Association of Business Administrators
3/19 Meeting

Julie Shuttleworth, HCM Program Director, Functional Lead
Trudi Sippola, HCM Project Lead, Change Management
## Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Facilitator</th>
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<tbody>
<tr>
<td>Workday Project Update</td>
<td>Julie Shuttleworth</td>
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<tr>
<td>Parallel Payroll Testing</td>
<td>Julie Shuttleworth</td>
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<tr>
<td>Workday Change and Training</td>
<td>Trudi Sippola</td>
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workday.upenn.edu/workday-advantages
Coming July 1, 2019
It is a University-wide effort to improve how we manage the broad range of faculty affairs, human resources, payroll, and related processes.

What is the Human Capital Management Transformation Initiative?

Goals

- Transform Service Delivery
- Integrated Modern System
- Simplified business processes

Expected Outcomes

- Official System of Record
- Increased Efficiency
- Improved Data and Decision-making
Workday@Penn Project Update and Timeline

**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

*In 2020, Wave 2 will include:* Performance, Talent Management, Learning, Effort Reporting

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**Prototype 1**
**Prototype 2**
**Prototype 3**

End-to-End Technical Testing
User Acceptance Testing (UAT)
Training

Go-Live

**2017**
Oct-Dec

**2018**
J F M A M J J A S O N D J F M A M J

**2019**

**July 2019**
Payroll Parallel Testing Scope

What will be tested?
- Earnings Calculations including Work Study
- Deduction Calculations – Employee/Employer including Benefits Deduction
- Taxes
- Withholding Orders
- Gross to Net
- Taxable and Subject Wages
- Compare Summary Totals

The following tasks are performed during the parallel testing:

<table>
<thead>
<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Identify differences between Legacy and Workday, reconcile variances and document results</td>
</tr>
<tr>
<td>Evaluate impacts of identified differences to employees and/or the organization</td>
</tr>
<tr>
<td>Modify Workday payroll configurations/data and retest (if applicable to correct discrepancies)</td>
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<tr>
<td>Share results with Change Management/Training team to support employee communications of known variances between Workday &amp; the Legacy payroll systems</td>
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<tr>
<td>Identify and Log data any conversion issues to be resolved by conversion or data cleanup (when applicable) for next data conversion.</td>
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Payroll Parallel Testing Cycles

- There will be two Parallel test cycles.
- Each cycle will focus on weekly and monthly payrolls, and will include new, converted data.
  - Findings in the first cycle will drive scope and reconciliation activities for the following cycle.

<table>
<thead>
<tr>
<th>Cycle</th>
<th>Timeframe</th>
<th>Acceptable Threshold</th>
<th>Scope</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parallel 1</td>
<td>• Five weeks</td>
<td>90% Match</td>
<td>• Earnings, Deductions, taxes reconciliation for all employees</td>
</tr>
<tr>
<td></td>
<td>• 04/01/2019 to 05/03/2019</td>
<td></td>
<td>• Reconciliation of regular and overtime earnings, and deductions</td>
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<td>• Hours reconciliation for the certain shift differentials</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>• Kronos time interface (FRES)</td>
</tr>
<tr>
<td>Parallel 2</td>
<td>• Four weeks</td>
<td>95% Match</td>
<td>• Earnings, deductions and taxes reconciliation excluding known differences and Exclusion List</td>
</tr>
<tr>
<td></td>
<td>• 05/06/2019 to 05/31/2019</td>
<td></td>
<td>• Pay check comparisons for sample set of employees between legacy and Workday</td>
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<td></td>
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<td></td>
<td>• Validation of Accumulators (e.g. Work Study, YTD – 1000 hours)</td>
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<td></td>
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<td>• Retroactive and Late pays</td>
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</tbody>
</table>
Managing Academic Appointments in Workday
Managing Academic Appointments in Workday

The following concepts will be fundamental to understanding management of Academic Appointments in Workday. Each topic will be covered in depth during formal Workday training.

- **Academic Units**: Organizational structures in Workday within which Academic Appointments are managed.
- **Academic Appointments**: Key attributes of Academic Appointments, including track, rank, tenure, etc.
- **Academic Affiliates**: Key attributes of Academic Affiliates, and how appointments for non-employees are managed in Workday.
- **Interfolio**: A companion project that will include academic management processes not covered by Workday.
What are Academic Units in Workday?

Academic Units are an organization type in Workday that holds Academic Appointments.

Academic Units and Supervisory Organizations maintain different data about academic workers and affiliates:

<table>
<thead>
<tr>
<th>Academic Unit</th>
<th>Supervisory Organization</th>
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<tbody>
<tr>
<td>Academic Units manage Academic Appointment information, including the <strong>rank and tenure</strong> of an academic worker or an affiliate</td>
<td>Supervisory Organizations manage workers and job/position data, including <strong>compensation and payroll</strong> data</td>
</tr>
</tbody>
</table>
How are Academic Units Organized in Workday?

While Supervisory Organization hierarchically builds the employee to manager structure, Academic Units and Academic Unit Hierarchy builds the University’s Academic Structure.

- **Academic Units** are centers, departments, or institutes
- **Academic Unit Hierarchies** are a grouping of academic units and define divisions, schools, and colleges

![Diagram of University of Pennsylvania academic structure]

- **University Level**
  - University of Pennsylvania

- **School Level**
  - School of Arts & Sciences
  - Law School
  - The Wharton School
  - (+10 more)

- **Departments, Centers, Institutes**
  - Center for Asian Law
  - Center for Tax Law and Policy
  - Graduate Program
  - (+12 more)
How are Academic Units Organized in Workday?

A Supervisory Organization may be, but is not always, assigned to an academic unit.

- A Supervisory Organization-Academic Unit relationship could be one-to-one (1:1) or many-to-one.
- A Supervisory Organization may only be assigned once to an Academic Unit.

Supervisory Organization(s) | Academic Unit
--- | ---
SAS-English | Cinema Studies
LAW-Business Affairs
LAW-Criminology
LAW-Grad and Professional Programs
LAW-Law Administrative Services
LAW-Public Interest Center | Law School

Many to 1

1 to 1
Who Has Access To Academic Appointment Data?

Academic Units and hierarchies drive **Academic Unit security roles**, which determine who has access to Academic Appointment business processes in Workday.

### Academic Unit Security Roles

- **Academic Partner** – Key *initiator* for academic appointment processes
- **Academic HR Partner** – Key *reviewer* for academic appointment processes
- **Office of the Provost**
- **Academic Chair**
- **Academic Dean**
- **Academic Provost**
- **Academic President**

- Users who have access to appointments for an entire school are assigned at the **Academic Unit Hierarchy**
- Only individuals holding a security role in an academic unit may complete Academic Appointment business processes
What is an Academic Appointment?

Academic Appointments track an individual’s academic career with the university.

Appointment information:
- Track and Rank, Title, etc.

Tenure information:
- Tenure eligibility, tenure home, status, and dates

Appointment information:
- Current appointments and Future Dated Appointments
What are Track Types and Ranks?

**Track types** are configured for eligibility for tenure, promotion, sabbatical, and instruction.

- **Ranks** associated with a particular track type will be available as options when assigning an Academic Appointment.
- Track type category is the means to categorize track type (E.g., Administrative, adjunct).

**Example:**

- **Track Type Category:** Standing Faculty
- **Track Type:** Tenure
- **Rank:** Professor
What is an Academic Affiliate?

Academic Affiliates perform academic functions at Penn but are not employees

- Key attributes of an Academic Affiliate:
  - Not considered an employee of the institution
  - Do not receive compensation, pay, or benefits
  - Self-service access is limited
  - Only has an Academic Appointment – not a member of a supervisory organization
- Affiliates are created by through the “Add Academic Appointment” process only

Academic Affiliate Track Examples

- Visiting
- Adjunct
- Clinical
- Wistar
What Will be Done in Interfolio vs. in Workday?

Interfolio is a companion project to Workday, launching this spring, that will provide various academic management functions.

**Interfolio**

- **Academic recruitment** (job posting/ad creation, application processing, job offer)
- **Committee review**, decision, and record of decision for promotion, hire, and tenure
- Collection of **required documents** and **approval** workflows for:
  - Appointments
  - Reappointment
  - Promotion
  - Tenure

**Workday**

- **Hiring** of academic workers
- **Approval/processing** of many FIS actions (e.g., Named Professorships, extensions)
- **Standard reporting** for Academic Appointments, with custom reports possible
- **System of record** for academic worker data (Academic Appointments, administrative appointments, payroll, compensation)
Workday Change and Training
Policy Management Update

Work Plan

- Level 1
  - Current policy no change
  - Minor changes to wording and terminology from legacy system references to Workday

- Level 2
  - Current policy changing in terms of content to align with Workday implementation
  - Needs re-write

- Level 3
  - Develop new policy that does not currently exist but is needed
  - Vet for approval

Target: to complete in coordination with Training
Training Timeline

Workday@Penn Implementation Training Timeline

<table>
<thead>
<tr>
<th>Test</th>
<th>Deploy</th>
<th>Support</th>
</tr>
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<tbody>
<tr>
<td>Feb’19</td>
<td>4/29</td>
<td>Jul’19</td>
</tr>
<tr>
<td>Mar’19</td>
<td></td>
<td>Aug’19</td>
</tr>
<tr>
<td>Apr’19</td>
<td></td>
<td>Ongoing</td>
</tr>
<tr>
<td>May’19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun’19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul’19</td>
<td></td>
<td></td>
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<tr>
<td>Aug’19</td>
<td></td>
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</tbody>
</table>

- Continue to Build & Refine Training Materials
- Establish Training and Delivery Logistics
- Publish Schedule & Send Invites
- Execute Training Program
- Assess Training & Adopt As Needed
- Note: The timeframes of these major activities are estimates and are subject to change.
Training communications will be conducted through go-live to inform and remind learners about training. Principally, communications will provide reminders of key dates and activities.

**Communication Channels & Timeline:**

**Email**
Emails will be sent to announce key dates, links, and training activity descriptions. These communications will also direct recipients to the Training website.

**Website**
The website will have the Training calendar, logistics information, FAQs, and contact information. We will direct learners here through the direct emails.

**Knowledge Link**
Knowledge Link will send automated registration links and reminders for those assigned to classes. The Training team will send targeted emails and that information will also be available on the Training website.
Training Strategy: Curriculum

Security roles determine the appropriate type of training that members of the Penn community will need to effectively use Workday. Tip sheets, practice labs, and office hours will complement ILT and vILT training opportunities for these key users.

**Pre-Work:**
High impact users who will be taking additional training courses will complete an introductory overview course – Welcome to Workday (25 min. Webinar)

**Training Course(s):**
Depending on the security role, end users will complete their required and recommended courses

<table>
<thead>
<tr>
<th>Security Role</th>
<th>Course Title(s) – time estimates</th>
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<tbody>
<tr>
<td>HR Analyst</td>
<td>• Workday HCM Fundamentals (8 hr ILT)</td>
</tr>
<tr>
<td>Budget Partner</td>
<td>• Workday for Budget Partners (4 hr ILT)</td>
</tr>
<tr>
<td>Recruiting Coordinator</td>
<td>• Workday for Recruiting Coordinators (4 hr ILT)</td>
</tr>
<tr>
<td>Academic Partner &amp; Academic HR Partner</td>
<td>• Managing Academic Appointments in Workday (4 hr ILT)</td>
</tr>
<tr>
<td>Timekeeper</td>
<td>• Workday Time Tracking – Basic (1 hr vILT)</td>
</tr>
<tr>
<td></td>
<td>• Workday Time Tracking – Advanced Scenarios (1 hr vILT)</td>
</tr>
<tr>
<td></td>
<td>• User Guide (Union Workers and Exception Time)</td>
</tr>
<tr>
<td>Manager</td>
<td>• Manager Self Service 101 (2 hr vILT)</td>
</tr>
<tr>
<td></td>
<td>• Manager Self Service 102 (2 hr vILT)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Recommended:</strong> Workday Time Tracking – Basic (1 hr vILT)</td>
</tr>
<tr>
<td>Employee As Self</td>
<td>• Workday Self Service (30 min. webinar)</td>
</tr>
<tr>
<td></td>
<td>• Time Entry (30 min. webinar)</td>
</tr>
</tbody>
</table>

Additional trainings will be provided for HR Executive, HR Partner, Recruiter, Compensation Partner, Absence Partner, Benefits Partner, and Report Viewers as needed.
Workday@Penn Project Update and Timeline

2017
Oct-Dec  J  F  M  A  M  J  J  A  S  O  N  D

2018
J  F  M  A  M  J  J  A  S  O  N  D  J  F  M  A  M  J

2019

Architect  Configure & Prototype  Test  Deploy

July 2019

GO-LIVE  July 1, 2019

Deployment Activities – Preparing for Workday@Penn

Workday@Penn Training
- End-User Training begins 4/29/2019 for high impact users
- Self-service online optional
- Blended learning via instructor led classroom, virtual learning and online webinars and tip sheets.

Cutover
- Cutover activities ensure a smooth transition from legacy systems to Workday.
- Detailed information and procedures will be shared in the spring.

Support Model
- Prepare for Go-Live via Workday website, newsletters and presentations
- Use Day 1 checklist
- Practice Labs, Office Hours
- Solution Center
- Ongoing team support
What to Expect

Workday@Penn is a forward looking solution and illustrates continuous improvement of our systems and processes. Know everything will not be perfect Day 1.

**Pennworks**
- Penn People
- PeopleAdmin
- HR Manager
- Faculty Information Systems (FIS)
- UMIS
- Local Applications
- eTimesheets
- School Systems

**Stabilization Period with Ongoing Support and Learning:**
There will be a necessary adjustment period during the transition to Workday as Schools/Centers refine their thinking about the set up of their supervisory organizations and security roles. Initial adjustments and fine-tuning is expected for the first 90 days to the first six months. Ongoing responsive service and support for the Penn community is available.
You are able to…

• Subscribe or read current or archive issues
• Review event recordings and Q&A, core concepts, glossary
• Find instructions for Workday preparation

Communications
HCM Flash Newsletter
Workday Advance Newsletter

Engagement
Change Agent Network
Events and Activities
Core Concepts
Glossary
HCM Primer

Toolbox
Key Business Changes
Supervisory Org Development
Hierarchy Tool
Security Roles
Legacy Data Cleanup
Change Freeze