NOVEMBER PRESIDENT’S COUNCIL

November 28, 2018
The WorkCyte Program
Update 28 November 2018
Workday
Go Live
July 1, 2019

… just a 'milestone'
Today’s topics

• Progress Update
• Communications Efforts
• Reporting
  • Downloading Data
  • Plans and Process
• Coming Soon - Governance
Workday Progress Update

• Test Execution (total 4,721 tests)
  • Finance, 97% Pass
  • Human Capital Management, 97% Pass

• Next Steps
  • Regression Testing – focus on integrations and reporting
  • Payroll Parallel Testing
  • User Acceptance Testing
  • (Many of the testing steps are iterative)
  • Communications and Training
Workday and ISD

- Workday is being configured according to President Wintersteen's recently announced decisions related to Improved Service Delivery

- We continue to carefully examine the timeline
Communications & Outreach

- ‘Monthly Matters’
  - Workshops
  - New Concept Corner
  - What’s Changing?
  - Meet WorkCyte people
- Workshops (37 to date)
- Faculty Engagement
- PIT Crews
- ‘Shadow’ System Outreach
  - PIT Crews have requested Units fill out Smart Sheet forms

*Monthly Matters*

Hello Colleagues,

In this newsletter, we are highlighting some of the recent changes and developments in our WorkCyte program. We have recently added new workshops and are planning to launch new concept corners and monthly matters. We are also aiming to meet with more faculty and staff members to discuss WorkCyte.

**Workshops (37 to date)**

We have conducted 37 workshops so far, covering various topics such as faculty engagement and PIT crews. PIT Crews have requested Units to fill out Smart Sheet forms.

**Faculty Engagement**

We have been actively engaging faculty members to provide feedback on WorkCyte and have scheduled regular meetings to discuss the progress of the program.

**PIT Crews**

PIT Crews have been actively involved in the implementation of WorkCyte. They have requested Units to fill out Smart Sheet forms to help us track the progress of the program.

**‘Shadow’ System Outreach**

We are actively reaching out to Units to provide support and assistance with WorkCyte.

Did you know the WorkCyte Program has a website? If not, let’s dive in!

The WorkCyte website is a central source of information for all things Workday, Okta, and improved service delivery at Iowa State. As we continue down our path to live, the website will continue to expand with information.

*Change Is In the Air*

Workday Human Capital Management, Payroll, and Finance will go live on July 1, 2019, bringing beneficial changes to campus. We are modernizing our business processes and systems for the 21st Century.

It’s an exciting time for ISU as we prepare for the changes these new technologies bring. We will be moving away from paper records and processes, and embracing the streamlined business processes and functionality that Workday enables.

Here to help in this transition are Project Implementation Teams, or PIT Crews. PIT Crews are composed of unit-level leaders across the University and provide a unit-level approach to implementing the changes associated with Workday. Additionally, PIT Crews are a point of contact for WorkCyte Program information for all units across campus.

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Who is Involved?
Visit the Program Sponsor, Steering Committee, Project Implementation Team (PIT Crew) pages, and take a look at WorkCyte’s organizational chart.

How Did We Get Here?
The history page goes through the path we’ve taken with Workday, including a video featuring President Hoppes.

How to Embrace the Change?
If you’re searching for tools and information, look no further than the Monthly Update, CyberRital (both Human Capital Management and Finance), and Workday Delivered Reports.

Exposure to Workday?
If you’re looking for what Workday will look like at ISU, visit Ready, Set, Learn! and the upcoming Events tab. These two locations will help you become more familiar with Workday, engaging videos in addition to dates and times of upcoming Workshops.
Reporting

- Data retrieval is NOT query-based as it is today
  - Data is retrieved through reports
- Lessons learned from Early Adopters
- 3,700+ of ‘Workday delivered reports’
- Outreach – over 75 conversations around campus
  - 100’s of ‘custom reports’ requested
  - We are building them as fast as we can
- Some reporting needs are 'stacked' - we have to develop core reports before identifying others
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This list is on the WorkCyte Website.
... But WHAT about Excel/Data Download?

- We understand
  - You have reporting and data analysis needs
- Concerns
  - Data Security, Data Integrity
- Workday Worksheets
  - Spreadsheet function built directly and securely into Workday
  - Allows users to analyze data, collaborate, and make real-time changes in a familiar interface (like Excel)
- Save-as-PDF Feature for Workday Reports
Excel Download Next Steps

- Excel Download Decision Document
  - Address Campus concerns and reporting needs
  - Complete Decision Document and present to PMT, Steering Committee, Program Sponsors for decision

- Data Governance
  - Develop a robust data governance process to ensure data security and integrity*

- Excel Download 'Request' Process
  - Provide a process to allow users to request Excel download
  - Examine based on need (business case) on a case-by-case basis

- Communicate decisions and processes to Campus
Coming Next – Post Go-Live Governance

Why?
• To develop a governance structure to manage enterprise systems
• To develop a system to:
  • Set priorities
    • Critical functional problems
    • Scheduled maintenance
  • Manage new releases and adoption of new functionalities
  • Review, approve, prioritize requests
    • Change process
Questions?

WorkCyte.iastate.edu

@WorkCyteProgram

@WorkCyte

@WorkCyte.iastate.edu

@WorkCyte Video
HR Update

Nov. 28, 2018
Accomplishments

• Drafted initial model
• Met with HR & HRL’s to outline model – ongoing weekly
• Held two town halls with campus
• Incorporated model feedback
• Drafted ISD workplan through 2019 – with staffing transition, model finalization, training, and service strategy
• Drafted position descriptions
• Drafted postings for HR & Finance
• Posted the AVP roles
• Ready to post Senior HR Partners

• Followed-up feedback with FAQs
• Drafted unit transition team charter
• Drafted individual transition plan
• Drafted unit alignment and potential numbers
• Created leadership survey
• Discussed employee interest evaluation concepts
• Recommended staffing for ISD support
Next Steps

**Short-Term**
- Identify date for job fair and point person
- Create interest survey and outline evaluation matrix
- Engage leadership on unit alignment and staffing numbers
- Identify unit transition teams
- Review leadership survey results
- Create a communications plan
- Draft HR initial service commitments
- Hold job fair and send interest survey

**Long-Term**
- Develop a training plan and strategy
- Implement the communication plan
- Evaluate and select employees for ISD roles
- Engage unit transition teams in developing individual transition plans
- Identify and mitigate unit level impacts
- Implement training strategy
Updated HR Service Delivery Structure

Key:
- **Central**
- **Strategic Unit Support**
- **Workday Expert**

**Note:**
- The number of HR Partners, HR Coordinator, and Staff Recruiting Specialists as well as unit alignments are still to be determined. This slide represents a conceptual model.
Finance Update

Nov. 28, 2018
Simplified Finance Services Delivery

- President/SVPs
  Fiscal Officer & Support Staff (as applicable)

- SVP Operations & Finance

- AVP Finance and Support Services

- Unit
  Fiscal Officer & Support Staff (as applicable)

- Finance Services Team
  - Financial Services Specialists
  - Grants Finance Specialists
  - Procurement and Expense Specialists

Finance Services Manager

Notes:
- Number of Fiscal Officers and supporting staff to be determined by units.
- Number of Specialists and Finance Managers and alignments to be determined.
This slide represents a conceptual model.

Key:
- Blue = Central
- Yellow = Strategic Unit
- Red = Finance Experts
Accomplished through November

- Drafted and refined model with input from many sources
- Sought input from Operations & Finance Colleagues re: model and transition strategies
- Held two town halls with campus
- With UHR and EO, developed ISD transition plan
- Held half day work session with 35+ to gain deeper understanding of duties for new specialist roles
- Developed descriptions of specialist positions with support from UHR
- Posted the AVP for Finance & Support Services
- Will post Finance Manager positions this week
- Followed-up feedback with FAQs
- Contributed to leadership survey
- Discussed employee interest evaluation concepts
- Recommended staffing for ISD support
What’s Next?
Draft Transition Timeline

- Post Finance Manager positions
- Develop interest survey for staff
- Develop evaluation matrix for selection process
- Outline unit alignment and number of associated roles
- Create Finance specialist training materials
- Meet with units and staff regarding transition and to gather input to optimally-size Finance Services teams
- Use new finance tool to track movement of people and monitor costs
Draft Transition Timeline

- **January**
  - Identify Interest - Recruit

- **February**
  - Identify People

- **March**
  - Finalize Roles

- **April - June**
  - Transition

- **Nov - Dec**
  - Create Framework

- **Hold job fair/s**
- **Send employee interest survey**
- **Identify unit transition teams**
- **Draft training plan and strategy**
- **Use new finance tool to track movement of people and monitor cost**
Longer Term

- Develop a training plan and strategy
- Implement the communication plan
- Evaluate and select employees for ISD roles
- Engage unit transition teams in developing individual transition plans
- Identify and mitigate unit level impacts
- Implement training strategy