## Workday@Penn Project Update and Timeline

<table>
<thead>
<tr>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Architect</td>
<td>Configure &amp; Prototype</td>
<td>Test</td>
</tr>
<tr>
<td></td>
<td>Prototype 1</td>
<td>Prototype 2</td>
</tr>
<tr>
<td></td>
<td>Prototype 2</td>
<td>End-to-End Technical Testing</td>
</tr>
<tr>
<td></td>
<td>Prototype 3</td>
<td></td>
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</tbody>
</table>

### 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*

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

**July 2019**
End to End (E2E) is the full testing of all business requirements in Workday including the integration to all connected Penn backend systems. We will execute E2E in two cycles, with the goal of ensuring all scope items are tested successfully.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>What is Tested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Testing all system configurations, business processes, integrations from start to finish.</td>
<td>All functional configurations and BPs, all core integrations, reports, worklets, and security configurations in scope for go live</td>
</tr>
</tbody>
</table>

**Cycle 1**
- The goal of cycle 1 will be to execute all integrated business processes
- Utilize a set of detailed business process test scenarios
- Run and validate all reports and integrations
- Remediate all Critical defects
- Regression test any changes made

**Cycle 2**
- The goal of cycle 2 will be test/retest all the integrated business processes, integrations and reports that were not completed/closed in cycle 1
- Cycle 2 will use the same detailed business process test scenarios
- All Critical defects must be closed
Live Demo – Cost Allocations
Legacy Data Cleanup Update

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.

**Completed**

- Data was managed and updated systematically by PennWorks support and Workday project team

**In Progress**

- Data is reviewed and updated manually by *departmental users* – workers who have access to review and update legacy data
Business Objects Queries

Role Review - Home ORG 0000 - 9999

<table>
<thead>
<tr>
<th>Name</th>
<th>Penn ID</th>
<th>Full Time</th>
<th>Emp Status</th>
<th>Home ORG</th>
<th>Home ORG Desc</th>
<th>Last Pay Processed Date (CP)</th>
<th>Job Class</th>
<th>Job Title</th>
<th>Emp Type</th>
<th>Emp Type Desc</th>
<th>Role ORG</th>
<th>Term Start Date</th>
<th>Term End Date</th>
<th>Role Annual Salary</th>
<th>Role Hours</th>
<th>Role Appt Pay</th>
</tr>
</thead>
</table>


Business Objects Query

Role Review - Home ORG 0000 - 9999

<table>
<thead>
<tr>
<th>Name</th>
<th>Pern ID</th>
<th>Full Part Time (EMP)</th>
<th>Emp Status</th>
<th>Home ORG</th>
<th>Home ORG Desc</th>
<th>Last Pay Processed Date (DP)</th>
<th>Job Class</th>
<th>Job Title</th>
<th>Emp Type</th>
<th>Emp Type Desc</th>
<th>Role ORG</th>
<th>Term Start Date</th>
<th>Term End Date</th>
<th>Role Annual Salary</th>
<th>Role Hours</th>
<th>Role Appt Pay</th>
</tr>
</thead>
</table>

**Employee Type** | **Employee Type Description**
--- | ---
1 | Exempt salaried, Professional, administrative, and faculty (monthly paid)
2 | Non-Exempt salaried, support staff (weekly paid)
3 | Non-Exempt hourly, part-time, temporary, and occasional workers and full-time staff members of certain bargaining units (weekly paid)
4 | Exempt salaried student (monthly paid)
5 | Non-Exempt hourly student (weekly paid)
6 | Exempt salaried, Professional, administrative, and faculty (monthly paid Executive)
8 | Education Fellowship recipient. These appointments are also referred to as stipends (monthly paid)
9 | No employer/employee relationship (retired or disabled personnel, post doctoral trainees, etc, monthly paid)

- Double check the Home ORG and Role ORGs. Do they match? If the home ORG doesn’t match the Role ORG, please transfer the Home ORG to the Role ORG unless there is a good reason for it to be different.

- Look to see if the term end date has passed for any roles. Please disable the roles which have a term end date which has passed.

- Sort or filter by different Employee Types
• Determine if they have had a pay processed or will in the future. Should they be terminated?

• View their role hours to make sure they have hours. Double check to make sure student workers don’t have more than 20 hours on active roles. Per University policy 20 Hours is the maximum.
Workday Means Different Things for Different People

This presentation is focused on the Employee As Self role and self-service capabilities; however, Workday also has a number of tools for managing others.

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### Employee As Self

- Personalized homepage and workflow tools
- View your own information
- Change and manage personal information

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### Managing Others in Workday

Workday will provide key Penn users with greater access and ability to manage worker’s data. Multiple Workday components (or business processes) are a part of managing a worker’s lifecycle, but every lifecycle is unique to each individual worker. More information on this Workday functionality will be communicated in the coming months.

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Sample business processes in a worker’s life cycle include (but are not limited to):
Workday means… An Integrated System

Workday will fully or partially replace many “legacy systems.” Unifying these systems will work to simplify and standardize processes for all Penn users.

<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>
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<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>
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</tbody>
</table>
What Workday Means for Penn

**Integrated System**
Sign on to one system that integrates with many other systems and reduces time to perform work.

**Mobile Capability**
Use your mobile phone or tablet to access and manage information, anytime, anywhere.

**Self-Service**
Initiate actions using worklets and complete tasks right from your Inbox.

**Increased Visibility**
Quickly search for and find information about your co-workers in a unified system of record.

**Improved Workflow**
View statuses of initiated tasks and get notified immediately on completed tasks.

**Access to Personal Information**
Access and update your own data using worklets.
Targeted Newsletters

**HCM Flash**
Preparing for Workday@Penn

*HCM Flash* is intended for the casual Penn community member who wants high-level information. First issue on September 25. Subscriber list is the same as *HCM Update* – an opt in model for anyone in the University.

**Workday Advance**
Preparing HCM stakeholders for Go-live

*Workday Advance* provides robust information for HCM stakeholders. The first issue of *Workday Advance* is October 9. HCM stakeholder lists uploaded to a subscriber list – an opt out model, rather than opt in!

The two newsletters will alternate with each other on a biweekly basis so that each is monthly.

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**Workday@Penn Website**

Expanded navigation, rich content, and flexibility, intended for go-live and beyond.

https://www.workday.upenn.edu/

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**Solution Center Website**

Mobile friendly and clear explanation of employee use.

https://www.solutioncenter.upenn.edu/