P&S Workday Update
September 5, 2019
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
Finance Update Workday and ISD

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
Finance Update Workday and ISD

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.
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
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, subordinates 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!