Workday Functionality Ready at Go-Live on July 23, 2023

What Can Faculty and Staff Do in Workday on Day 1?

General

- Faculty and staff can quickly access real-time information from anywhere with an internet connection on a desktop, smartphone, or tablet.
- Reports
    - Access reports easily with real time people, financial, and operational data to address key business issues, such as retention, workforce planning, diversity, budgeting, payroll cost analysis, financial impacts, compensation, and more.
    - Numerous out of the box standard reports as well as a multitude of additional custom reports that can be filtered and sorted and exported to Excel for further data analysis to meet the reporting needs of faculty and staff for decision making.
    - Scheduled or automated reports delivered daily, weekly, or as needed.
    - Manage favorite reports and scheduled reports.
    - Report and dashboard examples: My Team Management, Budget vs. Actuals report, Find Supplier Events report, and My Team's Performance Reviews.
- Execute tasks quickly
    - Task examples: create supplier invoice, create expense report, change legal name or preferred name, create position, change title for employee, and accounting journal entries.
- Create up to 10 shortcuts to save favorite reports and tasks for quick access.
- Review notifications for scheduled reports, reminders, and notifications to stay up-to-date on submitted & upcoming tasks, and daily & weekly reporting information.
- Manage how notifications are received.
- Customize and personalize applications to quickly access tasks, reports, and dashboards.
- Manage actions, approvals, and to dos in inbox to keep processes moving and completed in a timely manner.
- Review announcements for faculty and staff on Workday landing page and dashboards to keep up-to-date with the latest information, reports, and tasks.

** Safe Harbor statement applies. Security groups will determine what employees can access.*

Workday Mobile App

Mobile-first design provides secure, mobile access to real time data in Workday on any smartphone or tablet making it easy for faculty, staff, and student workers to do many tasks, including:

- Enter time in and out and submit timesheets for manager approval.
- Request, approve, or correct absences (PTO).
- Expense report activities are quickly and easily tracked for cash expenses reimbursement or credit card transactions. Faculty and staff can quickly enter purchase information, take pictures of receipts at time of purchase or shortly after, and submit expense reports.
- View worker profiles and search directory.
- Manage inbox items and easily approve requests.
- Push notifications and alerts for approvals, time tracking, and updates with the option to take immediate action from the app based on their role.
- Interactive dashboards and reports.
- Take actions based on the role of faculty and staff, including making compensation changes, giving performance feedback, and performing job changes.

HCM (Human Capital Management)

Begin efficiently recruiting, hiring, onboarding and managing faculty, staff, and student workers to optimize talent management and staffing. Start reviewing open positions and developing recruiting strategies from Workday's real time data to find and hire the best candidates to fill positions. Begin onboarding new faculty and staff in Workday with an effective paperless process.

Dashboards and reports with real-time data will be ready for faculty and staff to manage employees, conduct analysis, and make decisions, depending on their role or security group.

Some items listed below will be limited to certain security groups.

- Example: My Team Management, Recruiting dashboard, and Team Performance.
- View worker profile, job details, academic appointments, support roles for HR partner, and organizational chart.
- Enter, submit, or approve time worked.
- Request or correct absences (PTO).
- Review remaining absence (PTO) balances.

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- Request or return from leave of absence.
- Manage contact information including address and phone number.
- Change legal name or preferred name.
- Update emergency contact.
- Change photo.
- Edit government IDs and licenses.
- Changes for opting in for non-SPS benefits.
    - Example: ORP optional retirement plans.
- Add, manage, or end academic appointments.
- Create or edit named professorships.
- View academic appointments.
- Change job or promote employee.
- Change location.
- Staff reclassification.
- Add job to existing employee.
- Terminate employee (retirement, resignation, transfer).
- Employee contracts.
- Contract renewals or reviews.
- End contracts for contingent workers.
- Change title for employee.
- Create, manage, or freeze job requisitions and evergreen requisitions for faculty and staff.
- Create position, post position, or freeze/close position.
- Propose, change, and manage compensation for positions and employees.
- Source candidates.
- Candidates submit job applications.
- Assess candidates, screen candidates, and interview candidates.
- Generate offer letter for candidates.
- Initiates background checks process.
- Reference checks.
- Hire new faculty, staff, and student workers.
- Faculty, staff, candidates, and new hires can review documents and sign them electronically.
- Onboarding tasks including I-9 forms, withholding, benefits, payment elections, emergency contacts, photo, document reviews for faculty, staff, contingent workers.
- Create Workday accounts for new employees.
- Manage probationary period.

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- Request one-time payments for faculty and staff.
- Faculty overload.
- Period pay activity for stipend payments or supplemental pay.
- Create initial commitments.
- Create payroll commitment adjustments.
- Payroll accounting adjustments.
- Development plan.
- Performance review.
- Performance improvement plan.
- Disciplinary action.
- Enroll or drop enrollment for training courses.
- Manage training course content and instructors.

Finance

Start processing transactions significantly faster and more efficiently with set controls in place for security for how transactions flow in processes to better manage risk and compliance. Begin paying suppliers quicker, review the revenue lifecycle, connect with HCM to effectively plan projects while keeping costs at the forefront. Faculty and staff begin submitting and approving expenses from desktop or mobile app with set controls and spending analysis.

Tailored dashboards, scorecards, and reports with real-time data for operational and financial modeling to conduct analysis for planning, forecasting and decision making. Report examples: Budgets vs. Actuals report, Revenue and Expense by Fund report, Find Supplier Events report, and Cash to Bank Reconciliation Activities report.

Some items listed below will be limited to certain security groups.

- Review department budgets.
- Budget checks for spending events.
- Transfer funds between line items and/or budgets using budget amendments.
- Accounting journal entry.
- Load accounting journals en masse using EIBs (Enterprise Interface Builder) tools.
- Accounting adjustments.
- Accounting journal unpost/reverse.
- Create reoccurring journal templates.
- Update ledge period statuses.
- Close the ledger year.

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- Period close.
- Run and finalize all allocations.
- Record depreciation expense.
- Create and edit requisitions and receipts for purchase orders.
- Create, issue, or update purchase orders.
- Create and update change orders.
- Purchase order acknowledgments.
- Pcard (procurement card) transactions and management.
- Create supplier invoice settlement run.
- Import credit card transactions.
- Find and fix credit card transaction files.
- Supplier set up and management.
- Supplier invoices, payments, and contracts management.
- Create supplier invoice history.
- Create recurring supplier invoices.
- Prepaid supplier invoices.
- Returns to suppliers.
- Invoice matching.
- Supplier accounts match.
- Create, submit, or approve expense reports.
- Credit card transactions.
- Spend authorizations.
- Expense reimbursement.
- Create awards.
- Correct awards.
- Amend awards.
- Create and manage award billing schedule.
- Create and manage subawards.
- Create and manage letters of credit.
- Record letter of credit draw down.
- Customer invoices, customer payments, and customer contracts management.
- Manage banking settlement tasks.
- Review and reconcile bank statements.
- Ad hoc payments.
- Ad hoc bank transactions.
- Payment returns.
- Print checks.

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- Cash balance check.
- Asset cost adjustment.
- Asset disposal.
- Asset registration.
- Asset reclassification.
- Payroll commitments and adjustments.
- Payroll accounting adjustments.
- Assign costing allocation.

Adaptive Planning

Begin comprehensive and continuous budget and financial planning and forecasting. Develop accurate budgets effortlessly. Plan and adapt to changing business conditions quickly with confidence using powerful analytics and modeling tools.

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Appendix

Admins (ERP team, Workday Analysts)

Start effectively supporting and governing Workday while continuously improving the system to enhance end user experience. Begin planning for new releases and adopting new functionality to keep Workday up-to-date to further meet the needs of faculty and staff.

- Create and edit Workday accounts for end users to ensure new employee accounts are created & accessible, and any account issues are addressed quickly to keep processes flowing and employees using Workday efficiently.
- Manage and adjust security for the system (security groups, security roles, domains, business processes, etc.) as roles change and new business processes are adopted.
- Quickly edit and adapt business processes to add steps, change approvers, create custom notifications, and change completion step as business needs change over time.
- Create and edit custom reports to address new reporting requests, or update data available on reports for end users making decisions.
- Monitor incoming and outgoing integrations to ensure they are working without disruption.
- Create and manage dashboards, applications, and announcements to improve end-user experience and to keep them informed.
- Cancel or reassign tasks when faculty and staff leave, change jobs, or have not completed a task to keep processes flowing in a timely manner.

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