



Go Live: January 1, 2021

October 5, 2020



AGENDA – Campus-Wide

- What is Workday?
- Change Overview
- Key Changes
- “Employee as Self” Role
- Required Training
- *Questions*





AGENDA - Administration

- FDM Financial Data Model
- Finance Module
- HCM Module
- Sponsored Projects
- Other/Cutover/Stabilization
- Security Roles
- Required Training
- *Questions*





- **What is Workday?**
 - **Change Overview**
 - **Key Changes**

- <https://modernization.wsu.edu/>
- <https://modernization.wsu.edu/what-is-workday/>
- <https://modernization.wsu.edu/change-overview/>



“Employee as Self”

DEFAULT ROLES

Show entries

Search:

Workday Role	Process Responsibilities	General Description
Employee as Self	<ol style="list-style-type: none">1. View and print your pay slips2. Change your tax withholdings3. Access tax documents4. View supervisory organization5. View leave balances/accruals6. Enter time worked (applicable for certain employee types)7. Manage time-off and absence requests	<p>All WSU employees will be assigned the “employee as self” role, which will allow employees to perform self-service tasks, such as submitting time, viewing leave balances and making benefit elections.</p> <p>This role can also be referred to as ESS (Employee Self-Service).</p>

<https://modernization.wsu.edu/security-roles/>



Training for “Employee as Self”

<https://workdaytrainingcatalog.wsu.edu/>

Workday Training

- University-wide Workday training begins in October 2020 and runs through February 2021.

WASHINGTON STATE UNIVERSITY | WORKDAY TRAINING CATALOG

For questions, please visit modhelp.wsu.edu.

Training Focus

All Topics All Employees Finance Grants Human Resources Payroll Reporting Security Training by Role

Training by Type

Functional Work Area

Academic Accounting Assets Benefits Budgets Compensation Customer Contracts and Receivables Employee as Self

Endowments Finance Approvals Manager as Self Procurement Recruiting Staffing Time, Leave, & Absence

Travel and Expenses



Questions???



FDM – Financial Data Model

LEGACY

Accounts

Expenditure Authority



WORKDAY

Programs

Cost Centers

Program Mgr

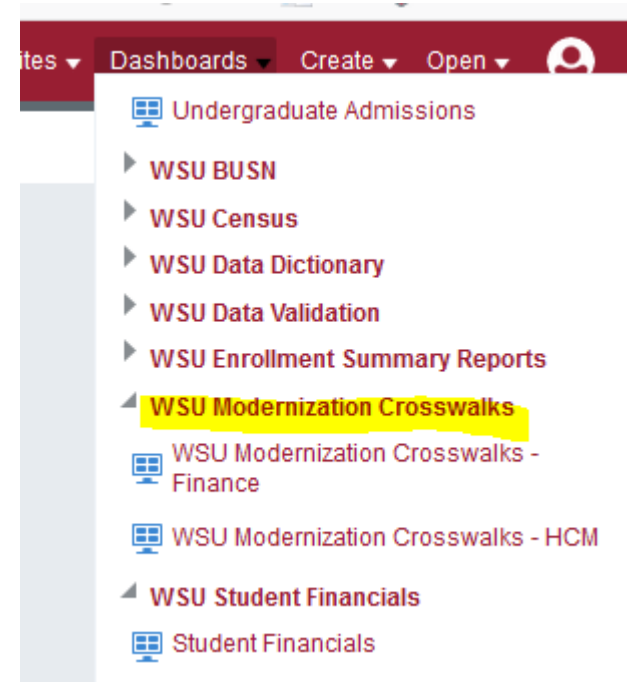
Cost Center Mgr

FDM Cross Walk tool located in:

[mywsu/OBIEE/Dashboard/WSU
Modernization Crosswalks](https://mywsu.edu/OBIEE/Dashboard/WSU%20Modernization%20Crosswalks)

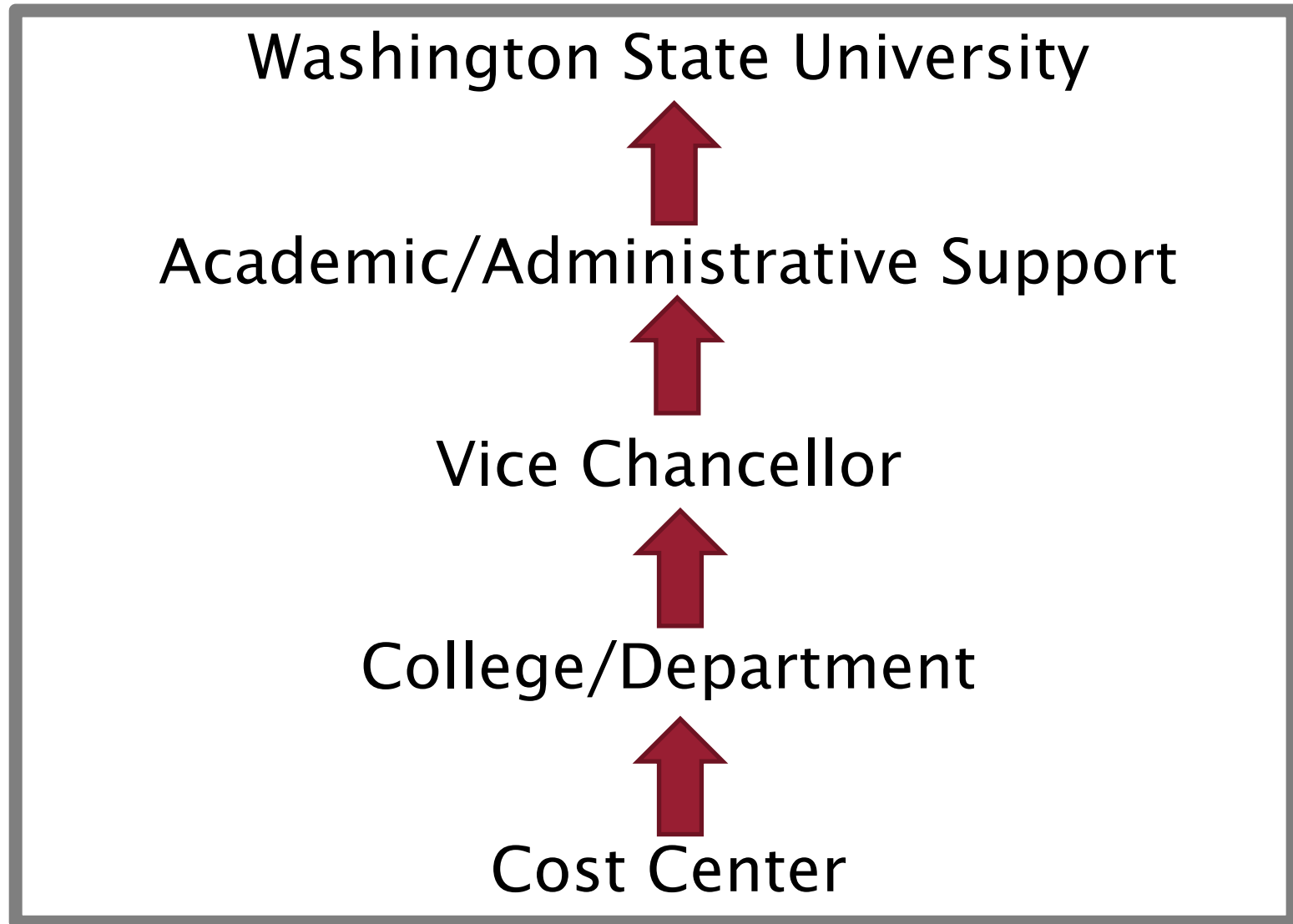
(Updated on an ongoing basis.)

Available to all employees.





Cost Center Hierarchies



Similar methodology for grants

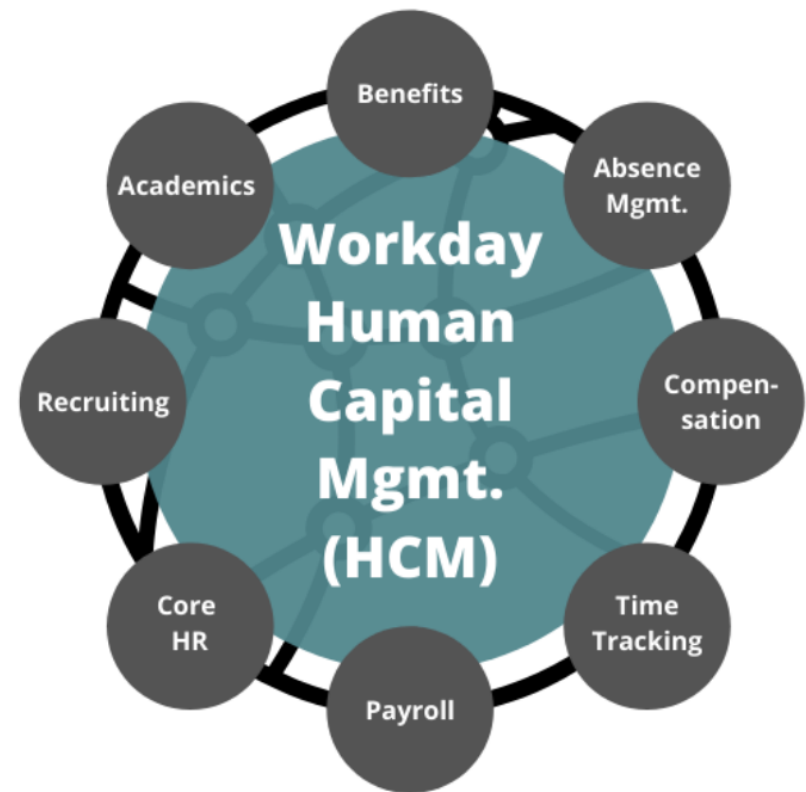


Primary Modules

IN SCOPE: FINANCE



IN SCOPE: HUMAN CAPITAL MANAGEMENT (HCM)





Financials

Manager Roles

Cost Center (central)

Program (central)

Grant (Outreach/Research)

Gift (Central)

Project

- Security Roles: Assigned based on Cost Center or Cost Center Hierarchy.



HCM – Human Capital Management



- Security Roles are assigned based on Supervisory Organization.
- Faculty are assigned to an Academic Unit.

• **New Role: Time Approver**



Sponsored Projects

- Tracked through a grant worktag.
- Effort Certifications – route electronically. Changes generate a payroll adjustment.
- Grant Managers and Principal Investigators (PIs) will have more visibility for award billing, reporting, budget to actuals, and cost share by dashboards and reports.
- Cost shares post in real-time for every payroll period.
- Security roles in Workday: Grant Managers and Grant Principal Investigators.
- Grant Manager will hold approval authority on all transactions using a grant worktag.



Other Information

IMPORTANT TO KNOW

Workday Launch

- Employees will be able to do some HR and Payroll transactions in Workday (like entering time off/worked) starting on December 16, 2020.
- January 1, 2021: All of Workday will be available for use University-wide.

Workday Training

- University-wide Workday training begins in October 2020 and runs through February 2021.

Workday Knowledge Base (Crimson Service Desk – Confluence)

Reference Guides
Frequently Asked Questions



Cutover Planning

- Data Transfer
- Transition to Workday
- Soft Freeze Dates: Slow down transactions
- Hard Freeze Dates: No more transactions are entered in legacy
- Occurs between November and December
- Full plan to be released in October

Process spring semester temporary appointments in Workday beginning Dec. 16



Stabilization

- To occur a full year after launch
- Work out kinks
- Expect bumps
- We will adapt to the new system
- Be patient
- Workday Knowledge Base and Service Desk



Security Roles

- Distributed to administrators
- Evolving as we continue to learn
- Security roles determine which training each employee needs




Training by Person


Note: Workday roles assigned to individuals in this file are based on R2PM Round 4 (with some updates from UAT). Data in this file should be ~95% directionally correct, based on detailed mappings of roles to training materials and limitations of WSU legacy data. If you have questions, please email modern.initiative@wsu.edu.						
Name	Area	Business Role	Business Role Category	Training Name	Training Type	Col
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing Guide: Add and End Additional Job	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing Guide: Change Job	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing Guide: Hire (New Employee or Contingent W	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing Guide: Manage Separation	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing: Create Position	Virtual Instructor-Led Training	
Roberta Stanco	WSU Tri-Cities	Compensation Partner	HR	Workday Staffing: Employee Lifecycle	Virtual Instructor-Led Training	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Accounting: Accounting Journal Reversal	Micro-Learning	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Accounting: Accounting Journals	Virtual Instructor-Led Training	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Budgets Guide: Create Budget Amendment	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Budgets: Manage Budget (Non-Central)	Virtual Practice Lab	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Finance Guide: View Position Budget	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Foundation Data Model Overview	Micro-Learning	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Payroll: Payroll Accounting	Virtual Instructor-Led Training	
Roberta Stanco	WSU Tri-Cities	Cost Center Accountant	Finance	Workday Reporting Guide: Using Workday Reports	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Manager	Finance	Workday Accounting Guide: Accounting Adjustment - Cost Tran	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Manager	Finance	Workday Accounting Guide: Accounting Journal - Reversal	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Manager	Finance	Workday Accounting Guide: Create Accounting Journals	Reference Guide	
Roberta Stanco	WSU Tri-Cities	Cost Center Manager	Finance	Workday Accounting: Accounting Journal Reversal	Micro-Learning	
Roberta Stanco	WSU Tri-Cities	Cost Center Manager	Finance	Workday Accounting Guide: Transfer Asset	Reference Guide	


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 Learning Transcript

 Credentials 

 Help 



Workday Training is Here!
Workday Instructor Led Trainings are now Open for Enrollment! Search Content above for courses. Find relevant courses, materials, and Reference Guides in the **Workday Training Catalog**, based on your Workday security role. Find additional tips and considerations for Workday Training participants on the **Modernization Training** web page.

Please join us for two special presentations from the Employee Assistance Program:
Leading Change *for WSU Leaders*
Navigating Change *for all WSU Faculty and Staff*
Search Content to enroll in any available sessions!



Questions???