

Workday 42 System Update

Feature Highlights | March 2024

Agenda

- Workday Update Methodology
- Feature Highlights
- Stay Tuned

Workday 42: Methodology

- Workday updates functionality 2 times per year
- Each update contains many enhancements to WD functionality that Brown may accept or defer depending on their impact to the community
- Each accepted enhancement is tested prior to being deployed
- Deployment will take place over a weekend update, during which Workday will be unavailable
- The community will be provided with updated information, training and materials depending on the magnitude of the enhancement

Workday 42: Feature Highlights

User Experience Changes

- Homepage Enhancements: Announcements, Awaiting Your Actions and Timely Suggestions
- Quick Review Task from Homepage
- My Tasks Advanced Filters
- Workday Assistant updates
- User Based Security Business Process
- Expanding Hubs
- Recovery Assistant Update



- Announcements have been relocated to the top of the Homepage
- Navigate to different announcements by using the arrow icon
- Select task in announcement to take action

Homepage Enhancements

Awaiting	Your Action	
	<u>Time Off Correction: Bus, Gus (655171)</u> My Tasks - 38 second(s) ago DUE 08/30/2023	Quick Review
	Review	и ^л Х
		~
	Details to Review	_
	First Day of Time Off 02/27/2024	
	Last Day of Time Off 02/27/2024	
	Total 1 Send Back Cancel	
	Deny	Approve

- Quick Review allows you to take action directly from homepage
- Select "Quick Review" to access the most recent Inbox tasks
- Task details will be presented without being moved into "My Tasks" page
- Task can be expanded for more information
- Send back and cancel are available from quick review

Quick Review from Homepage



- View timely suggestions for actions to be taken such as:
 - Updating emergency contact information
 - Home contact information
 - Starting your self-appraisal
- Take action on unsubmitted purchase requisitions

Timely Suggestions from Homepage

All Items			93 items	
Q Search: /		+	↑ ↓	
	Par	ameter	ſS	
	Assig	gnment	select one 🔻	1
	Туре		select one	
	1900		Assigned Only to Me	
	Step		Assigned to Multiple People	
			Delegated to Me	
Paran	neter	S		
Assignn	nent	Assigned	d Only to Me 🔹	
Туре		× Requ	uest Time Off 🛛 😑 2	
Step		× Appro	roval 😑 3	

- Advanced Search in "My Tasks" supports searches by task type, step and date range
- Select tasks assigned to you, others or delegated to you
- Identify the type of task you want to search; this will default to the tasks in your Inbox at the time the search was created

My Tasks Advance Search



Once search is set, it can be edited, removed or saved

 To remove Saved Search, select arrow icon to return to all results

 Once search is set, it can be saved to identify critical tasks on an ongoing basis

My Tasks Advance Search



- Workday Assistant supports tasks such as requesting time off, viewing all team member time off, viewing performance reviews, enrolling in learning content or updating contact information
- To get started, use search, select from the list of topic options or select "show available capabilities"
- Once on the topic heading, select from a list of items that Workday Assistant can support

Workday Assistant



When assigning a user-based role, the process can route for approval, broadening the review of security-based changes as they are occurring

 Supports the documenting of ticket number for related request and any additional notes from the requester

User-Based Security Business Process



- Hubs consolidate tasks, reports and data in a single location
- Jobs Hub, Expenses Hub, Financial Coordinator Hub and Benefits and Pay Hub are currently available to all staff and faculty
- Manager Insights, Time and Absence Hub coming spring, 2024

Expanding Hubs



- Single point of access for all pay and benefits-based data
- Benefits: View and make changes to benefit elections, view ACA forms, view and update beneficiaries and dependents
- **Pay**: View your prior pay slips, most recent pay and deductions, make changes to payment elections (direct deposit), and update tax elections
- **Compensation**: View compensation and one time payment history as well as merit statements

Pay and Benefits Hub



Recent Applications

(View All Applications)		
	Q Find Jobs at Brown 1	
Senior Research Assistant	🗘 My Job Alerts 🛛 🕘	
u	My Applications 3	

Welcome to Find Jobs at Brown!

Welcome to Find Jobs at Brown, Brown's Internal Career Hub. Browse for openings, review application status and create j...

Read More

Single point of access for all internal job searches

- Find Jobs at Brown: View available positions and prior application status. Use *Find Jobs at Brown* to search and apply to staff positions
- My Job Alerts: Setup job alerts to be notified of job of interest based on profile, job family and manager
- My Applications: View in progress applications and withdraw applications as needed via "My Applications"

Jobs Hub



 Single point of access for Buyers to create, review and take action on requisitions, change orders, contracts and purchase orders

 Buyer Hub includes link to Requisitions app

Buyer Hub Updates



- Single point of access for all expense -based data and transactions
- Expense Reports: Create expense reports, view expense report status and history; view expense reports awaiting action or requiring additional information for completion
- Expense Transactions: View expense transactions awaiting expense report assignment
- **Payment Elections**: Update Payment Elections for reimbursements

Expenses Hub



- Single point of access for HR related data for HR Business Partners and HR Coordinators
- **Header**: Has announcement information and references links available to users
- **Reports**: Reports identify *Worker Movement* including incoming and outgoing workers and change job events; process level data available for viewing and to take action
- **Suggested Links**: Links to available reports and dashboards as well as Inbox and Archives

HR Partner Hub

Welcome message f Your work as a Financial Coordinator is success of Brown University. Please us View More	s critical to the operational		Derations Polici s Finance Operations policie View More		Workday Training Available Seats available in all Workday trainings; enroll now View More	
ne Reporting Learning						
Ay Inbox - Chart	₩æ	My Inbox Business Process Event Open Enrollment Change: Bus, Gus (655968) on 01/01/2024.	Subject Bus, Gus (655968) View More	Date : Initiat 02/12 01:14: PM	Image: Wy Actions Create Expense Report for Worker Create Requisition Create Miscellaneous Payment Request More (4) Image: Wy Requisitions My Expense Reports My Tasks for Orders More (2)	
Change Benefits for Open Enrollment View More					My Transaction History View More Processes My Analytics	

- Single point of access for Financial Coordinators making reviewing and managing financial-related tasks and processes quick and easy.
- Header: Has announcement information and references links available to users
- Hub includes: Inbox detail, transaction history information, financial analytics, access to Financial Coordinator reports and direct links to training & your Learning Transcript

Financial Coordinator Hub



- Single point of access for time entry, leave of absence and time off transaction and data
- Announcements and references links to available to users in header
- The hub includes: Access to headcount and FTE reporting, performance reporting and contact information for individuals you oversee

Manager Insights Hub (coming soon)



- Single point of access for time entry, leave of absence and time off transaction and data
- Link to related policies and reports for Absence Partners and Timekeepers
- Process level data available for viewing and to take action

Time and Absence Hub (coming soon)



 "Recovery Assistant" available for tasks started and navigated away from within 1 day of last interaction

- Use the Recovery Assistant pop up or access using your profile
- Available via worker profile cloud

Recovery Assistant

Workday 42: Feature Highlights

Recruiting, Staffing, and Payroll

- Disposition Groupings
- Job Profile business process
- Section Personal Information Help Text
- Streamlined Hire
- Performance and Goal interface update
- Change Location
- Model My Pay Updates
- Costing Allocation End Date Requirement
- Photos in Workday
- Skills on Job Requisition (*coming soon*)



- Disposition reasons are now grouped by disposition categories for the purposes of recruiting reporting
- More easily identifies disposition types for recruiting managers and HR staff

Disposition Categories



 Internal job profile creation and edits are done by business process

 Process will route for review and additional functional updates where there are downstream impacts

Job Profile Business Process

Marital Status	
Marital Status is an optional field at Brown University.	\triangleleft \checkmark
Marital Status	
× Single (United States of America) ∷≡	
Marital Status Date	

- Help Text for Personal Information sections to define fields within personal information inline
- Defines which fields are required versus optional

Help Text for Personal Information

Hire Date *		ľ
Reason		
First Day of Work MM/DD/YYYY	future, test	•
End Employment Date		
MM/DD/YYYY	Worker Information	
	Pre-Hire	
	future, test	•
	Phone Number	
	+1 (401) 5551111	

Streamlined interface for end user; subprocess user interface remains the same

 Pre-hire information prepopulated on reference card

 Unused fields removed from the process

Streamlined Hire



Performance review template streamlined

- Navigation from left side toolbar
- Process easily downloadable
- Managers can save throughout drafting the process and return to update the evaluation prior to submitting

Updated Performance Template



- Job Change business process is enhanced to support location changes for employees*
- The process can be initiated from the worker profile by the HR Business Partner or HR Coordinator from the worker profile or as a related action under "Job Change"

*Location updates for remote locations not currently available

Location Change Updates

Model M	y Pay Bus, Gus (655968)		
Reference	Pay		
Company	Brown University	Position	POS347735 Planner
Pay Period	Feb 1, 2024 - Feb 29, 2024	Gross Pay	8,750.00
Payment Date	Feb 29, 2024	Net Pay	6,379.46

Modeling Options

Expand sections below as needed and enter new values in the Adjusted Value column. Click the Adjust Federal Taxes and Adjust State Ta When finished, click the Model button to run a calculation that compares your changes to your original pay.

> Pre-Tax Deductions: 0.00



Model My Pay can be used to review your taxation elections and project potential changes prior to making them in Workday in conjunction with a specific pay date

Federal and/or state taxation updates are available for review by selecting the respective adjustment and then model

Model My Pay

Modeling Options

Expand sections below as needed and enter new values in the Adjusted Value column. Click the Adjust Federal Taxes and Adjust State Taxes buttons to make changes to your tax elections When finished, click the Model button to run a calculation that compares your changes to your original pay.

Pre-Tax Deductions: 2,789.66

(+)	*Decemintion	Additional Information	Input Details			
	*Description	Additional information	Туре	Current Value	Adjusted Value	
	Dental					
			Amount	72.74		
	Fidelity Deferred Vesting					
			Percent	0.19	2	
	Medical UHC EE					

Model My Pay can be used to review your retirement elections and project potential changes prior to making them in Workday

Retirement deduction updates are available for review by entering an adjustment percent and then model

 A new retirement deduction can be added by using the plus sign to add a new deduction line to model

Model My Pay: Retirement Deduction(s)

	08/30/2	023 💼 ?		Default Organizational Assignments (As o	n Start Datej
d Date	12/31/2	023 🖬 🕐		Business Unit: BU4030 CSV-Facilities Management Cost Center: CC72000 FM - Project Management Expense Purpose Code: 9999 Not Applicable Fund: FD100 General Operating	
Costii	ng Alloo	cation Attachments			□."
			Required with no		
(+)	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	*Worktags	*Distribution Percent

- Costing allocations for grant worktags will require end dates
 - Allocations without end dates will generate an error message to add an applicable end date

Costing Allocation End Date Requirement



- Upload your professional photo to your Workday profile to create a more personalized experience and build a connected campus community. Your photo will display on your Workday profile and be visible to others in the Brown community in Workday
- Guidance on photos can be found on the UHR website <u>here</u>

Photos in Workday



Up to 5 critical skills can
 be added to staff job
 requisitions to help
 identify key candidates

Skills on staff
 requisitions will display
 on job posting

Skills on Job Requisition (coming soon)

Workday 42: Feature Highlights

Purchasing and Supplier Accounts

- Requisition enhancements
- Expense Distance Calculation
- Supplier Account Analytics
- Workday Strategic Sourcing
- Cancel Write Off/Award Corrections
- Additional decimal precision in effort certification
- Effort Certification Work Area



- Requisitions App ordering methods have been streamlined to most applicable items
- Default requisition details can be stored to streamline the requisition initiation process
- When creating a requisition, the *Try New Experience* button will bring you to the Requisitions App

Requisitions App



- View all requisitions and take action from Requisitions menu
- "My Requisitions" is also available via the Financial Coordinator Hub
- Product Tours have been made available in the Requisitions App

Requisitions App (cont'd)


- Google Maps is available to calculate mileage distance in expense process
- Round trip calculation can automatically be assessed by selecting "Round Trip".

Distance Calculation



 Supplier transaction summaries, supplier creation and days to complete available to Accounts Payable

• Other KPIs also available

Supplier Account Dashboard



- Supplier registration is moving to the Workday platform
- Suppliers will be sent a registration link and integrated to Workday once approved by AP
- This experience will streamline the supplier registration process

Upcoming Supplier Management Changes

Overview	Award Lines	Notes	Attachments	Special Conditions	Committed Effort	Plan	NSF Code Allocations	Award Credits	Other Information
✓ Corr	ection Inform	nation							
Reason									
-									

 Cancellation of write offs are now supported if the write off is active and payment has not been applied

Award correction reason is now required on Correct Award business process

Cancel Write Off/Award Correction



 Decimal places of up to 4 are supported in effort reporting to align with compensation and payroll accounting precision

Precision decimal updates are available for in progress or new effort reporting

Decimal Precision in Effort

Effort Certification Work Area 🚥 🗲	
Overview 1 My Work Queue 2	
Administrative Review Certify Effort Certification	49 Count

 Effort Certification Partners can access the Effort Certification Work Area to view all Effort Certifications assigned to them in a single place

 Toggle the Overview and My Work Que tabs to view and take action on your assigned effort reports

Effort Certification Work Area

Workday 42: Feature Highlights

Learning, Absence and Time Tracking

- Course Offering Enhancements
- Waiver Enhancements
- Certifications for Learning
- Mass Enroll into Offering
- Schema in Learning
- Enter Time by Period
- Smart Summaries
- Absence Calendar Changes (*coming soon*)

Select Offeri	ng				>
Absence Pa	artner & Timekeeper User	Group			
No Filters Applied				Saved Filters select one	•
Dpen Offerings 2	items				
Select Offering	Start Date	End Date	Attendance Type 3	Availability	
	Tue, Mar 19, 2024, 2:00 PM Eastern Time (New York)	Tue, Mar 19, 2024, 3:00 PM Eastern Time (New York)	Virtual	32 out of 35 Seats Available	A
	Tue, Jun 18, 2024, 2:00 PM Eastern Time (New York)	Tue, Jun 18, 2024, 3:00 PM Eastern Time (New York)	Virtual	35 out of 35 Seats Available	•
	n offering that works for y in other locations and dates.	/ou?			•
				Cancel	ОК

- Offerings can be filtered by date, attendance type, location and availability
- Expressing interest in an additional offering is also supported from active offerings page

Course Offering Enhancements

Reason			:=						
ible Assigr	nments	Ineligible Assignm	ents						
0 items									a."
	_earner	Learning Content	Assigned Date	Assignment Mechanism	Assigned By	Due Date	Enrolled	Required	
				No Data					

- Waiver functionality streamlined and moved to grid framework
- Mass waiver supported
- Supports Learning administrators with updating required learning assignments

Waiver Enhancements

× Test for Blended Course ☑ :Ξ	
No Change	
Format \checkmark \mathbf{B} \mathbf{I} \mathbf{U} \mathbf{A} \checkmark	R M
New Version	
	li
	× Test for Blended Course L := No Change Format ∨ B I U A ∨ :≣ %

- Schemas for blended courses to make versioning of content consistent
- Effective versions of courses for when you version a course by a minor update type, a new minor version of the course is created as a new effective version

Schemas in Learning

ertifications 1 item				× = = = •	≣ ⊞
Certification	Achievement Source	Issuer	Issued Date	Expiration Date	*
Learning Certification Absence Partner - Brown University - (Issued by Learning)	Absence Partner Learning Program	e Brown University	02/23/2024		

- Certification programs offered by Workday
 Program team will now display as a certification in Workday
- Certifications earned by Workday certification programs will display on your worker profile

Certifications in Learning (coming soon)

Q holidays		\otimes
Non Union Holiday Schedule		
Mon, May 27	Memorial Day	
Tue, May 28	Day After Memorial Day	
Wed, Jun 19	Juneteenth	
View More Request Time Off See Team Time Off		
Your Team's Upcoming Time Off		
Bus, Gus (655968)	Thu, Mar 14	

- Workday supports quick searches to display team time off and active holidays
- Use to search for "holidays" or "team time off" to bring up future holidays in the current calendar year and approved time off for your team members within the next 30 days

Smart Summaries

Enter Time	Johns, Jill (6561 > Feb 25 - Ma					Actions V
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Feb 25	26 Regular Hours \bigcirc 7.5 Hours	27 Regular Hours © 7.5 Hours	28 Regular Hours © 7.5 Hours	29 Paid Time Off ① 4 Hours Regular Hours ① 3.5 Hours	Mar 1 Regular Hours	
	7.5 Hours	7.5 Hours	7.5 Hours	▼ 15 Hours	7.5 Hours	
3	4 Regular Hours	Today 5 Regular Hours () 7.5 Hours	6 Regular Hours (-) 7.5 Hours	7 Regular Hours C 7.5 Hours	8 Regular Hours () 7.5 Hours	

- Search "Enter time by period"
- Brings up full open time period in easy calendar view
- Similar actions and time entry on enter time screen
- Can select week to submit
- Review summary displays time totals for period

Enter Time by Period (coming soon)

Submit Time			×	
You are about to submit t	time for the week 02/25/2024 - 03/02/2024.		Close	
Following date range will be s	submitted for approval.			
February 25 – March 2, 2	024 : 45 Hours			
Total for February 2	25 – March 2, 2024			
Regular	40			
Overtime	1			
Paid Holiday	0			
Time Off	0			Submit Time
Non Worked Hours	4			These periods contain unsubmitted time. Select a period to submit.
Shift Differential Hours	0		*	Submit.
		Cancel	Submit	 February 25 – March 2, 2024 : 45 Hours March 3 – 9, 2024 : 37.5 Hours
				L3
				Cancel OK

- Search "Enter time by period"
- Brings up full open time period in easy calendar view
- Similar actions and time entry as enter time screen
- Can select week to submit

Х

Review summary displays time totals for period

Enter Time by Period (cont'd)



- Absence calendar refresh allows users to request multiple types of time off in different quantities in a single place
- Leave requests will also be managed through calendar interface
- Inline balance information in request process
- Available to employees for self service as well as Absence Partners

Absence Calendar (coming soon)

Workday 42: Feature Highlights

Mobile

- User Interface Update
- Audio Name Pronunciation via Mobile
- Learning Actions
- Change Benefits via Mobile
- Update Payment Elections



- Email workers directly from notification of birthday or anniversary
- Access Learning to engage in mediabased content via mobile
- Access Inbox and review most tasks for completion
- Access Workday Assistant to help with self service tasks

Mobile User Interface Enhancements



- Name pronunciation audio can be added with mobile app to supplement visual pronunciation in Workday
- Record your name, preview it and Submit
- Once submitted, your audio pronunciation will be accessible in Workday

Audio Name Pronunciation via Mobile





- Access learning activities and transcript details
- Take action to drop learning enrollments and enroll in additional content
- Continue learning directly from transcript for in progress, media-based content

Learning Access

Change Benefits		
	Close Change Reason	
Change Reason *	Q Search	
Submission Comments	O Birth/Adoption	
Comment	O Change Beneficiary at any time	
	O Change HSA at any time	
	O Change in Spouse's Employment	Benefits
	O Change Life Insurance Coverage	\$729.43
	O Change Transit or Parking	Cost Per Paycheck
	O Death of Dependent	Health Care and Accounts
	O Delete Dependent	
Save for Later Submit	_	Medical \$656.69 Dental \$72.74 \$72.74
		Vision Enroll Enroll Health Savings Account Enroll
		Select each available card to update elections. Once complete, click on the "View Summary" button to review final selections and Submit
		View Summary

- Open Benefits application from homepage
- Choose appropriate benefits change reason
- Access Inbox or benefits
 application to open
 change benefits task and
 update elections

Change Benefits on Mobile



Accounts	2 Items	
* 0	Joint Checking	
Payment E	ilections 2 Items	Add Add
*	Payroll Joint Checking	

- Open Pay application from homepage
- Select actions in upper right corner to open Payment Elections
- Select pencil icons to edit existing accounts or elections
- Select Add to enter new accounts or elections

Payment Elections from Mobile



 Next release of Workday functionality in September 2024