P&S Workday Update

September 5, 2019

WorkCyte
Where Your Workday Begins

Finance Update Workday and ISD

Workday

- Improvements since July 1
    - Refining security roles to improve access
    - Streamlined/improved multiple business processes
- In-Progress Issues/Improvements
    - Correcting mapping of programs/cost centers
    - Adding job aides
    - FARM training for leadership has begun
    - Re-evaluating p-card processing in Workday
    - Significant transaction loads
    - CyBuy 36 of 41 suppliers in catalog
    - Working on job aides for faculty
    - Completion of payrolls on time and with minimal issues

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Improved Service Delivery

- Improvements since July 1

  - Changed business processes to improve efficiency

  - Collaborate with central offices for consistent transactions

  - Participate in departmental retreats, staff meetings, etc.

  - Established continuous training for specialists

  - Hired additional specialist in certain areas and reassigned specialists to help with backlogs

- In-Progress Issues/Improvements

  - Creating guidelines and continuous training for specialists

  - Streamlining business processes to reduce redundancy

  - Developing templates to assist campus

  - Establish priorities and protocols for resolving tickets

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Improved Service Delivery

- In-Progress Issues/Improvements (cont.)
  - Developing reports to assist with managing workload
  - Clarifying all roles within business process (PES, CCM, etc.)
  - Evaluating organization structure that balances customer service, specialty work, efficiency, and oversight
  - Participate in business process changes in Workday
- Concerns to be addressed
  - Correct balances, summer salary, and indirect costs for grants
  - Re-evaluate office space for specialists
  - Outline all business processes from beginning to end
  - Prepare training for basis computer skills
  - Create better business processes to assist faculty, PIs, etc.

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CIO/Tech Update
Collect Feedback
Facilitate HCM and FIN changes
Address technical issues

Your Recent Feedback

- Where to direct questions
  - E-mail
    - HR_delivery@, Finance_delivery@, Solution@
    - Workcyte_feedback @iastate.edu (new!)
      - For general feedback, concerns, frustrations (not for request of immediate service)
  - Phone
    - Service teams
  - Webpage- with videos, job aids, etc.
- Feedback after Service Now ticket closed
  - 'smiley face continuum' and open text

Your Recent Feedback – There's more

- Service Now Questions
  - How to see closed tickets
    - Prior logged tickets often have very useful information
  - Confusion between 'Resolved" and 'Closed'
    - You can 're-open' resolved, but not closed
- Business Process Issues
  - Need to see the whole business process
  - If student (or anyone) doesn't complete separation tasks – they are NOT separated!
  - (JMs need to know what hasn't been done)

Your Recent Feedback – even more

- When I report a problem, people believe that it is a problem with MY understanding or use – not the system

- We need better, more complete job aids

- Some business processes need refining/improving
  - How do we go about *changing* a bad process?

- Student workers
  - Manual entry – for hundreds of students
  - Reviewing time for hundreds of students
  - – we need to find a better way!

Your Recent Feedback – even more

- Access to data needed for job
  - FIN/HR – access to data 'on the other side'
- ISD specialists still need more training
- CCM approval of transactions
  - Volume for some is very, very high
- Department account reconciliations
  - Report showing all line item expenses?
- Posting to grants incorrect

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Your Recent Feedback -

- Internal job applications
  - Process concerns –
- CCM BUFA concerns
  - Specific questions on:
    - Costing allocations
    - Payroll
      - T&H card transactions
    - Others…

CIO/Tech Improvements since July 1

- Locations
  - Resolved issues with packages not having complete room information
- Find Functionality
  - Opened "Find" up for BUM/CCM/BUFA/CCFA roles to allow ability to directly search for specific financial transaction details
- Time Clocks
  - Increased the number of jobs available for users from 5 to 15
- Delegation Changes
  - Ability to delegate to anyone within the organization, previously limited to peers, superiors, sub-ordinates based on SupOrg
- User Labs
  - 1218 attendees including Faculty sessions

CIO/Tech Current Activities

- Identity Management
  - Syncing of Okta, Univ ID, NetID with Workday
  - Collaborating with UHR on department designators in ISU Directory and Outlook Global Address List
- ServiceNow
  - Life Cycle of a ticket- communication and education
  - Review of priority options/default configurations
- Time Clocks - Governance and funding
- Contextual help in Workday - Adding links to Job Aids IN Workday
- Workday 33 – new release September 7

Feedback and Discussion

- Sharing experiences

- Identifying issues

- Brainstorming solutions

THANK YOU!