Workday@Penn will fully or partially replace many of Penn’s “legacy systems.”

Unifying these systems will work to simplify and standardize Penn’s end-to-end processes related to managing people and supporting core HR functions for “hire to retire” and beyond.

**Workday@Penn Wave 1** includes:
- Core HCM
- Academic Unit
- Payroll
- Benefits
- Compensation
- Time/Attendance
- Absence
- Recruiting
- Onboarding

*In 2020, Wave 2 will include:* Performance, Talent Management, Learning, Effort Reporting
Workday will fully or partially replace many “legacy systems.” Unifying these systems will work to simplify and standardize processes for all Penn employees.

<table>
<thead>
<tr>
<th>Legacy Systems (fully or partially replaced):</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Payroll</td>
</tr>
<tr>
<td>• PennWorks (Core and Additional Pay)</td>
</tr>
<tr>
<td>• eTimesheets</td>
</tr>
<tr>
<td>• U@Penn Apps</td>
</tr>
<tr>
<td>• PeopleAdmin Staff &amp; Faculty</td>
</tr>
<tr>
<td>• HR Manager</td>
</tr>
<tr>
<td>• HR Application Portal</td>
</tr>
<tr>
<td>• Requisitions</td>
</tr>
<tr>
<td>• Faculty Information System (FIS)</td>
</tr>
<tr>
<td>• PennPeople</td>
</tr>
<tr>
<td>• Additional local systems and applications</td>
</tr>
</tbody>
</table>
**Workday@Penn Project Update and Timeline**

**2017**
- Oct-Dec

**2018**
  - Architect
  - Configure & Prototype
  - Test
  - Deploy
  - Prototype 1
  - Prototype 2
  - Prototype 3

**2019**
- J F M A M J

### Architect Activities
- Document business requirements and processes
- Design business processes in Workday

### Configure & Prototype Activities
- Build data conversions
- Prototype technical infrastructure
- Legacy Data Cleanup
- Playback sessions
- Town halls and engagement activities

### Test Activities
- End-to-end technical testing
- UAT testing
- Payroll testing
- Develop training materials

### Deploy Activities
- Prepare for go-live
- Execute system and business cutover to Workday
- Training

---

**Go-Live**

*In 2020, Wave 2 will include: Performance, Talent Management, Learning, Effort Reporting*
Companion projects are needed to cover functionality outside of Workday’s scope and therefore outside applications are needed to integrate into our Workday solution.

Key Accomplishments:

- Held first monthly meeting and scheduled recurring meetings with sponsors.
- Change team met with companion project leads to assess change management, communication, and training needs.
- Started weekly meetings with the functional team to review any necessary questions, risks, impacts and dependencies with the HCM Workday project.
Solution Center Update

Tel 215-898-7372
Email hcmsolutioncenter@upenn.edu
Website
www.hr.upenn.edu/hcm/penn-employee-solution-center

New Website Coming September 24!

Hours: 9:00 am - 5:00 pm ET, Mon–Wed, Friday
        9:00 am - 4:30 pm ET, Thursday

Questions on health and welfare benefits and from retirees or on retirement will continue to be serviced by PENN BEN and PENN RET during this initial phase although the Solution Center will help transfer questions to those service centers.

Penn Benefits Center: 1-888-PENN-BEN, 1-888-736-6236
Retirement Call Center: 1-877-PENN-RET, 1-877-736-6738

Vision

- Build a hub providing answers to the Penn community
- Provide faculty and staff with optimal customer service and timely resolutions
- Build an integrated knowledge base for the Penn community
- Deliver an irresistible customer experience

Current Areas of Expertise

- Compensation
- Leave Administration
  PTO, FMLA, Disability Leaves
- Payroll
  Questions about changes in amount, errors in payment, pay dates
- Recruitment
- Retiree Email Support
- Staff and Labor
  System usage, policy and procedure
- Time Reporting
  eTime, PTO system
- Tuition Benefits
- All Penn community questions welcomed and addressed
The Workday@Penn project team will provide timely communications on topics that align with project status and updates, and use multiple channels to cascade information reaching a variety of levels of stakeholders.

- **Outbound Communication**: a variety of Change Impact topics will be communicated through the redesigned bi-weekly newsletter.
- **Stakeholder Engagement**: appropriate stakeholders will be asked to support project efforts that include data clean up, security role assignments, and user acceptance testing.
- **Events**: select stakeholder groups will be asked to attend various presentations and trainings throughout the Workday@Penn implementation process. Registration instructions and event details will be provided in advance of each event. Dates TBA.
Legacy Data Cleanup Overview

Legacy Data Cleanup is an effort to resolve a number of data conversion issues originating in Penn’s legacy data systems, improve the quality of data in Workday, and make your job easier once we go live.

Data Cleanup in progress:

<table>
<thead>
<tr>
<th>Type</th>
<th>Owner</th>
<th>Process to Complete</th>
</tr>
</thead>
</table>
| Manual Cleanup      | Data is reviewed and updated manually by departmental users – workers who have access to review and update legacy data | • The Workday@Penn Project team will contact users and provide instructions for cleanup (cycles of cleanups)  
• Business Objects reports will be provided to support cleanup  
• Users will correct data as requested |

Data Cleanup completed:

| Systematic Cleanup | Data was managed and updated systematically by PennWorks support and Workday project team | • PennWorks support and Workday project team completed batch updates to data in PennWorks and created validation rules to prevent future issues in PennWorks and U@Penn apps |
There are a variety of legacy data cleanups items that require assistance from departmental users. Details and instructions will be provided, starting with higher priority items.

<table>
<thead>
<tr>
<th>Data Cleanup</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Annual Salaries</strong></td>
<td>In Workday, individuals will be paid based on their annual salary, not based on their distribution lines.</td>
</tr>
<tr>
<td><strong>Hours (Missing or Incorrect) vs. Salary</strong></td>
<td>Hours for all roles are required in Workday which drive FTE% and accurately represent the employee (full vs part time). Hours will also drive eligibility for benefits.</td>
</tr>
<tr>
<td><strong>Roles with No Salary</strong></td>
<td>If a PennWorks role does not contain a salary, it will cause an issue when converted to a Workday position.</td>
</tr>
<tr>
<td><strong>Disable Expired Roles</strong></td>
<td>Completing this action ensures that only records for active Student Workers and Temps will be brought into Workday,</td>
</tr>
<tr>
<td><strong>Faculty Admin Appt Old Data</strong></td>
<td>Some Faculty Admin appts have old distribution end dates but active job end dates.</td>
</tr>
<tr>
<td><strong>Unsalaried Employees (where Salary Key is “U”)</strong></td>
<td>Terminate employees who have not been paid in 18 months.</td>
</tr>
<tr>
<td><strong>Correct Role Title</strong></td>
<td>Role Title in PennWorks will be converted as the Business Title in Workday. If Role Title is not updated, Job Class Title will be converted to the Business Title.</td>
</tr>
</tbody>
</table>
Legacy Data Cleanup Next Steps

• Communication on Data Clean Up Initiative sent to Local Change Agent Leads (L-CALs) in the Change Agent Network (CAN) on September 5, 2018
  • Communication provided information about the Initiative, timeline, available resources, and action list
    • Information is housed on a page on the Workday@Penn Project Website (accessible behind PennKey).
• L-CALs were asked to take the following actions:
  • Review the materials housed on the Workday@Penn Project Website to understand each legacy data cleanup request
  • Determine if you need to involve other individuals in this activity to successfully make the requested updates, and involve them accordingly
  • Complete as much as possible by 09/22/2018 for the next data conversion and continue to monitor any similar updates that need to be made to your legacy data moving forward

If your L-CAL has already reached out to you for support, please actively work with them and additional stakeholders to complete the action list for your area.
If you have not received information, reach out to your L-CAL to determine how you can assist.
Introduction to Defining Compensation

**Definition**

- Compensation is **NOT** the actual wages in an employee’s paycheck
- Compensation consists of:
  - Base salary or hourly plan that an employee (not contingent worker) is eligible to earn
  - If applicable, one or more allowances, merit plans, or one-time payments
  - If applicable, period activity pay

**Business Processes**

- **Request Compensation Change**: To request a compensation change, outside the Change Job process
- **Request One-Time Payment**: To offer ad hoc payments, such as awards or tuition reimbursement
- **Propose Compensation**: To suggest a potential compensation rate as part of developing or updating an employee’s Compensation Package

**Compensation and Payroll**

In Workday, **Compensation and Payroll are decoupled**. A breakdown of this information will be forthcoming.

As reference, **Workday Payroll** controls and gives flexibility and insight to manage **organization-wide payroll**. Workday transforms the **hire-to-pay process** with a single HCM, benefits, compensation, time tracking, and payroll management system.
Current to Future State

Current

- All allowances are lumped into one earnings type of ALA
- Allowances are processed through Additional Pay or Distribution Line in PennWorks
- Requests for extra compensation processed through Additional Pay

Future

- Compensation Plans in Workday enable specific allowance plans for different types of allowances (i.e. car, cell phone, etc.)
- Allowances are processed through Request Compensation Change Business Process
- Ad hoc Payments are processed through One Time Payment Business Process
Job Catalogs

Job Catalog Structure

The Job Catalog structure shows how positions are organized within the organization and how information is organized to inform position management.

Position
The position a worker is hired into

Job Profile
A description that includes a Compensation Grade Profile and salary structure

Job Family
A collection of Job Profiles

Job Family Group
A collection of Job Families

Job Catalog Mapping

<table>
<thead>
<tr>
<th>Job Profile (formerly Job Class)</th>
<th>Legacy Grade (to be retired)</th>
<th>New Job Family</th>
<th>New Job and Grade Profile</th>
<th>Salary Range (unchanged)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMIN ASST B</td>
<td>024</td>
<td>Administrative Support</td>
<td>Administrative Assistant B</td>
<td>$16.89 to $28.72</td>
</tr>
<tr>
<td>ADMIN COORDINATOR</td>
<td>025</td>
<td>Administrative Support</td>
<td>Administrative Coordinator</td>
<td>$19.22 to $34.60</td>
</tr>
<tr>
<td>ADMIN, FACULTY AFFAIRS</td>
<td>028</td>
<td>Administrative Support</td>
<td>Administrator, Faculty Affairs</td>
<td>$57,379 to $109,020</td>
</tr>
</tbody>
</table>
Compensation Structure in Workday

**Compensation Framework**

*The compensation framework gives structure for how a worker’s total rewards is determined. It is composed of multiple compensation components that are determined for each worker.*

**Package**

A grouping of compensation guidelines and plans that Penn can assign to workers as a set. Packages provide a quick view of the eligible plans for a particular job or group of employees.

**Guidelines**

Compensation Grades and Grade Profiles

**Plan**

Assigns $ amounts to worker pay. This includes regular salary, allowances, and one-time payments.

**Compensation Package**

- **Guidelines**
  - Grade Profiles
  - Steps

- **Plans**
  - Salary / Hourly
  - Allowances
  - Merit
  - One-Time Payment

**Element**

(Link to Payroll)

**All Compensation Plans are automatically fed to Payroll, accept merit, which is evaluated after initiation. Allowances are added to regular pay.**
Period Activity Pay is the **Workday functionality** that allows the payment of workers for **activity-based or time constrained activities**.

**Definition**

**Uses**

Period Activity Pay:
- Is **different from traditional** compensation plans
- Has **greater flexibility** for total payment, timing and end dates
- Has the ability to **specify payments** for summer or evening teaching and seasonal research compensation
Building the Future of Work at Penn

Town Hall - 10/11 open to all

Playback Session — date pending

Workday@Penn