Welcome to a New Workday!

TAMU - Monthly Forum
May 18, 2017
Helios vs Workday
Mission of the Project

The Texas A&M University System is replacing various legacy mainframe payroll and human resource systems with one unified system called **Workday**.
Objectives of the Project

- Replace our existing HR and Payroll solution with a modern, integrated HR and payroll system
- Simplify and standardize processes
- Make it easy to get work done and harder to make mistakes
- Minimize administrative overhead for HR and Payroll employees, faculty, staff and end users
- Lower our operating costs, reduce risk and realize efficiencies with a cloud-based solution
Meet the TAMU Change Team

Dr. Barbara Abercrombie
Danny Grimes
Jim Nachlinger
Laura Dohnalik
Barbara Bayer
Brandy Kosh
21 Individual Members
Project Partners

workday

Deloitte

Grant Thornton
Higher Education using Workday

- Cornell University
- LSU
- Yale
- Penn State
- University of VA
- University of Miami
- USC University of S. CA
- The University of TX- Austin

- Brown University
- Champlain University
- Georgetown University
- Palm Beach State
- University of Maryland University College
- Vassar
- The Ohio State University

*Green* indicates these are considered by TAMU to be Vision 2020 peer institutions
What is Replaced by Workday?

<table>
<thead>
<tr>
<th>Replaced by Workday</th>
<th>Staying in Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPP*</td>
<td>SSO</td>
</tr>
<tr>
<td>EPAs*</td>
<td>Business Objects</td>
</tr>
<tr>
<td>Guardian I-9</td>
<td>AggieBuy</td>
</tr>
<tr>
<td>HRConnect*</td>
<td>eTravel / Concur</td>
</tr>
<tr>
<td>iBenefits*</td>
<td>Glacier</td>
</tr>
<tr>
<td>LeaveTraq*</td>
<td>Maestro</td>
</tr>
<tr>
<td>PeopleAdmin (PATH)</td>
<td>Time &amp; Effort</td>
</tr>
<tr>
<td>TimeTraq*</td>
<td>TrainTraq*</td>
</tr>
</tbody>
</table>

* = legacy system
Agenda

What’s Happening?

Getting Everyone Ready to Use

What’s Next?

What’s New to You?
What’s Happening?
Project Activities

- **Data Cleansing**
- **System Integration Testing**
  - Cycle 2
  - April 11 – June 1
- **Training Material Development**
- **Security Role Mapping, Member Decisions on Primary Responsibilities**
- **Business Process “Deep Dives”**
  - May 11, 18, 25

**ARCHITECT**
- Payroll Compare Testing
  - Cycle 1
  - May 22 – June 22

**CONFIGURE & PROTOTYPE**
- June 2016

**TEST**
- December 2016
- Workday Life Event #2 (Core)
  - Week of June 19

**DEPLOY**
- July 2017

**GO LIVE**
- December 2017

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- **Project and Member Communication**
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Getting Everyone Ready to Use Workday
Raising Awareness- SSO menu header

![SSO Menu Header](image)

<table>
<thead>
<tr>
<th>Applications you have access to</th>
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</thead>
<tbody>
<tr>
<td>Name : Kosh, Brandy F</td>
</tr>
<tr>
<td>UIN</td>
</tr>
<tr>
<td>ADLOC : 02120067</td>
</tr>
<tr>
<td>Last Logon : 11/06/2015 08:52 AM</td>
</tr>
</tbody>
</table>

*Out With The Old - The A&M System is doing some spring cleaning to make your Workday simpler. Learn more*
Training Development is Underway

### Core HR, Payroll and Benefits

<table>
<thead>
<tr>
<th>Course Type</th>
<th>Courses</th>
<th>Hours</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Courses</td>
<td>11</td>
<td>21 Hours</td>
<td>3.5 Days</td>
</tr>
<tr>
<td>eLearning Courses</td>
<td>5</td>
<td>4.5 Hours</td>
<td></td>
</tr>
<tr>
<td>Practice Simulations</td>
<td>90</td>
<td>7.5 Hours</td>
<td></td>
</tr>
</tbody>
</table>

**Managers**

- **8** eLearning Courses
- **6 Hours**
- **12** Practice Simulations
- **1 Hour**

**Employees / Retirees (optional)**

- **2** eLearning Courses
- **2 Hours**
- **50** Practice Simulations
- **4 Hours**

### HR Departmental Processors / Liaisons

<table>
<thead>
<tr>
<th>Course Type</th>
<th>Courses</th>
<th>Hours</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>WebEx Courses</td>
<td>7</td>
<td>9.5 Hours</td>
<td>5 Weeks</td>
</tr>
<tr>
<td>eLearning Courses</td>
<td>2</td>
<td>2 Hours</td>
<td></td>
</tr>
<tr>
<td>Practice Simulations</td>
<td>50</td>
<td>4 Hours</td>
<td></td>
</tr>
</tbody>
</table>

**HR**

- **9/18 General Awareness**
- **10/16 Targeted Awareness & Hands-On Skills**

**Managers**

- **9/18 General Awareness**
- **10/23 Targeted Awareness & Hands-On Skills**
November 6, 14, 15, 16
- 8:00 a.m.-5:00 p.m.
- General Services Complex, Suite 2201
Pulse Checks & Readiness Surveys

• Leadership (2 of 3 complete)
• Core HR, Payroll, and Benefits (1 of 3 complete)
• HR Liaisons (1 of 3 complete)
• Managers (1 of 3 complete)
Pulse Check Results - Trends We Noticed

Core HR, Payroll, Benefits (45% response rate)

- I don’t know enough
- I don’t know my role
HR Departmental Liaisons (7% response rate)

- 59% of the respondents support faculty
- Most have heard of the project and know basics; not a lot of confidence that it will work for them; they want to be involved
- Concerns over go-live system wide; don’t feel like their management will be patient as they learn new processes
- Overall, want details, more specific information on what they do and training
Managers (4% response rate)
- Never heard of the project or know very little about it
- Many have been researching Workday on their own to see what it is all about
- No confidence in the implementation being effective
- Many that are aware of communication have chosen to ignore it; will worry about it later
Readiness Monitoring Continues

Pulse Check #2 will be released to:
• Core HR, Payroll, Benefits on 6/5
• HR Liaisons on 6/12*
• Managers on 6/19*

*HRLs and Managers will receive the invitation to participate from Dr. Abercrombie; reminders will also be sent out the week following the release of each survey
Next Steps
## Next Steps

<table>
<thead>
<tr>
<th>Ongoing Communication</th>
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</thead>
<tbody>
<tr>
<td>Monthly meetings between project team and member representative(s)</td>
</tr>
<tr>
<td>Monthly member updates</td>
</tr>
<tr>
<td>- TAMU HR Open Forums</td>
</tr>
<tr>
<td>- HR Liaison Network News</td>
</tr>
<tr>
<td>- TAMU training development</td>
</tr>
<tr>
<td>Regular web updates</td>
</tr>
<tr>
<td>- Employees.tamu.edu/workday</td>
</tr>
<tr>
<td>- YouTube channel (subscribe)</td>
</tr>
<tr>
<td>- workday.tamus.edu</td>
</tr>
<tr>
<td>- News You Can Use (subscribe)</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Project Work</th>
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<tbody>
<tr>
<td>Finish System Integration Testing</td>
</tr>
<tr>
<td>Start Payroll Compare Testing</td>
</tr>
<tr>
<td>Continue to clean up data</td>
</tr>
<tr>
<td>Continue mapping Security Roles</td>
</tr>
<tr>
<td>Continue developing training</td>
</tr>
<tr>
<td>Our readiness activities (members)</td>
</tr>
</tbody>
</table>
TAMU Monthly Forums- Please Come!

Offered via WebEx if you’re unable to attend in person

- **Thursday, 5/18**: Equine Center Andras Classrooms A&B from 12:00pm-1:30pm (registration is now open)
- **Thursday, 6/15**: Rudder 501 from 12:00pm-1:30pm
- **Wednesday, 7/19**: GSC 101 from 10:30am-12:00pm
- **Thursday, 8/17**: Equine Center Andras Classroom A&B from 12:00pm-1:30pm
- **Monday, 9/18**: GSC 101 A&B from 1:30pm-3:00pm
- **Thursday, 10/19**: Rudder 601 from 12:00pm-1:30pm
- **Future meetings yet to be scheduled through Feb 2018**
What’s New to You?
Effective September 1, 2017 the biweekly pay periods will run from Sunday to Saturday

Benefits
• Employees receive their pay closer to the end of the pay period
• FLSA work week over-time calculations better align with most employees’ actual work week
• TimeTraq can easily support this change, and it is a preferred configuration in Workday

Communication Plan is under development. More to come!!
Transition to Biweekly Payroll

Effective September 1, 2017 ALL non-exempt (hourly) employees will be paid on the same bi-weekly schedule

• Simplifies the payroll process across all members
• The Sept timeframe allows transitioning employees to receive three paychecks in September, putting pay in their hands quickly
  – Sept 1, pay for time worked in August
  – Sept 15, pay for time worked Sept 1 – Sept 9
  – Sept 29, pay for time worked Sept 10 – 23

Communication plan is under development
Payroll Correction Module

• A new electronic Payroll Correction Module will be available in Canopy when we go live with Workday, December 1, 2017
Performance Evaluations & Goals

• Past period (4/1/16 – 3/31/17) performance evaluations will be completed in PATH by 5/31/17, unless approved by HR.

• Goals for current year (4/1/17 – 3/31/18) should be created and tracked locally:
  – Managers & Employee notes
  – Will not load into PATH
  – Added to Workday sometime after launch (date/method TBD)

• Current period (4/1/17 – 3/31/18) performance evaluations will be completed in Workday.

• Past evals will be available in PATH by request to HR.
# Extended Pay Plan Changes, January 2, 2018

<table>
<thead>
<tr>
<th>CURRENT: Extended Pay Plan</th>
<th>NEW: Save for Summer (in Workday)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withhold % of net pay</td>
<td>Withhold flat, dollar amount of net pay</td>
</tr>
<tr>
<td>Enroll using a paper form</td>
<td>Enroll using a paper form</td>
</tr>
<tr>
<td>Withdraw at any time; receive held back pay</td>
<td>Withdraw at any time; receive held back pay</td>
</tr>
<tr>
<td>in the next paycheck</td>
<td>in the next paycheck</td>
</tr>
</tbody>
</table>
Multiple Bank Accounts in Workday

- Direct Deposit to up to 5 different bank accounts
- Available to all employees
- Employees will be able to self-service their information directly within Workday
April’s Word on Workday

What’s New?

During the Test phase, we’ll check every nook and cranny of our business processes and HR partner integrations to make sure the solution we configured during the Prototype phase is the solution we designed in the Architected phase.

Learning Workday

Our training strategy is focused on providing essential Workday knowledge and skills to stakeholders who are most impacted by retiring BPP and other legacy applications. Starting September, awareness training will introduce Workday’s core concepts and essential functions. Later, skills training will take a deeper look at how to use Workday to perform role specific duties. Additional materials including quick reference videos and job aids will be available in SSO through Workday Help.

New Update Expected: >5/22/17
TAMU Q&A’s

• Updates for our member will be on the website weekly
  – employees.tamu.edu/workday
Questions?

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Barbara Bayer    bbayer@tamu.edu    862-1146
Brandy Kosh    b-kosh@tamu.edu    845-1691

workday.tamus.edu
it.tamus/projecthelios
Employees.tamu.edu/workday