

Knight Vision Open Forum



December 10, 2021

Agenda

- A Message from President Cartwright
- Knight Vision Program
- Knight Vision Scope Elements
- Workday Training
- Questions & Answers



A Message from President Alexander Cartwright



Knight Vision Program

Questions & Answers

Submit Questions Via Zoom



Submit questions to the panel via the Q&A button on the Zoom window



Upvote questions to move them up in the order they will be answered.

- Click the “thumbs up” icon below any question to upvote.
- The icon will turn blue when clicked

Knight Vision Guiding Principles



Simplification & Standardization



Transformative Change



Measurable Results

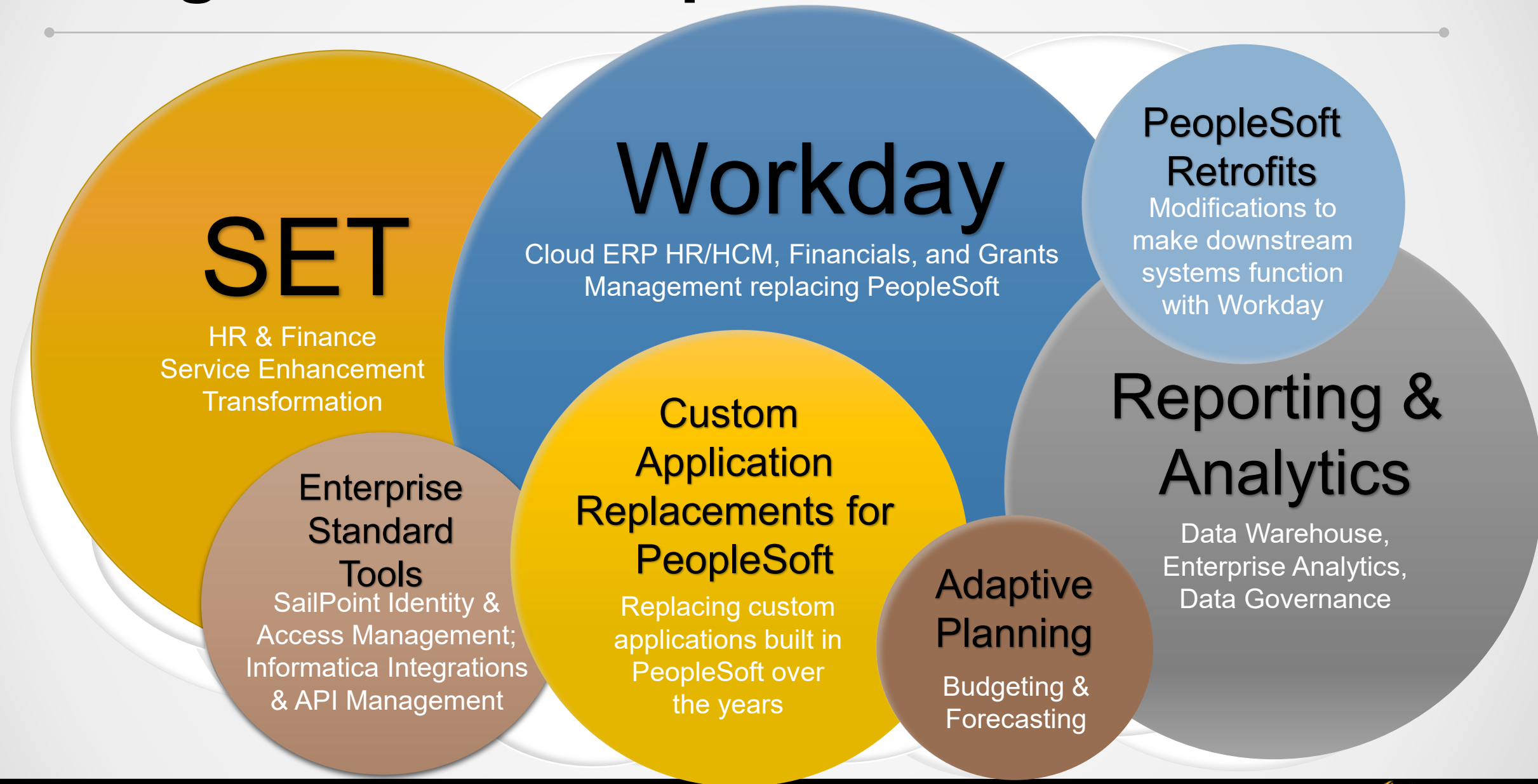


Transparent & Inclusive

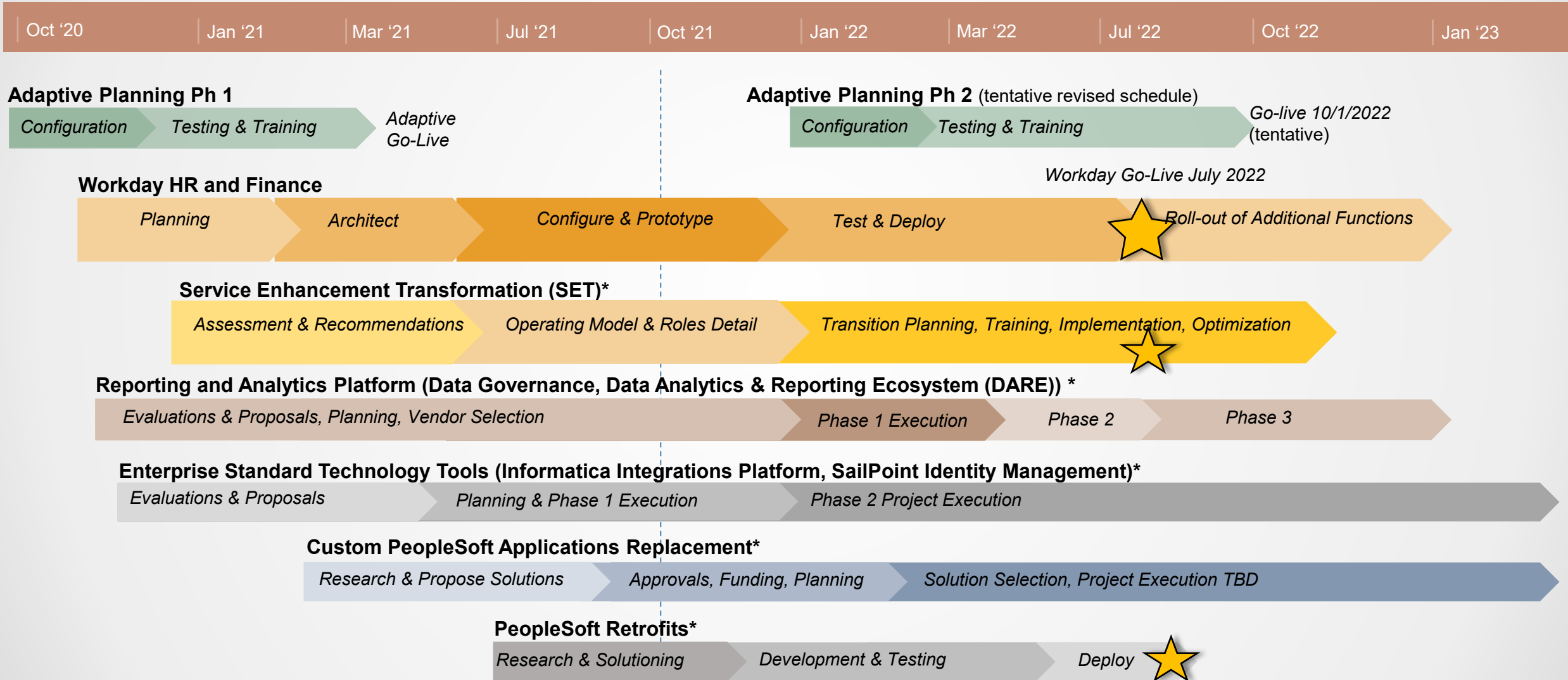


Enhanced Accountability

Knight Vision Scope



Knight Vision Program Timeline



*Detailed scope, schedules, and costs are still being established

Service Enhancement Transformation (SET)

Maureen Binder and Misty Shepherd

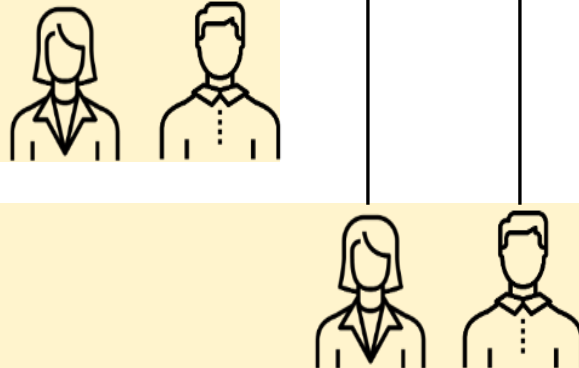
SET: HR & Finance Business Centers

HR BUSINESS CENTER

HR Director

HR Partner(s)

HR Coordinator(s)

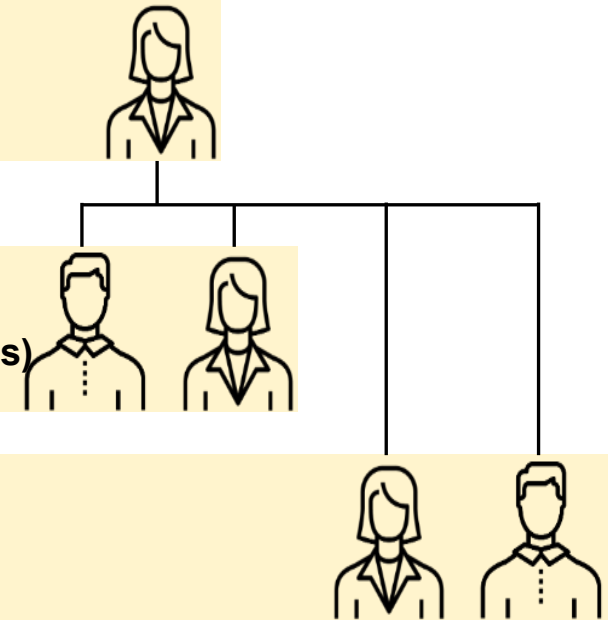


FINANCE BUSINESS CENTER

Finance/Budget Director

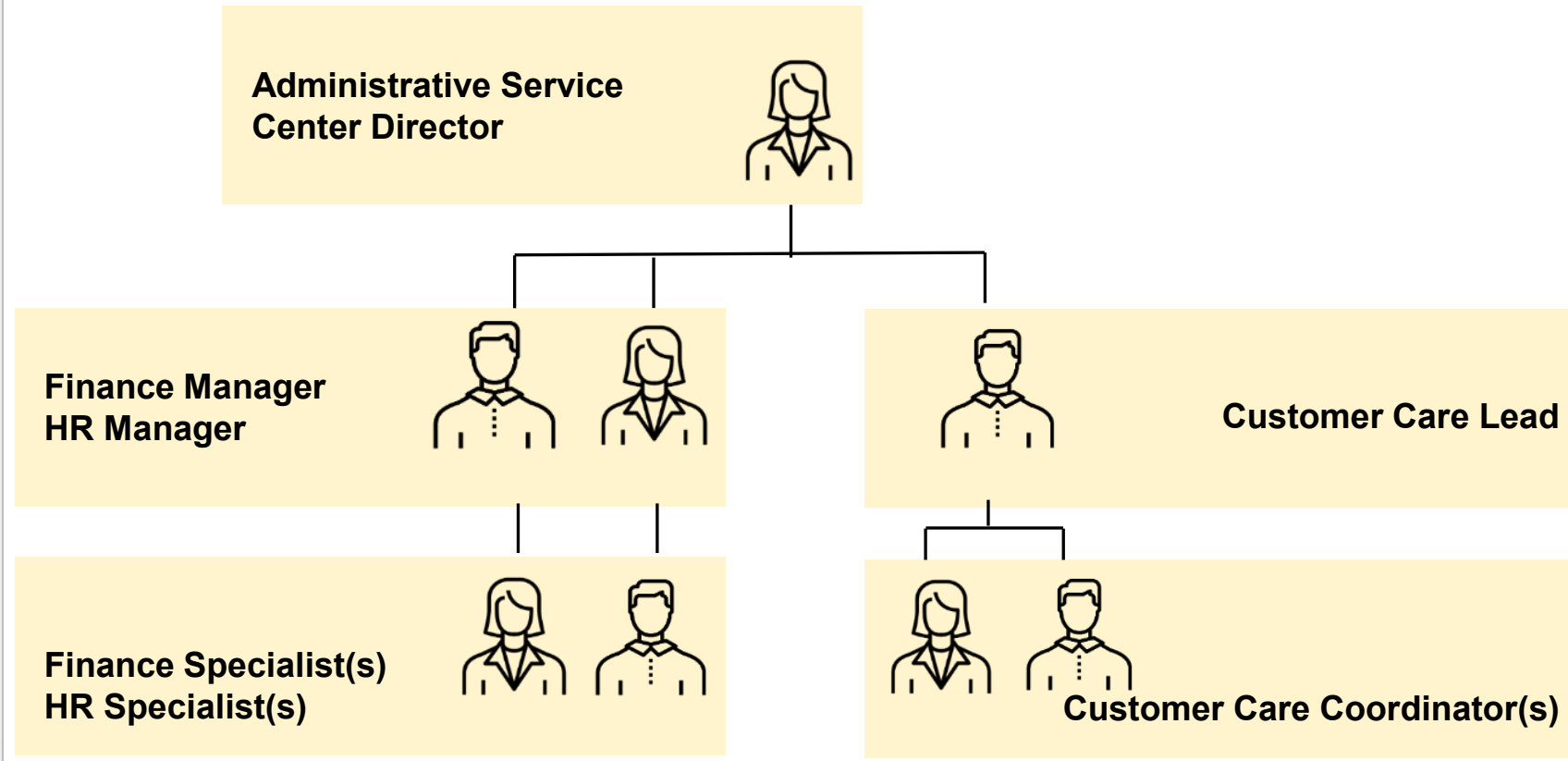
Finance/Budget Analyst(s)
Post Award Grant Specialist(s)

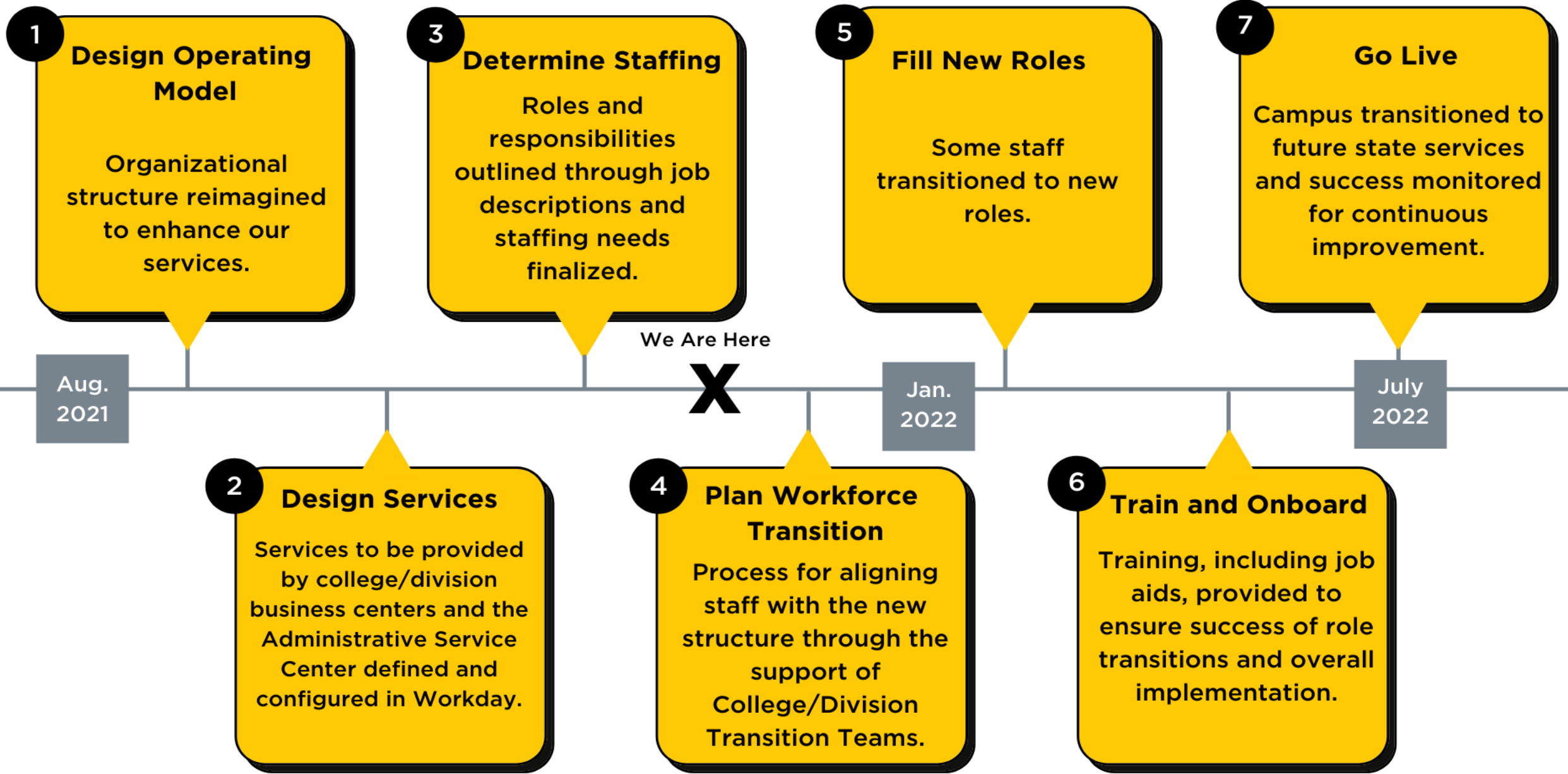
Travel Coordinator(s)
Procurement Coordinator(s)



SET: Administrative Service Center

ADMINISTRATIVE SERVICE CENTER





SET Communications

Recent Updates

- Information about transition teams and what they are
- SET Workforce Transition Charter
- SET Workforce Transition Plan
- [The SET Gazette](#) started on Nov. 19 (bi-weekly)

What's Coming

- Knight Vision XChange focused on SET – January 12, at 11 a.m.
- SET virtual event in February – more information to come soon
- Information about roles and responsibilities
- Updates to [SET webpage](#) as information is available

Workday Human Resources

Becky Moulton

Changes to HR Processes



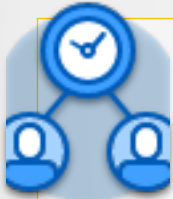
Mobile Functionality



Self Service Paperless Time Tracking



Self Service Leave Requests



Manager and Team Member to Team Member Visibility on Time-Off



New Process for Faculty Agreements



New Recruiting/Hiring/Onboarding Process



Workday Learning



Improved Notifications



Drillable Reports and Dashboards

Workday Financial Processes

Tera Alcala

Changes to Financial Processes

“Designation” worktags will be used to capture smaller buckets of funds (i.e., PI, Start-up, Balance accounts, etc.)
No more tracking these funds in Excel!

Expense reports and credit card reconciliations will be done in Workday
No more paper packets!



Gift worktags will be used to spend Foundation funds
No more paper packets!

“Punchouts” will be used to purchase goods from commonly used suppliers in Workday
Automates requisition creation



“Attractive” assets (such as laptops) will be tracked in Workday, following the same process as capital assets (\$5k or higher)
No more tracking these assets in Excel!

Budget development and planning will continue in the Adaptive Planning tool, updated to align and integrate with Workday
No more budgeting in Excel!



Projects functionality will be used for more than capital projects, including IT, carry-forward, asset builds, and other operating activities
No more tracking these activities in Excel!

Cash sales will be recorded in Workday

No more manual transmittal forms to send to the Cashier’s office.



Workday Grants

Michelle Greco

Changes to Grants

Real-time
Facilities &
Administration
(F&A)
expenditure
postings for up-
to-date budget
availability



Continued integration
with Huron Research
Suite allows utilization
of HRS functionality,
reporting and
processes

Improved
process for
generating
sponsor
invoices

Drillable
Reports for
easier
access to
grant
transaction
details



Inclusion of
Financial
Aid Grant
awards for
enhanced
reporting

Dashboards
and Grant
hierarchies for
easier portfolio
management
and reporting

Improved
workflow
notifications



Workday Technology and Integrations

Bradley Smith

Workday Technology/Integrations

140+ Integrations with critical 3rd party systems and vendors

Continuous updates and system improvements

Reduce duplicative systems

Converting data from PeopleSoft and other 3rd party systems

Mobile functionality across the entire Workday application

 canvas

 HURON

ORACLE®

PeopleSoft

Campus Solutions



 workday®

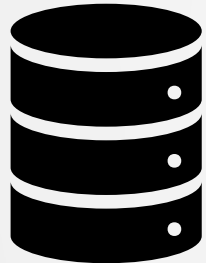
Reporting and Analytics

Linda Sullivan

Changes to Reporting & Analytics

Workday Reporting: Self-service data & information

- Data updates in real-time
- Actionable reports allow users to prompt, filter, and drill to specific details
- HR and Finance data can be displayed together in a single report
- Dashboards consolidate key reports and information in one place

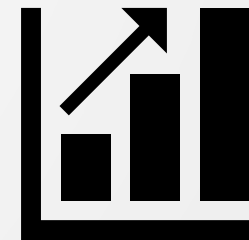


Data Governance at UCF: Trust in data

- Formalized data governance
- Utilizing new data governance technology and data owner/data steward structure
- Enhance data standardization, data quality, data usage compliance

DARE (Data & Analytics Reporting Ecosystem): Advanced analytics

- New university-wide cloud data lake/data warehouse
- Housing multiple data sources for accessibility, governance to reduce siloed datasets
- Enable end-to-end reporting with validated, standardized data



Custom Application Replacements for PeopleSoft (CARP)

David Canova

Updates for CARP

Custom Application Replacements for PeopleSoft (CARP) will identify custom apps built in PeopleSoft over the last 20 years with alternative solutions.

What is Complete:

- Meetings with application owners
- Information gathering of each application
- Partnered with consultants to finalize analysis phase
- Research potential commonly used solutions

Next Steps:

- Final report with timeline, overview and analysis to be completed in January
- Coordinating the short term/long term impact with each phase of Workday Implementation



PeopleSoft Retrofits

Varsha Das

Updates for PeopleSoft Retrofits

PeopleSoft Retrofits project will allow UCF to:

- continue providing student services like enrollment & financial aid disbursements for ~75,000 students,
- provide the ability to integrate data between PeopleSoft and Workday,
- maintain services to ~12,000 faculty and staff
- and continue mandatory state reporting on financial activity, students, faculty and staff.

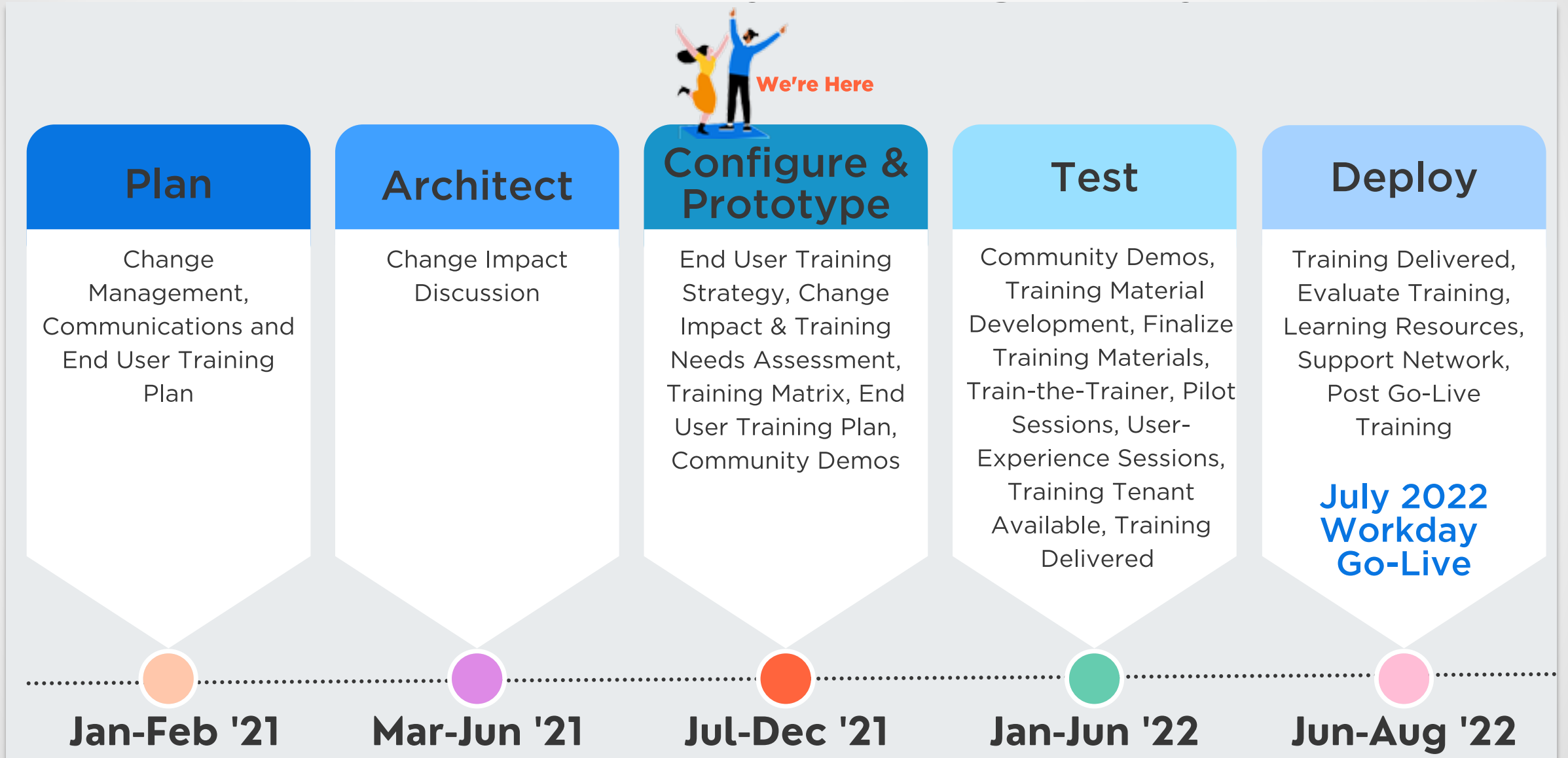
What should you be doing?

- Retrofit any departmental reports/queries from Campus Solutions
- Review and potentially update business processes
- Understand that the source of data for employees will be Workday HCM
- Campus Solutions will continue to serve as a historical reference for person data
- View additional details on the [PeopleSoft Retrofits webpage](#)

Training Update

Jacqueline Lewis

End-User Training Lifecycle



We're Here

Configure & Prototype

End User Training Strategy, Change Impact & Training Needs Assessment, Training Matrix, End User Training Plan, Community Demos

Test

Community Demos, Training Material Development, Finalize Training Materials, Train-the-Trainer, Pilot Sessions, User-Experience Sessions, Training Tenant Available, Training Delivered

Deploy

Training Delivered, Evaluate Training, Learning Resources, Support Network, Post Go-Live Training

July 2022 Workday Go-Live

What will training look like?



Real-time learning

Learning Labs Virtual Webinars
Instructor-led Workshops
Office Hours



Learn Your Way

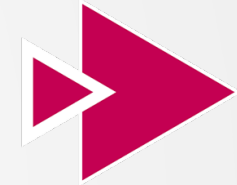
On-demand learning

Job Aids Interactive Tutorials
Demo Videos Tenant Practice
User Guides Cheat Sheets

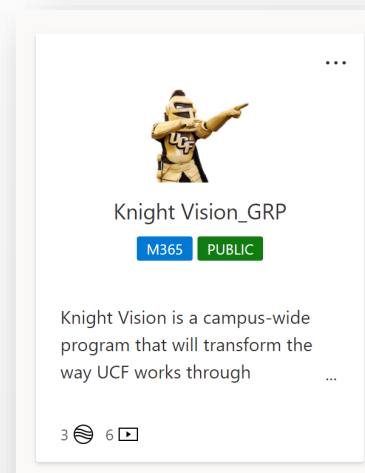


Stream Now to Learn Workday

- Visit Office365.com and login with NID
- Select the Microsoft Stream icon to open app
- Go to “Find Groups” or search to locate the [Knight Vision Group!](#)



Microsoft Stream





Get Involved

CCAG Communication Network

Members are:

- A team located across UCF to help users through change and continuity efforts
- A two-way communication channel to ensure rapid and accurate communications within UCF
- A group of people who influence positive change
- A formal network to leverage peer-to-peer communications

Members are not:

- A replacement for existing communication mechanisms
- A substitute for the existing management structure
- A decision-making body

Benefits of joining include:

- Monthly virtual meetings with program updates
- A sneak-peek of informational material
- Opportunities to provide feedback on handouts before they're distributed
- Access to an exclusive Microsoft Teams site with resources



[Join the CCAG Communication Network](#)

How to Get Involved?



Keep up to date by visiting the Knight Vision website at knightvision.it.ucf.edu



Email: knightvision@ucf.edu



Subscribe to our newsletter:
<https://tinyurl.com/KVNewsletterSubscription>



Provide feedback:
<https://tinyurl.com/KnightVisionFeedback>



Participate in our virtual events and open forums:
knightvision.it.ucf.edu/get-involved



Q&A

Questions & Answers

Submit Questions Via Zoom



Submit questions to the panel via the Q&A button on the Zoom window



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Questions?

