Workday Town Hall
April 9, 2018
Online Questions: workday@austin.utexas.edu
Welcome

Tinley Hald
Director – Academic Personnel Services
Our Program for Today

Dana Chapman,
AVP for
Administrative Systems
Modernization
Go Live Countdown

205 Days 16 Hours 08 Minutes 16 Seconds

Time until Thursday, November 1, 2018 (Austin time)
Agenda

• HRMS and DEFINE transitions
  • Bridging Workday HCM/Payroll to DEFINE Financials
  • HRMS Clean up – A How-To Example from UGS

• Getting Campus Ready
  • Demos and Road Shows
  • Training
  • Deployment

• How Workday Will Work
  • Recruiting and Onboarding changes
  • Security Roles
  • Why Workday? Mobile Demo

• What’s Next
Questions?

Online questions: workday@austin.utexas.edu
HRMS and DEFINE Transitions: Bridging Workday HCM/Payroll to DEFINE Financials
Juan Ortiz, Technical Program Director
Bridging

What is Bridging?

Bridging are the group of configurations and integrations that we will need to put in place in order for Workday HCM/Payroll to be able to interact with DEFINE Financials. This includes creating integrations to exchange data between the two systems, as well as upgrading and modifying existing systems to be able to consume Workday concepts.
Bridging

• UT has a large number of “bridges” that will be implemented as part of the Workday HCM/Payroll implementation

• Many of the “bridges” will be used by the Business Processing Offices (BPOs), and not be exposed to the campus

• But some of “bridges” will involve systems or functionality that will be used by Colleges, Schools, and Units (CSUs)
Bridging

Example BPO Bridges
- Cash Management integrations
- 3rd Party Payments
- Vendor integrations
- State of Texas Interfaces
  - USAS
  - TRS
  - HRIS
- Bank Reconciliation
- IRS 1042S Reporting

Example CSU Bridges
- Chart of Accounts (Workday’s Financial Data Model (FDM))
- Project Dates on Costing Allocations
- Encumbrances
- Posting Payroll transactions (VP4s and VJ1s)
- Overdraft Notifications and Reports
- DEFINE Codes
- Clearing Account System
Workday’s Financial Data Model (FDM)

- DEFINE will continue to be the “System of Record” for all financial information.

- The FDM in Workday will be made of a subset of the DEFINE Chart of Accounts (account number and associated data).

- Only the relevant parts of the DEFINE Chart of Accounts that are needed to process and post the payroll will be brought into Workday.
DEFINE Account Numbers = Workday Cost Centers

- Relevant DEFINE Account numbers will be brought into Workday as “Cost Centers”

- Some key attributes of the Accounts will be brought into Workday as additional information:
  - State/Local
  - NACUBO
  - Federal Element
  - Fund Group
  - Project Dates
**AC1902202810 FIS - CLASSIFIED SALARIES**

<table>
<thead>
<tr>
<th>Details</th>
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**Cost Center Bridging Information**

- **Funding Period Begin**: 05/12/2010
- **Funding Period End**: 05/13/2019
- **State/Local**: L
- **Fund Group**: 160
- **NACUBO**: 14
- **Federal Element**: 20
Encumbrances

• Encumbrance amounts will be calculated by Workday Payroll, and then posted overnight to DEFINE Financials

• We will continue to encumber the same types of transactions that we do today:
  • Salary for monthly employees
  • Fringes for monthly employees

• Key differences on how transactions will look:
  • There will be a single fringe type (due to pooled fringes)
Posting Transactions

• Payroll transactions will be posted to DEFINE Financials after each Payroll run in Workday

• Transactions will continue to be posted via VP4 and VJ1 documents

• Key differences on how transactions will look:
  • There will be a single fringe type (due to pooled fringes)
Questions?

Online questions: workday@austin.utexas.edu
Workday “See the System” Demos

- Become familiar with the look and navigation
- Introduce fundamental concepts
- Illustrate business processes
- Highlight how future practices will differ from current practices
- Prepare individuals for formal Workday training
- Started in March and will continue until go live
## Upcoming “See the System” Demos

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>4/9/18</td>
<td>1 p.m.</td>
<td>Workday Employee Self Service and Basic Navigation</td>
<td>Avaya Auditorium (POB 2.302)</td>
</tr>
<tr>
<td>4/13/18</td>
<td>10 a.m.</td>
<td>Workday Demo Onboarding</td>
<td>Avaya Auditorium (POB 2.302)</td>
</tr>
<tr>
<td>4/17/18</td>
<td>1 p.m.</td>
<td>Workday Demo Time/Absence</td>
<td>Avaya Auditorium (POB 2.302)</td>
</tr>
<tr>
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</table>
Rolling Roadshow Presentations

• Opportunity to see the new technologies in person
• Speak to Program Subject Matter Experts
• Intended for small groups
• Business officers can choose from a list of demos
• Contact stephanie.gillen@austin.utexas.edu to inquire
Selecting Super Users

• Business Officers will identify “Super Users” to participate in End User Testing

• Will have deep institutional knowledge of their unit’s business

• Will act as a point of contact for support during training and after go live for their unit
End User Testing

• Allows Super Users to validate the system will support business operations

• Through End User Testing, Super Users will become “experts” on the system before training begins

• Super Users will provide valuable feedback on Workday and training materials
Workday Training

• Begins in August and will be based on the employee’s security in the system (more on this later in the presentation)

• Will focus on core human resources and payroll processes

• Self-serve training for all employees (employee as self) and managers will be available
## Ways to Receive Training

<table>
<thead>
<tr>
<th>Instructor-led classroom training</th>
<th>eLearning through video tutorials</th>
<th>Instructional Guide &amp; Process Overview documents</th>
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<tr>
<td>Guided practice workshops</td>
<td>Open lab sessions</td>
<td>Training Presentations</td>
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</table>
Financials Training

• The Nov. 2018 Workday launch is for HCM/Payroll only

• Only financials related to Payroll will be impacted

• Purpose: To help campus financial managers locate information needed to effectively manage DEFINE financials relative to compensation and payment processing in Workday
Training Timeline

Sep – Dec 2017 | Jan – May 2018 | June | July | August | September | October | November

- Training Design
- Training Development
- Training Prep
- Pilot Training
- For Super Users
- Training Delivery
- Campus Training Begins

Workday April 2018 Town Hall Campus Training Begins For Super Users
Questions?

Online questions:
workday@austin.utexas.edu
Getting Campus Ready: Deployment
Rich Janes, Deployment Lead
What is Deployment?

• Strategies, plans, and activities to help move us from our current (legacy) systems to the new Workday system

• Involves “cutting over” which includes:
  • Timing on when to stop certain transactions in legacy and start them in Workday
  • Move data from the legacy systems to Workday
  • A brief period of time when the legacy is “view only” but Workday is not yet live
  • Emergency exception processes for the window while the systems are down
Workday Deployment Strategy

• Communicate schedules, examples, and considerations to campus

• Practice for success but plan for contingencies!
Sequence of Cutover Activities

- **HR Activities**
  - Complete pending HR activities
  - Emergency HR processing
  - Process HR transactions in Workday

- **Payroll Activities**
  - Complete Monthly Payroll activities
  - Semi-Monthly Payroll complete
  - Process Payroll in Workday

- **Timesheets**
  - Finalize any outstanding timesheets
  - Process timesheets in Workday

**Workday Campus Access**
- HRMS Read Only
- Timesheets Read Only
- Payroll Read Only
How to Handle Transactions

Before

During Cutover

After
What to Expect in the Next Two Months:

- Advice and guidelines will be provided to campus HR and IT professionals to include:
  - Stopping future transactions in current systems
  - Getting data ready for conversion in to Workday
  - Other cutover preparation and planning

- Communication via Workday.utexas.edu website, through existing meetings (HR Consortium, HR Spectrum, Workday Town Halls, IT FYIs) and other various channels
Questions?

Online questions: workday@austin.utexas.edu
How Workday Will Work:
– Recruiting and Onboarding Changes
Karen Chawner, HR Director
Recruiting

• Workday will have TWO career sites
  • A site for posting jobs for external candidates
  • A site for posting jobs internally for internal candidates

• Candidates are required to have any email address in order to apply – any email address will suffice

• **HINT:** Check out the “job requisition” demo from 3/6 at [https://workday.utexas.edu/events](https://workday.utexas.edu/events)
  • This demo covered job requisitions and job profiles
Candidate Management

- Workday’s Candidate Management includes a dashboard which provides insights into the candidate pool and what stage each candidate is at at any given time from “review” to “ready to hire”

- Includes visualizations to help see not just the individual candidate but also where all candidates sit in one view

- **HINT:** Watch the Candidate Management demo from 4/6 for more specifics [https://workday.utexas.edu/events](https://workday.utexas.edu/events)
Onboarding

• Onboarding will be tracked in the Workday system
  • New hires and managers will use Workday to track progress toward the completion of tasks

• Onboarding process instructs new employees on Onboarding next steps via Email and the Workday Inbox
  • Employees can get a head start on some tasks before their first day
  • Any email address will suffice for the new hire

• **HINT:** An upcoming Workday Newsletter will feature a video and Workday Brief on Onboarding. Email workday@austin.utexas.edu to subscribe to the newsletter.
Questions?

Online questions: workday@austin.utexas.edu
How Workday Will Work:
– Security Roles
Heather Hanna, Security Lead
## What is a Workday Role?

- Security Groups are how Workday determines what a position can see and do in the system.

<table>
<thead>
<tr>
<th>Security Group</th>
<th>Determines what you can <strong>see</strong> and what you can <strong>do</strong>. Provides individuals with access to appropriate data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role-Based Security Group</td>
<td>At UT Austin, all roles at the college, school, and unit level are role-based. Role assignments are associated to a <strong>position</strong>, not a person.</td>
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</table>
What is Role Mapping?

• An iterative process where college, school, and unit business officers and HR leaders map roles to the names of employees in their units

• Roles will determine what the individual can see and do in the system and what training they should attend
Why Workday?
Demo on Workday’s Mobile Capabilities
Laura Marshall,
Workday HCM/Payroll Program Director
What to Expect in April and May

• Closing out Unit Testing

• Continuing End to End Testing (started April 2\textsuperscript{nd}!)

• Preparing for the next round of testing
  • End User Testing
  • Parallel Payroll and Bridging Testing

• Change Impacts being discussed on campus broadly

• More demos and readiness events

• More communications and more frequent newsletters
Thank You!!!

- **WEBSITE**
  workday.utexas.edu

- **BLOG**
  sites.utexas.edu/workday

- **EMAIL**
  workday@austin.utexas.edu