Welcome to a New Workday!

TAMU Monthly Workday Open Forum
Thursday, October 19, 2017
Countdown to Workday!

Sun, December 17, 2017  12:00 AM

59  days remaining
AGENDA

• Texas A&M Change Team
• Security Roles
• Workday Resources
• Preparing for Go Live
• Q&A Review
Meet the Texas A&M Change Team

Dr. Barbara Abercrombie
Danny Grimes
Jim Nachlinger
Mary Schubert
Laura Dohnalik
Barbara Bayer
Brandy Kosh
## Security Roles

<table>
<thead>
<tr>
<th>Department Level Roles</th>
<th>Core / Central Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Absence Partner</td>
<td>• Benefits Partner</td>
</tr>
<tr>
<td>• HR Contact</td>
<td>• Compensation Partner</td>
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<td>• I-9 Processor</td>
<td>• Faculty Partner</td>
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<tr>
<td>• Recruiting Coordinator</td>
<td>• Graduate Studies Partner</td>
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<tr>
<td>• Talent Analyst</td>
<td>• HR Partner</td>
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<td>• Timekeeper</td>
<td>• Payroll Partner</td>
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<tr>
<td>• Manager</td>
<td>• Recruiting Partner</td>
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<tr>
<td>• Cost Center Approver</td>
<td>• Retiree Partner</td>
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<tr>
<td>• Department Head</td>
<td>• Workers’ Compensation Partner</td>
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<td>• Safety Partner</td>
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<td>• Talent Partner</td>
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</tbody>
</table>
Security Role Changes

• Submit to Laura Dohnalik (ldohnalik@tamu.edu) by Wednesday, October 25
  – Change requests after October 25 may not be available at Go Live

• Post Go Live
  – Change request process will be communicated through HR Liaison Network News
Workday Resources

• **Workday Help**
  – Single Sign-On Menu
  – [sso.tamus.edu](http://sso.tamus.edu)

• **Workday & You**
  – Human Resources & Organizational Effectiveness
  – [employees.tamu.edu/workday/](http://employees.tamu.edu/workday/)
# Workday Help – Get Started / Crosswalks

<table>
<thead>
<tr>
<th>Crosswalk</th>
<th>Target Audience</th>
<th>Development complete</th>
<th>Available on Workday Help</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA</td>
<td>Core</td>
<td>Aug 18</td>
<td>NOW</td>
</tr>
<tr>
<td>iBenefits</td>
<td>Employees</td>
<td>Sep 1</td>
<td>NOW</td>
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<tr>
<td>HRConnect</td>
<td>Employees</td>
<td>Sep 1</td>
<td>NOW</td>
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<tr>
<td>TimeTraq</td>
<td>Employees</td>
<td>Sep 1</td>
<td>NOW</td>
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<tr>
<td>LeaveTraq</td>
<td>Employees</td>
<td>Sep 1</td>
<td>NOW</td>
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<tr>
<td>BPP</td>
<td>Various</td>
<td>Nov 1</td>
<td>Mid-November</td>
</tr>
<tr>
<td>Monthly Payroll</td>
<td>Department Heads</td>
<td>Nov 1</td>
<td>Mid-November</td>
</tr>
<tr>
<td>Reports</td>
<td>Various</td>
<td>Nov 1</td>
<td>Mid-November</td>
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</tbody>
</table>
Workday Help – Use Workday / Job Aids

**Browse by Functional Area**
- Benefits
- Dept Head
- HR
- Onboarding
- Payroll
- Recruiting
- Time & Absence
- All Job Aids

**Browse by Role**
- Workday Basics
- Faculty / Staff
- Managers
- Retirees
- Student Workers
- All Job Aids
Launch Resources

Workday Help
https://sso.tamus.edu

Workday & You
employees.tamu.edu/workday
Explore Workday:
Manager Navigation, Inbox and Delegation
Why We Love Workday Videos

Yale University
https://www.youtube.com/watch?v=Og_ICzwr0Dw

Georgetown University
https://www.youtube.com/watch?v=GE3DjB2h4iE

Broward College
https://www.youtube.com/watch?v=mNPVhMvCXb8&list=PLH6Be9QWI1Ez6nMITMCK-NJZz6TwddwCM&index=27

The Ohio State University, University of Rochester, Vassar College
https://www.youtube.com/watch?v=K4MPUXEBT7U&list=PLH6Be9QWI1Ez6nMITMCK-NJZz6TwddwCM&index=23
Preparing for Go Live

December 17, 2017
Monday, November 20

- **Canopy EPA**: All EPAs frozen for monthly employees
- **Monthly Payroll (eBVDs)**: Monthly payroll becomes read-only after last payroll submitted

*(NOTE: submit EPAs to Payroll Services no later than noon on Friday, November 17 to have the best opportunity for the EPA to complete by 11/20)*

Tuesday, November 21

- All activity entered in BPP must be dual entered in Workday
- **HRConnect**: Read-only for all activities
- **iBenefits**: Create new employee process frozen
Cutover Period: November 21 – December 19

Friday, December 1
- **iBenefits**: Evidence of Insurability process frozen

Wednesday, December 6
- Workday soft launch
- Begin catch up transactions for Core security roles

Friday, December 8
- **iBenefits**: Modify / submit new employee benefit elections is frozen
- **iBenefits**: Beneficiary updates frozen
- **iBenefits**: Dependent verification frozen
Cutover Period: November 21 – December 19

Wednesday, December 13
- **LeaveTraq**: Read-only; leave entered in Workday beginning December 17

Sunday, December 17
- **Go Live for all employees!**
- Biweekly employees begin entering time in Workday

Monday, December 18
- **Canopy EPA**: All EPA entries frozen
Tuesday, December 19

- **TimeTraq**: Read-only after the last workstation has submitted payroll
- **BPP**: All BPP screens frozen (BPP screens for month end and year end reporting will be available until January 26)
- **BPP Screens Available in FAMIS**:
  - FAMIS screen 723 replaces BPP screens 308, 310, 403, 408, 409, 415, 417, 418, 419, 421, 424, 480
  - FAMIS screen 724 replaces BPP screen 309 AA table
Processing During the Cutover Period

• New Hires/Transfers
• Terminations
• Other Changes
PATH Transition Timeline

• Position Descriptions (Staff)
  – PATH actions approved on existing PINs by *November 6 or 7* (previously announced date was October 27) will transition to Workday
  – PATH actions completed after the data snapshot date will have to be re-entered into Workday after it launches
  – New positions without a BPP PIN will require Workday data entry after launch
• Postings (Staff)
  – Applicants and Postings will **not** migrate from PATH to Workday
  – Hire process options during transition
    • Select hire from PATH applicant pool, or
    • Wait until Workday to post
Workday Training

• General Awareness and Skills training based on security roles
  – Assignments made in TrainTraq
  – HR Departmental Processors / Liaisons complete eLearning courses and instructor-led WebEx sessions
  – Managers complete eLearning courses (new assignments will be released October 23)

• All employees encouraged to complete
You MUST register for a session even if…
# October Training Schedule

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<th>SUN</th>
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**Awareness Training Continues**

| 8   | 9   | 10   | 11  | 12  | 13  | 14  |

**Awareness Training Continues**

| 15  | 16  | 17   | 18  | 19  | 20  | 21  |

**Awareness Training Continues for Core, Managers and View Only**

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**Core Skills: TAMUCT, TAMUCC, TAMUSA, TAMUG, TAMU 1, WTAMU**

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<tr>
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**Core Skills: AgriLife, PVAMU, Tarleton, TEES, TEEX, TAMU 2**

**Skills Training Continues for Managers**
# November Training Schedule

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<td>Safety Incident WebEx Payroll Deep Dive</td>
<td>FAMIS</td>
<td>Prep Budget</td>
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<td>Core Skills: TAMUC, HSC, TAMIU, TTI, TAMU 3, 4</td>
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<td></td>
<td>Payroll Deep Dive Data Warehouse Updates</td>
<td>FAMIS</td>
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<td>HROs Follow up on Incomplete Training</td>
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What About Classroom Training?

- Classroom training limited to central administrator roles
  - Begins October 24

- HROE Professional Development technology trainers and SMEs will receive special training in November
  - Train-the-trainer model
User Support

• Texas A&M Workday Operations Team
  – Workday Warriors
  – Workday Mentors
  – Workday Coaches
  – Workday Support
  – Workday Gurus

• Coming Soon
  – Dedicated website (workday.tamu.edu)
  – Dedicated email (workday@tamu.edu)
  – Dedicated hotline
Will Sick Leave Pool be tracked in Workday?

• Sick pool hours will be handled in Workday similar to how it is handled today (tracking and usage).
• There is a separate time off plan for sick pool hours, the hours will be "granted" to employees to use etc.
• Placing a certification on an employee makes them eligible for the plan (new process).
  – involves the Absence Partner clicking on “add” under certification, choosing the certification from the drop down list and adding dates as appropriate
The current Budget Process utilizes an excel worksheet, which is uploaded to BPP. Will we still have excel worksheet uploaded to Workday?

- During the normal Phase II budget cycle, the awarding of merit and other base salary changes will be processed directly in the Workday application through the Merit Business Process.
- There will also be an opportunity to award one-time, or lump sum, merit in Workday during this process.
- Other changes formerly done through the old merit template such as title changes, percent effort changes, ADLOC, etc. can be made directly in Workday, but outside of the merit cycle.
How does the Budget Prep cycle work in Workday?

• A spreadsheet upload will be available to process costing allocation changes during Phase II.
• These source account changes were previously processed through the merit template or on Screen 52 in BPP.
• The Budget Office will provide more detail and training on the costing allocating template as we approach the FY 2019 Phase II cycle.
Will there be a setting in Workday that will notify departments when a student is dual employed? Will it take the place of the form?

- You will be able to see that an employee is dual employed. However, the Add Additional Job business process doesn't have all information for HR to review the potential overtime requirements of the additional position.
- The Dual Employment Agreement form will continue to be required as supporting documentation for the Workday process at Go Live.
- The form may be updated to include reference to Workday and how to use in support of the Workday process.
- HR will continue to evaluate the need for the form after Go Live and determining if the information in Workday will allow them to verify the FLSA compliance.
We have been told that Vacation Payouts will be calculated and processed through Workday. Does this mean that the form will no longer be needed?

• Yes, forms will still be required for Vacation Payouts.
• The reason is that the one-time payments in Workday cannot be split funded as it only allows you to enter 1 account.
• In addition, central payroll does a 5 year look back to see how the vacation payout should be funded across our ACAP accounts, which the departments would not know at the time of initiating the one-time payment.
Will payroll continue to post to an account that is in deficit?

- Nothing is changing regarding to posting payroll to accounts that are deficit; it will continue as is today.

- One change to be aware of is that employees that do not have an identified source line for a pay period will post to a central account. Those transactions will be manually transferred through accounting to the correct accounts.
Questions?

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