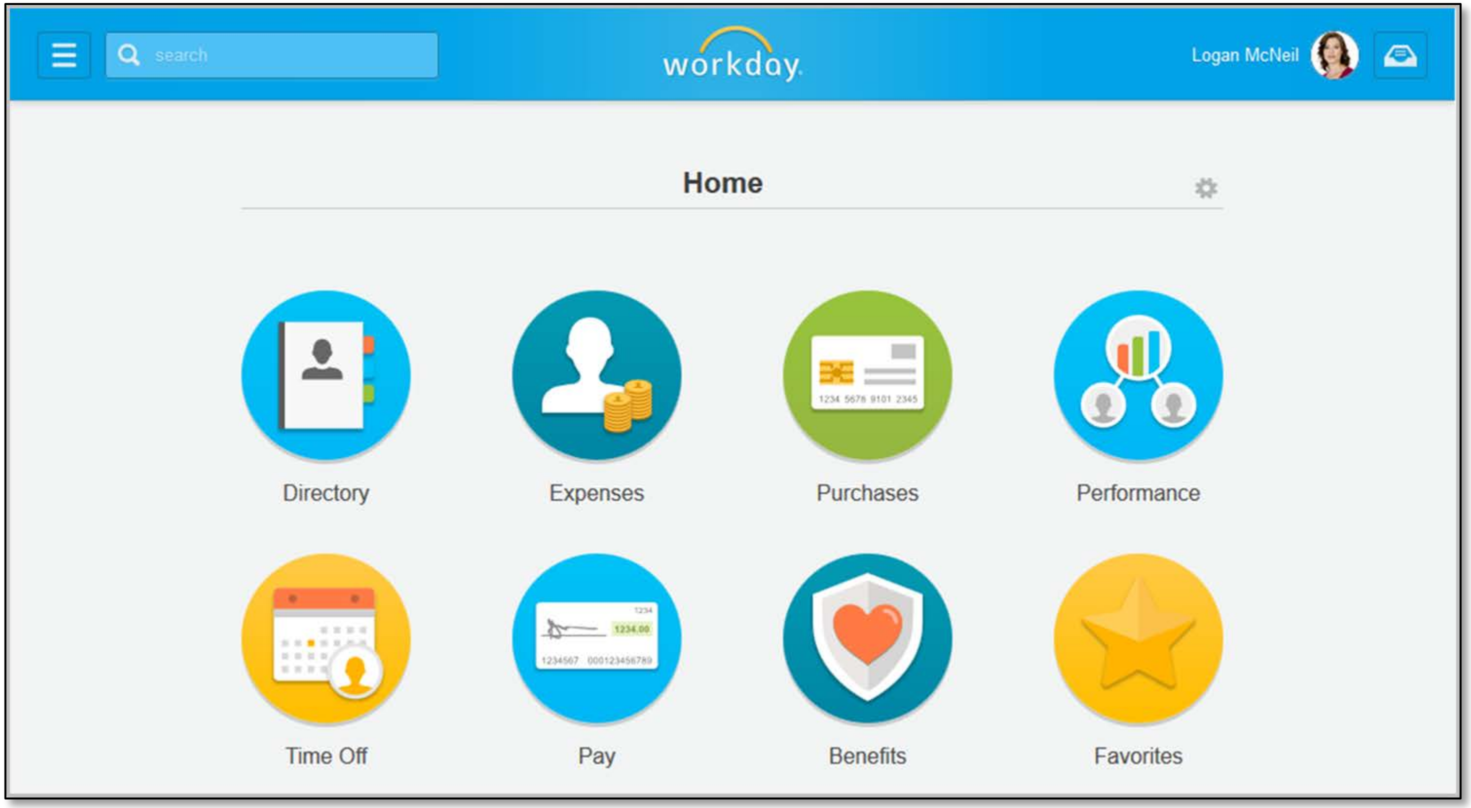
What is a User Interface?

- 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

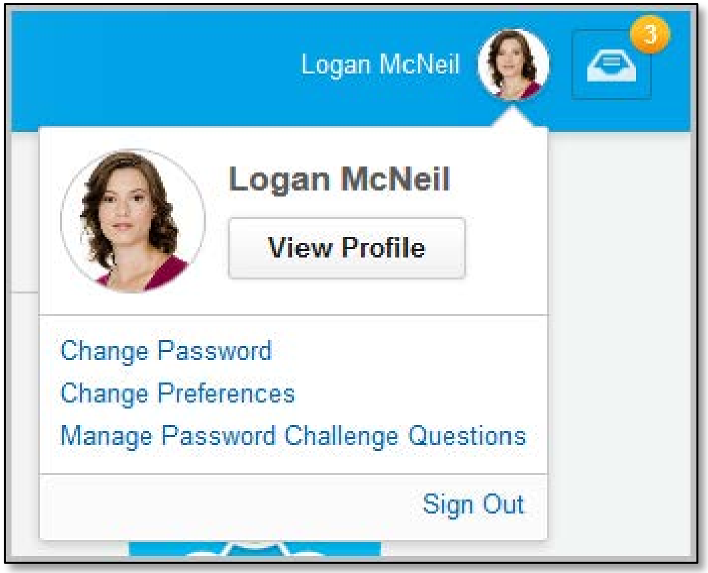
Home

- 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

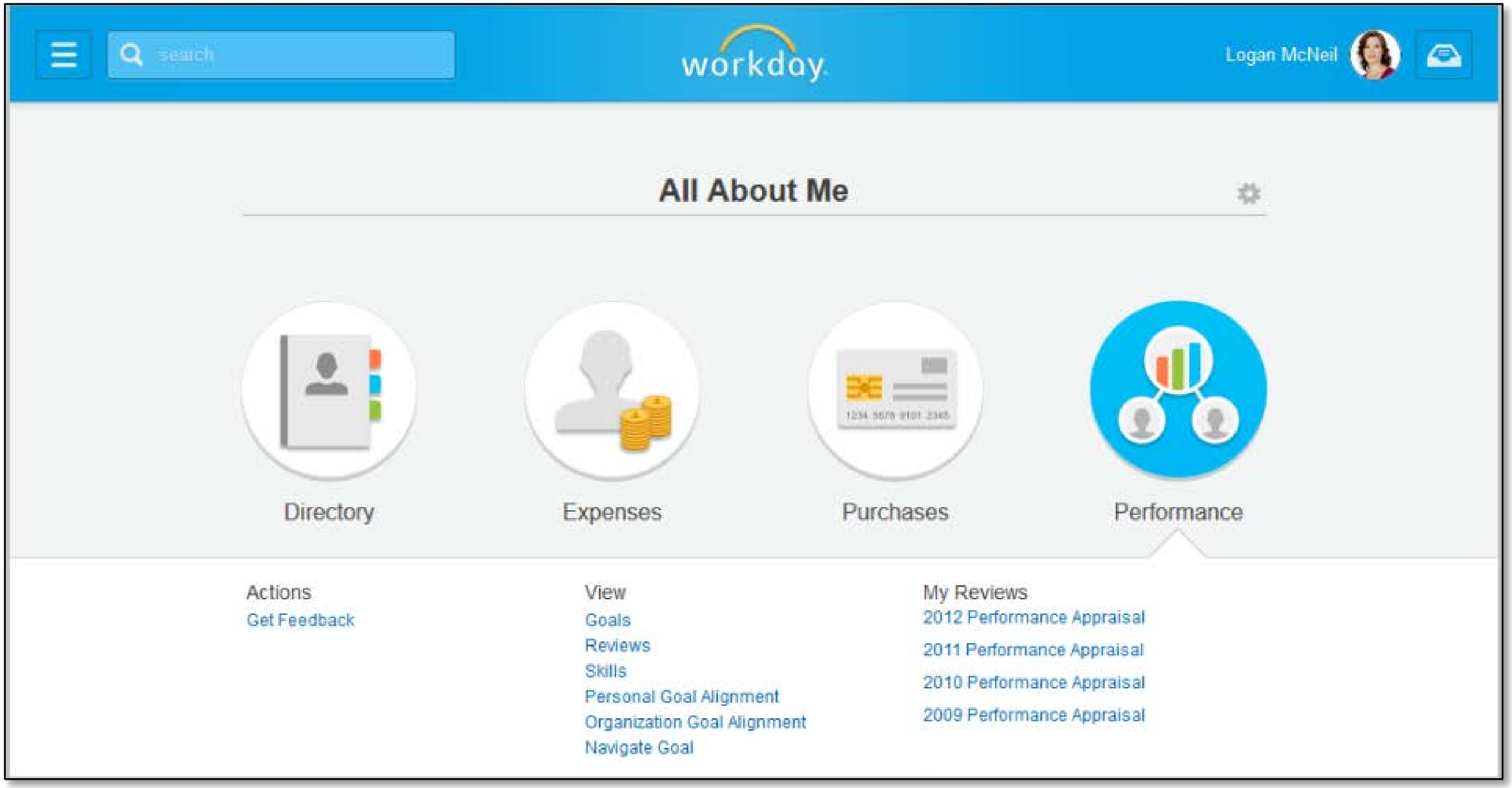
The Application Header will always display while you navigate throughout Workday and includes the Main Menu, search bar, Workday logo, your name and photo and the new Inbox icon



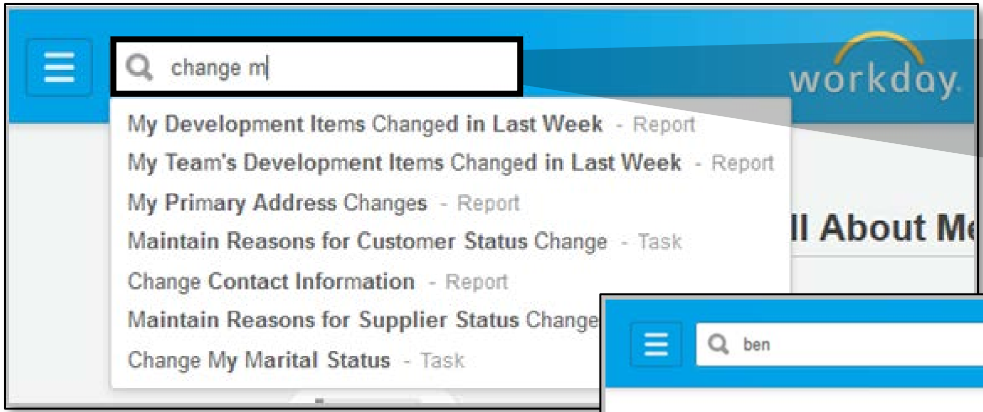
- When you select your image, the following account options display:
  - View Profile
  - Change Preferences
  - Change Password
  - Manage Challenge Questions
  - Switch Account
  - Sign Out
- This new menu replaces the current My Account menu and Switch User option

All About Me

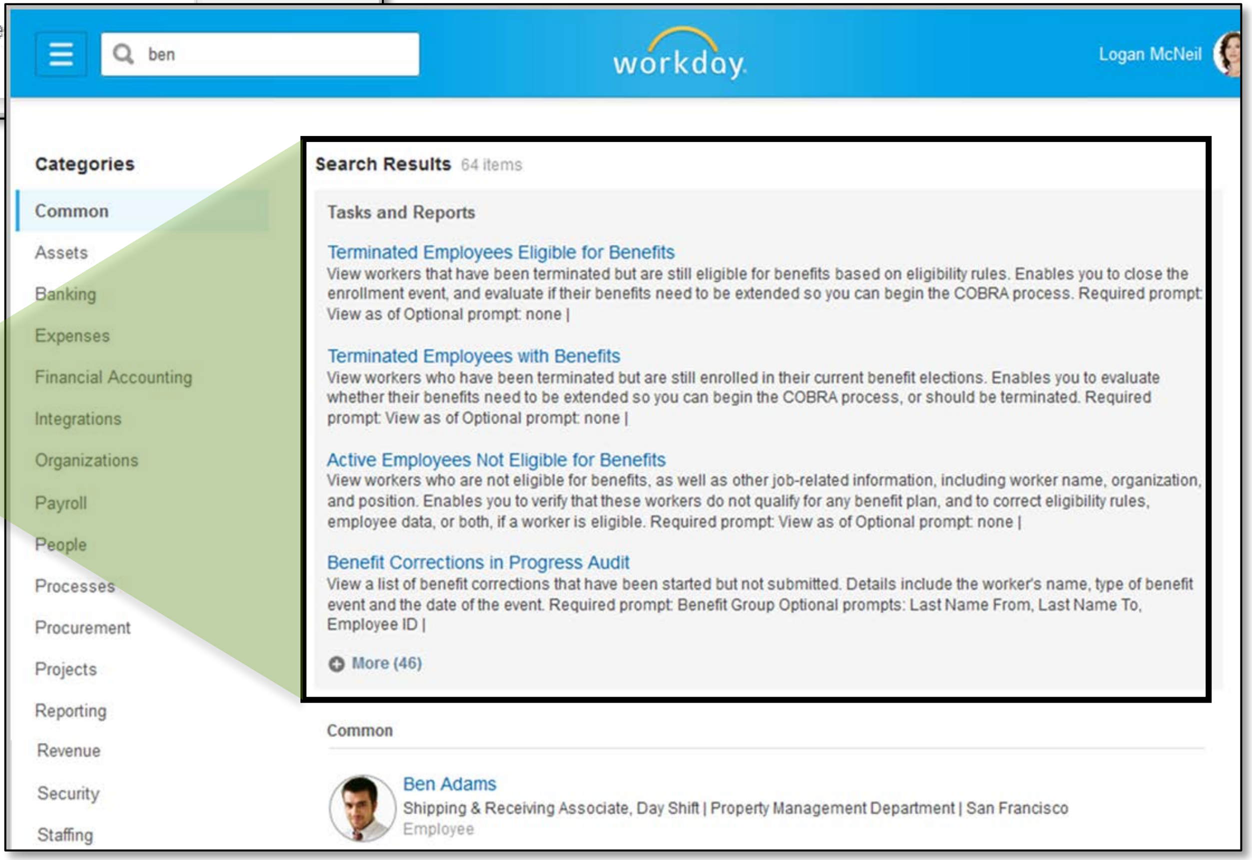
- The All About Me page is a one-stop-shop for all worker self-service and informational needs
- The icons on your All About Me page provide access to groups of related tasks, reports, and links called worklets



Search Features



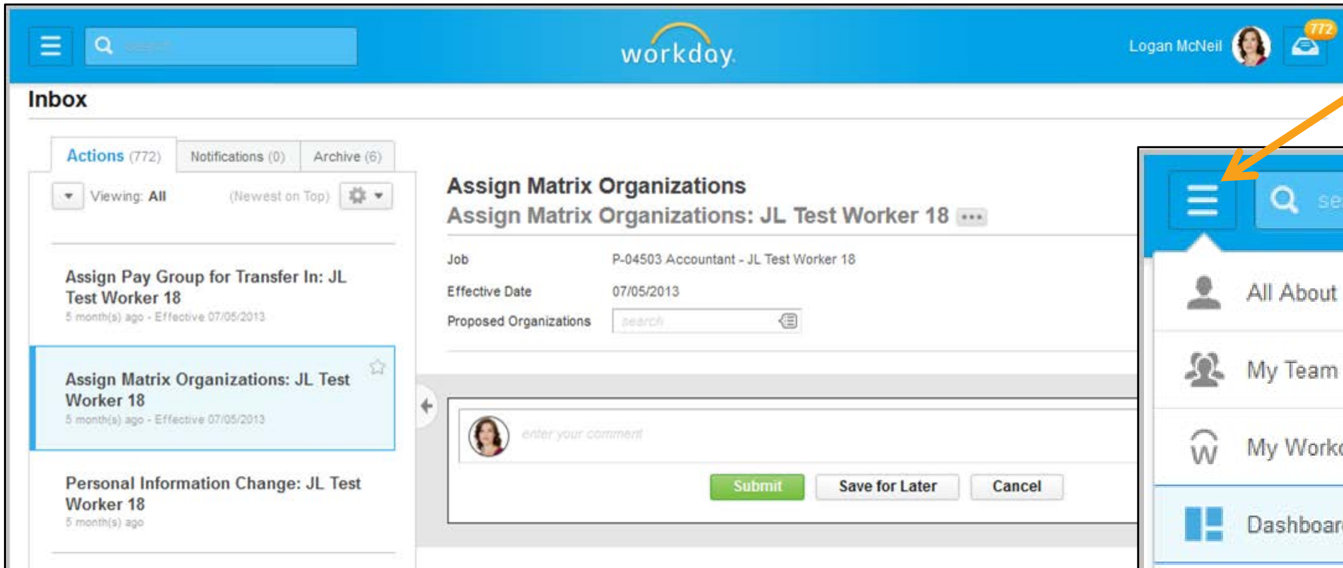
Returns type-ahead predictive results



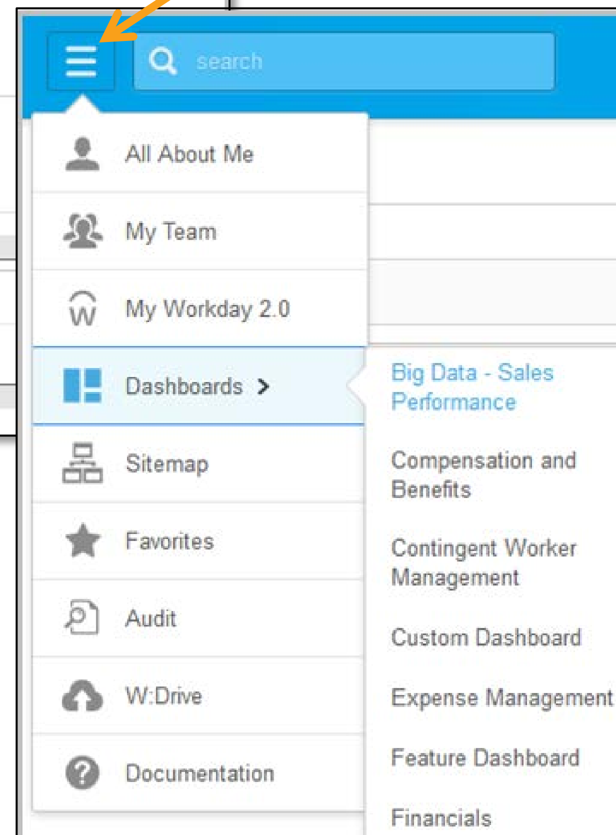
Displays full-page search results

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



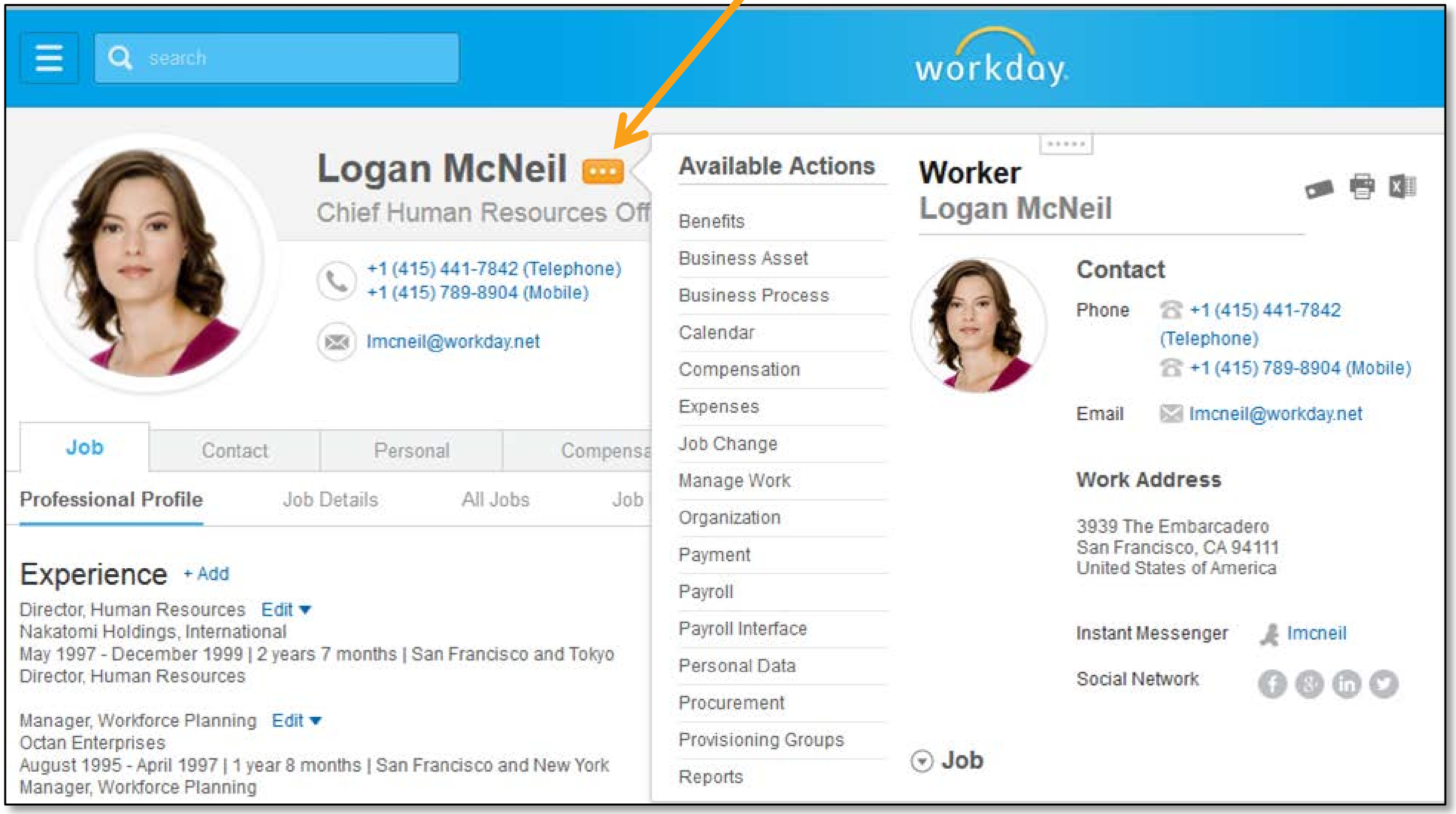
Users can access all Dashboards in the Main Menu icon



Worker Profile

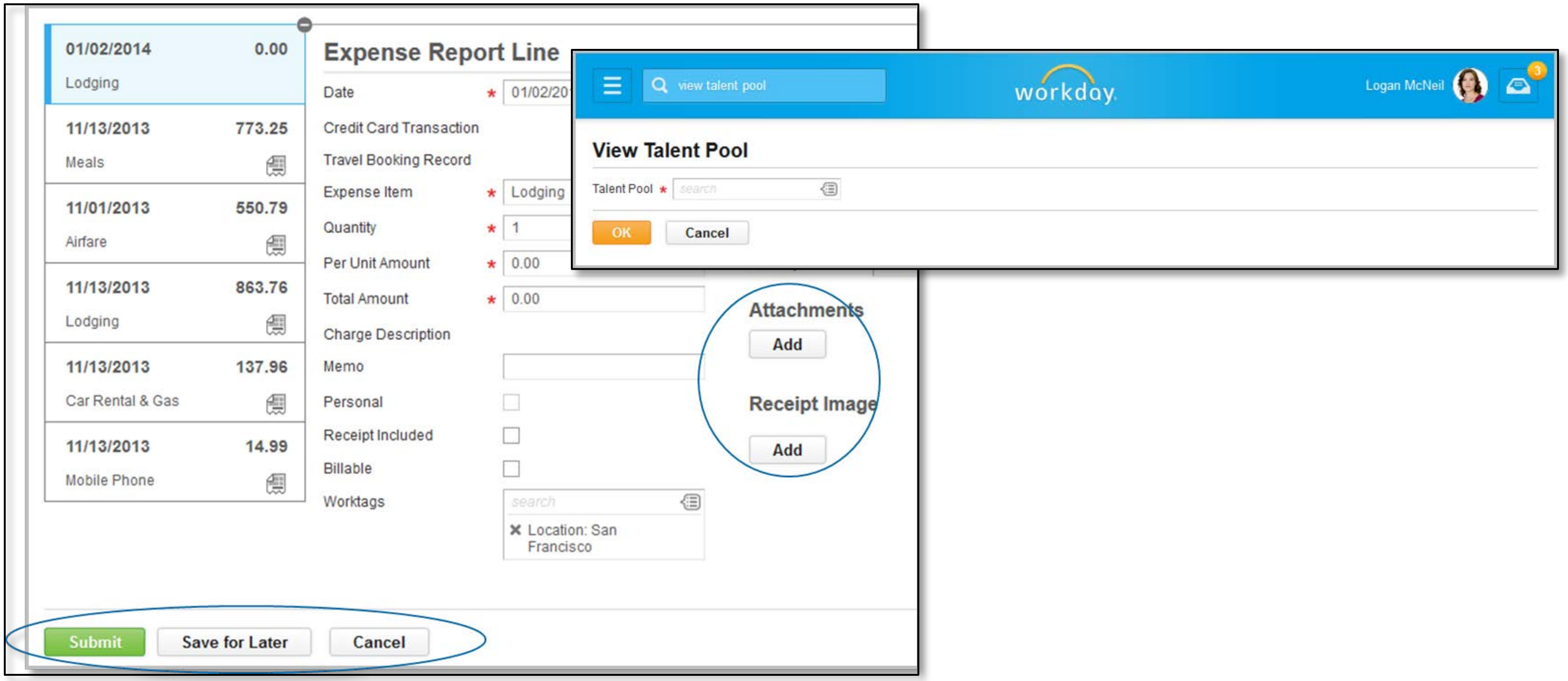
- In the new Worker Profile, items are visually separated and related actions are removed, freeing up space and reducing clutter
- The profile group icons have been removed, giving the page content more real estate to include information most valuable to you

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

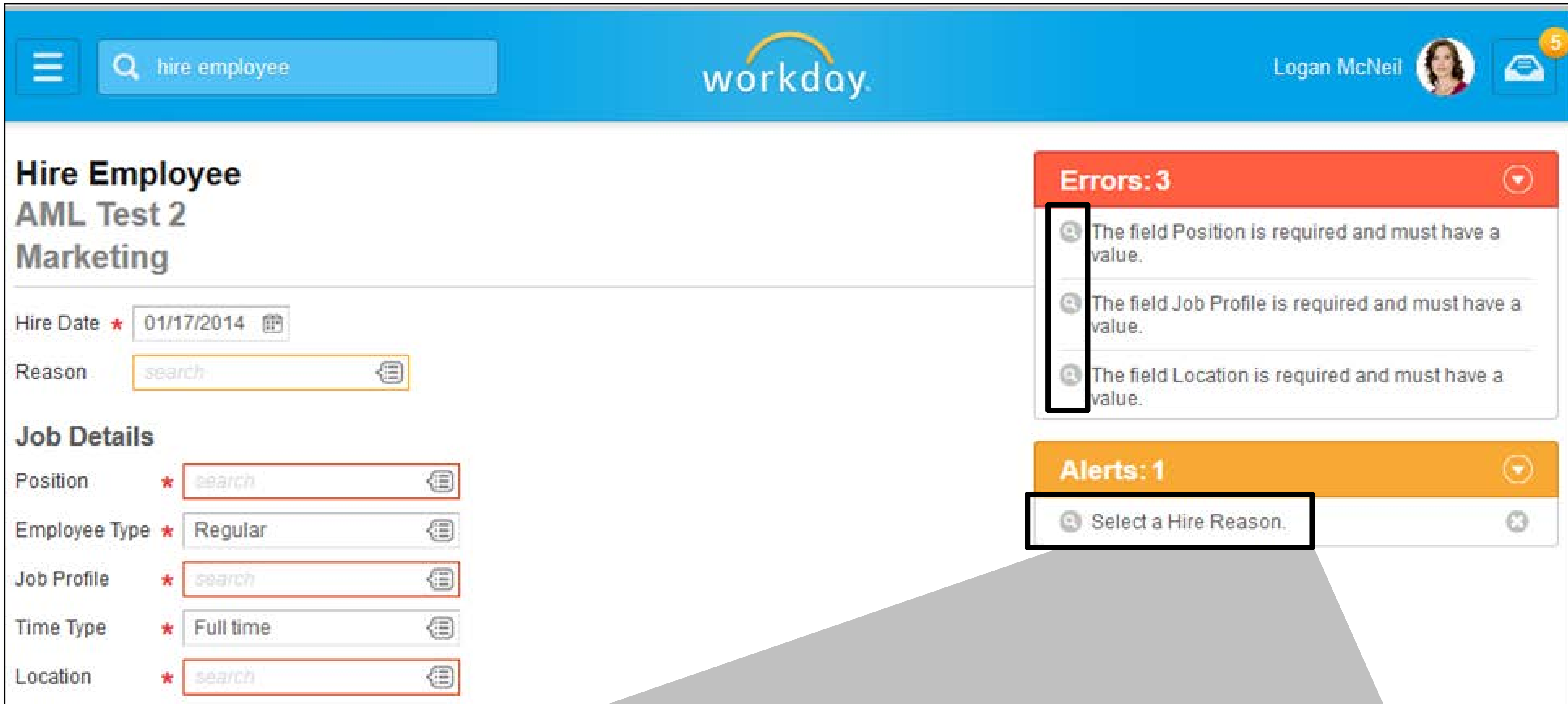


Buttons

- 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*



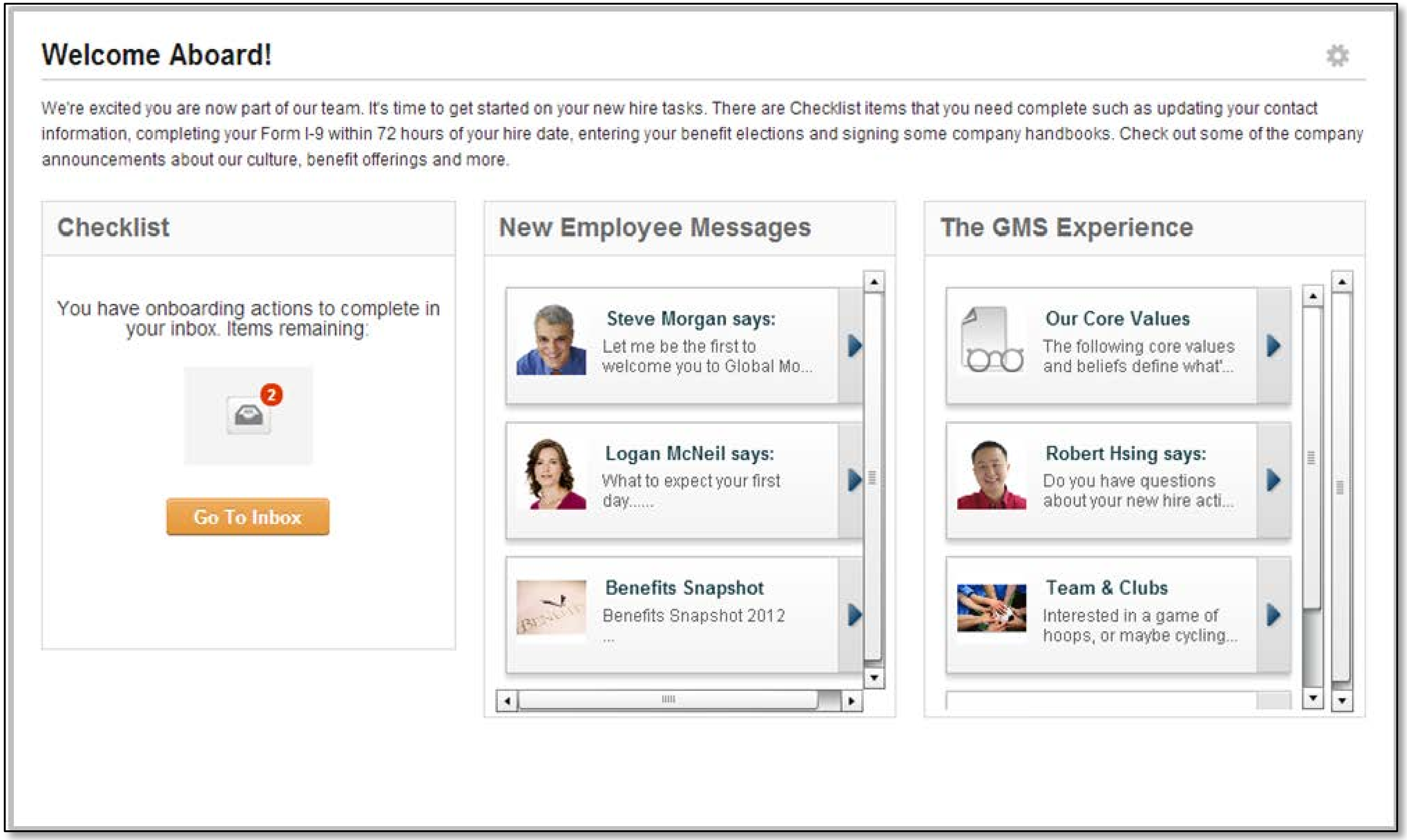
Error Messages



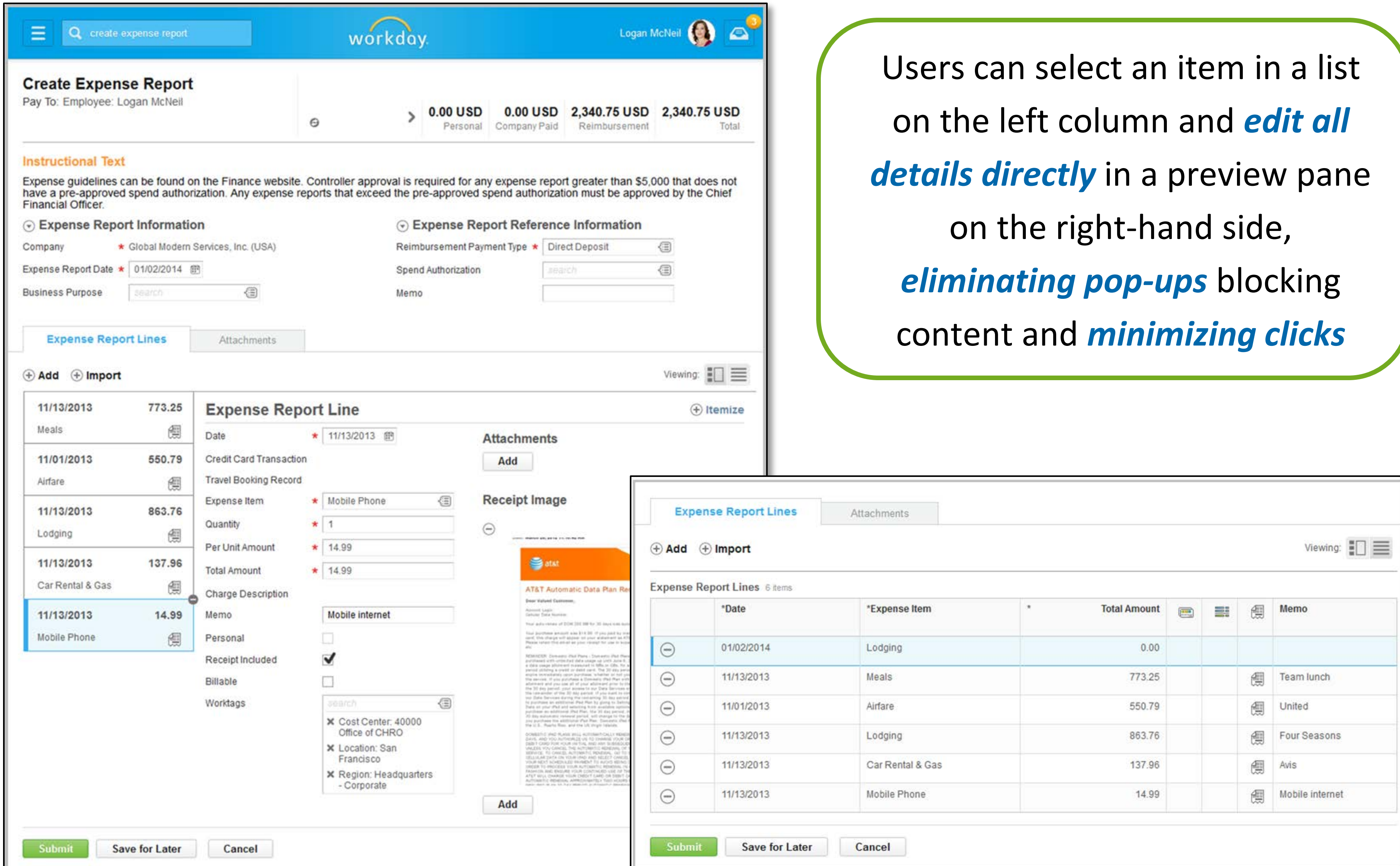
- Updated error messages help you by indicating what is wrong on the page AND instructing you on how to fix the problem
- When applicable, a magnifying glass icon will appear, and, when selected, jumps your cursor to the issue location so you can fix the problem quickly

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



Expense Reporting



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***

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

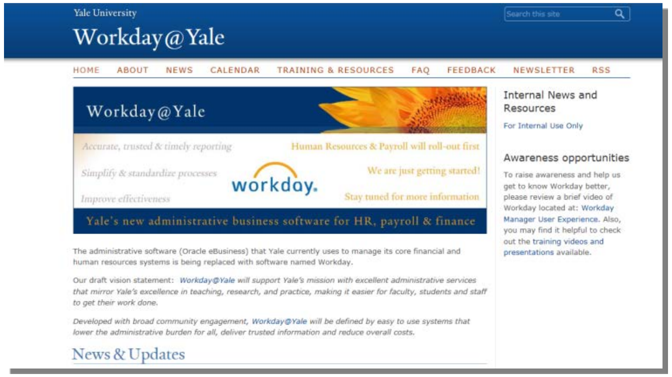
List of Service Groups

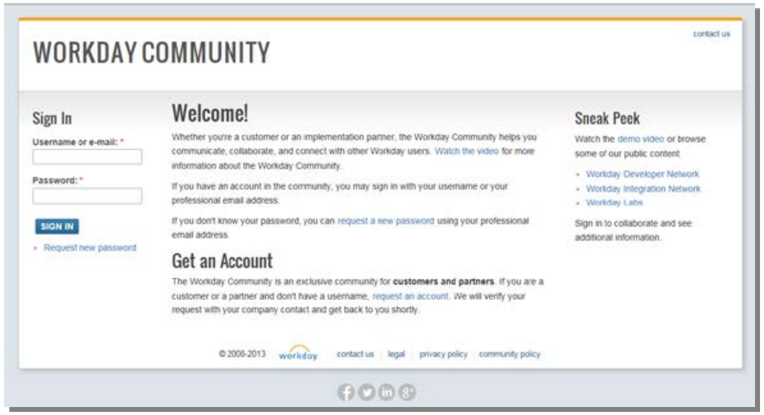
- Workforce Management
- Accuracy of Unit Financial Statements
- Information Delivery
- Getting Started at Yale University Faculty Recruitment, Appointments and Promotions
- Position and Compensation Management
- Hiring Staff
- Unit Financial Management
- Gift & Endowment Stewardship
- Purchasing Goods & 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
- 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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