Update for Faculty Senate Council

January 15, 2020
Why MyDay? Why Now?

• Multi-year, multi-project program to replace our aging Finance, HR, and Student administrative systems with a single system, cloud-based system called Workday

• We have to replace our systems. They are old, difficult to maintain and secure, and don’t allow us to answer key questions at the university, school, or unit level.

• We want to do more than just implement new systems. We have an opportunity to make changes that will improve our ability to collect, report, and analyze data; simplify many of our business processes; and provide a better experience for those who use these systems.
What’s in Workday?

HCM
- Benefits
- Time
- Time and Absence
- Compensation

FIN
- Expenses
- Financial Accounting
- Projects
- Procurement
- Grants Management
Workday Implementation Timeline

Planning
April - October

Design Workshops
Oct - March

Configure and Confirm
March - August

Test
September - May

Deploy
May - June

Post-Go Live Support Begins
July - ongoing

Data Clean Up & Validation
Understanding & Sharing Impacts
Campus Readiness
September - June

Training
March - Go Live

Go-Live!
6/30

Today
Major Changes for WashU

- **New Chart of Accounts** - In Workday this is called the Foundation Data Model (FDM), which will be the new data framework we use to record and report financial activity.

- **Greater transparency** - Workday security roles will ensure that access to information is based on business need, but certain foundational elements of Workday mean that more information will be more visible to more people.

- **More self service** - Expense reports/reimbursement requests can be submitted online as well as remotely via the Workday mobile application.

- **More modern experience** - HR and Financial tasks move to a single, more modern, integrated, stable system.
What does this mean for faculty?

- The transition to Workday will impact faculty differently depending on:
  - how they engage with our current HR and finance systems
  - the level of security they need within Workday

- We’ve identified four major groupings of faculty system users. Faculty may wear one or more of these “hats”
  - Occasional User
  - People Manager
  - Principal Investigator
  - Unit or Department Leader

- All faculty will have access to education and support to assist with the transition, but support will vary based on complexity of what they need to do in the system
Occasional User

<table>
<thead>
<tr>
<th>Today: Sample Activities</th>
<th>Changes with Workday</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Use HRMS self-service to make benefit selections, update contact info, check pay stubs in current system, etc.</td>
<td>• Use Workday self-service for personal HR tasks. More modern interface and mobile capabilities.</td>
</tr>
<tr>
<td>• Submit receipts and form for expense reimbursements as needed</td>
<td>• Initiate expense reimbursements in Workday. Greater visibility into where reimbursements are in process (e.g., approval). Can be submitted on mobile phone.</td>
</tr>
<tr>
<td>• Certify effort in ePARS, but do not manage finances on any grants</td>
<td>• Workday will replace ePARS for effort certification. Certification to occur every 6 months.</td>
</tr>
<tr>
<td>• Do not supervise students, faculty, or staff</td>
<td></td>
</tr>
<tr>
<td>• No significant reporting needs</td>
<td></td>
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</tbody>
</table>
## People Manager

<table>
<thead>
<tr>
<th><strong>Today: Sample Activities</strong></th>
<th><strong>Changes with Workday</strong></th>
</tr>
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<tbody>
<tr>
<td>• Recruit, onboard, and/or manage one or more individuals including staff, students and/or other faculty</td>
<td>• Initiate many manager tasks in Workday, which will be the system of record for all HR-related data and transactions</td>
</tr>
<tr>
<td>• Approve time off for direct reports</td>
<td>• Faculty no longer need to approve expenses for direct reports. This responsibility will sit with cost center (departmental), grant or project mgrs.</td>
</tr>
<tr>
<td>• Approve expense reimbursements for direct reports</td>
<td>• Ability to temporarily delegate HR and Finance approval responsibilities</td>
</tr>
<tr>
<td>• Conduct performance evaluations</td>
<td>• Visibility into salary information for all direct reports</td>
</tr>
<tr>
<td>• Minimal reporting needs</td>
<td>• More formalized processes may require faculty to learn how to manage task/approval requests within Workday.</td>
</tr>
</tbody>
</table>
## Principal Investigators

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<th>Changes with Workday</th>
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<tr>
<td>• Responsible for the preparation, conduct, and administration of a research grant or project.</td>
<td>• Better visibility into funds.</td>
</tr>
<tr>
<td>• Use FFR to report on budget, expenditure and available balance data on grants; including views of allocations/accounts for other faculty, staff and students in other departments/schools.</td>
<td>• Workday reporting for grants will replace FFR.</td>
</tr>
<tr>
<td></td>
<td>• May be required to approve time for students on research projects with external funding. Student workers will use Workday to certify effort.</td>
</tr>
<tr>
<td></td>
<td>• New approach for tracking grant-to-grant cost sharing</td>
</tr>
<tr>
<td></td>
<td>• Those with financial responsibility for grants will need to understand grant/salary/budget limits, including the percentage of someone’s time worked to a grant and how that translates into salary dollars.</td>
</tr>
<tr>
<td></td>
<td>• More formalized processes may require faculty to learn how to manage task/approval requests within Workday.</td>
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## Unit or Department Leader

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<tr>
<td>• Direct a university or school-based program, center or institute.</td>
<td>• Greater access to data on HR and FIN transactions for unit (e.g., revenue/expenses, headcount, payroll, etc.)</td>
</tr>
<tr>
<td>• Need a variety of financial and HR reports</td>
<td>• Through Workday reporting will have access to more information about grants distributions in development</td>
</tr>
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## Planned Support for Faculty

<table>
<thead>
<tr>
<th>Support Type</th>
<th>Occasional</th>
<th>People Manager</th>
<th>PI</th>
<th>Unit Leader</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-help web site</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>On demand &quot;how to&quot; videos</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>In-system guidance</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support line for questions</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>School-based staff “mentors” to help through go live.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Instructor-led, classroom-based training depending on security role</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Wins and Concerns

Wins
- Reduction in manual, paper-based work (e.g., expenses)
- More modern experience, mobile capabilities
- Enhanced and/or new capabilities for budget checking, reporting, and analysis
- Increased transparency

Concerns
- Outsized impact on administrative staff, particularly business managers and those who work regularly in the HR and Finance systems
- Significant amount of process changes for grant administrators and other staff
- Increased transparency
Supporting Your Staff

- Staff will have the same supports as faculty.
- Because of the outsized impact, they will receive more training and support, which will require time away from daily activities.
- It will take time to learn the new systems. During our first year, it may take longer to do routine tasks.
- Type of training (on demand, instructor-led) is determined by each person’s security role in Workday. More complex roles will require more.
- Training will be finalized and shared once security roles are assigned.
- Some training will begin as early as March. Training to support go-live will continue through July, and ongoing training will be available after go-live.
What you can do now

• Sign up for newsletter (https://myday.wustl.edu)

• Explore some Workday previews
  – myday.wustl.edu > Resources > Workday Previews
  – https://myday.wustl.edu/resources/workday-previews

• Identify the Mentors for your respective schools (https://myday.wustl.edu/myday-mentors/)

• Faculty preview sessions to be held in the spring