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# Knight Vision XChange: Ready, SET, Go-Live!

# Why Workday and Why SET?

# What is Workday?

## Why Workday?

The implementation of Workday is a part of a campus-wide program (also known as [Knight Vision](#)) that will transform the way UCF works. This change will impact all UCF faculty and staff.



### One Single Source Platform

*UCF employees will be able to now access all self-service, HR and finance elements in one system with a customized dashboard.*



### Data Transparency

*Workday allows less time looking for data share key metrics with entire organizations. Get the right information to the right people at the right time!*



### Streamlined Business Processes

*Business processes will be reusable and automated for data quality and reporting. P.S. - No more LAPERS!*

# About SET and Business Centers/kNEXT

The **Service Enhancement Transformation (SET)** Project is part of the Knight Vision Program. It aims to improve and simplify human resources, payroll, finance, procurement and unit-based post-award services and processes throughout our university.

**Workday is a modern technology tool that addresses our greatest business challenges.**

We lack a unified way of doing HR and finance work. Processes happen manually and in shadow systems outside PeopleSoft. Workday fixes this. It puts HR and finance data in one place and gives us consistent reports we can trust to make critical decisions.

We will have greater insights into how we operate to enable the best decisions for our institution.



**Workday and SET are both critical to supporting UCF's mission.**

Combined, the SET community utilizing Workday will transport us to a place where nearly everyone does things the same way with these processes, eliminating the wide variation in how we perform services and supporting our ultimate mission of research and education.

We strive to provide best-in-class service through updated technology and service expertise.

We will have a window into accurate and consistent data to make the best decisions to align our resources with our educational and research priorities.



SET is a thoughtful structuring of our people based on their interests and talents.

By realigning our people, providing training and developing expertise in this new Workday technology and functional work, we will provide our campus with what we need more quickly and accurately and in a consistent, simplified way.

**SET is a community of people structured to best leverage our talents and new technology.**

# About SET and Business Centers/kNEXT

The Knights Experience Team (kNEXT, with a silent "k") will be the one-stop shop for your HR, finance and Workday needs beginning this Friday, July 1, when Workday and the Service Enhancement Transformation (SET) project go live.

## What is kNEXT?

- kNEXT is comprised of a team of Customer Care Coordinators who will serve as a helpful source for answering your common self-service questions or who can direct your questions to the right support team. kNEXT is also comprised of a team of Specialists who will provide backup support for the college and division Business Centers.
- kNEXT will continuously improve the processes and Workday tools that will help you complete tasks in the new ERP system.

## How will you interact with kNEXT?

- kNEXT will empower employees to feel confident as they navigate their own information in the Workday system, which will improve everyone's ability to quickly and efficiently get work done.
- For managers and employees, you will interact with kNEXT for questions related to Workday processes, self-service questions and for getting you connected to the right business center support team for HR and Finance support.

## What does this mean for you?

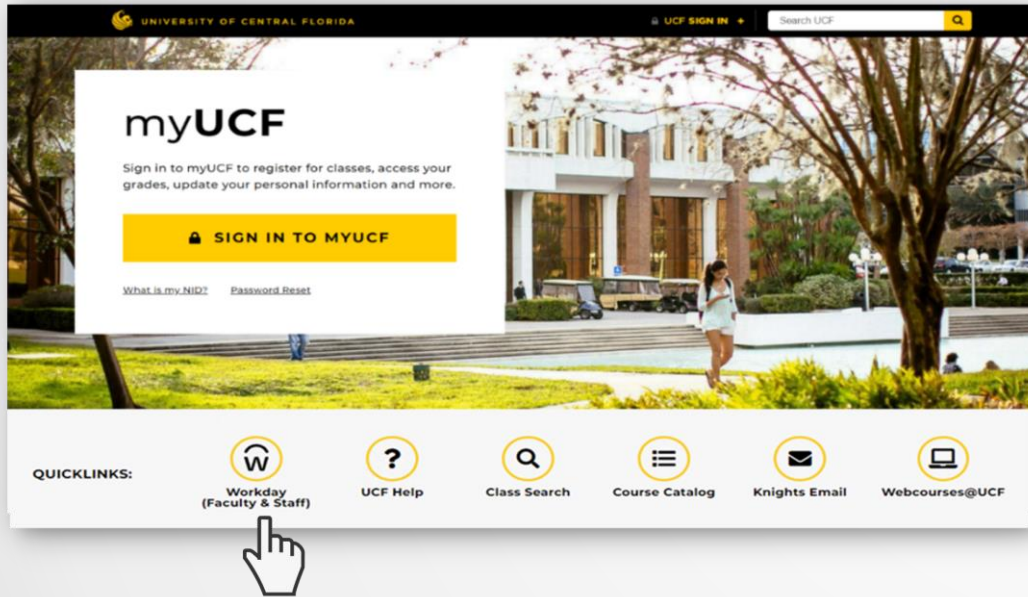
- The kNEXT website, <https://knext.ucf.edu>, will launch on Friday and will be the starting point to help you get the information you need for HR, Finance and Workday processes.
- Should self-service questions arise, kNEXT's centralized website and Customer Care Coordinators will be available to assist by connecting you to real people in real-time to help you.

# How to Access Workday and Workday Training

# How to Access Workday Starting July 1, 2022

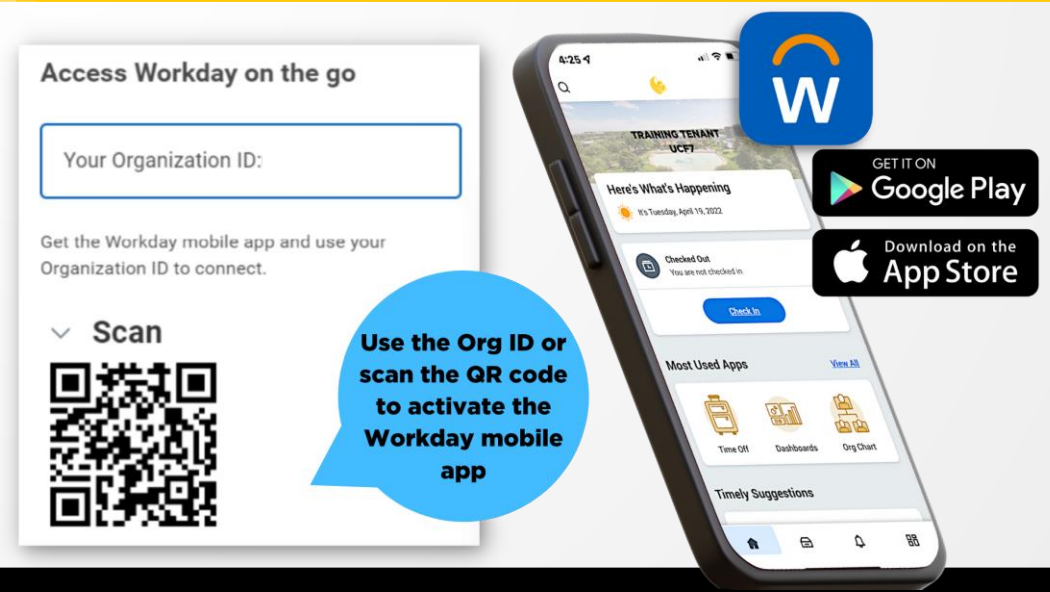
All UCF employees and affiliates [direct support organizations (DSOs)] will have access to Workday using their UCF NID through multi-factor authentication (MFA). **To access Workday, users can login 3 different ways:**

**1** Go to <https://my.ucf.edu> and access Workday from the “Quick Links” menu.



**2** Go to <https://workday.ucf.edu> and log in with your UCF NID.

**3** Access the Workday mobile app on your device and log in with your UCF NID.



# Workday Training

Visit the Workday Training Catalog to help you identify which training to access [based on your role](#):

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

The navigation menu located to the right of the catalog allows you to view training details by functional area. Once available, simply click the "Access Now" hyperlink in each learning category column to access on-demand training materials (job aids and video demos). \*Note: Access to training materials requires UCF NID login.



## **Live Workday Sessions are optional learning resources.**

All other Workday training materials (job aids, cheat sheets, video demos) from the training catalog can be utilized as other stand-alone training materials and will continue being available after July 1. Additional live sessions will be added and provided as an ongoing resource for UCF employees (faculty and staff) after Go-Live.



# Workday Basics You Should Know

# Common Apps in Workday

**Workday Applets (Apps)** are icons that live on the home page of the desktop and mobile versions of Workday. Each one acts as an entry point to a category of actions or information. Your home page will display a pre-set group of Apps and provide you with the option to customize how they display.

The following apps are default for all UCF employees



The following apps are default for all UCF managers



**Note:** Specialty roles will have additional default Apps. All employees can add more apps.



# Navigating the Workday Inbox

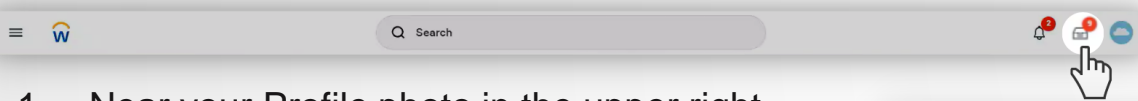


Your Inbox includes notifications of tasks, approvals, due dates, and other items sent to you as part of your organization's business processes. You can access your Inbox using your desktop web browser or mobile device.

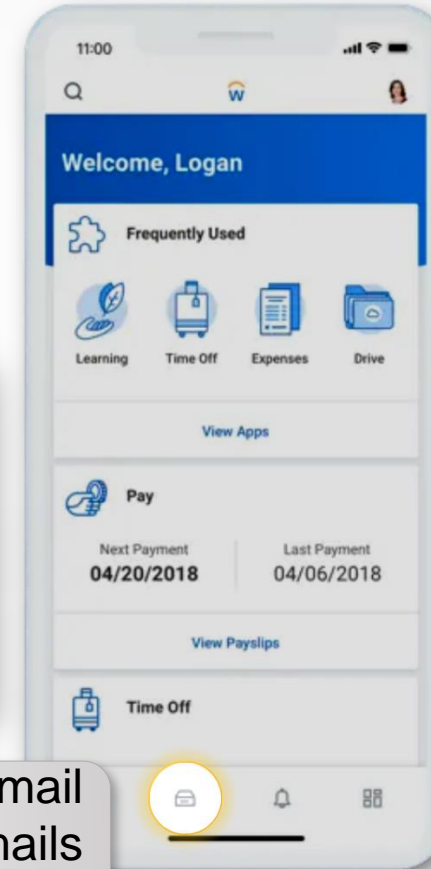
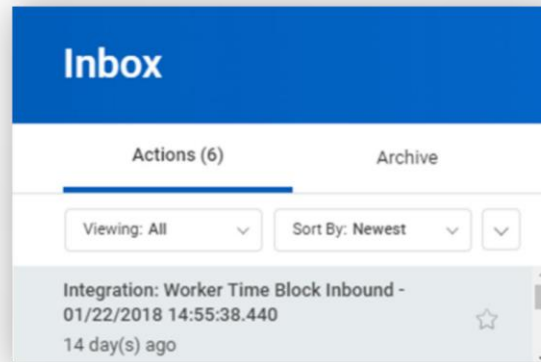


## Viewing Your Inbox

### Desktop Instructions



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.



## Viewing Your Inbox

### Mobile Instructions

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.



Workday inbox emails will also be sent to your Outlook email from [ucf@myworkday.com](mailto:ucf@myworkday.com). Keep an eye out for all emails from this email address.

# Workday Support

# Where to Go & Who to Contact for HR & Finance Inquiries

Need help with HR, Finance or Workday, and not sure where to start?

**KNEXT.UCF.EDU** ↘

**Best for most questions—it's quick and self-driven**

- For example, find contact information for your business centers, central offices and kNEXT

**407-823-NEXT** ↘

**Want to talk with someone?**

- kNEXT Customer Care Coordinators can route your question to the right support team or assist you with a Workday self-service need
- For example, Customer Care Coordinators can assist employees with managing their personal information in Workday, time and time off questions, paycheck questions, etc.
- kNEXT's phone line (407-823-NEXT) hours of operation are from 8 am - 5 pm EST.

**WORKDAY HELP** ↘

**Best for help with HR and Finance needs and finding job aids and answers to FAQs**

- Contact your HR & Finance Business Centers, kNEXT and Central HR and Finance offices by submitting a case via Workday Help; cases submitted in Workday Help will automatically route to the appropriate person to support your HR & Finance issues, inquiries and needs
- Find job aids and FAQs in our Knowledge Base
  - For additional self-driven training, access Workday Learning, our new LMS where we will migrate training

# What is Workday Help?

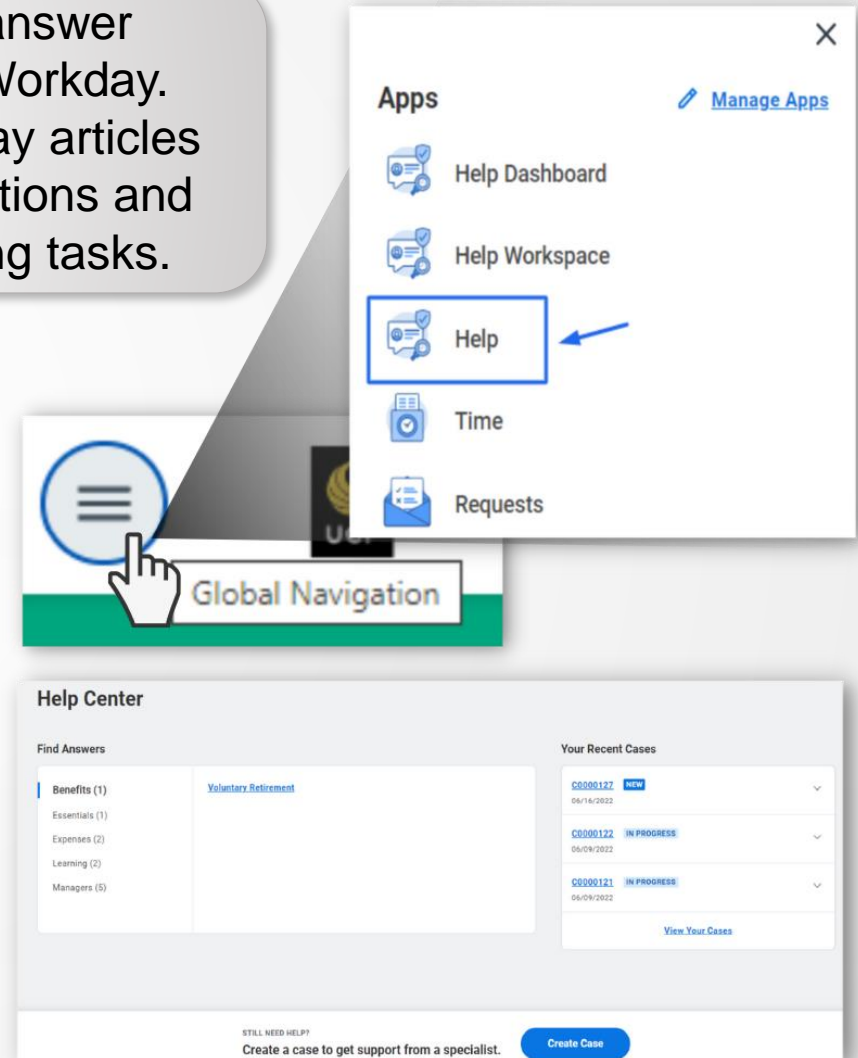
**Workday Help** is designed to provide users resources to answer questions and provide guidance on completing tasks within Workday. Searching a topic in which you are seeking guidance will display articles which include overview information, answers to common questions and links to job aids providing step by step guidance on completing tasks.

## Accessing Workday Help

1. Click on the top-left global navigation panel.
2. Select the Help application.
3. Open the Help Center.

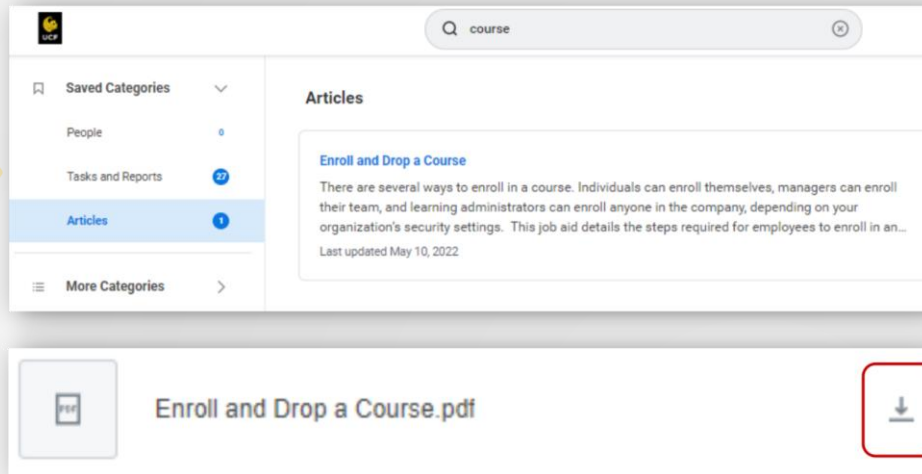
Workday Help includes the following two components:

- **Knowledge Base** - All Workday job aids and videos demos, along with additional UCF resources, will be available as Articles within the Workday Help Knowledge Base.
- **Case Management** - Users may submit a Help Case if they are unable to perform a self-service action in Workday or require additional assistance on locating the right resources.



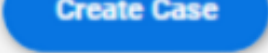
# What is Workday Help?

## Search for Help



\*Select the download icon to download the pdf version of an Article if available.

If you still require assistance after reviewing the Workday Help article and related job aid, you can create a case in Workday. Toward the bottom of the article, complete the following actions:

1. Select Create Case. 
2. **Create For:** your name will auto-populate.
3. **Case Type:** select a related category from the drop-down menu.
4. **Case Title:** add a short description of the case.
5. **Detailed Description:** provide a detailed description of the case. *\*Attachments: use the paperclip icon to attach relevant screen shots.*
6. Select Create Case.

1. From the home page, use the search bar to Search for a common term such as 'course'.
  2. On the search results page click Articles to view related articles.
  3. Related articles will display.
  4. Select an article.
- Each article will provide information to review and an option to download a job aid with step-by-step instructions and screen images of select processes.

## Create a Case

# What is Workday Help?

## Review a Case

Your case will be routed to designated staff from kNEXT, business centers or service desk teams that can best answer your question. They will have the security access to review and close a case in Workday.

1. Search View My Cases.
2. Select the View My Cases report to review all cases and statuses.
3. Click the case name to review details.
4. Click Reply to add additional information or notes to assist the case manager.
5. Click Add Attachment to include attachments.

Case	Detailed Message	Case Type	Case Creation Date	Assigned To	Case Status
<a href="#">C0000112: Test case creation.</a>	I would like to enroll my team members into a WD Learning course. I am receiving an error message.	Workday Learning	06/03/2022 03:25:15 PM		New



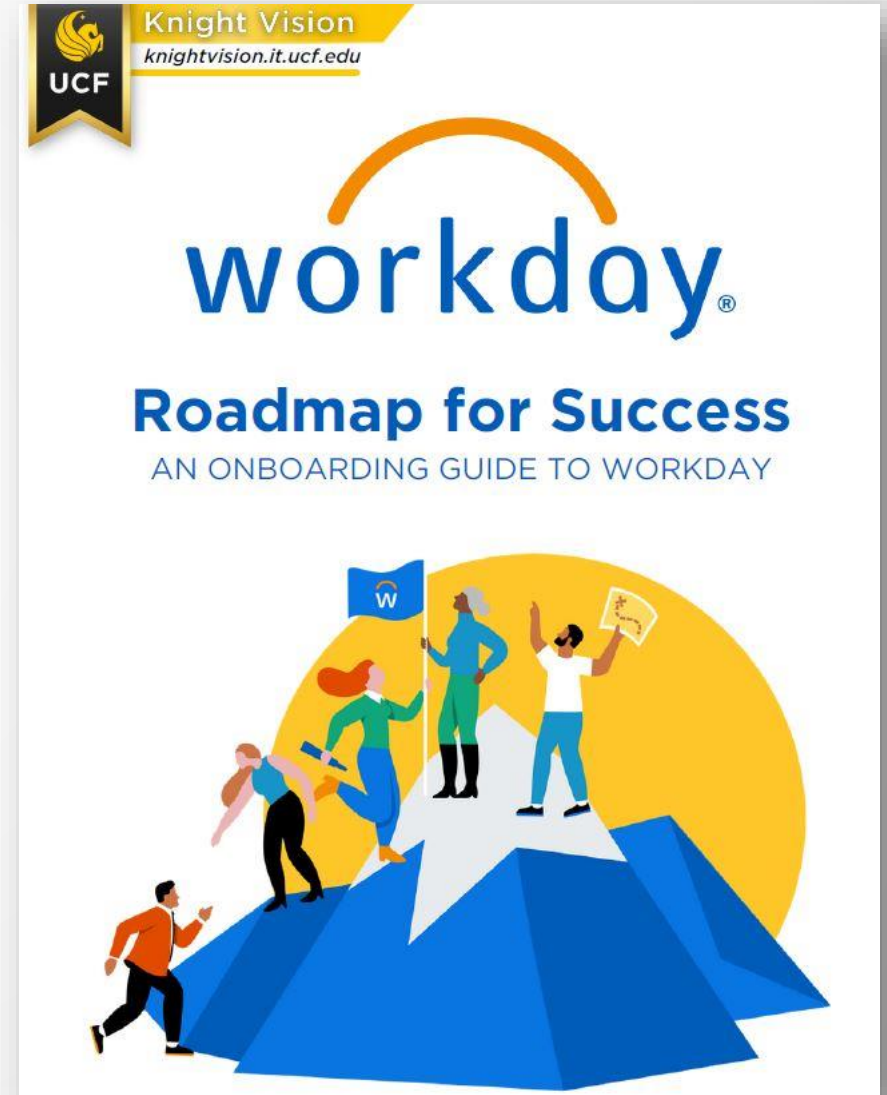
# Q&A

# Workday Roadmap to Success Guide

A transition guide to help guide all UCF employees (faculty & staff) on the Workday implementation.



<https://knightvision.it.ucf.edu/wp-content/uploads/sites/11/2022/06/Workday-Roadmap-for-Success-Guide.pdf>



# How to Get Involved?



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



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