WorkCyte Update

Dave Cantor and Jo Anne Powell-Coffman

September 10, 2019

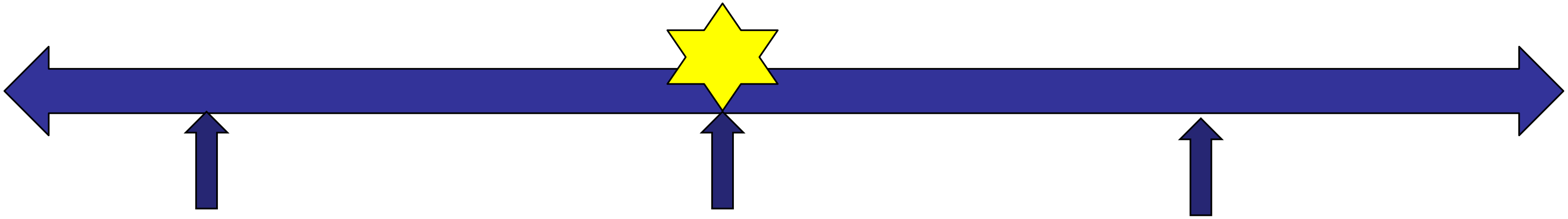
WorkCyte
Where Your Workday Begins

Quick Recap

- Go Live – July 1
  - Replaced 200+ legacy IT systems
- ISD Staffing Changes
  - 96 – ISD Finance Service Team Members
  - 45 – ISD HR Service Team Members
- First Priority – Getting People Paid From Workday in July
  - Approx. 10,500 employees paid ($43 Million in gross wages)
- Summer User Labs Sessions (More than 1000 attendees)
- Stabilization Period

Timeline

- New technology system is impacting everyone.
- All ISD financial and HR staff are now in ***new*** roles.
- Everything takes longer as we ***learn*** the new systems, new business processes, and the new support networks.



<u>Before Go-Live:</u>
Lots of planning, development, workshops, faculty forums & training.

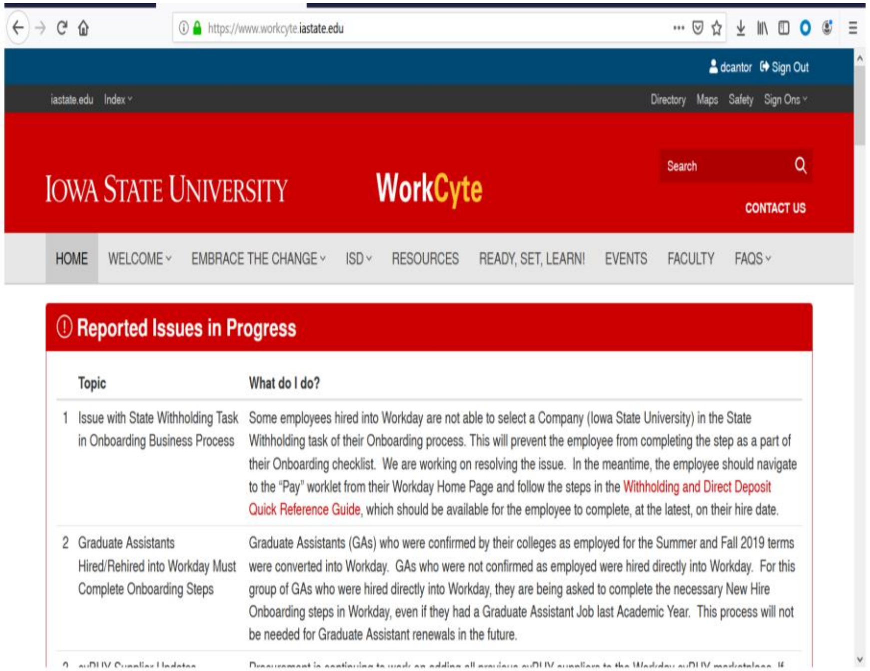
<u>Go-Live:</u>
On July 1, we turned on Workday & ISD.

<u>Post Go-live:</u>
We are listening, collecting feedback, learning and making improvements to roles, responsibilities, & business processes in Workday and ISD.

We are listening to your concerns and developing rapid response plans.

Sample – "Known Issues"

- Collection and Resolution of Feedback Provided to ISD/WorkCyte Team
- Payroll – Grad Student Stipends and Related Policy
- ISD/Campus Interactions Including ServiceNow Ticketing System
- Responsibility for Managing Worktags
- Co-PI Access to Award Data
- Financial Reporting on Faculty Grants



Workday/ISD Listening Sessions

- Held September 3, 2019
  - Organized by President Wintersteen
  - Supported by Pam Cain, Kristen Constant, Kristi Darr
  - Listening Session Attendees:
    - Senior Leadership, members of the Institutional Budget Management Team (IBMT), HR and Finance Improved Service Delivery Leadership and Workday Leadership
    - Operation and Finance Colleagues
  - Resulted in 31 action items

Listening Sessions - Action Plan

Seq.	Feedback Item	Owner	Completion Date (Est.)	Action Plan
1	"Due Dates" on website Reported Issues	Joli	9/6	Review existing Reported Issues and add estimated completion dates.
2	Staff morale concerns of having to track time	Kumari	9/27	Kumari and John Estes to write a Monthly Matters (MM) article that articulates the rationale (potential to be cosigned by Kristi/Mike Norton)
3	Better communicate wins	Kumari	9/27	MM article on Workday improvements (over Legacy processes)
4	How are decisions being made?	Kumari	9/27	MM article on the governance and decision-making process
5	Job Aids for security roles	Kumari	9/20	Create Job Aid that explain what each role can see and do
6	Workday glossary of terms	Kumari	9/13	Create Job Aid (leveraging existing content)
7	Simplified business process flows	Kumari	9/20	Identify ~10 business processes to add a simplified flow to the Job Aid with the action/approval steps
8	ISD / Campus Interaction	Dwaine, FIN ISD Managers	9/20	Deploy additional outreach/meeting cadences for 1) Specialist/Delivery teams (e.g. PES), 2) HR/FIN teams (e.g. all Birch specialists), and 3) each tree with their customers
9	Security Access and Responsibilities	Mindi/Dwaine	9/20	Evaluate HR Partner / HR Coordinator security access
10	Security Access and Responsibilities	Autumn / Kevin Houlette	9/20	Evaluate BUM / CCM security access
11	Analysis of Hire business process for Finance/Budget impacts	Joli	9/27	Meet cross-functionally to ensure appropriate budget/financial controls are in place on the Hire BP
12	Grants Compliance Concern	Kristen/Pam	9/13	Discuss Grants compliance concern with Sarah.
13	Tool for parking lot for future enhancements and collaboration	Kristen/Carol	10/25	Evaluate existing tools and develop plan for inclusive collaborative tool for Workday enhancements.
14	Establish In person outreach and feedback approach	Kristi/Kristen/ Pam	9/27	Evaluate approach to Campus in-person outreach and feedback

Listening Sessions - Action Plan - continued

Seq.	Feedback Item	Owner	Completion Date (Est.)	Action Plan
15	Access to Workday Community	Carol	9/13	Evaluate distributed (Business Unit Managers/Fiscal Officers, etc.) access to Workday Community
16	Additional training for Job Management (JM) Support	Mindi	9/20	Schedule an additional seminar/training for individuals with JM Support Role
17	Communicate "find transaction" functionality to the CCM/CCFA/BUM/BUFA roles	Joli	9/6	Communicate to the CCM/CCFA/BUM/BUFA roles that they now have the ability to use the "find transaction" functionality.
18	Additional visibility in Letter of Offer and Renewals process	Mindi	9/16	Evaluate opportunity to improve visibility for the Letter of Offer and Renewals process
19	Lack of visibility to the compensation split is causing issues in AES	Joli	9/13	Follow-up with AES Fiscal Officer to explain the process for obtaining the unconstrained compensation role.
20	Financial Reporting Questions	Alicia	9/20	In the next OFC Financial Reporting training, review/demo the following: demonstration to pull report with actuals from a prior period, explanation of obligations and how it relates to prepaids for 9-month faculty
21	Faculty / FTE Report	Kevin DeRoos	9/27	Using report requirements provided by Beate and Kristen and develop report
22	Security Access around Separation	Carol	9/13	Communicate when access is disabled when an employee separates, whether a delegate is needed for a period of time after separation, and how to communicate to Procurement upon separation to update T&H / P-Card rights.
23	ISU In Progress Earnings – CCM and Supervisor different access	Mindi	9/10	Review access for CCMs to the ISU In Progress Earnings report
24	Report error messages	Kevin DeRoos	9/13	Communicate how to tell if a report that returns no data actually has no data or if you don't have access to that report.
25	Expense Transaction Business Purpose	FIN ISD Managers	10/4	Clarify the best way to get business purposes from the individual that submits expense transactions. Develop guidelines for acceptable business purposes, and provide additional training to specialists to help ensure consistent application of guidelines.

Listening Sessions - Action Plan - continued

Seq.	Feedback Item	Owner	Completion Date (Est.)	Action Plan
26	Request for CCM to be able to change program and department detail on financial transactions	Joan/Kathy	9/27	Investigate enabling the CCMs to change the Worktags on a transaction in their queue for approval.
27	Concern about preventing duplicate expense reports	Kathy	9/13	Communicate how to manage T&H card items for a single trip for which someone submits multiple expense reports, and in general ensuring duplicate travel is not submitted.
28	Request to be able to attach an email to an expense report (to verify business purpose)	Kathy	9/13	Investigate this request.
29	Remove costing allocation process for student hires	Joli	9/27	Meet cross-functionally to evaluate Student Hire BP.
30	Reporting on invoices by cost center and sorting by supplier	Kevin DeRoos	9/13	Communicate with OFC how to view separate invoices by cost center and how to sort by supplier.
31	Co-PI Access to Award Data	Kathy/Mindy	9/13	Confirm access for all Co-PIs to Grant Financial data.

Faculty Job Aid

Faculty Job Aids

IOWA STATE UNIVERSITY

Area	Job Aid Title and Link	Job Aid Description
General	Faculty Training Map	List of computer-based courses recommended for faculty members to take based on their responsibilities at ISU
General	Faculty as Managers	Chart of HR tasks that a faculty member can initiate/review in Workday along with the support roles (ISD and non-ISD) that can assist in the completion of these tasks
General	How to find your Tree/ISD Team	Link to ISD section of the WorkCyte website, where you can select your tree to see who are your HR and Finance ISD specialists
General	Configuring Applications on the Workday Landing Page	Step-by-step instructions on how to add/remove optional applications on your Landing Page
General	Change Email Notification Preferences	Step-by-step instructions on how to update the type of notifications you receive from Workday or how to disable email notifications
General	Add Reports and Tasks to Favorites Dashboard	Step-by-step instructions on how to add your frequently used reports and tasks into one dashboard for easier use
General	Creating, Applying, and Editing Workday Inbox Filters	Step-by-step instructions on how to create a filter for your Workday Inbox
General	Workday 101 - Navigation	Overview of basic concepts in Workday, including the Workday Landing Page, Inbox, actions that can be taken within the system, and key terminology
Academics	View Academic Information and PRS	Provides a high-level overview of finding your academic appointments and how to view your PRS
Academics	Updating a PRS	Step-by-step on how to request an update to a faculty PRS. *Relevant to department chairs and deans only*
Absence	Viewing Absence Balances and Requesting an Absence	Learn how to view your absence (sick, vacation, etc.) balances in Workday and how to submit time off
Absence	Request Absence Quick Reference Guide	Step-by-step instructions on how to submit a time off request in Workday
Benefits	Changing Benefits Quick Reference Guide	Step-by-step instructions on how to process a change to current benefits and view status of submitted

https://iastate.box.com/v/faculty-job-aids

Preliminary Action Plan for Faculty Feedback

- Implementing a collaborative problem identification and resolution approach.
  - Team includes CIO, UHR, Central Finance, ISD, faculty representation, and other partners.
  - Listening to faculty perspectives and needs.
  - Developing plans to assist individual units as needed.
  - Building stronger ISD service team partnerships based on faculty input.
  - Identifying and addressing concerns regarding information access.

Listening and Incorporating Faculty Input into Stronger ISD/WorkCyte Team

- Faculty Senate (Jonathan Sturm)
- Improved Service Delivery Committee (Rob Wallace)
- WorkCyte Steering Committee
- WorkCyte Project Management Team (Dave Cantor & Jo Anne Powell-Coffman)
- Department chairs and college leadership are also forwarding unit-specific concerns and needs
- workcyte_feedback@iastate.edu

QUESTIONS?

Thank You!

workcyte_feedback@iastate.edu

WorkCyte
Where Your Workday Begins

WorkCyte Feedback
workcyte_feedback@iastate.edu
www.workcyte.iastate.edu