

# Workday Community Information Session 4/21/22



# Agenda

- Welcome
- What is Workday?
- Upcoming Events
- Workday at UCF: Procurement
- Workday at UCF: Reporting & Analytics
- Training Update
- Q&A

# Introductions

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**Mika Garcia**  
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Functional Lead:  
Procurement



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Reporting and Analytics



**What is Workday?**



# 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 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**



# 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. With the transition to Workday, some information currently accessed through Employee Self Service will be converted into historical data. Some of these changes require employees to take a few steps before July 1, to better prepare for the transition.

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**

# Upcoming Events



# Upcoming Knight Vision Events

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- Knight Vision Day in the Life of UCF Faculty (**April 21 at 1 p.m.**)
- Knight Vision Virtual XChange: HR (**April 26 at 3 p.m.**)
- Knight Vision Virtual XChange: Faculty (**April 27 at 3:30 p.m.**)
- Knight Vision Virtual XChange: Finance and Grants (**May 9 at 10 a.m.**)
- Knight Vision Virtual XChange: Reporting and Analytics (**May 16 at 1 p.m.**)
- Knight Vision Virtual XChange: SET (**May 17 at 10 a.m.**)
- Workday Community Information Session (**May 19 at 9 a.m.**)



# Workday at UCF: Procurement

# Procurement Options

How to buy goods or services within Workday

Supplier  
Punchout

Non-Catalog  
Requisition  
(Manual)

Expense Card or  
Procurement Card

# What is a Punchout?

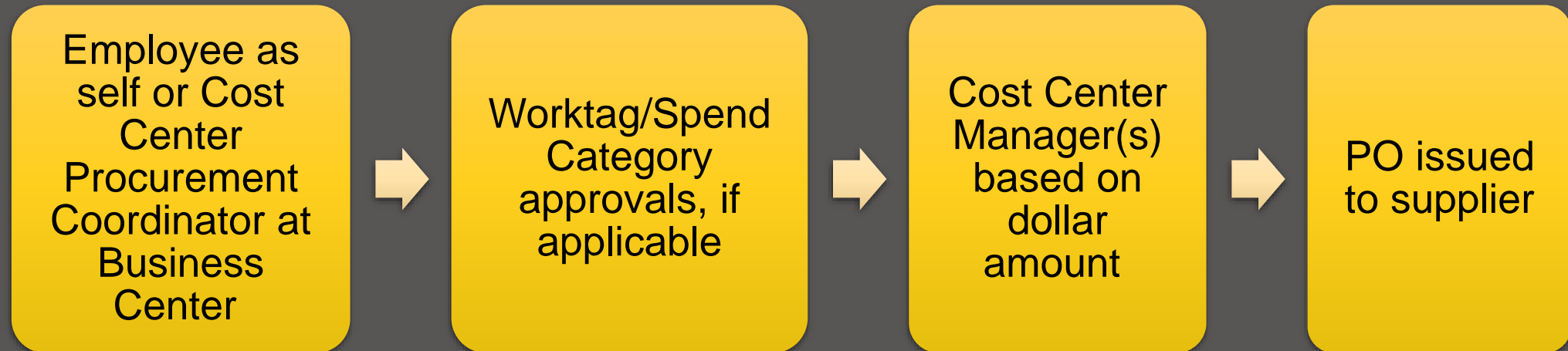
A Punchout is a connection to a supplier website within Workday that allows users to shop a supplier's catalog of goods and services. Placement of order, approval, receiving and payment processes will all occur in Workday.

## Benefits:

- Encourages use of preferred suppliers with contracted pricing and discounts
- Similar functionality to shopping on .com websites
- Greater visibility of spend; approvals on front end of transaction
- Purchase orders sent via electronic integration – supplier automatically receives order upon final approval
- No keying of invoices
  - Received through electronic integration
  - If purchase order, receipt and invoice match – payment will be issued to supplier

# Punchout Order Process

- Will follow requisition to purchase order workflow - regardless of dollar amount
  - No expense card or procurement card use
  - No additional quotes are required
  - Requisition line-item details are populated from the catalog



# Supplier Punchouts at Go-Live

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**Airgas**®

an Air Liquide company

 **Staples**™

amazon **business**

**GRAINGER**®



 **fisher** scientific  
part of Thermo Fisher Scientific

# Post Go-Live Supplier Punchouts

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We are reviewing the following for implementation post Go-Live:

**McMASTER-CARR**<sup>®</sup>

  
**GraybaR**<sup>®</sup>

 **HENRY SCHEIN**<sup>®</sup>

**VWR** <sup>®</sup>  
*We Enable Science*

  
**SIGMA-ALDRICH**

# Considerations for Punchout

Supplier currently has a contract and/or contract we can review for adoption

Volume of transactions

- High volume, low dollar
- PCard or Purchase Order
- Assist with compliance requirements

Supplier has punchout capability and technical resources to help support integration

*Please forward recommendations for punchouts to be considered for future integration to [nellie.nido@ucf.edu](mailto:nellie.nido@ucf.edu)*



# Supplier Punchout Demo

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Log-in to  
Workday

Create  
Requisition

Connect to  
Supplier  
Website

Shop and  
Checkout

Submit for  
Approval

PO Issued  
to Supplier



# Major Changes with Reporting in Workday

# 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.

# Training Update

# Workday Training Update

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- **Release and Deliver Training** with training tenant access beginning **May 2**.
  - ❖ **Special Edition: Training Newsletter** will provide access details and upcoming training information.
- 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](#)



Knight Vision Group



# Understanding your Learning Path

A **Learning Path** is the ability to align your job role to our Workday learning categories. This information will allow you to better identify with which training you will need.

## ACTION STEPS TO TAKE:

- **STEP ONE: Complete Core Categories** that provides a foundational understanding for all UCF employees.
- **STEP TWO: Know your Role.**
  - Are you a non-exempt employee?
  - Are you a manager or supervisor?
- **STEP THREE: Determine your Specialty.**
  - What functional area do you work in?
  - Are there specific business process tasks you perform?



# About On-Demand Training

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Direct Access to SharePoint folder from Workday Training Catalog (NID login required)



Consists of Job Aids (step-by-step) and Video Demos. Some webcourse options will be available by registering on MyUCF.



All employees will have access to the Workday training environment.

# Training Release Plan

Workday training starts on May 2. All training materials will follow a roll release schedule to provide support and enable knowledge retention.

**\*Includes: All on-demand materials (job aids/demos); webcourses; live training sessions (support labs/ILT)**

## May 2 – May 13

- May 2: Workday Essentials, Pay & Absence, Time Tracking, Learning, Benefits UCFAA, Workday for Managers (WDY 101 & 102)
- May 9: Workday Academic Affairs, Workday Reporting Basics

## May 16 – May 23

- May 16: Workday Finance, Workday Procurement - Basics (WDY 200 & 201)
- May 23: Workday Finance, Workday Procurement, Workday Expenses – FULL (WDY 202)

## June 1 – June 30

- June 1: Workday Recruiting, Workday Staffing & Compensation
- June 6: Workday Grants, Workday Endowments
- June 13 – June 30: Drop-in Labs, Filler sessions (extra instruction)

← ONGOING SUPPORT LABS →



# Workday Training Catalog

<https://knightvision.it.ucf.edu/workday-training-catalog-general/>

This catalog is designed for all **UCF employees** and serves as a prerequisite for all additional Workday learning paths. Participants will learn employee self-service functionality in the Workday system, which includes basic navigation, mobile functionality, pay application and how to navigate to Workday Learning.

Search:

| Category Name  | Category Description   | Included Business Process Tasks  | Estimated Duration | On-Demand Materials |
|--|--|--|--------------------|---------------------|
| Workday Essentials (Getting Started)<br><br><a href="#">WDY100 webcourse</a> | Participants will learn about employee self-service functionality in Workday, which includes a basic overview of the Workday system. | Use Tools and Navigation<br>Workday Search<br>Use Your Inbox<br>Set Up Account Preferences<br>Installing Workday Mobile<br>Identify Your Place in the Organization<br>Workday Accessibility<br>View Benefits Dashboard | 20 mins.           | Coming Soon         |
| Workday Pay & Absence  | Participants will learn how to navigate the Pay Application, including how to view and edit payment elections and leave requests.    | Change W-4 Withholding Elections<br>Manage Payroll Options<br>Manage Your Time Off<br>Manage Your Absence  | 10 mins.           | Coming Soon         |
| Workday Learning   | Participants will learn how to enroll in a course and manage course enrollment from the Learning application.                        | Enroll and Drop a Course   | 5 mins.            | Coming Soon         |

[Edit](#)

Showing 1 to 3 of 3 entries

## Getting Started in Workday

Coming Soon!

[All Employees](#)

[Non-Exempt Employees](#)

[All Managers](#)

[Faculty](#)

## Specialty Areas in Workday

[Academic Affairs](#)

[Reporting Basics](#)

[Finance](#)

[Procurement](#)

[Expenses](#)

[Recruiting, Hiring & Onboarding](#)

[Staffing & Compensation](#)

[Grants/Endowments](#)

# Available Workday Webcourses

We will be rolling out 6 webcourses to serve as an additional learning opportunity for high impact audience groups. All training materials within webcourses will also be available through the Workday Training Catalog.



All webcourses will require registration on MyUCF.  
Enrollment and completion data will reflect in Workday prior to and following go-live.  
**See Workday Training Catalog for Release Dates.**

# Live Training Sessions

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Live Training Sessions will be located in Workday Training Calendar on MyUCF Events. Combination of virtual and in-person events.



Registration will be required for all live training sessions to monitor capacity limits and ensure session accommodations.



Will consist of Learning Labs, Instructor-led trainings and additional support labs if needed.

# Training Support

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1

## Refer to Workday Helpful Resources

- [Handouts and Flyers](#)
- [Knight Vision videos \(demos/events\)](#)
- Notes and Tips located in job aids

2

## Live Training Support

- Ask questions during live sessions and attend support labs.
- Reach out to trainer or SME if needed following a session.
- Complete Training Evaluation Survey.

3

## Pre Go-Live Support

- Complete short Qualtrics form for Workday training environment assistance.
- Continue to bring general questions to [knightvision@ucf.edu](mailto:knightvision@ucf.edu)

# 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

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workday.



Questions?



# How to Get Involved?



Keep up to date by visiting the Knight Vision website at [knightvision.it.ucf.edu](https://knightvision.it.ucf.edu)



Email: [knightvision@ucf.edu](mailto:knightvision@ucf.edu)



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