

UNIVERSITY OF
LOUISVILLE

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Introduction to Workday

June, 2021

Agenda

1. What is Workday
2. Workday Features
3. Workday Self Service
 - Employee Self-Service
 - Manager Self-Service
 - Mobile App
4. Workday @UofL Website



What is Workday?

What is Changing?

ORACLE®
PEOPLESOFT

*Paper Forms &
Shadow Systems*



workday®

What is Workday?

Workday is a cloud-based enterprise resource planning solution that offers suites that enable institutions to effectively manage their employees, students, and finances. Customizable business processes and security roles allow institutions to tailor the system to their business needs.



1. **Human Capital Management Suite:** Functionality includes Time Tracking, Absence/Leave, Payroll, Benefits, Compensation, Recruiting, Onboarding, Performance, and more.
2. **Financial Management Suite:** Functionality includes Procurement, Expenses, Financial Planning, Grants Management and more.
3. **Student Suite: (possible)** Functionality includes Recruiting, Admissions, Financial Aid, Academic Advising and more. Allows students the opportunity to view courses, track student employment, time, tuition and other expenses.



Workday Intro Video



What is Changing?



- **Streamlined business processes** - Workday is the one-stop system of record for workflow and approvals. Fewer paper forms, fewer additional systems, such as OnBase.
- **Advanced technology** - The Power of One: As technology advances, Workday automatically delivers the latest innovations without requiring process or configuration changes.
- **Validated data** - Data Accuracy: Data entry and transactions have validations built in to ensure data accuracy.
- **Enabled reporting and dashboards** - Data Analysis: Workday enables reporting and dashboard capability with the most up-to-date information.
- **Mobilized data** – Managers and employees have access to information from a mobile device

Workday Terminology

Term	Definition
Functional Area	A collection of domain or business process security policies that are related to the same set of product features (e.g., Talent & Performance, Time Tracking, or Benefits).
Tenant	Workday software with data and configuration that exists independently of other tenants (or environments) and is used for different purposes, such as conversions, testing, or training.
Business Processes (BP)	A set of steps related to the execution of a task such as hire, onboarding, termination, etc.
Worktag	A keyword that you can assign to transactions and supporting data to make their business purpose clear and establish a common relationship. Worktags allow you to find information more easily, filter searches to focused results, and analyze information.
Cost Center	A worktag that identifies a unit within the university where a budget is assigned.
Supervisory Organization (Sup Org)	A grouping of employees who report to the same manager. In Workday, these groupings are built into a hierarchy that defines the reporting structure and organizational chart.
Applications	Icons on your Workday homepage that organize and provide access to groups of related tasks and reports by functional area.
Security Roles	What a user is allowed to access in Workday. They define what actions a user can perform, define where a task is routed to for review and approvals, and control what data a user can view.



Workday Navigation and Features



Workday Features: The Landing Page

Home button →

Search Bar
You can type the first three letters of your search and Workday will return a list of results.
Example: Mel Shu will pull up my information.

Applications (Worklets) →

- Directory
- Favorites
- Absence
- Pay

Profile →

Inbox →

Keep Track Cards →

Announcements →

Workday Features: Employee Profile

← **Profile** Your profile information including favorites and reports

- Home
- My Account
- Favorites
- Drive
- My Reports
- Documentation
- Sign Out

Workday Features: Quick Access

The screenshot shows the Workday homepage with the following sections:

- Header:** UL logo, search bar, and a grid icon (indicated by a yellow arrow).
- Hero Image:** A large photograph of a university building.
- Hello There:** Greeting "It's Monday, May 17, 2021" and a "View All" button.
- Most Used Apps:** A vertical list of icons for Directory, Favorites, Absence, and Pay.
- Keep Track:** A notification card titled "Keep Your Emergency Contacts Updated" with an "Update Contacts" button.
- Announcements:** A section with a header and a placeholder image of a dome, with text explaining its purpose for sharing HR news.

Quick Access

Links for the work that you do most often

The screenshot shows the "My Shortcuts" panel with the following elements:

- Header:** "My Shortcuts" with an "Edit" link and a close button (X).
- Message:** "No Shortcuts yet. Add your favorite tasks, reports, and more."
- Section:** "My Most Used Apps" with a "View All" link.
- Shortcuts:** Three red icons representing "Team Time", "Personal Information", and "Career".



Workday Features: Workday Inbox

Notifications and Inbox



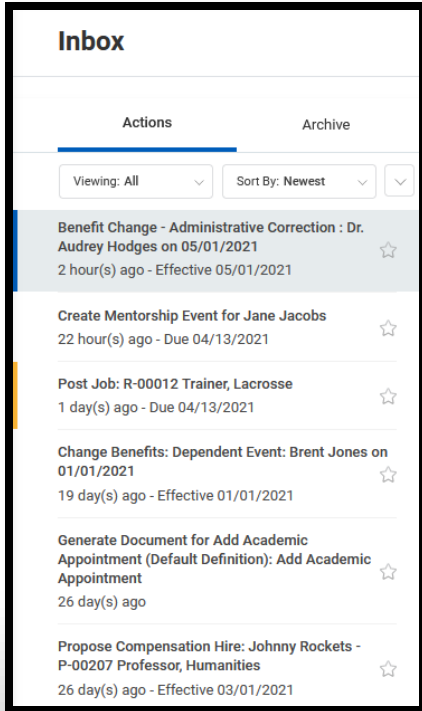
Assigned tasks and actions will appear in your inbox, where they can be completed. These tasks can include reviews, approvals, to-do's and more. Tasks completed by others, warranting your notice will appear as notifications.

Reviews and Approvals

Tasks that require review or approval appear in the employee's inbox similarly to other tasks. These reviews and approvals are built into the business process so that the appropriate parties get the opportunity to validate the work that their colleagues executed previously. A business process can have no reviews or approvals of 3 or more depending on the preferences and needs of the client.

Cancel and Rescind

Workday offers this function to correct business process (BP) errors. Cancel is only applicable when the BP is in progress and rescind when it has been completed.





Self-Service

Employee Self-Service

Manager Self-Service

Employee Self Service (ESS) Overview

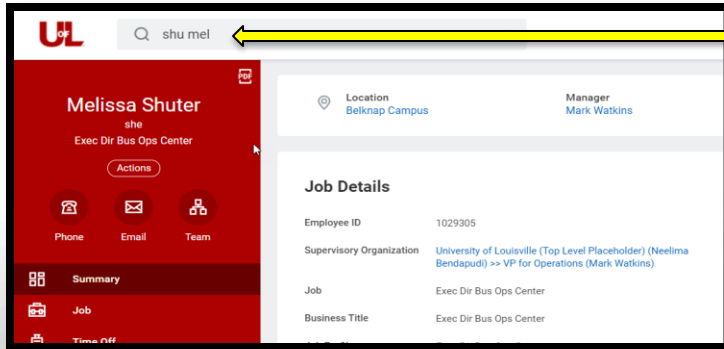
- Employee Self Service (ESS) are tasks or business processes that you can initiate in Workday
- We will cover the following topics:
 - Editing Personal Information
 - Making Payment Elections
 - Making Withholding Elections



Personal Information



Pay



Reminder: Search quickly using first three letters of last and first names to pull up needed personal information

Editing Personal Information



Personal Information

Use the Personal Information

Application to make changes to:

- Your contact information (e.g. address, phone, email, etc.)
- Your personal information (e.g. marital status)
- Your emergency contacts
- Your Profile Photo
- Your legal and preferred Name

The screenshot shows the UL HR system interface for Melissa Shuter. The left sidebar is highlighted in red and contains a menu with the following items: Summary, Job, Time Off, Pay, Contact, Personal (highlighted with a yellow arrow), Performance, Career, and Feedback. The main content area shows the following information:

Location: Belknap Campus
Manager: Mark Watkins

Job Details:

Employee ID	1029305
Supervisory Organization	University of Louisville (Top Level Placeholder) (Neelima Bendapudi) >> VP for Operations (Mark Watkins)
Job	Exec Dir Bus Ops Center
Business Title	Exec Dir Bus Ops Center
Job Profile	Exec Dir Bus Ops Center
Employee Type	Regular
Time Type	Full time
FTE	100.00%
Location	Belknap Campus
Hire Date	09/24/1987
Original Hire Date	09/24/1987
Continuous Service Date	(empty)
Length of Service	33 year(s), 7 month(s), 9 day(s)

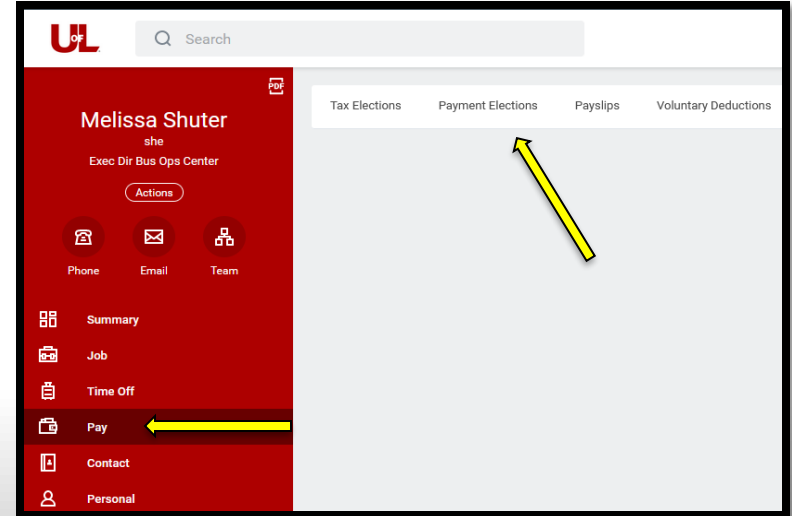
Making Payment Elections



Pay

- View/Update My Elections
 - Payment Elections
 - Withholding Elections

- Payment Elections Enrollment is the process used to create or edit direct deposit information
- Tasks that can be completed include:
 - Setting up an account
 - Editing an existing account
 - Deleting an account
- These options can be found in the Pay Application by selecting “Payment Elections” action or in your user profile under Pay and ‘Payment Elections





Pay

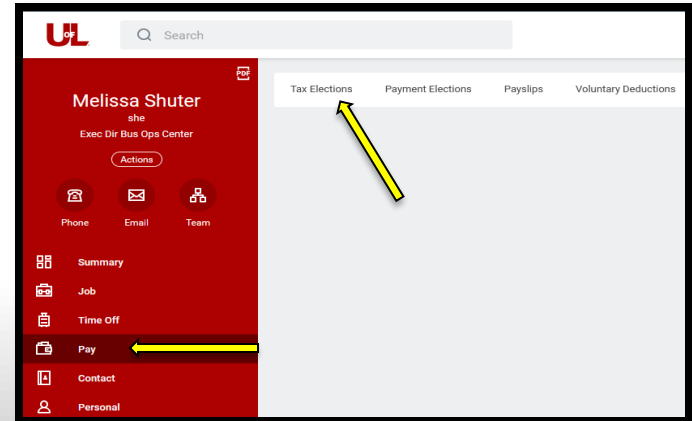
Making Withholding Elections

- Users can complete their Federal, State, and Local Withholding Elections in Workday.
- This can be found under the Pay Application in the “Withholdings Elections” action under the “Federal”, “State”, or “Local Elections” Tab.
- It is also available under your user profile in Pay and Tax Elections tab.

View/Update My Elections

Payment Elections

Withholding Elections



Manager Self Service Overview

- The Workday Inbox is where managers will spend most of their time.
- All actions and to-dos appear in the Workday Inbox and may include review or approval steps for business processes affecting manager's employees.

The screenshot displays the Workday Manager Self Service interface. On the left is the 'Inbox' with a list of actions and their details. On the right is a detailed view of a selected action, 'Propose Compensation Hire'.

Inbox

Actions | Archive

Viewing: All | Sort By: Newest

- Post Job: R-00190 Lecturer, Literature
1 day(s) ago - Due 04/08/2021
- Change Benefits: Dependent Event: Brent Jones on 01/01/2021
13 day(s) ago - Effective 01/01/2021
- Generate Document for Add Academic Appointment (Default Definition): Add Academic Appointment
20 day(s) ago
- Propose Compensation Hire: Johnny Rockets - P-00207 Professor, Humanities**
20 day(s) ago - Effective 03/01/2021
- Period Activity Pay: Mary Daphne Madison - 2022 Summer Term
20 day(s) ago - Effective 05/09/2022
- Onboarding Setup for Hire: Mary Daphne Madison - P-00280 Professor, College of Arts & Sciences on 07/01/2021
20 day(s) ago - Due 03/19/2021; Effective 07/01/2021

Propose Compensation Hire

Johnny Rockets | P-00207 Professor, Humanities (Unfilled)

20 day(s) ago - Effective 03/01/2021

Compensation

Effective Date & Reason

Effective Date
03/01/2021

Reason
Hire Employee > New Hire > New Position

Total Base Pay

Total Base Pay
● 139,800.00 USD Annual added

Submit | Deny | Save for Later | Close

Inbox

Actions Archive

Sort By: Newest ▼ ▼

From Last 30 Days

- Job Requisition: R-00190 Lecturer, Literature**
1 day(s) ago - Successfully Completed: Multiple Parties
- Post Job: R-00189 Bioengineering Professor**
1 day(s) ago - Successfully Completed
- Job Requisition: R-00189 Bioengineering Professor**
1 day(s) ago - Successfully Completed: Dr. Alison May

Review Your Archive

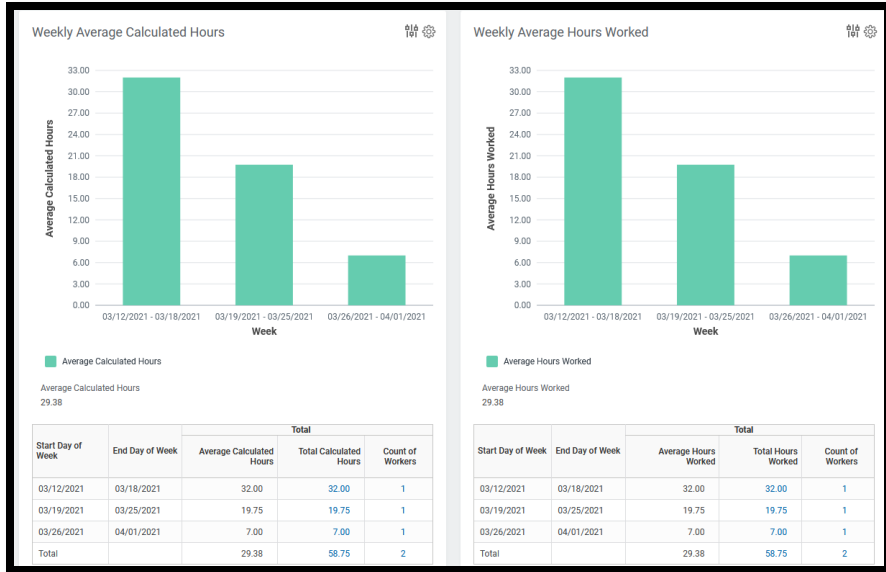
- The Archive tab allows a user to search past requests and actions.
- *Curious to know what's next in a business process?*
The Process History table will tell you what's happened and when, and who's next to complete a step.

Process History 10 items

Process	Step	Status	Completed On	Due Date	Person	Comm
Requisition Compensation	Review Requisition Compensation Change	Not Required		04/08/2021		
Assign Roles	Assign Roles	Automatic Complete	04/06/2021 01:26:14 PM	04/08/2021		
Role Assignment Event		Automatic Complete	04/06/2021 01:26:14 PM	04/08/2021		
Job Requisition	Review Job Application Template	Submitted	04/06/2021 01:26:24 PM	04/08/2021	Jill Jones (HR Administrator)	
Job Requisition	To Do: Maintain Committee Definition	Not Required		04/11/2021		
Post Job	Post Job	Awaiting Action		04/08/2021	Jill Jones (HR Partner)	



Viewing Team Information



- In Workday, there are many standard reports that a manager can utilize.
- Managers have access to certain dashboards which are pre-configured pages that display analytical information for the manager and may include graphs or pie charts.



Team Time



My Team Management

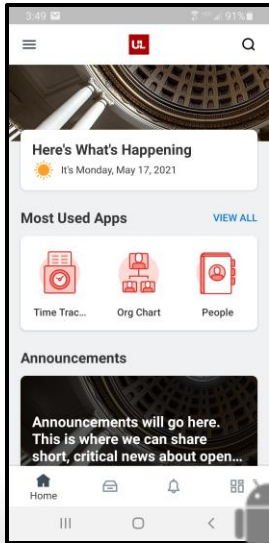


Dashboards

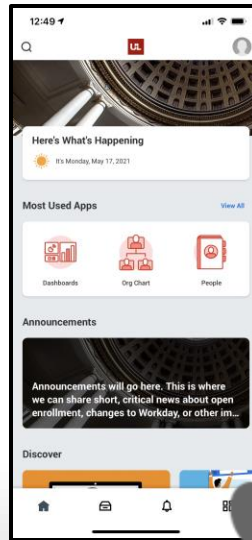


Workday Mobile

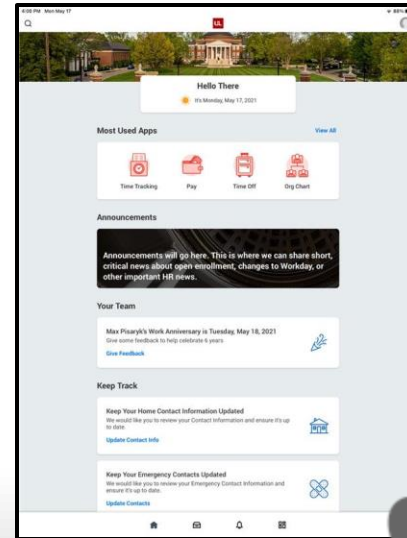
Workday Mobile



Workday for Android

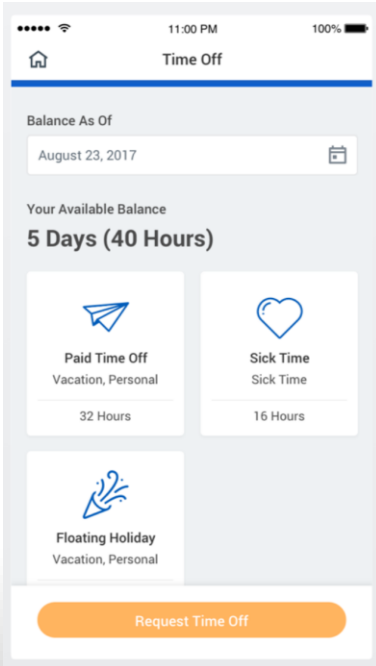


Workday for iPhone



Workday for iPad

Workday Mobile



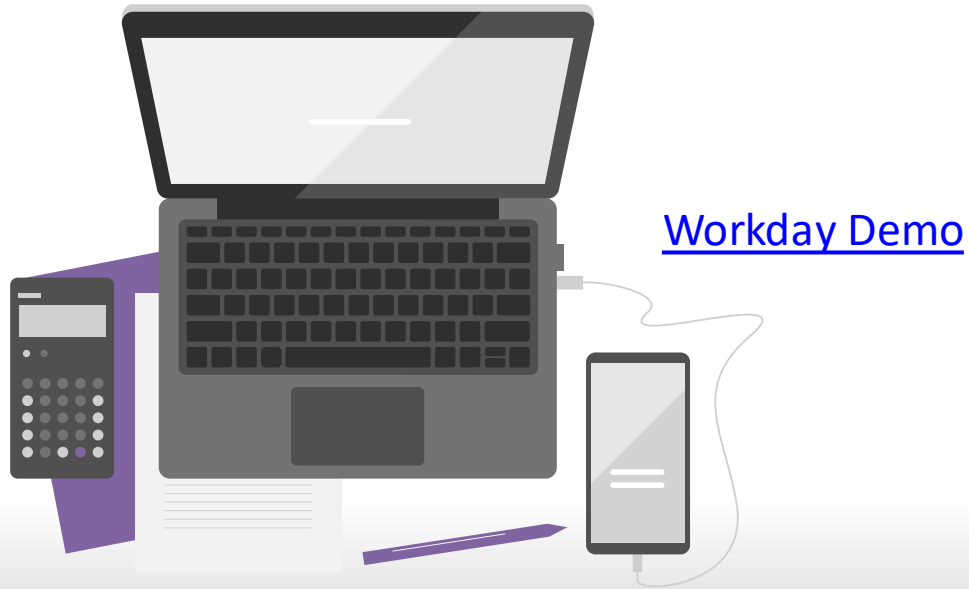
Workday's mobile application also allows users to access Human Resource tasks and capabilities such as:

- **Approvals:** Access your Workday Inbox to approve business processes on-the-go
- **Recruiting:** Search for candidates and view details for jobs and prospects
- **Time off:** View balances, request or correct time off



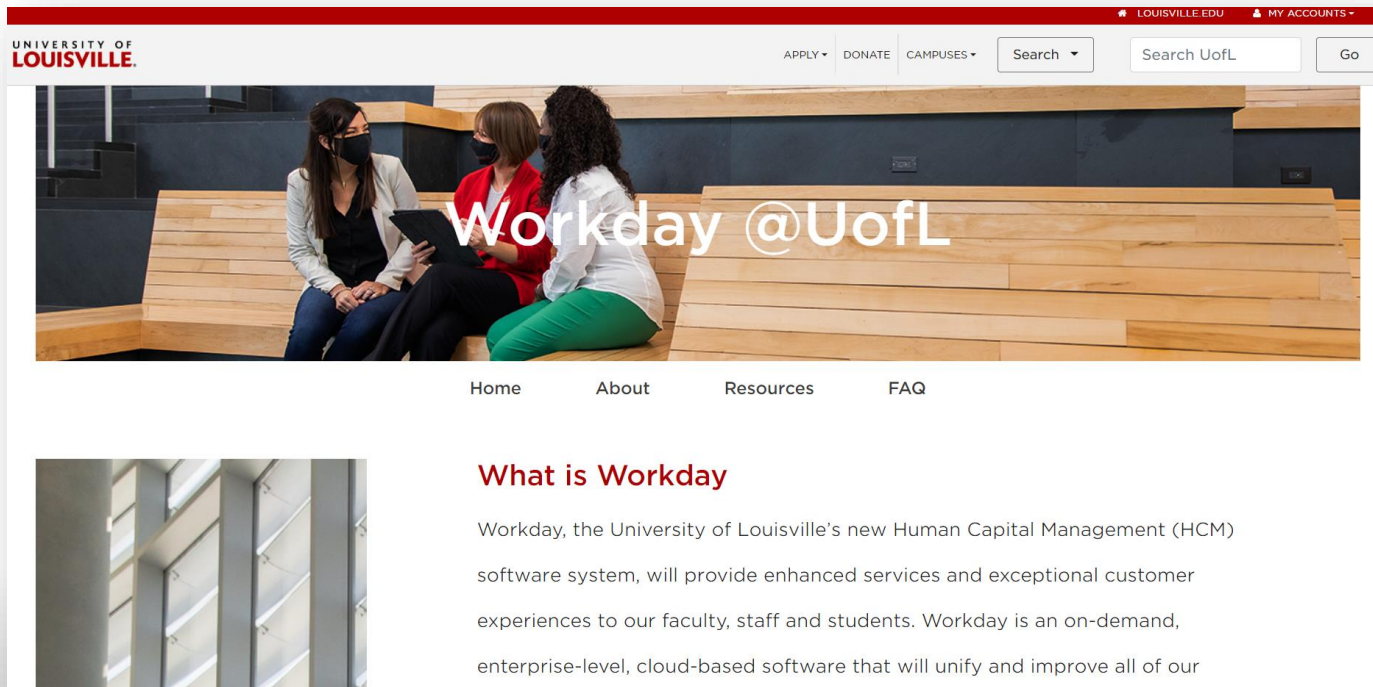
Workday Demo

Workday Demo





Workday @UofL Website



The screenshot shows the top portion of the Workday @UofL website. At the top left is the University of Louisville logo. To the right are navigation links for 'APPLY', 'DONATE', and 'CAMPUSES'. A search bar contains the text 'Search UofL' and a 'Go' button. Below the navigation is a large banner image of three women sitting on a wooden bench, with the text 'Workday @UofL' overlaid. Underneath the banner is a horizontal menu with 'Home', 'About', 'Resources', and 'FAQ'. Below the menu is a section titled 'What is Workday' with a small image of a window on the left and a text block on the right.

UNIVERSITY OF LOUISVILLE

APPLY ▾ DONATE CAMPUSES ▾ Search ▾ Search UofL Go

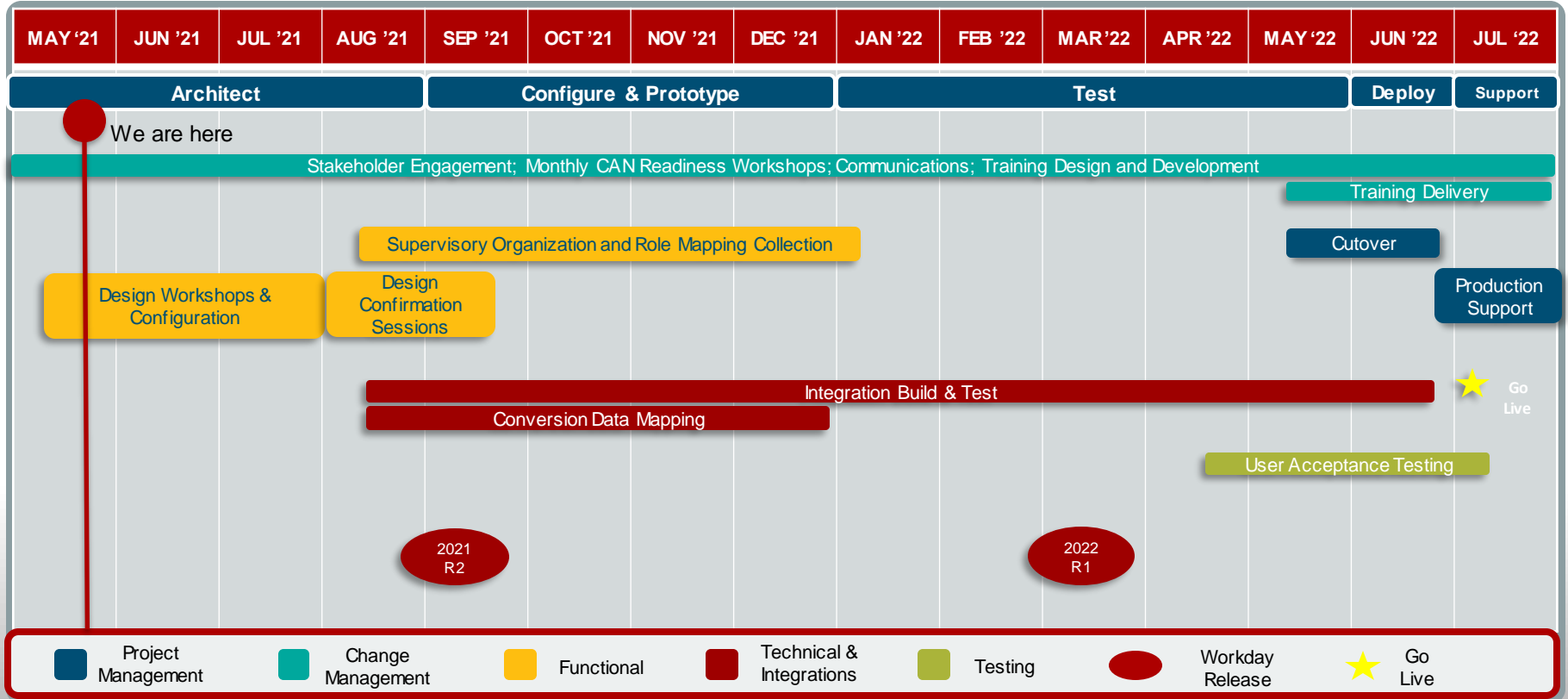
Workday @UofL

Home About Resources FAQ

What is Workday

Workday, the University of Louisville's new Human Capital Management (HCM) software system, will provide enhanced services and exceptional customer experiences to our faculty, staff and students. Workday is an on-demand, enterprise-level, cloud-based software that will unify and improve all of our

Deployment Timeline





What's the Faculty Senate Role?



Embrace the Change

Change is always tough...we as Faculty Senators can influence our respective colleges and be a positive force.

There will be issues...there always are. How we react will make the difference.

Specifics regarding faculty decisions to come – this was to update everyone with the transition.

Workday HCM Project Guiding Principles



Using Workday existing functionality and workflows.



Using Higher Education Best Practices for Human Resources and Payroll.



Focusing on the majority of transactions that are processed.



Closely examining the exception transactions to determine the best possible solution for processing.

Change Ambassador Network Members

VP Dean	VP Dean Name	Ambassador	Count of EMAIL
10	President's Office	Jake Beamer	188
11	Athletics	Deanna McMahel	294
		Lauren Sharrock	310
12	CFO	Mike Marquette	54
13	HR	Kristina Doan	36
15	COO	Brittany Schmitt	46
		Pam Frank	130
		Tina Pierce	338
16	ARC	Kim Adams	13
20	Provost	Debbie Dearing	284
		DeMarco / Stith	119
		Missi Moutadier	431
21	EVPRI	Brigitte Fasciatto	114
22	Student Affairs	Suzanne Galbreath	418
		Tim Moore	500
24	Advancement	Alicia Clark / Tammy Hale	68
26	Community Engagem	Susan Jenkins	24
27	Libraries	Rachel Hodge	165
28	A&S	MaryPat Chiavaroli	376
		Taleia Willis	450
		Yolanda Demaree	437
29	Speed School	Debbie Hudson	157
		Susan Cunningham	410

30	Business	Jessica Kidd	310
31	CEHD	Barbara Bishop	274
		Kenneth Allen	250
32	Kent	Elana Nance / Tammy Vories	235
33	Law	Jon-Paul Moody	106
34	Music	Shavon Wagner	239
40	Health Affairs	Carmel Mackin	124
41	Dental School	Anna Hinton	274
		John Tichenor	319
42	School of Medicine	Cheri Bingham	446
		Eron Weaver	419
		Kathy Keibler	438
		Kimberly Whitt	373
		Liz Young	419
		Shive Augustine	427
		Sonya Cary	417
		Stephanie Hodgins	729
43	Nursing	Paula Hensel	233
45	SPHIS	Eric Nunn	227
Huron	Huron	Sophie Proebsting	1
		Annie Lewandowski	1
		Christy LaTorre	1
		Christy Moore	1
LFO	LFO	Todd Hoffman	1
		Celeste Carter	1
		Will Armstrong	1
Grand Total			11628

- **Large unit primary contact:** For large units, identify a primary contact point for the unit to report back to the Change Management Team
- **Email limitations:** Only 500 emails can be distributed in Office 365
- **Representation:** All Lead Fiscal Officers, both senates and both commissions are included in the network