

Workday Community Information Session 3/17/22



Agenda

- 1 Welcome
- 2 What is Workday?
- 3 Workday at UCF: Expense Reports
- 4 Training Update
- 5 Get Involved

Introductions



Mika Garcia
Knight Vision
Communications Analyst



Jacqueline Lewis
Knight Vision
Training Lead



Meghan McCollum
Knight Vision
Functional Lead: Expenses,
Supplier Accounts and
Endowment

What is Workday?

WILL WORKDAY AFFECT ME?



Are you a UCF or UCFAA employee?

Go Knights! Do you use UCF Financials or PeopleSoft HR systems?

Great! You will be affected by the implementation of Workday.

That's okay! You will *still* be affected by the implementation of Workday.

The implementation of Workday will not affect you at this time.



WORKDAY WILL AFFECT ALL UCF EMPLOYEES STARTING JULY 2022.
STUDENTS WILL BE AFFECTED BY WORKDAY IN THE COMING YEARS.
STAY INFORMED AND UPDATED BY VISITING THE KNIGHT VISION WEBSITE.

[HTTPS://KNIGHTVISION.IT.UCF.EDU](https://knightvision.it.ucf.edu)





workday[®] at UCF

Workday will be the new Enterprise Resource Planning (ERP) system changing administrative process across the University.

Workday will Go Live on **July 1, 2022**, for all Human Resources, Payroll and Finance functions. Workday Student is being evaluated for implementation as Phase 2.

Workday will replace multiple systems, including Page-Up, OASIS, NetSuite, Financial Edge, Power Plan, Great Plains and more.

Employees will use Workday to manage their personal info, time off and time worked, pay information, finance and reporting and procurement.

WORKDAY ERP IMPLEMENTATION OVERVIEW

PLAN (JAN-JUN 2021)



- Project Start-up
- Customer Training
- Project Planning Initiated

ARCHITECT (JULY-SEPT 2021)



- Architect Workshops
- Architect Documents
- Test Prep for Configure & Prototype
- Finalized Project Planning Documents

CONFIGURE & PROTOTYPE (SEPT 2021-JAN 2022)



- Customer Preview Sessions
- Configuration Unit Test
- Reports Build & Unit Test
- End-User Training Plan
- Test Preparation

TEST (FEB-MAY 2022)



- End-to-End Testing
- User Experience Testing
- Payroll: Parallel Testing
- Cutover Plan
- End-User Training Materials

DEPLOY (JUN-AUG 2022)



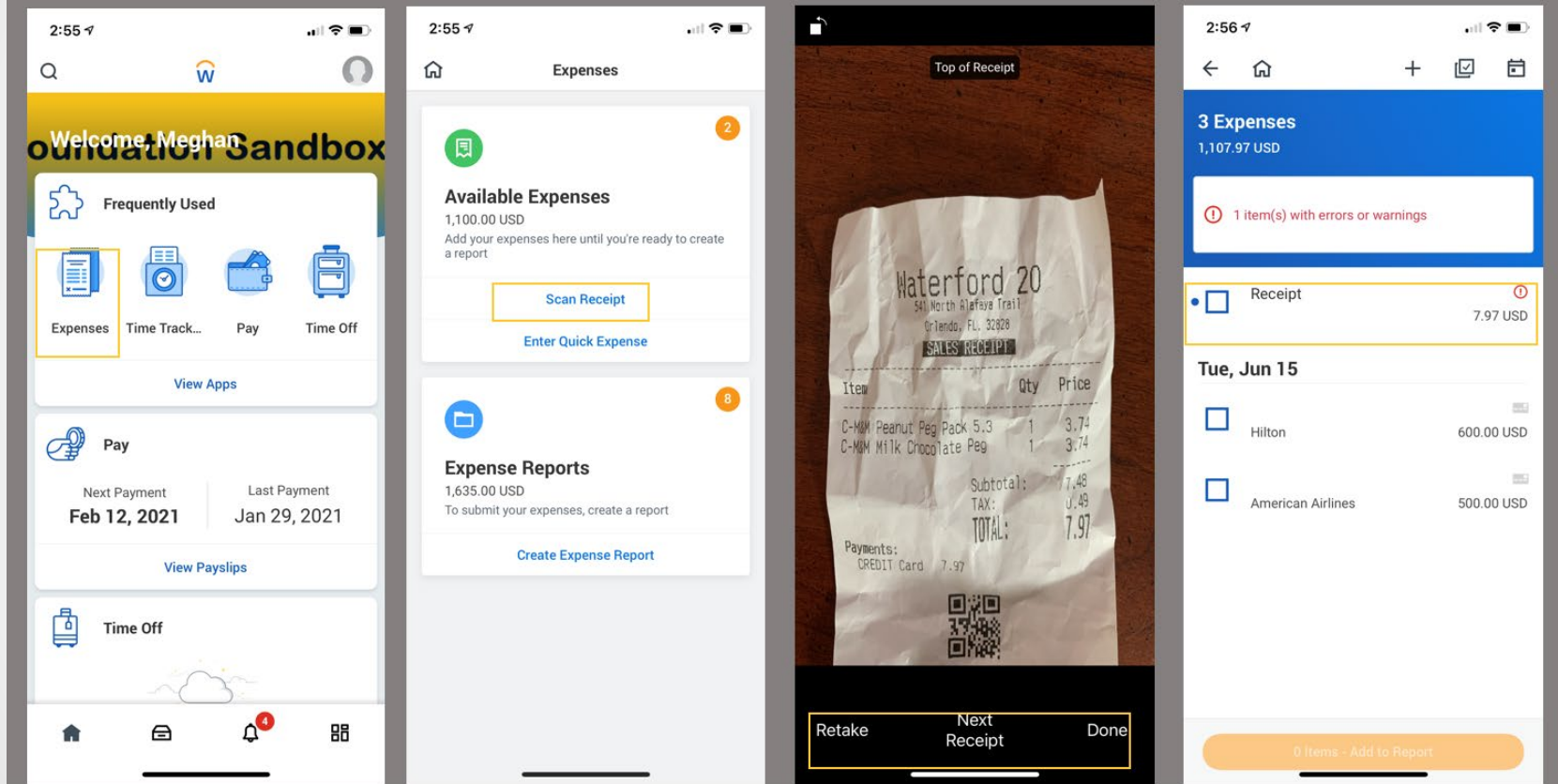
- End-User Training
- Go-Live
- Post-Production Data Conversion
- Production Support

**JULY 1, 2022
WORKDAY GO-LIVE**



Workday at UCF: Expense Reports

Expense Reports on Workday Mobile



Expense Reports on Workday Mobile

Screenshot 1 (2:56): Initial form with a red error message: "Please enter values for these required fields: Date".

Screenshot 2 (2:58): Scanned receipt "IMAGE.JPG" (Uploaded 1 minute ago by Meghan McCollum). Form fields: Date: 06/07/2021; Expense Item: Classroom Supplies; Merchant: Regal; Amount: 7.97; Currency: USD.

Screenshot 3 (2:59): Summary screen showing "3 Expenses" for a total of 1,107.97 USD. Items: Classroom Supplies (7.97 USD), Hilton (600.00 USD), American Airlines (500.00 USD).

Screenshot 4 (2:59): Review screen for report "EXP-UCF-00000003" with a total of 7.97 USD. Categories: Reimbursement (7.97 USD), Personal (0.00 USD), Company Paid (0.00 USD), Prior Balance Applied (0.00 USD).

Expense Reports on Workday Mobile

Expense Reports	
Drafts	1,635.00 USD
Draft - 06/21/2021	792.00 USD
EXP-UCF-00000004 Draft - 06/15/2021	0.00 USD
EXP-UCF-00000005 Draft - 06/15/2021	0.00 USD
EXP-UCF-00000006 Draft - 06/15/2021	0.00 USD
EXP-UCF-00000007 Draft - 06/15/2021	0.00 USD
Reason Draft - 05/03/2021	843.00 USD
In Progress	1,836.97 USD
EXP-UCF-00000003 Waiting on Manager - 06/21/2021	7.97 USD
EXP-UCF-00000008 Approved - 06/19/2021	380.00 USD
Tax Conference Approved - 06/21/2021	1,449.00 USD

Expense Card vs. Procurement Card

Expense Card

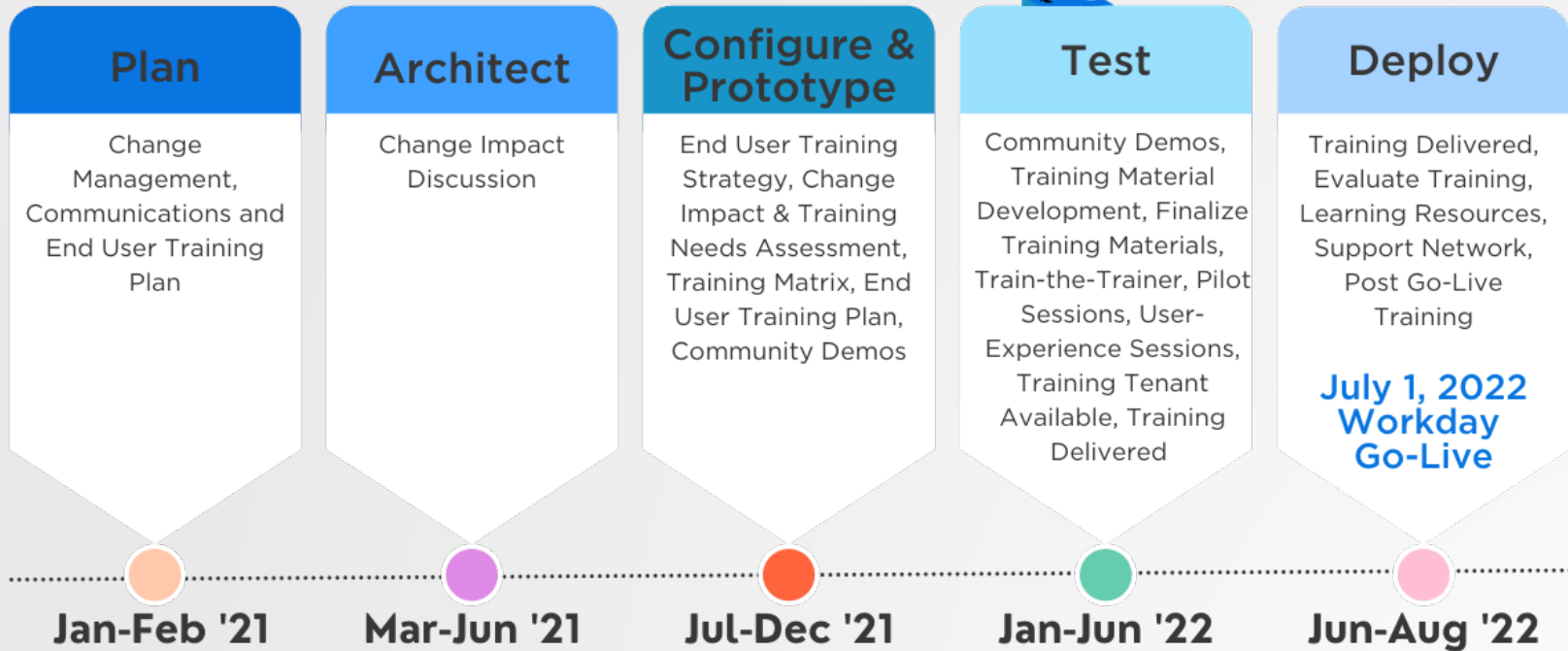
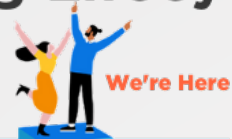
- People who have PCards today will likely have Expense Cards in Workday
- Used for travel related purchases and purchases under \$1,000 that do not require a P.O.

Procurement Card

- Will be issued to individuals at the College/Division Business Centers and kNEXT
- Purchases that require a P.O.

Workday Training Update

End-User Workday Training Lifecycle



Knight Vision



Knight Vision

Workday Training Update

- ✓ **Release and Deliver Training** with training tenant access beginning **May 1**.
- ✓ Upcoming training sessions will be provided via our **Training Calendar**.
- ✓ How to **stay informed** on training updates?
 - ❖ Plan to attend our pre-training events (“Day in the Life” virtual series)
 - ❖ Subscribe to Knight Vision newsletter (includes our SET Gazette)
 - ❖ View past event recordings and Workday video demos before training begins on our [Microsoft Stream channel](#)



Lunch & Learn: “Day in the Life” Series

Lunch & Learn: “Day in the Life” is a series of live demonstrations that will help **guide** your **understanding** of everyday Workday functionality.

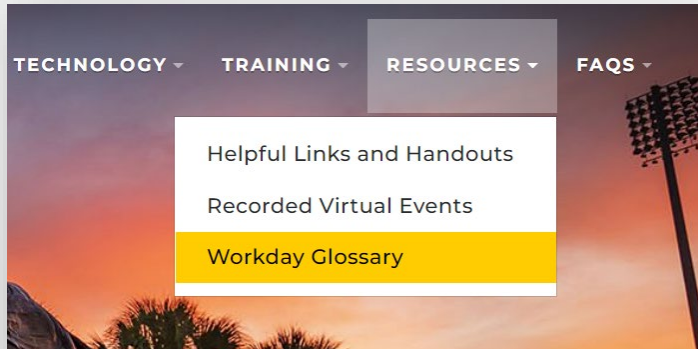


- “Day in the Life of a **UCF Employee**”
March 15 (12:30 p.m. – 1:30 p.m.)
- “Day in the Life of a **UCF Manager/Supervisor**”
March 23 (12 p.m. – 1 p.m.)
- “Day in the Life of a **UCF Faculty/Faculty Manager**”
March 31 (12 p.m. – 1 p.m.)

What does that word mean?

Learning common Workday terms

Learn more from our
[Workday Glossary](#)
on our website!



- 1 Dashboard** - A specialized landing page containing links to actions, reports and tasks. May also contain charts and graphs.
- 2 Applet** - A specialized landing page that contains preconfigured data charts and links to tasks and reports for a functional area.
- 3 Tenant** – Separate database that configures UCF business processes, security and data.

What is a Job Aid?


- ✓ Similar to UCF Financials' Addy Notes/Addy Tips
- ✓ A step-by-step process guide
- ✓ Contains learning category type and topic
- ✓ Contains desktop and mobile instructions, if applicable

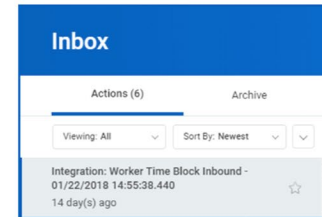


Your Inbox includes notifications of tasks, approvals, due dates, and other items sent to you as part of your organization's business processes. You can access your Inbox using your desktop web browser or mobile device.

DESKTOP

VIEW YOUR INBOX

1. Near your Profile photo in the upper right corner of your dashboard, click the **Inbox** icon .
2. Click the **Actions** tab to view your business process tasks, approvals and to dos.
3. Click the **Archive** tab to access the status of your previous business processes. Items are saved for 30 days.





MOBILE

VIEW YOUR INBOX

The Inbox is your personal activity stream. It includes actions (e.g., approvals or to dos) sent to you by your organization's business processes.

From the navigation bar:

1. Tap the **Inbox** icon .
2. Tap the **Actions** or **Archive** tab to access the corresponding information. You can sort Actions by tapping the **Sort** icon .
3. Select an item to view more details.



There are several ways to enroll in a course. Individuals can enroll themselves, managers can enroll their team and learning administrators can enroll anyone in the university.

This job aid details the steps required for employees to enroll in and drop a course. All instructions in this job aid start from the Learning application.

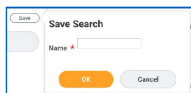
MANAGE YOUR COURSES

ENROLL IN A COURSE

1. In the Workday Learning application, select the **Discover** tab, then click the **Browse Learning** button.
2. All available courses and lessons display. You can narrow down your results using the search bar or the faceted search filters on the left side of the page.



Tip: You can easily access previous search results by saving your faceted search parameters.



3. Select a course or lesson to enroll in by clicking its title.
4. Click the **Enroll** or **Select Offering** button. The Enroll button displays for digital-only courses. The Select Offering button displays for courses with an instructor-led lesson.



Note: Some courses and lessons do not require enrollment. For those select courses, rather than selecting **Enroll** or **Select Offering** you can start the class by clicking the **Start Course** button.

5. For courses with an instructor-led lesson, the Select Offering page displays. Here, view the offering information such as the date, time, location, and instructor. Select the offering that works best for you and click **OK**.
6. From the Review page, click **Submit**.
7. Then, click **Done**. You are now enrolled in the course.

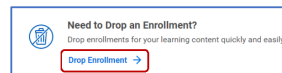


DROP A COURSE



Note: To drop a course you are on the waitlist for, navigate directly to the course page and click the Drop button. Then proceed to step 4 of the instructions.

1. From the Learning menu on the left, select **My Learning**.
2. On the My Learning page, select **Drop Learning Enrollment**.



3. From the Program or Course prompt, select the course you want to drop.
4. Click **OK**.
5. From the Drop Reason prompt, select a reason, if applicable.
6. Click **OK**.
7. Enter a comment and click **Submit** to drop the course, then click **Done**.

CREATE A LEARNING PATH

You can create *optional* personalized curriculums called learning paths of courses you want to take in the future. Only you will be able to see your learning paths. Follow the steps below to collect and organize courses into learning paths.

1. From the Learning menu, select **My Learning** and scroll down to **Learning Paths**.
2. Click the **Create Learning Path** button.
3. Enter a name for your new learning path.
4. Click **OK**. Your new learning path now displays in My Library.

ADDING A COURSE TO A LEARNING PATH

1. From the Learning menu, select the **Discover** tab, then click the **Browse Learning** button.
2. Select a course by clicking its title.
3. Click **Save**.



4. You have the option to:
 - a. Save the learning content to an existing learning path.
 - b. Create a new learning path to save the learning content to.
5. Once you save the learning content to an existing or new learning path, you can find the learning paths and content in **My Learning**.

Workday Learning Categories



ALL EMPLOYEES - MANAGERS

- Workday Essentials (Getting Started)
- Workday for Managers
- Workday Pay & Absence
- Workday Time Tracking
- Workday Learning
- Workday Benefits - UCFAA

“

OUR LEARNING CATEGORIES

”

SPECIALTY ROLES

- Workday Recruiting, Hiring & Onboarding
- Workday Staffing & Compensation
- Workday Expenses
- Workday Procurement
- Workday Finance
- Workday Grants
- Workday Reporting
- Workday Endowments
- Workday Academic Affairs

Employee Self Service in Workday

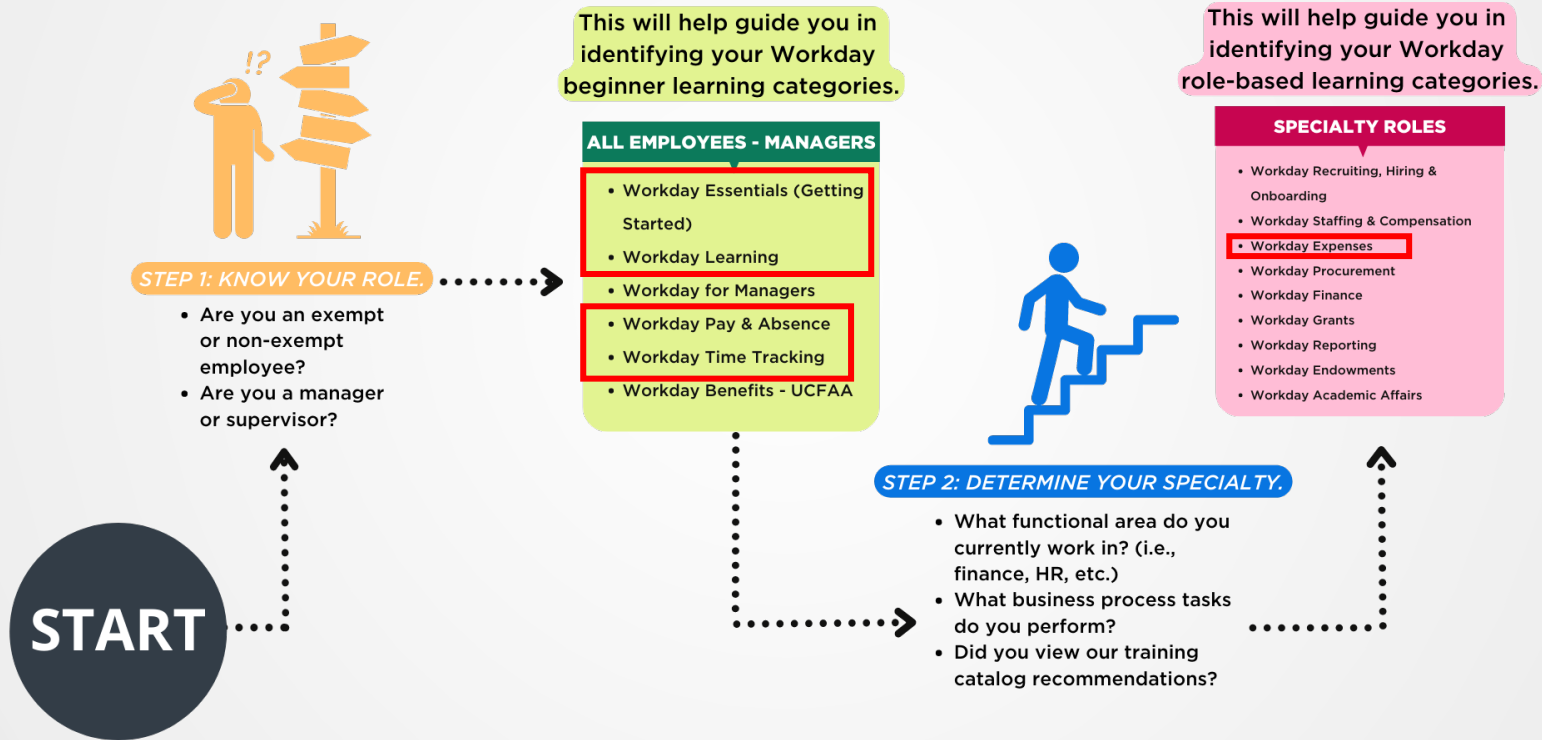
This category is designed for **all employees** and serves as a **prerequisite** to **all additional Workday** learning categories. Participants will be provided with a **basic overview** of the Workday system & functionality including **access, basic navigation, terminology, mobile** and **personal information**.



- Using tools and navigation
- Workday search bar
- Using your inbox
- Setup Account Preferences
- Installing Workday mobile
- Identify your place in the organization
- View payslip & W-4
- Workday accessibility functionality
- Modify personal information
- View benefits summary
- Find Jobs & Apply Internally
- Time off & Leave of Absence
- Time Tracking (non-exempt)

Learning Path Example #1

Natalie Portman, USPS/Non-Exempt Employee



Manager Self Service in Workday

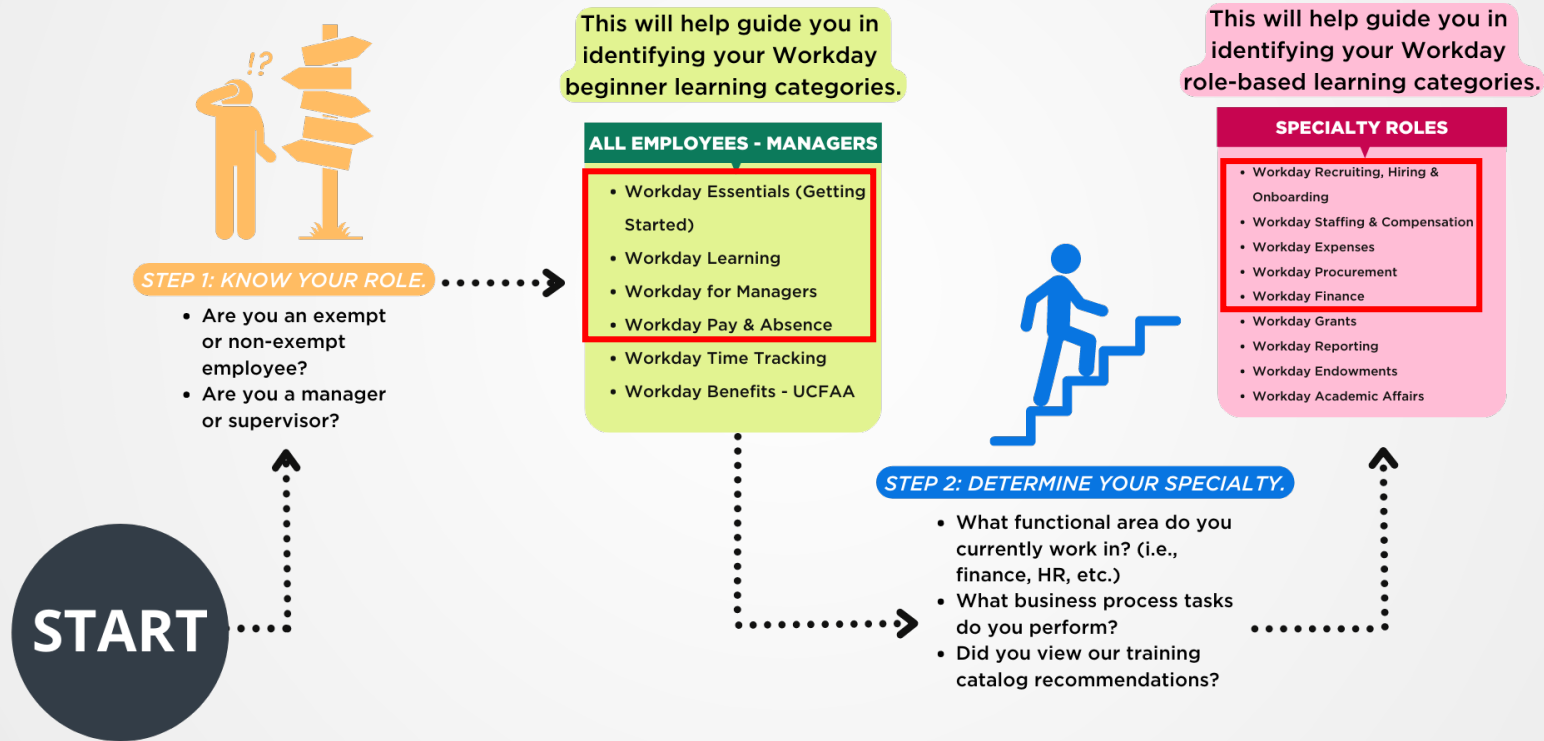
This category is designed for all **managers or supervisors** and serves as a **prerequisite** to all additional **Workday** learning categories. Participants in supervisory roles will learn and practice using **additional navigational tools for managers**.

- Time and absence dashboard
- Access a worker's time
- View worker's time block details
- Review time for multiple workers
- Manage direct reports in WD Learning
- Manage course enrollment in WD Learning
- Generate reports



Learning Path Example #2

Reese Witherspoon, A&P Exempt Employee



Workday Swag Giveaway

Giveaway Items

The **two** winners of this session's giveaway will be randomly selected and contacted by the **end of day**. Each winner will receive one item.

Thank you for your participation!



Q&A

workday.



Questions?

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



Thank you for your support!

