Quick Updates

• Multi-state tax information – Jennifer Klein
• Report: Work Location and Work Space are on the Employee Directory report - CR HCM Employee Directory
• Fraud Attempts and Cyber Security - Eric Rogers
Overview

- Conducted 7 listening sessions with AFOs and Administrative Managers
- Collected and cataloged ~250 items
- Combined duplicate items from the different sessions resulting in ~160 items
- Drafted a response for each item

Goal for this meeting:
- We are proposing actions and asking/seeking your input
Timeline

11/1: Completed listening sessions with each college, campus and administrative support areas.

11/10: Presented listening session update to Steering Committee

11/15: Presented listening session update to Area Finance Officers.

12/1: Present to Administrative Managers and AFOs
HCM

Topic: Recruit to Hire Processes
Recommended action: Planned upcoming work

• Continue to review these processes for efficiency and streamline workflow
• Review to determine if steps can be removed, combined or altered
• Remove approvals steps as soon as possible
  • Provost Office approvals have been slimmed down recently after lifting restrictions
• Provide end to end process training as part of Instructor Led Training in the near future
• Update current training material based on feedback
HCM

Topic: I-9 concerns

Recommended action: Not possible but.....

• The I-9 step is the very first step in the Onboarding process. In Workday, the Hire process must be complete before Onboarding can begin.

• Analyze the Review and Approval steps in the Hire process to determine when and where steps are being delayed.
HCM

Topic: **Ending jobs automatically**

Recommended action: Not possible

- In legacy, temporary jobs with end dates and without payroll transactions were ended through a batch process if no action was taken by the units. Batch processes are not available in Workday.

- In Workday, temporary jobs with end dates must be ended or extended. The system cannot determine what action is needed based on the date alone. The following guides provide an overview of dates. Please provide feedback on this guide if more is needed.
  - Understanding Employment and Compensation End Dates  
    https://jira.esg.wsu.edu/servicedesk/customer/kb/view/169153961
  - Dates in Workday  
    https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156962986
HCM

Topic: Visibility into HR processes and worker info
Recommended action: Not possible but…..

• Two links below address worker transactions. If additional information is requested, please provide

  • Worker History by Category
    https://jira.esg.wsu.edu/servicedesk/customer/kb/view/199885338

  • Video: Finding business transactions in progress
    https://jira.esg.wsu.edu/servicedesk/customer/kb/view/196286884
HCM

Topic: Pre-academic Faculty access to systems
Recommended action: Need to evaluate

• Pre-academic year appointments are possible in Workday with guidance below. Please provide additional feedback if needed.

• Pre-academic year appointments
  https://jira.esg.wsu.edu/servicedesk/customer/kb/view/180489718
HCM

Topic: Allow employees to adjust their own funding on time blocks
Recommended action: Communication Needed

• A workgroup was formed and vetted this issue. Considering the “Activities” option given as a work around, the workgroup determined this was not a viable option. Once that consensus was made, guidance was provided on options to reduce the pain point in July 2021.

• Guidance is found here
  https://jira.esg.wsu.edu/servicedesk/customer/kb/view/184421668
Finance

Topic: Position Budget

Recommended action: Planned upcoming work

• Thank you AAFO for your assistance!

• We have formed two working groups consisting of AFOs and Admin Managers:
  • Policy workgroup: This team will focus on making policy recommendations around position budgets and some needed policy decisions to use Workday for position budgeting with the goal to get this function in Workday beginning 7/1/22.
  • Data gap/bridge workgroup: This group will be reviewing the 18th month gap of position budget data in Workday (1/1/20-6/30/22) and looking for workable solutions to caught up on accrual processing, etc.
Finance

Topic: Grant Reporting
Recommended action: Planned upcoming work

• Wrap up implementing the F&A commitments integration. This functionality encumbers F&A similar to legacy.
• Resolve award analyst roles and release guidance on which reports should be used
  • Engage the Voiland College of Engineering
• Form a workgroup of about 10 grant managers with the goal to ease the reporting burden.
Finance

Topic: Budget Statement

Recommended action: Planned upcoming work

• Continue to use the reporting workgroup to help address concerns to the budget statement and other reporting issues.
• May form a workgroup of administrative managers to collect their specific feedback.
• Ask these groups for detailed information about what the specific issues are and how we can overcome them.
• Ask peer institutions for an overview on what their budget to actual reports look like.
  • We have reached out to the following universities to date:
    • Arizona State University (ASU)
    • Louisiana State University (LSU)
    • University of Arkansas System (UASYS)
Finance

**Topic:** Departments must reach out to other departments to get effort certification approval outside of the Workday system (effort cert reviewer)

Recommended action: Planned upcoming work

- Pursue routing defect ticket with Workday

**Topic:** Gift training/defining key terms around gifts & endowments

Recommended action: Planned upcoming work

- Engage both Treasury Services and the WSUF
Finance

Topic: Security request process
Recommended action: Planned upcoming work

• Enhance the security request framework/business processes. Eliminate the paper form.

Topic: Engage with system owners on myFacilities worktag assignment (not able to code to cost center directly).
Recommended action: Planned upcoming work

• There is an integration between Workday and myFacilities
• Troubleshoot missing elements with system owners (cost centers)
Finance

Topic: **Encumbered benefits on core funds**
Recommended action: Planned upcoming work

- Work with the reporting workgroup and Modernization reporting team to update core budget to actual reports to filter out benefit encumbrances on core funds

Topic: **Hourly position encumbrances**
Recommended action: Planned upcoming work

- Seeking input on whether we should eliminate these encumbrances from the system.
Finance

Topic: **Notifications around the budget amendment business process**

Recommended action: Planned upcoming work

- Many of our procurement/travel related business processes have notifications.
- Install notifications
Reporting

Topic: **Budget Statement**
Recommended action: Planned upcoming work
  • Create communication on how to use the reports

Topic: **Dashboards**
Resolution Action: Planned upcoming work
  • Update
  • Review, remove reports, and add new reports
  • Faculty
  • After F&A integration and award analyst role work is complete
Reporting

**Topic:** Benefits and Encumbrances
Recommended action: Planned upcoming work
- Work with Finance, Budget Office, and Reporting Workgroup

**Topic:** Too Many Reports
Resolution Action: Communication Needed
- Highlight how tools like dashboards, favorites and my custom report library can help
- Dashboard work will also help with this.
General Workday

**Topic:** Improved Reference Guides/Materials

Recommended action: Planned upcoming work

- Form work group to help identify top 10+ Reference Guides that need improvements and updates.
- Review edits and changes with work group prior to publishing.

**Topic:** Instructor Led Training

Recommended action: Planned upcoming work

- Develop training for Gifts, Recruit to Hire, and other topics.
- Seek input from work group on other topics/functions that would benefit to have a training offering.
General Workday

Topic: **Forum to connect with others who are using Workday in a similar role**

Recommended action: Need to evaluate

• Need to investigate available platforms to offer this type of opportunity.
• A few current ideas include, Teams group chat, Slack channel, or regular Zoom meetings.
• Question for the group: What tool or mechanisms would you prefer of those mentioned above?

Topic: **Service Desk**

Recommended action: Need to evaluate

• Opportunities for improvements or changes will be looked after the first of the year.
Next steps

• Feedback on the top items
• Finalize list of all line items and publish
• Working on roadmap
• Show confluence page
Confluence Page

**Workday Listening Sessions Fall 2021**

Created by Riedinger, Annie, last modified on Nov 12, 2021

Hearing from the WSU community about their experience using Workday.

Throughout Fall 2021, Modernization Team members from Finance and Human Resources documented these sessions. These sessions provided the opportunity for in-depth discussion.

During the sessions, Modernization Team members documented common themes.

From this list, we have compiled the following tables, highlighting suggestions for discussion.

- Finance
- General
- Human Resources
- Reporting

**Human Resources**

Created by Riedinger, Annie, last modified a minute ago

**Link to share:** [https://jira.esg.wsu.edu/servicedesk/customer/kb/view/196291051](https://jira.esg.wsu.edu/servicedesk/customer/kb/view/196291051)

<table>
<thead>
<tr>
<th>Issue/Concern</th>
<th>Recommended Action</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confusion between who is responsible for certain processes (for example, with recruiting and I-9s, which portions are Payroll and which are HR?)</td>
<td>Need to evaluate</td>
<td>Both Recruitment and the I-9 process reside with HRS. If there are other examples on business processes straddling between HR and Payroll, please provide.</td>
</tr>
<tr>
<td>Cannot do analysis on job searches as an Appointing Authority unless she is added to each search in Workday (Denise F.)</td>
<td>Need to evaluate</td>
<td>Specific examples of data needed for analysis will help us address this concern</td>
</tr>
<tr>
<td>Visibility into transactions seems to be missing. More so on the HCM side as a general rule.</td>
<td>See response</td>
<td>Two links below address worker transactions. If additional information is requested, please provide feedback. Worker History by Category <a href="https://jira.esg.wsu.edu/servicedesk/customer/kb/view/199885338">https://jira.esg.wsu.edu/servicedesk/customer/kb/view/199885338</a>, Video: Finding business transactions in progress <a href="https://jira.esg.wsu.edu/servicedesk/customer/kb/view/196296884">https://jira.esg.wsu.edu/servicedesk/customer/kb/view/196296884</a></td>
</tr>
<tr>
<td>Providing a list of faculty side leave accruals</td>
<td>Not possible</td>
<td>In legacy, departments updated paper leave reports with sick leave accruals</td>
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</tbody>
</table>