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# Knight Vision XChange: Faculty

## A Conversation with the Knight Vision Program Teams

April 5, 2022

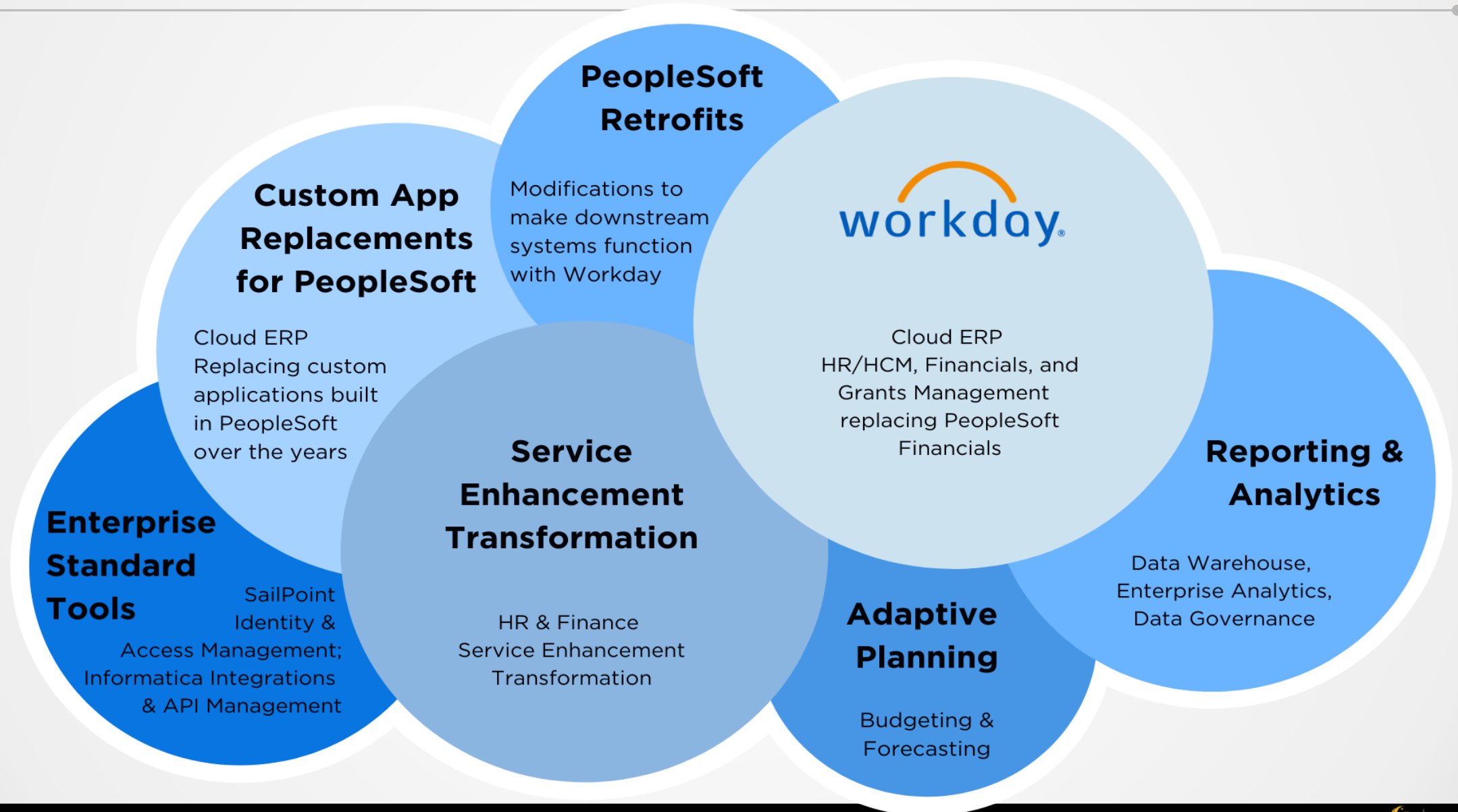
# Agenda

- Provost Johnson Remarks
- Knight Vision Program Overview
- SET Overview
- Workday Overview
- How Faculty Will Be Affected
- The Road to Go-Live
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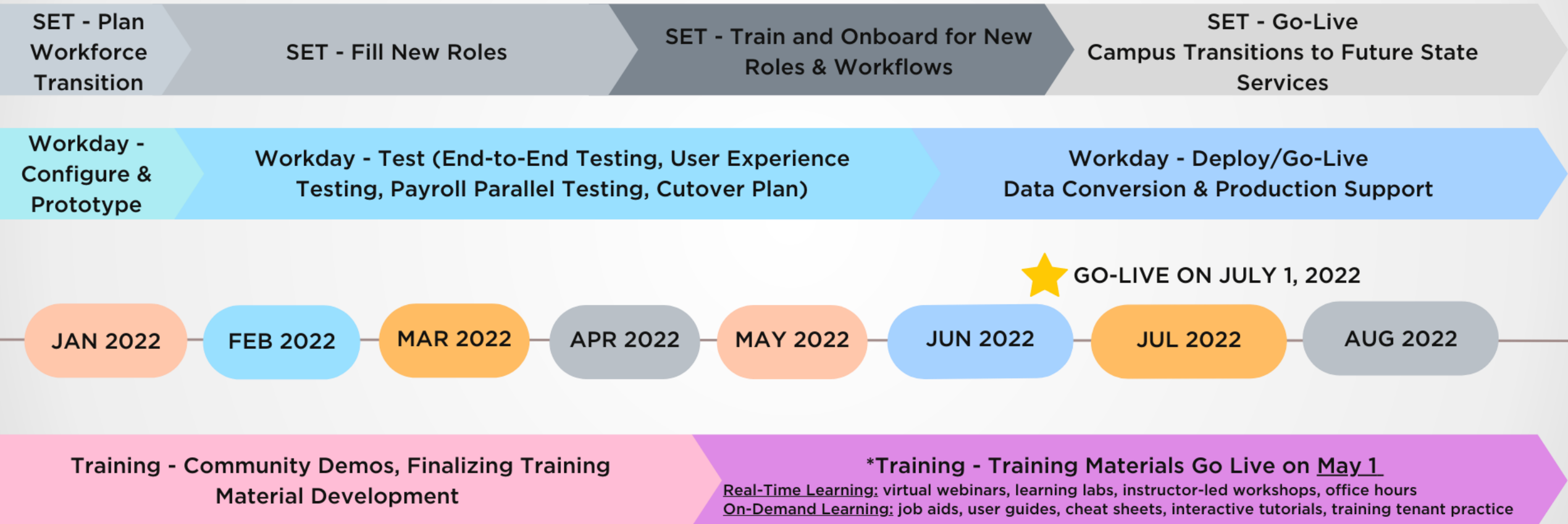
# A Message from Provost Johnson

# Knight Vision Program Overview

# Knight Vision Scope



# Knight Vision Service Enhancement Transformation (SET), Workday and Workday Training 2022 Timeline



*\*Faculty members will still have access to training before and after the July 1 Go-Live date*

# Service Enhancement Transformation Overview

# SET Realignment

## Takeaways

- All responsibilities are re-aligned.
- All employees remain at UCF, in the same college/division.
- Almost all employees interested in a SET role will be in such a role when SET goes live.

| College/Division Pre-SET Transition Employees |       |        |        |        |        |        |        |        |        |        |
|---|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| FTE   | Art   | Bob    | Cara   | Dale   | Eli    | Fran   | Guy    | Hao    | Jay    | Kris   |
|   | Eol-Y | Eol-Y  | Eol-Y  | Eol-Y  | Eol-Y  | Eol-Y  | Eol-Y  | Eol-Y  | Eol-N  | Eol-N  |
| 10  | Fin-1 | Fin-6  | Fin-16 | Fin-22 | Fin-26 | Fin-34 | Fin-37 | Fin-43 | Fin-48 | Fin-49 |
| 20  | Fin-2 | Fin-7  | Fin-17 | Fin-23 | Fin-27 | Fin-35 | Fin-38 | Fin-44 | Ac-8   | Fin-50 |
| 30  | Fin-3 | Fin-8  | Fin-18 | Fin-24 | Fin-28 | Fin-36 | Fin-39 | Fin-45 | Ac-9   | Ac-15  |
| 40  | Fin-4 | Fin-9  | Fin-19 | Fin-25 | Fin-29 | HR-12  | Fin-40 | Fin-46 | Ac-10  | Ac-16  |
| 50  | Fin-5 | Fin-10 | Fin-20 | HR-5   | Fin-30 | HR-13  | Fin-41 | Fin-47 | Ac-11  | Ac-17  |
| 60  | HR-1  | Fin-11 | Fin-21 | HR-6   | Fin-31 | HR-14  | Fin-42 | HR-19  | Ac-12  | Ac-18  |
| 70  | HR-2  | Fin-12 | HR-4   | HR-7   | Fin-32 | HR-15  | HR-18  | HR-20  | Ac-13  | Ac-19  |
| 80  | HR-3  | Fin-13 | Ac-2   | HR-8   | Fin-33 | HR-16  | Ac-4   | Ac-6   | Ac-14  | Ac-20  |
| 90  | Ac-1  | Fin-14 | Ad-2   | HR-9   | HR-10  | HR-17  | Ac-5   | Ac-7   | Ad-7   | Ad-9   |
| 100   | Ad-1  | Fin-15 | Ad-3   | Ad-4   | HR-11  | Ac-3   | Ad-5   | Ad-6   | Ad-8   | Ad-10  |

| College/Division Post-SET Transition Employees |      |        |        |       |        |       |        |        |       |       |
|--|------|--------|--------|-------|--------|-------|--------|--------|-------|-------|
| FTE  | Art  | Bob    | Cara   | Dale  | Eli    | Fran  | Guy    | Hao    | Jay   | Kris  |
|  | dept | FIN    | FIN    | HR    | FIN    | HR    | FIN    | FIN    | dept  | dept  |
| 10   | Ac-1 | Fin-6  | Fin-16 | HR-5  | Fin-26 | HR-12 | Fin-37 | Fin-43 | Ac-8  | Ac-15 |
| 20   | Ac-3 | Fin-7  | Fin-17 | HR-6  | Fin-27 | HR-13 | Fin-38 | Fin-44 | Ac-9  | Ac-16 |
| 30   | Ac-4 | Fin-8  | Fin-18 | HR-7  | Fin-28 | HR-14 | Fin-39 | Fin-45 | Ac-10 | Ac-17 |
| 40   | Ac-5 | Fin-9  | Fin-19 | HR-8  | Fin-29 | HR-15 | Fin-40 | Fin-46 | Ac-11 | Ac-18 |
| 50   | Ac-6 | Fin-10 | Fin-20 | HR-9  | Fin-30 | HR-16 | Fin-41 | Fin-47 | Ac-12 | Ac-19 |
| 60   | Ac-7 | Fin-11 | Fin-21 | HR-4  | Fin-31 | HR-17 | Fin-42 | Fin-1  | Ac-13 | Ac-20 |
| 70   | Ad-6 | Fin-12 | Fin-22 | HR-10 | Fin-32 | HR-1  | Fin-34 | Fin-2  | Ac-14 | Ad-2  |
| 80   | Ad-5 | Fin-13 | Fin-23 | HR-11 | Fin-33 | HR-2  | Fin-35 | Fin-3  | Ac-2  | Ad-3  |
| 90   | Ad-4 | Fin-14 | Fin-24 | HR-19 | Fin-49 | HR-3  | Fin-36 | Fin-4  | Ad-7  | Ad-9  |
| 100  | Ad-1 | Fin-15 | Fin-25 | HR-20 | Fin-50 | HR-18 | Fin-48 | Fin-5  | Ad-8  | Ad-10 |



# SET Updates

## Expression of Interest

- Closed on Feb. 20
- 405 staff expressed interest
- SET leaders are reviewing qualifications and will meet with staff to confirm fit and interest

## SET Leadership

- 100% (18/18) of Finance Business Center leader positions filled
- 85% (11/13) of HR Business Center leader positions filled
- SET leaders will review org charts for college/division

## Selection Process

- Offers to staff began week of March 21
- Supervisors, transition teams and stakeholders will be notified
- Goal of 85% offers made by April 30

## Training

- Training course catalog reviewed and finalized
- Individual training plans will be created for selected staff
- SMEs will be identified for training
- Training will begin in May

## Workforce Transition

- SET leaders have names of interested staff
- “Other,” non-HR/finance responsibilities are being tracked
- Technology, equipment and space is being determined

# Business Center Leadership

College/Division  
Finance Business Centers +  
HR Business Centers



## Finance Business Center Leaders

**Rebeca Richards**, senior academic finance leader

- **Karen Cobbs**, Academic Affairs
- **Donna DuBuc**, Administration and Finance and Facilities & Safety
- **Lesanne Brunswick**, Burnett Honors College
- **Cathy Radzai**, College of Arts and Humanities
- **Jessica Dong**, College of Business Administration
- **Allison Jefferson**, College of Community Innovation and Education
- **Nanette Aubert**, College of Engineering & Computer Science
- **Nicole Arft**, College of Graduate Studies
- **Jacquelyn Daigneault**, College of Health Professions and Sciences
- **Danny Cavallo**, College of Medicine
- **Sunny Heyl**, College of Nursing
- **Mark Wagenhauser**, College of Optics and Photonics
- **Seresa Cruz**, College of Sciences
- **Heather Simeon**, President's Division
- **Chris Hale**, Office of Research and Research Centers & Institutes
- **Catherine Gholson**, Rosen College of Hospitality Management
- **Sharon Ekern**, Student Development and Enrollment Services

## HR Business Center Leaders

**Bernice Lugo**, senior HR leader

- **Abbee Camen**, Academic Affairs
- **Millicent Downer**, Administration and Finance
- **Suzanne Lin**, College of Arts and Humanities
- **Amy Perry**, College of Business, Rosen College of Hospitality Management and College of Optics and Photonics
- **Vanessa Nixon**, College of Community Innovation and Education
- **Katy Salisbury**, College of Engineering & Computer Science
- **College of Health Professions and Sciences** and **College of Nursing**, (*ongoing search*)
- **Nancy Gayton**, College of Medicine
- **Madeline Byrne**, College of Sciences
- **Doug Lewis**, Facilities & Safety
- **President's Division**, (*ongoing search*)
- **Bernice Lugo** /Transition, Office of Research, Research Centers & Institutes, and Burnett Honors College
- **David Pavlonnis**, Student Development and Enrollment Services

# Workday Overview



# workday<sup>®</sup> at UCF

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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 HR, Payroll and Finance functions. Workday Student is being evaluated for implementation as Phase 2.

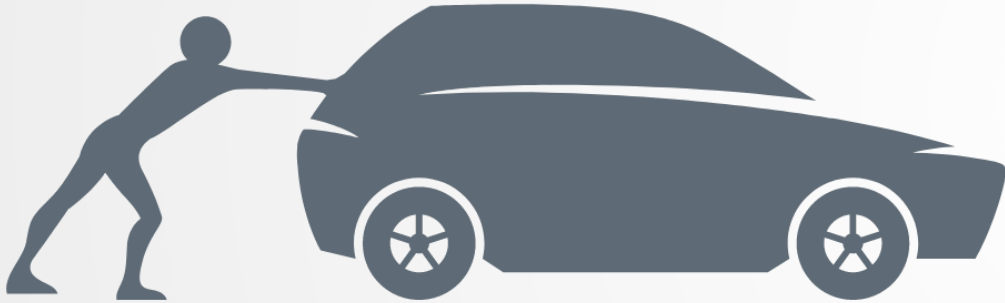
Workday will replace multiple systems, including Page-Up, OASIS, NetSuite, Financial Edge, Power Plan, Great Plains and more.

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

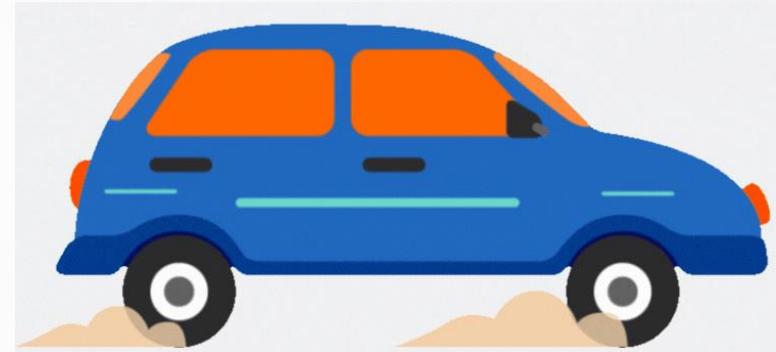
# Why Workday?

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Current State of HR & Finance Processes



Future State of HR & Finance Processes



UCF has grown at an incredible rate and is composed of a strong foundation of exceptional students, staff and faculty. For a university of this size, it's necessary to implement modern technology that reflects our growth and innovation.

# How will Workday Access Work?

Security access **will** be based on job role.

Training will be available for **various roles**.

Workday will be accessed through **myUCF**.



# How Knight Vision Affects Faculty

# Financial Processes

## Spend Authorizations (requests for travel approval) and Expense Reports

- Faculty can create and submit **their own Spend Authorizations** (requests for travel approval) and Expense Reports in Workday, or they can be created on their behalf.
- Faculty can see where your Spend Authorizations and Expense Reports are in the **approval process**.
- Workday **mobile functionality** allows all employees to quickly upload receipts from their phones via the Workday app.

## Foundation Data Model (FDM)

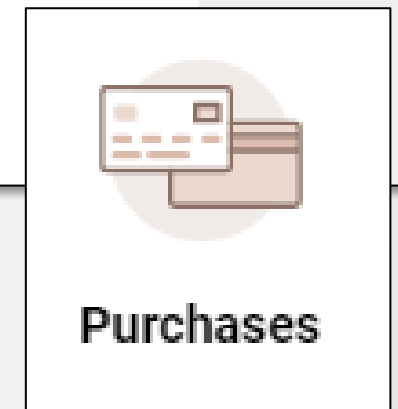
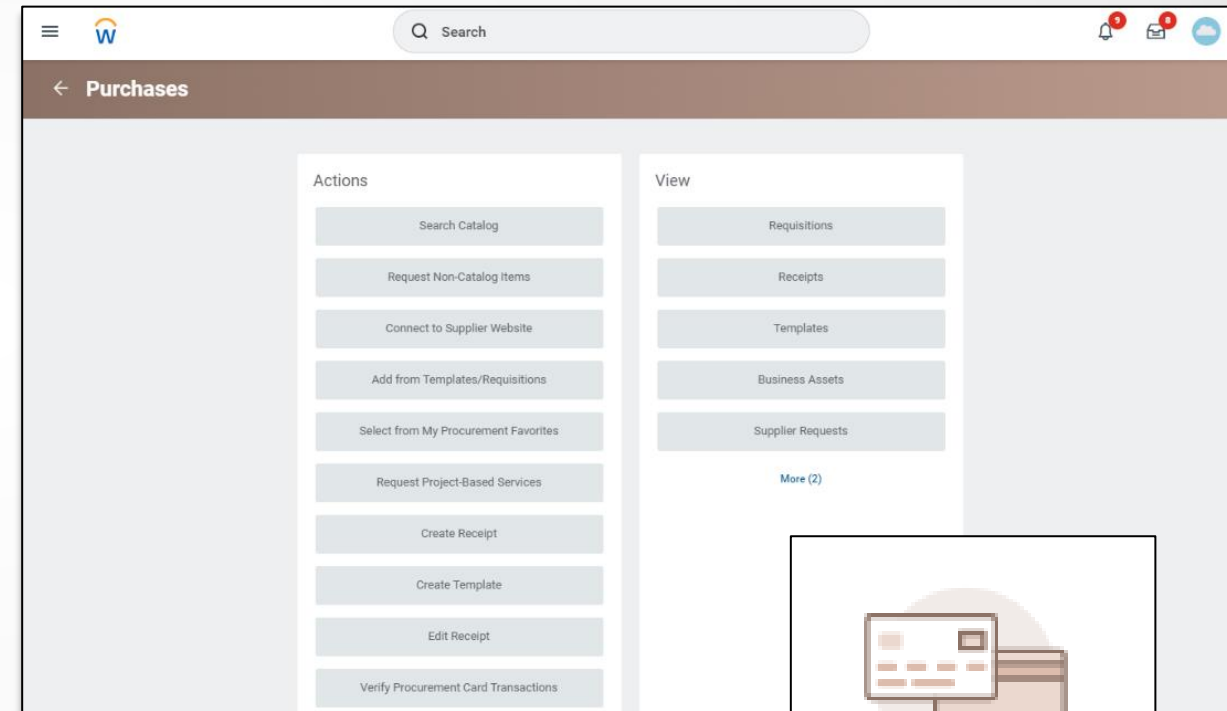
- FDM is replacing the PeopleSoft Chart of Accounts and the new worktags (currently PeopleSoft Chartfield Values) will allow employees to use **Designations** to capture smaller buckets of money, such as **faculty accounts**.
  - Designations will have **four specific subtypes** for faculty/employees: General, Overhead, Balance, and Startup. One person at the University can hold multiple designation types.



# Financial Processes – Continued

## Knight Vision Impacts to Purchasing (Procurement):

- Faculty can create and submit requisitions for purchase of goods and services or request a requisition through their Finance Business Service Center.
- Faculty will use an expense card for travel and purchase of goods and services **under \$1,000**.
- Workday will provide the ability to **shop from within the system, rather than a separate website** for Airgas, Amazon, Fisher, Grainger and Staples.
  - Similar functionality through Workday as you see on the “.com” sites today, but within Workday.
  - Additional suppliers will be added over time.



# Financial Processes – Continued

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

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

Department names on existing Proposal records and on the existing Credit Splits are not being converted to a Cost Center

If a proposal is in an editable state, then it can be updated to include the correct Cost Center

Award Smartform will include new fields, some will require review/completion by assigned Award Administrative Contact (similar to today)

Drillable reports in Workday to provide easy access to grant transaction details

Enhanced and all-encompassing view of awards and related grants and personnel assigned to roles on the award/grant

PI Dashboard in Workday will provide quick access to Grants data (PARIS replacement)

## **Knight Vision Impacts to Grants:**

# Financial Processes – Continued

## 5 Major Changes with Workday Reporting

1. **Data updates in real-time, meaning reports always feature the most current data available.** Transaction approvals and edits made in Workday will update right away, which means no more waiting overnight to run reports.
2. **Actionable reports allow users to view specific details by use of filtering, sorting and drill-down, all in the same report.** Reports will be interactive, and many can be accessed on mobile devices. Reports can be scheduled for auto-delivery to an individual's inbox, or to multiple inboxes.
3. **HR and Finance data can be displayed together in a single report.** Users will no longer need to manage multiple external systems and export data to create and manage reports.
4. **Dashboards consolidate key reports and information in one place,** giving users improved navigation and visibility for more accurate, streamlined planning and decision making.
5. **Security groups/roles determine** which dashboards users can access, which reports they are able to run, the kinds of data that they are able to see in those reports (e.g., PII) and their ability to drill down into further details or initiate business processes.



## IKM Data & Pegasus Mine Portal

IKM Data/Pegasus Mine Portal will continue through Phase I of the Knight Vision implementation. Minor changes may occur in reports that include HR or Finance data.

# HR Processes

## Faculty Agreements

- After Go-Live, **faculty will need to sign agreements digitally via DocuSign through Workday**. These agreements include New Hire, Annual and Summer Supplemental Agreements (no more paper)
- Faculty will receive a **Workday e-mail notification/inbox notification when agreements are ready to be reviewed** (will no longer go directly to HR College Staff for distribution to the faculty member)
- Faculty will be able to **view the final signed agreement by all parties** in their Worker Profile Documents section

## Academic Appointments

- After Go-Live, **faculty will be able to view their Academic Appointments via their Academic Profile**.
- Academic Appointments will **track Faculty members' affiliation** with academic departments or centers.
- **Tenure Clock Report** – Tenure-earning faculty will be able to view their Tenure Clock year and what Academic Year they need to apply for Tenure via their Academic Profile.

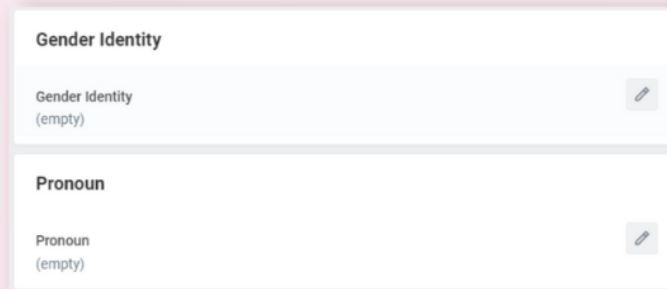
# HR Processes - Continued

## Self Service Profile Options in Workday:

### Gender Identity Options

All UCF employees can edit their Gender Identity and Pronouns within Workday when they visit the "Personal Information" tab within their profile.

This information is visible to everyone in the organization.

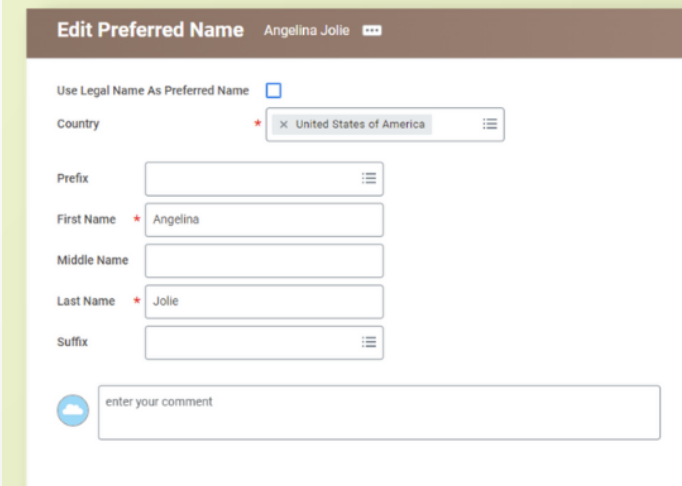


The screenshot shows two sections: "Gender Identity" and "Pronoun". Each section has a text input field that is currently empty and a small edit icon to the right of the field.

### Preferred Name Options

All UCF employees can modify their preferred name within Workday when they visit the "Names" tab within their profile. This name change does not require validation from an HR professional.

This information is visible to everyone in the organization.



The screenshot shows the "Edit Preferred Name" form for Angelina Jolie. It includes a checkbox for "Use Legal Name As Preferred Name", a "Country" dropdown menu set to "United States of America", and input fields for "Prefix", "First Name" (containing "Angelina"), "Middle Name", "Last Name" (containing "Jolie"), and "Suffix". There is also a comment field at the bottom with the placeholder text "enter your comment".

# HR Processes - Continued

Managers/supervisors will have the ability to start a student hire in Workday.

- If a supervisor has selected a student, then the supervisor will be able to enter them into the system.
- Additionally, the Business Center will also be able to complete the student hire in lieu of the supervisor.

The image displays three overlapping screenshots of the Workday 'Start Job Requisition' interface. The central screenshot shows the 'Job Details' section with the following fields:

- This job will:**  replace a worker,  add a worker
- Select a worker to replace:** Michael Jordan
- Job Information:**
  - Job Profile:** Assistant Professor (FAC Individ Exmpt)
  - Job Title:** Assistant Professor (FAC Individ Exmpt)
  - Job Description Summary:** (empty text area)
  - Job Description:** (rich text editor)
- Buttons:** Submit, Save for Later

The leftmost screenshot shows the 'Worker Types' selection screen with the following options:

- Fixed Term (Fixed Term)
- Regular
- Student (Fixed Term)
- Temporary
- Search:** Regular

The rightmost screenshot shows the 'When would you like this worker to start?' section with the following options:

- As soon as possible
- Select Date: 04/16/2022
- What recruiting instruction do you have for this job?:**
  - select one
  - Do Not Post
  - Post Internally
  - Post Internally & Externally
- Select additional locations to post this job:** (empty text area)

# The Road to Go-Live

# Actions to Take Before Go-Live

**Beginning July 1, 2022**, all UCF employees will be utilizing the Workday system for HR and financials – replacing PeopleSoft HCM and Financials. Personal information currently accessed through Employee Self Service will not be transferred to Workday, so **employees will only have direct access to documents from any date earlier than July 1 prior to Go-Live.**

As we approach Go-Live, more information will be populated here <https://knightvision.it.ucf.edu/actions-before-workday-go-live/> regarding what actions UCF employees need to take before the new system is implemented.



**SCAN ME**



# Training Update

**Release and Deliver Training** with tenant access beginning **May 1, 2022**

- Upcoming training sessions will be provided via our **Training Calendar**.

## How to **stay informed** on training updates?

- Attend Workday Community Info Sessions and Day in the Life sessions
- Subscribe to Knight Vision newsletter
- View video demos before training on our [Microsoft Stream channel](#)



# Q&A

# How to Get Involved?



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