Welcome to a New Workday!

CSBA Conference
May 15, 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
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?

Replaced by Workday

- BPP*
- EPAs*
- Guardian I-9
- HRConnect*
- iBenefits*
- LeaveTraq*
- PeopleAdmin (PATH)
- TimeTraq*

*= legacy system

Staying in Place

- SSO
- Business Objects
- AggieBuy
- eTravel / Concur
- Glacier
- Maestro
- Time & Effort
- TrainTraq*
Agenda

What’s Happening?

Getting Everyone Ready to Use

What’s Next?

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

- **System Integration Testing**
  - Cycle 2
  - April 11 – June 1

- **Training Material Development**

- **Business Process “Deep Dives”**
  - May 11, 18, 25

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

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

- **Security Role Mapping, Member Decisions on Primary Responsibilities**

- **Data Cleansing**

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

![SSO Menu](image)

**Applications you have access to**

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<th>UIN</th>
<th>ADLOC</th>
<th>Last Logon</th>
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<td></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

- **11 Classroom Courses**
  - 21 Hours
  - 3.5 Days

- **5 eLearning Courses**
  - 4.5 Hours

- **90 Practice Simulations**
  - 7.5 Hours

Managers

- **8 eLearning Courses**
  - 6 Hours

- **12 Practice Simulations**
  - 1 Hour

HR Departmental Processors / Liaisons

- **7 WebEx Courses**
  - 9.5 Hours
  - 5 Weeks

- **2 eLearning Courses**
  - 2 Hours

- **50 Practice Simulations**
  - 4 Hours

Employees / Retirees (optional)

- **2 eLearning Courses**
  - 2 Hours

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

- **9/18 General Awareness**
- **10/23 Targeted Awareness & Hands-On Skills**
TAMU Drop-in Learning Labs: November 2017

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
How Are We Doing – Trends We Noticed

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

Ongoing Communication

- Monthly meetings between project team and member representative(s)
- Monthly member updates
  - TAMU HR Open Forums
  - HR Liaison Network News
  - TAMU training development
- Regular web updates
  - Employees.tamu.edu/workday
  - YouTube channel (subscribe)
  - workday.tamus.edu
  - News You Can Use (subscribe)

Project Work

- Finish System Integration Testing
- Start Payroll Compare Testing
- Continue to clean up data
- Continue mapping Security Roles
- Continue developing training
- Our readiness activities (members)
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>
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<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 in the next paycheck</td>
<td>Withdraw at any time; receive held back pay in the next paycheck</td>
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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

The Word On Workday

April 2017

Securing Our Information

Workday’s cloud-based system is delivered with world-class infrastructure, policies and procedures to ensure that our data is protected. The cloud reduces our dependence on custom software development and ensures that we are always on the current version of Workday with regular upgrades twice a year. Security threats and risks are mitigated through strong internal controls and a comprehensive security program designed to ensure the protection and integrity of personal data.

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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