Workday 43 System Update

Feature Highlights| September, 2024

Agenda

- Workday Update Methodology

- Feature Highlights

- Stay Tuned

Workday 43: 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 43: Feature Highlights

User Experience Changes

- Simplified Search

- Machine Learning Assisted Search

- Streamlined Inline Tabs

- Questionnaires in Workflow

- Workday Assistant Updates

- Related Actions

- User Based Security Business Process

- Benefits Elections Card Summary

- Expanding Hubs
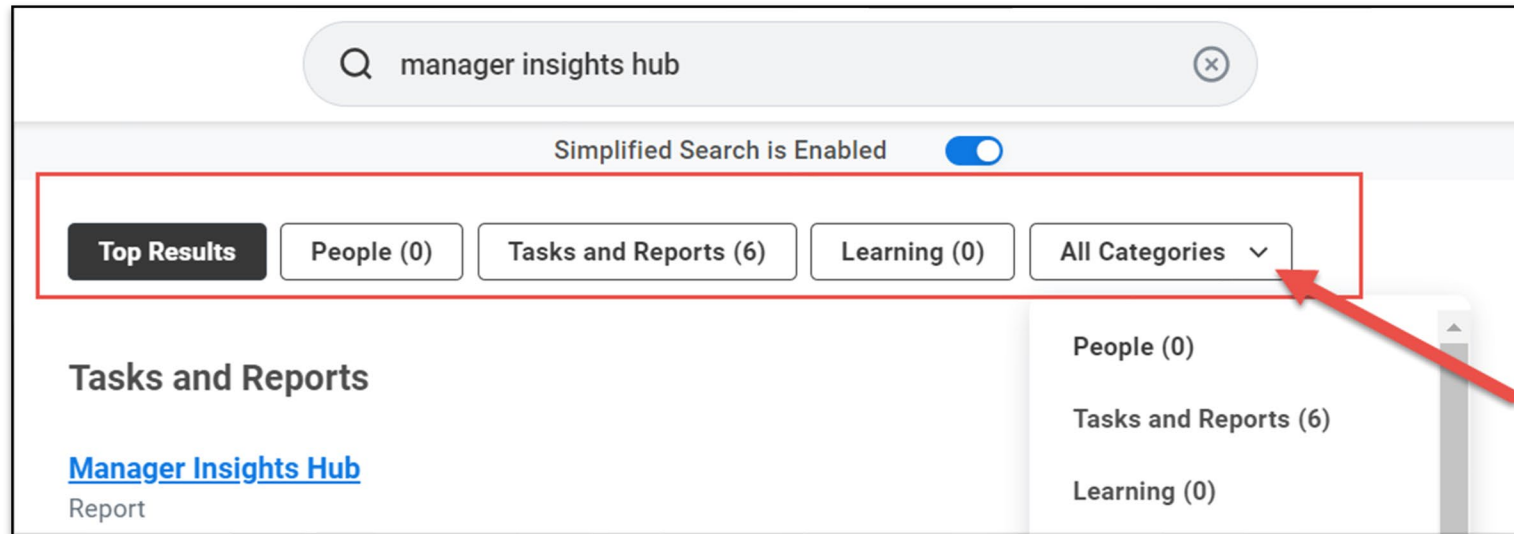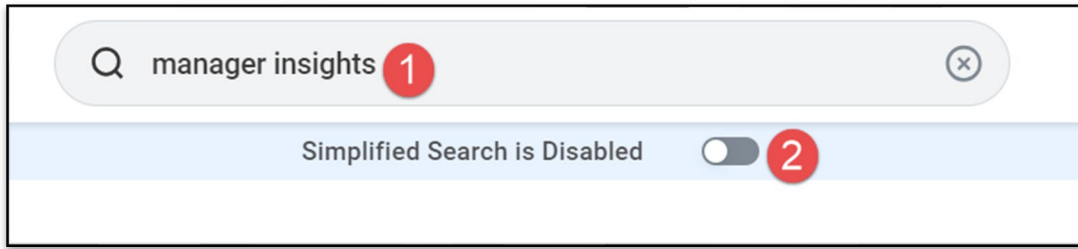
- Simplified Search supports individual search preferences

- Makes filtering on specific categories more user friendly

- All preferences will be available upon rendering search results

Simplified Search
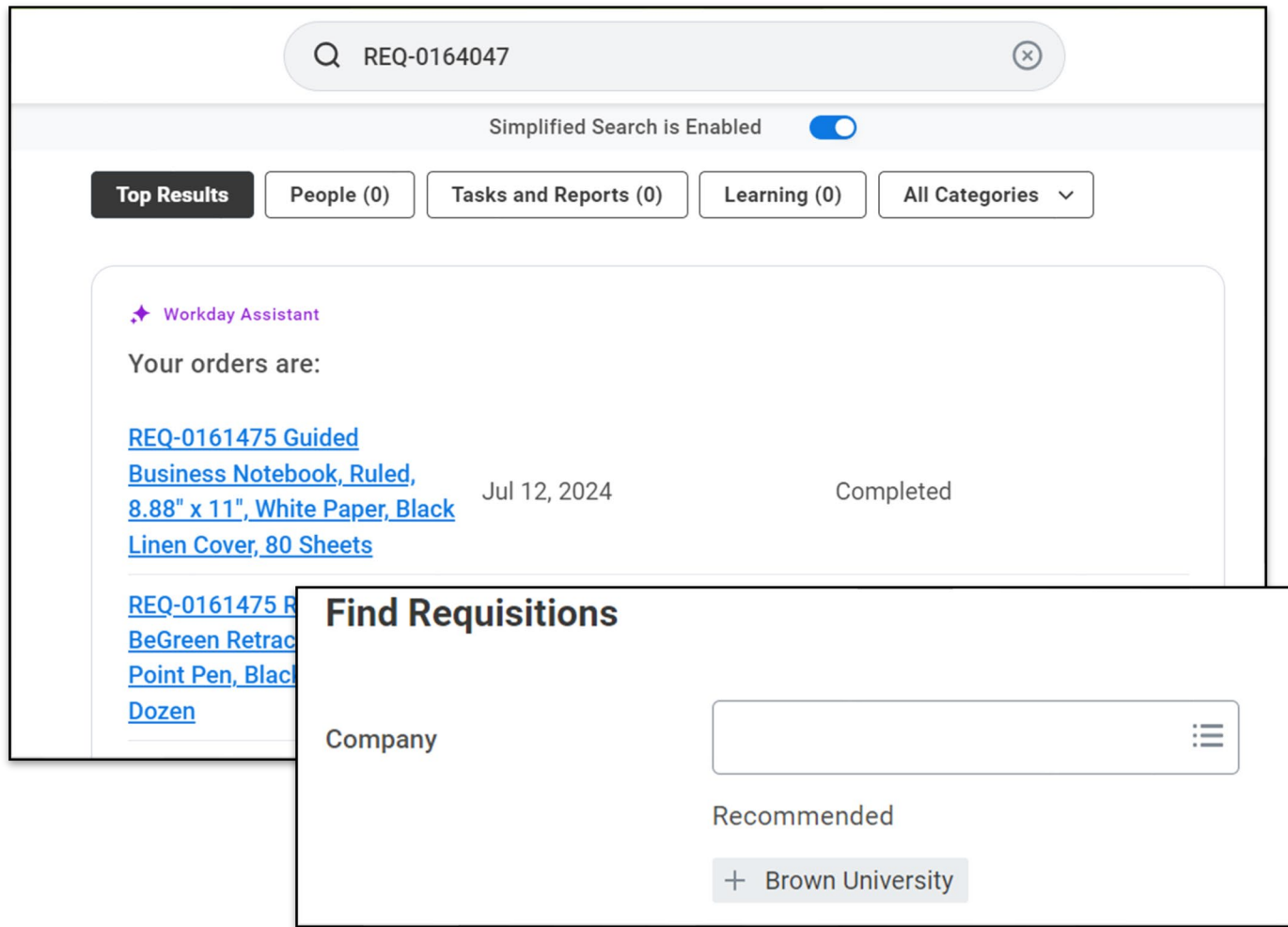
- Machine Learning is used to return relevant information based on the search criteria

- Recommended results are based on Workday Assistant features

- Recommended prompts results will be viewable based on prior prompt values

Machine Learning Search and Prompts
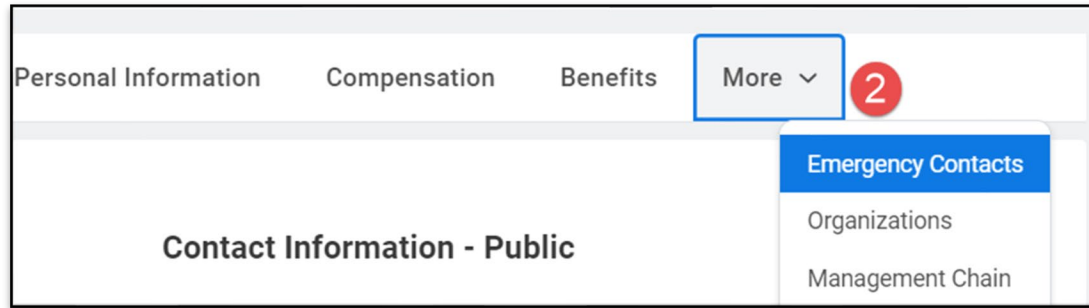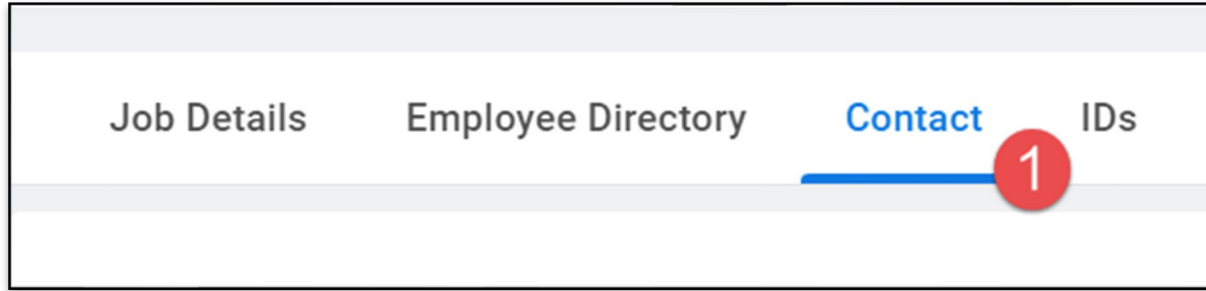
- Tabs on pages are highlighted

- More provides list of all additional tabs not displayed

- Subtasks are modified to indicate they are specific to a tab to easily navigate a page

Streamline Inline Tabs

- Questionnaire responses will appear in workflow tabs for initiators and approvers of in progress or completed processes

- Streamlined view of questionnaire responses in business processes to easily review responses

Questionnaires in Workflow
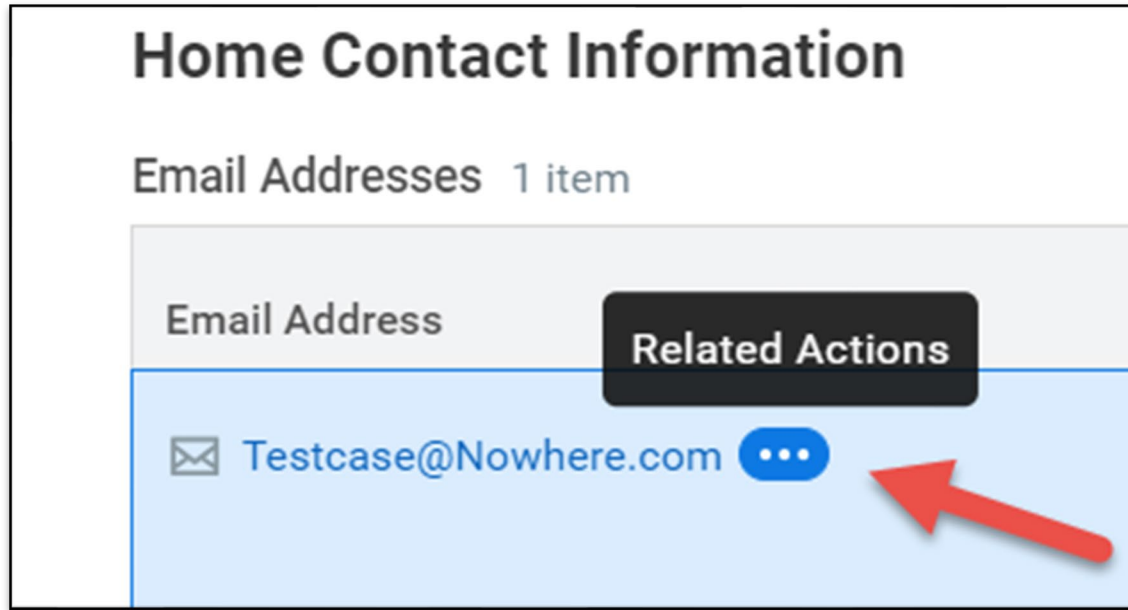
- Related actions are used next to Workday business objects to take action

- Related actions are now blue and the related action help text will appear when hovering next to the business objects

Related Actions
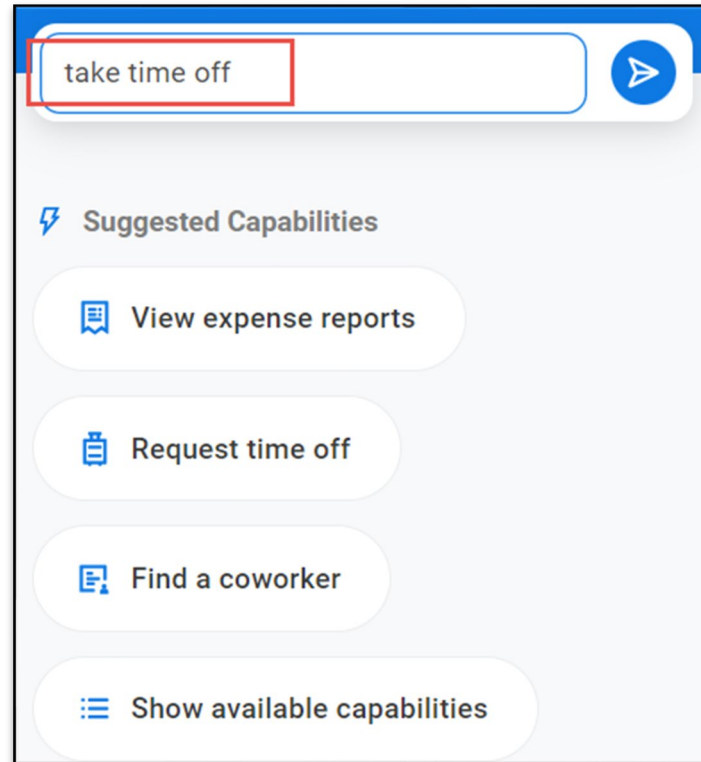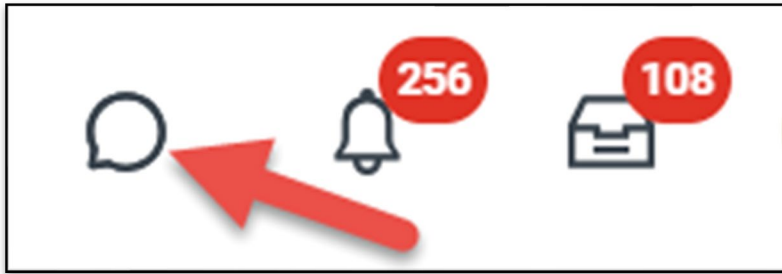
- Icon moved to navigation ribbon

- 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 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 Updates

Update User-Based Security Group Assignments

Person	Bus, Gus (655968)
User-Based Security Groups	✕ Absence Administrator ··· ☰
	✕ Compensation Administrator ···
Comment	* Roles assigned as per UHR ticket #55545

- 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

- Process can support single or multiple member assignments

User-Based Security Business Process

Benefit Election Card Summary

- Current benefit elections now display as card summaries for easier view
- Scroll through cards to view each election
- View details to see additional election information

Medical - UnitedHealthcare CDHP (A Consumer Directed Health Plan)

Benefit Election Details

Coverage Begin Date	01/01/2024
Deduction Begin Date	01/01/2024
Coverage	Employee + Spouse
Dependents	
Employee Cost (Monthly)	$292.66
Employer Contribution (Monthly)	$1,203.62

Resources

Provider Website   UHC

You Pay (Monthly)

$42.10	Employee Only
$234.60	Employee + Child(ren)
$292.66	Employee + Spouse
$353.48	Employee + Spouse + Child(ren)

- Select view details on plan elections to see additional information including:
  - Cost
  - Coverage level
  - Dependents
  - Provider websites

Benefit Election Card Summary (cont'd)

|	
Benefits and Pay Hub	Expenses Hub
Financial Coordinator Hub	HR Business Partner Hub
Jobs Hub	Buyer Hub
Time and Absence Hub	Manager Insights Hub

- Hubs consolidate tasks, reports and data in a single location

- Jobs Hub, Expenses Hub, Financial Coordinator Hub, Manager Insights and Benefits and Pay Hub are currently available to all staff and faculty

- Time and Absence Hub available to Absence Partners and Timekeepers

- Recruiting Hub available to HR Business Partners, fall 2024

Expanding Hubs
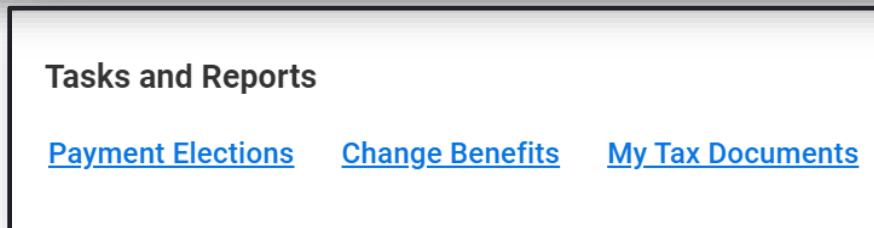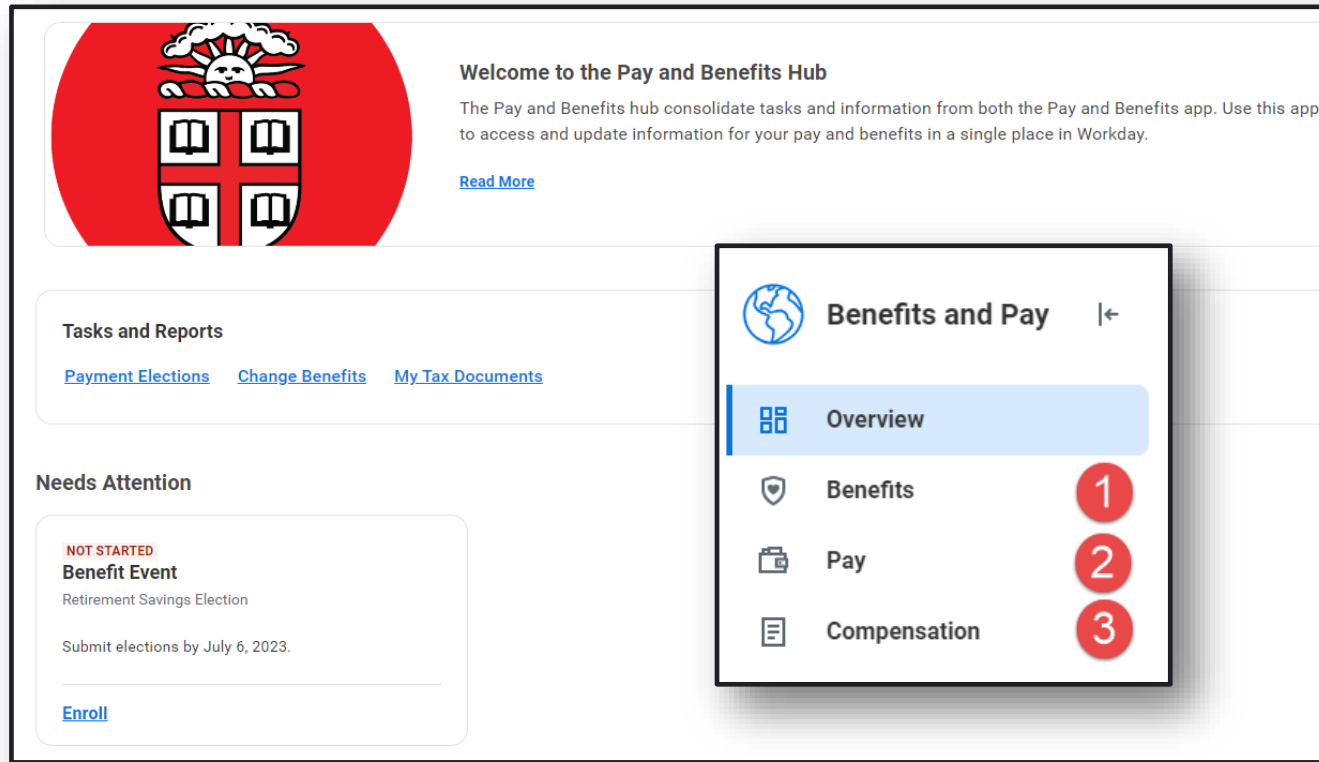
- Single point of access for all pay and benefits-based data

- **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

Benefits and Pay Hub
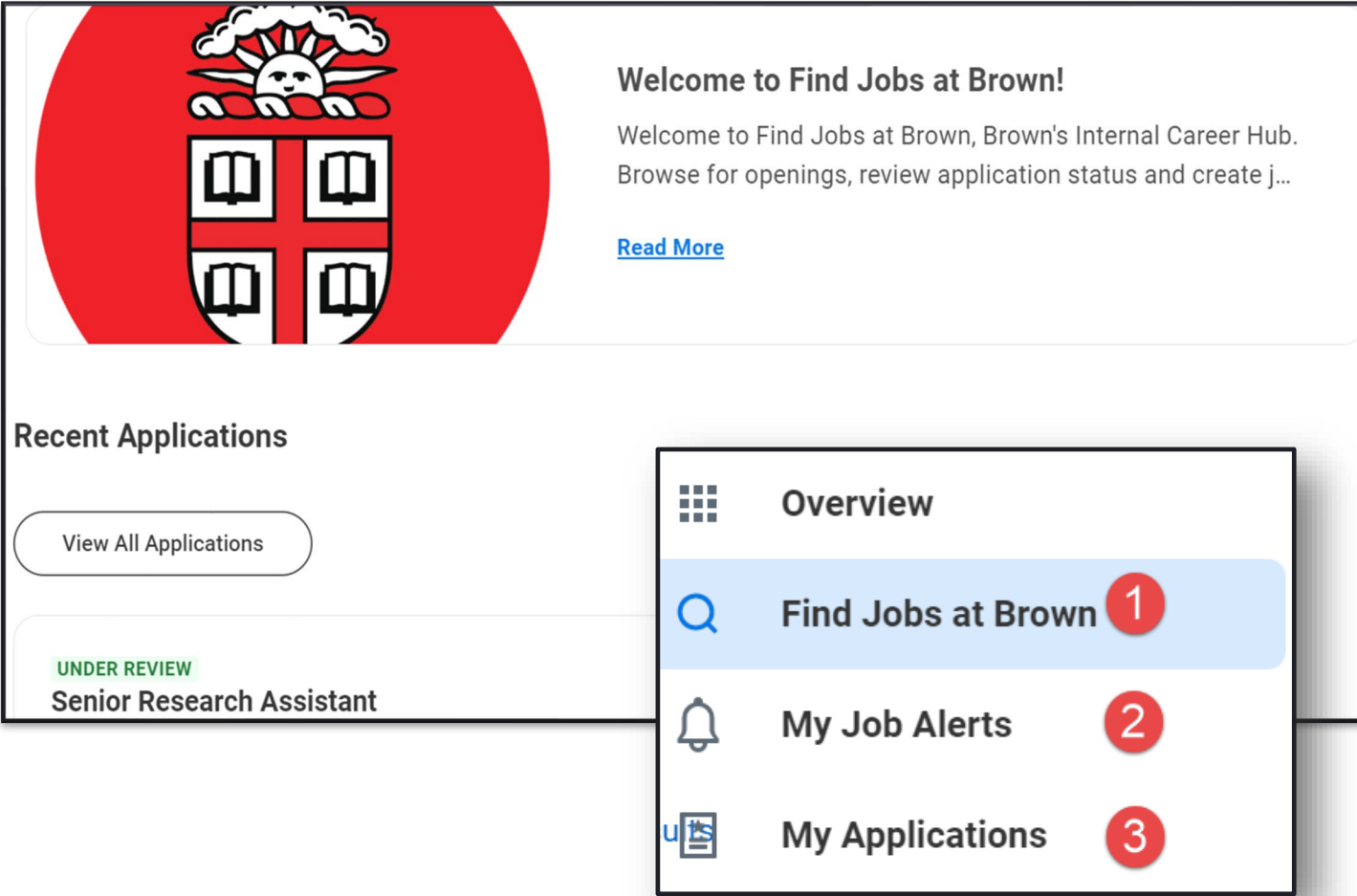
- Single point of access for all internal job searches

- **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
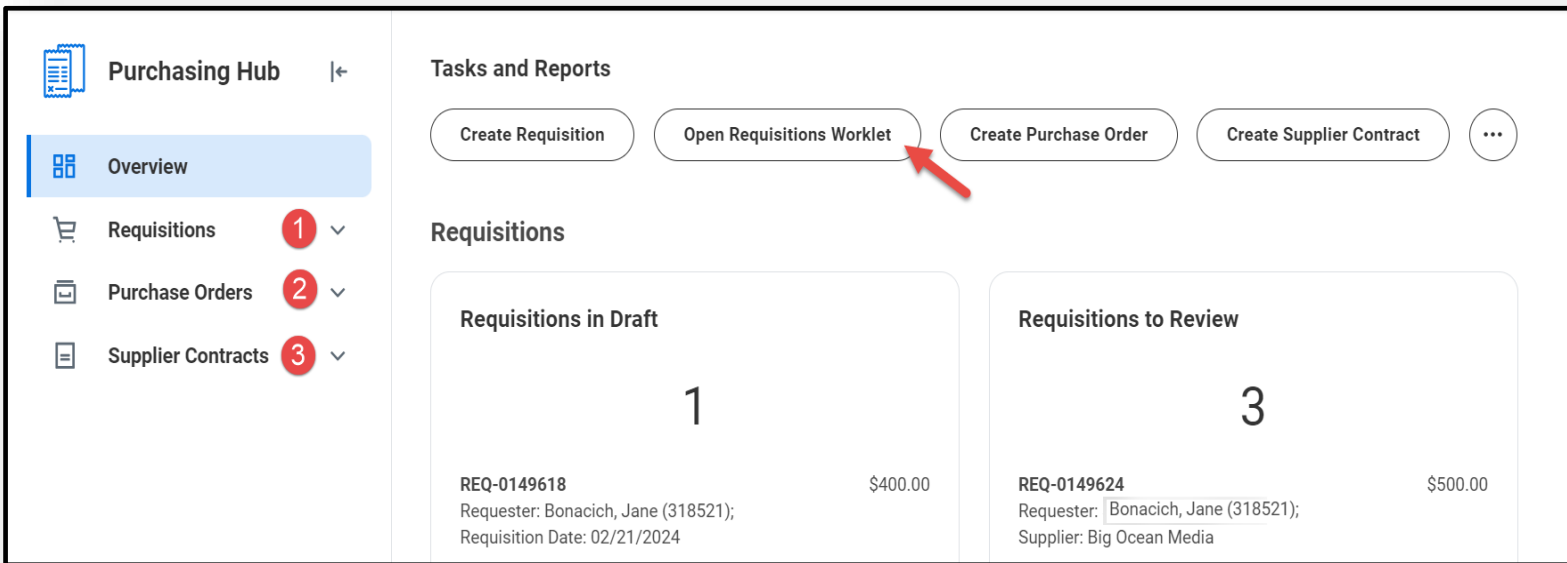
- Single point of access for Buyers to create, review and take action on:
  - Requisitions
  - Change Orders
  - Contracts
  - Purchase Orders

- Buyer Hub includes link to Requisitions app

Buyer Hub Updates
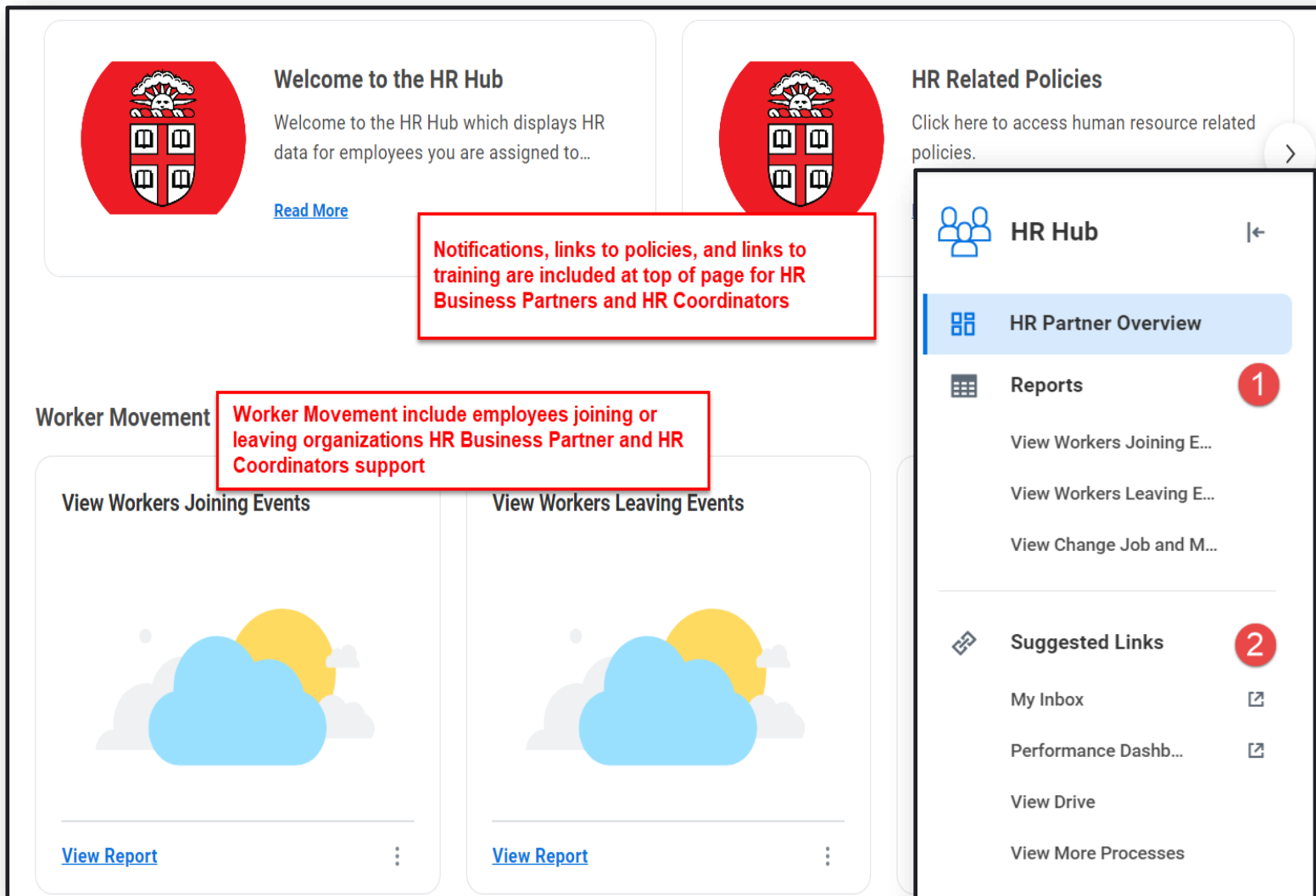
- Single point of access for all expense -based data and transactions

- **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

Welcome to the HR Hub

Welcome to the HR Hub which displays HR data for employees you are assigned to...

Read More

HR Related Policies

Click here to access human resource related policies.

Notifications, links to policies, and links to training are included at top of page for HR Business Partners and HR Coordinators

Worker Movement

Worker Movement include employees joining or leaving organizations HR Business Partner and HR Coordinators support

View Workers Joining Events

View Report

View Workers Leaving Events

View Report

HR Hub

HR Partner Overview

Reports   1

View Workers Joining E...

View Workers Leaving E...

View Change Job and M...

Suggested Links   2

My Inbox

Performance Dashb...

View Drive

View More Processes

- 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
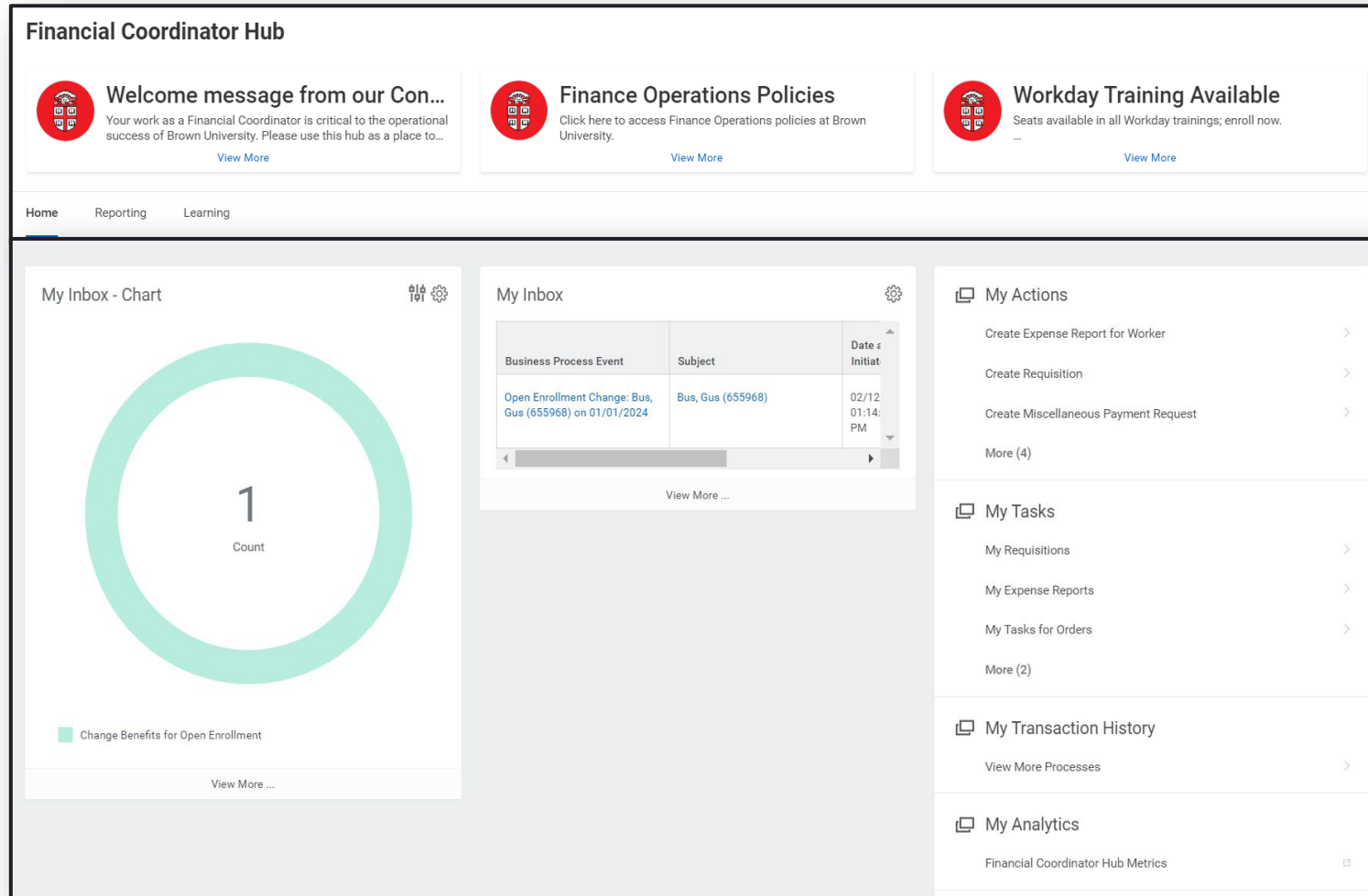
- Single point of access for Financial Coordinators making reviewing and managing financial-related tasks and processes quick and easy

- **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
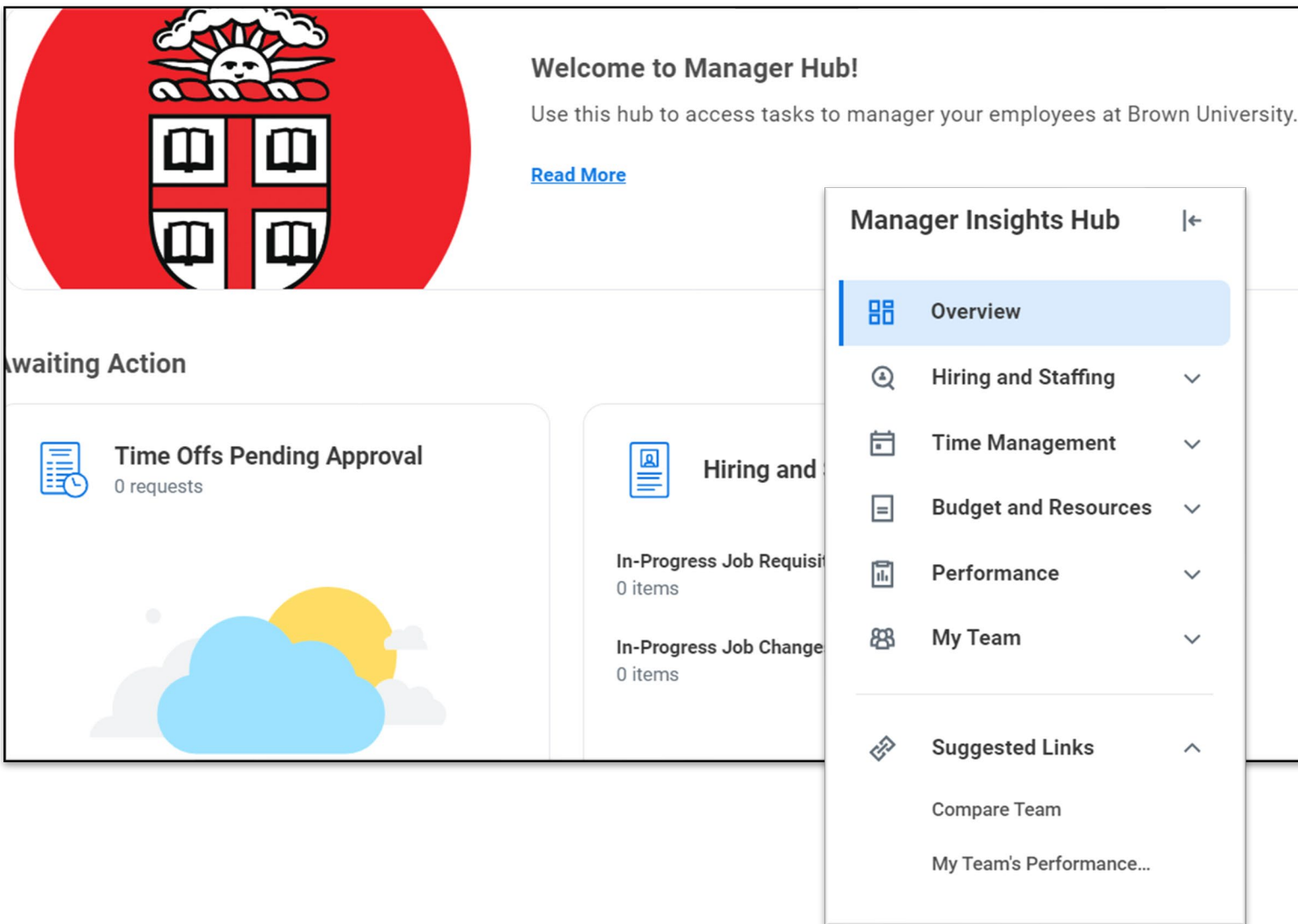
- Single point of access for time worked and time off review and approval, hiring and staffing information, team compensation details and performance management

- Review team details and initiate processes for team members from hub

Manager Insights Hub

- 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
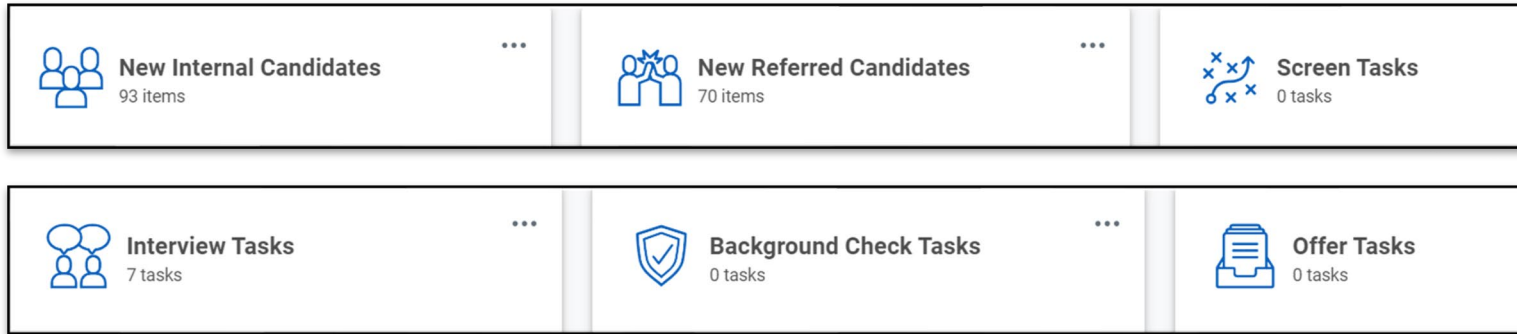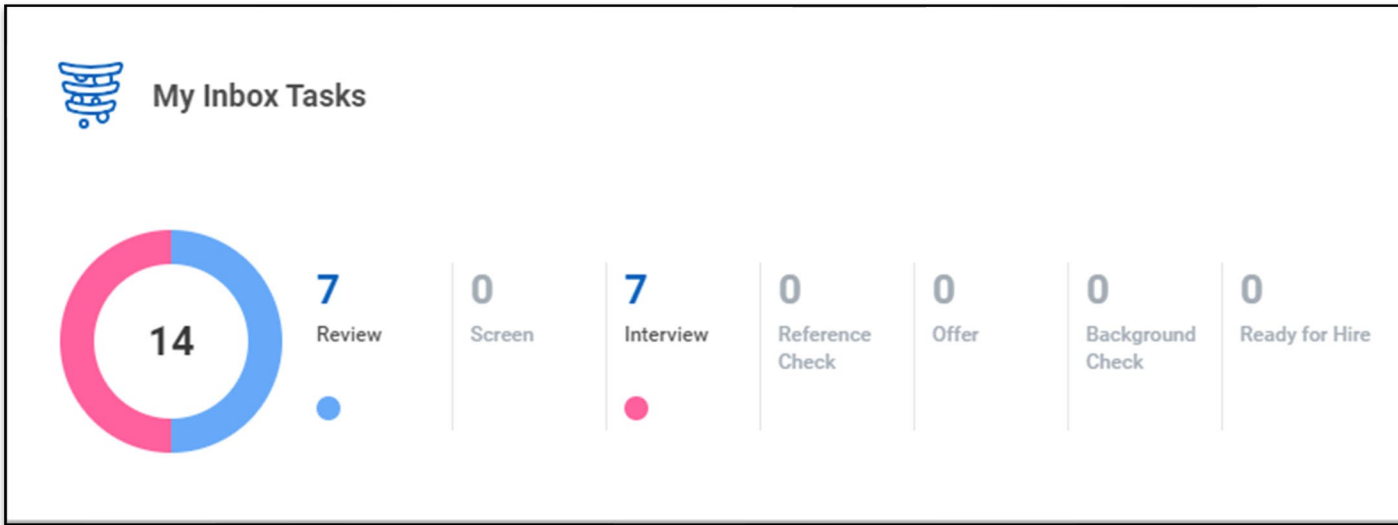
- Single point of access for all recruiting tasks for which you are an HR Business Partner in Workday

- Take action from the hub on in progress tasks and view data across all organizations and requisitions to easily identify items awaiting action

- Coming fall, 2024

Recruiting Hub
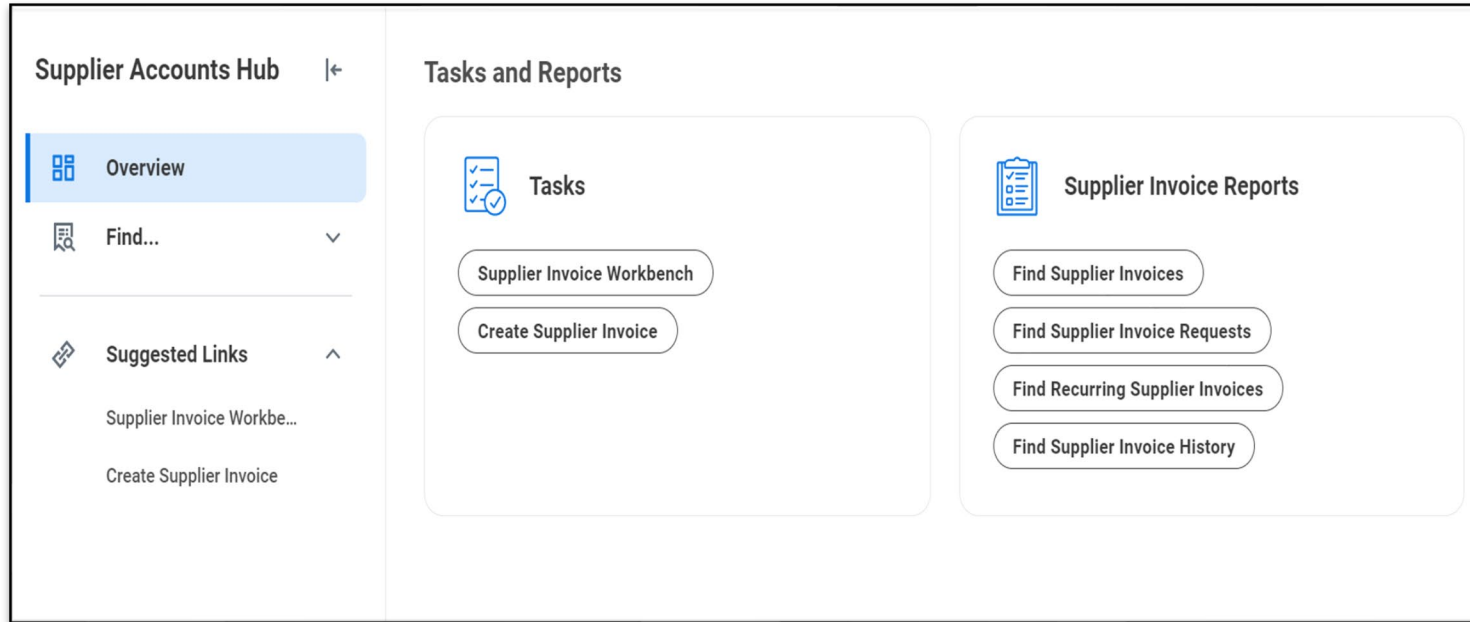
- Supports creation of invoices and ability to review supplier invoice reports in a central location

- Provides link to Supplier Invoice Workbench and Work Que

Supplier Accounts Hub

Workday 43:
Feature Highlights

Recruiting, Staffing, and Payroll

- Job Profile business process

- Orchestrated Hire

- Change Location process

- Candidate Applicant Experience

- Model My Pay Updates

- Arrears Balance Visibility

- Costing Allocation Sequencer

- Global Address Lookup

- Miscellaneous Process Updates

- Skills on Job Requisition (*coming soon*)

Details

For	IT Application Manager
Overall Process	Edit Job Profile: IT Application Manager
Overall Status	In Progress

Details

Job Profile	IT Application Manager

Profile Details

Effective Date	03/02/2024
Job Profile Name	* IT Application Manager
Job Code	* IT Application Manager
Include Job Code in Name	☐

- 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

- Hire organization assignments and service dates included in hire process guided experience

- Streamlined interface for end user

- Compensation change, pay group and costing step will remain standalone sub-process

Orchestrated Hire

- Job Change business process is enhanced to support location changes for employees*

- Process can be initiated from worker profile by HR Business Partner or HR Coordinator from worker profile or as a related action under "Job Change"

- Edit Position will no longer be available to edit location effective 10/1

*Location updates for non-remote locations

Change Location Updates

- Account generation becomes part of application process

- Candidate application has been updated to make the application process more efficient

- Country will default from browser settings

- Pages have been streamlined to highlight critical information

- Error messages are more easily viewable

Candidate Application

- 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.

1

⌄ Pre-Tax Deductions: 2,789.66

4 items

		Additional Information	Input Details		
3	*Description		Type	Current Value	Adjusted Value
	Dental				
			Amount	72.74	
	Fidelity Deferred Vesting				
			Percent	0.19	**2**
	Medical UHC EE				

4 [Model] [Adjust Federal Taxes] [Adjust State Taxes] [Cancel]

- 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)

- Staff can now see current arrears balances from the Benefits and Pay Hub

- Drilling into balance details will display additional information for the most recent completed payment date

Arrears Balance Visibility

Current and Future Costing Allocations
1 item

Allocation Event Number	Start Date	End Date	Costing Allocation Level	Position
ACA-195371	02/01/2018		Worker Position	POS10666 Managing Director, Workday Program and Management Initiatives - Altomari Cavanagh, Stephanie M (314198)

- Costing allocations processes will be issued an event number

- Costing event sequencing ensures that each completed costing allocation event has a reportable reference for tracking and auditing. It also supports linking these events with their associated central accounting procedures

Costing Allocation Sequencer

- Global address validation supports standardization of address formatting

- Provides user with suggested address to move forward when an invalid address is detected

Global Address Validation

Skills ⌄

Skills

Suggested skills based on Job Details from the requisition and similar worker profiles. Workday doesn't display suggestions if there are no relevant skills available.

Required Skills ⬅

Workday; Workday Extend; Workday HCM

Optional Skills ⬅
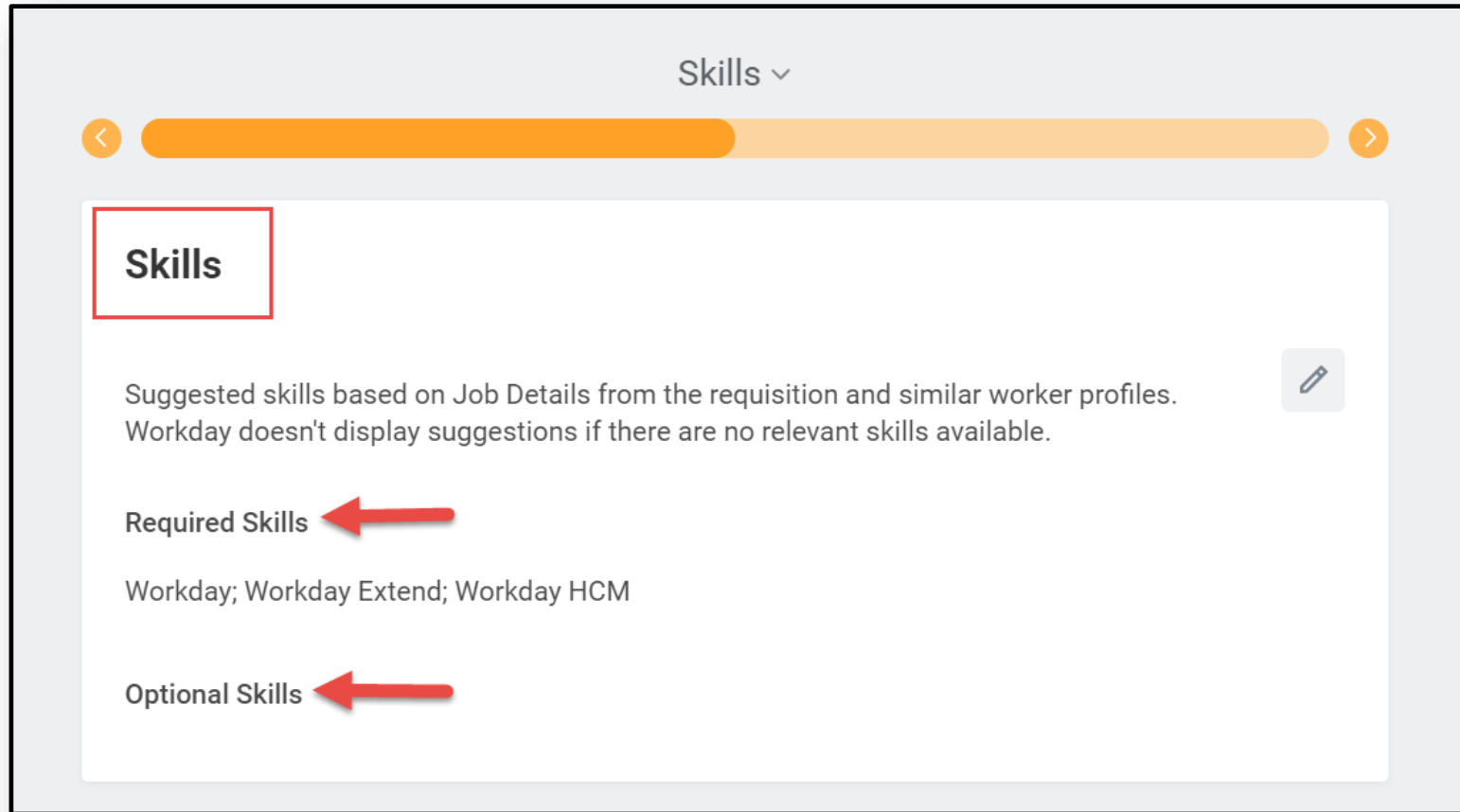
- Up to 10 critical skills can be added to staff job requisitions to help identify key candidates

- Skills on staff requisitions will display on job posting

Skills on Job Requisition (*coming soon*)

Workday 43: Feature Highlights

Purchasing, Supplier Accounts and Grants

- Requisition App

- Requisition Instructional Text

- Export Control Questionnaire in Requisition

- Expense Distance Calculation

- Supplier Work Que

- Additional decimal precision in effort certification

- Effort Certification Work Area

- Bill sponsors outside award line dates

- 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)

- Requisition instructional text will appear on the create requisition task and in My Requisitions

- This text is specific to Brown and intended to provide reminders for purchasing goods and services

Requisition Instructional Text

EC Requisition

Purchase Order requisitions for goods/equipment will move through an Export Control questionnaire. Depending on the answers, this requisition may move to the Export Control Team for a review and approval of the purchase. For more information about Export Control, see Export Control FAQs. Should you decide not to continue with this requisition at this time, please cancel it.

Does this purchase involve any of the following?

- Items potentially going to outer space, including rockets, spaceships, and CubeSats
- Weapons, Explosives and other items with military applications
- Drones/unmanned aerial vehicles (UAV)
- Electronic intelligence, surveillance, or monitoring systems (and systems to counteract these)
- Cameras with infrared, thermal imaging or night vision capabilities
- GPS
- Semiconductors
- Chemical agents and compounds
- Biological agents and compounds
- Robots
- High end computing equipment
- Items that may be shipped or hand carried (exported) outside the US

- Export control questionnaire will be added to the create requisition workflow to uphold purchasing requirements

- This will be a required step for purchases as outlined here

Export Control

Item Details

Origin Address (1) * ✕ 3 Eddy St, Providence, RI, USA

Destination Address (2) * ✕ Harvard University, Cambridge, MA, USA

Unit of Measure for Distance Miles

Estimated Distance of Driving Route * 54.7 ⬅

Trip Distance * 54.7

Round Trip ☑

Distance to Expense * 109.4 ⬅

- Google Maps is available to calculate mileage distance in expense process using the expense item of mileage

- Round trip calculation can automatically be assessed by selecting "Round Trip"

Distance Calculation
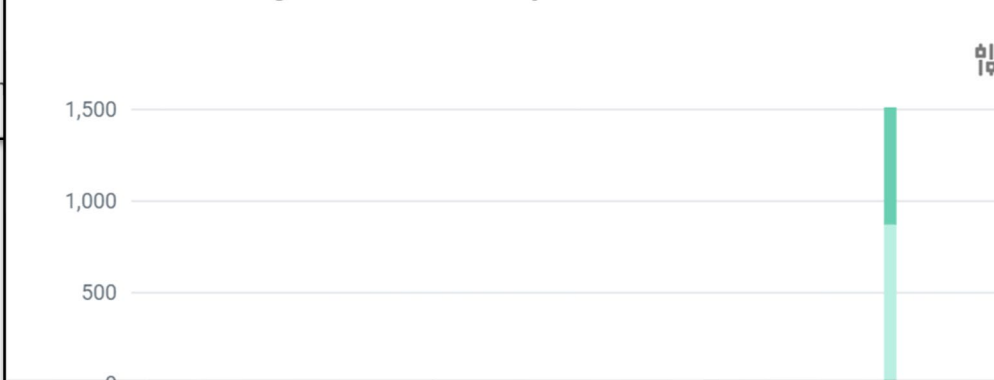
- Allows viewing multiple supplier invoices by Accounts Payable based on payment terms, supplier and source

- Supports prioritization of work and efficiency when reviewing processes in mass

- Displays metrics for cycle times

Supplier Work Que

Effort Certification Summary

Certified Amount Estimated	Certified Percentage of Group Estimated	Certified Percentage of Total Estimated
411.77	100.00%	92.9923%

- 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

- Bill Sponsors Outside Award Line Dates eliminates the need for workarounds to invoice sponsors for billable expenditures that fall outside award line dates

- Saves time and improves auditability

Bill Sponsors Outside Award Line Dates
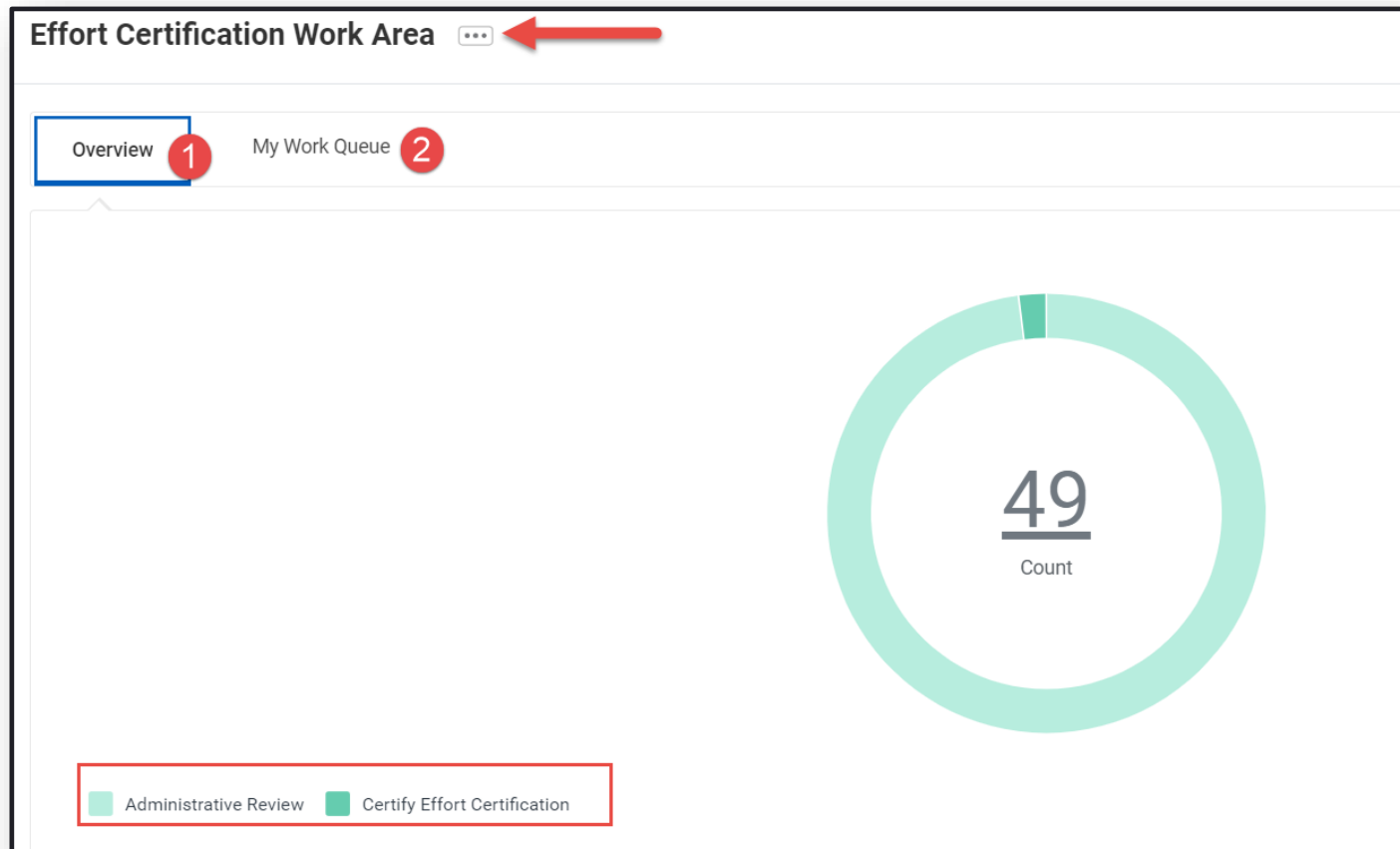
- Effort Certification Partners can access the Effort Certification Work Area to view all Effort Certifications assigned to them in a single place

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

Effort Certification Work Area

Workday 43:
Feature Highlights

Learning, Absence and Time Tracking

- Certifications for Learning

- Schema in Learning

- Linkedin Learning Update

- Smart Summaries

- Enter Time by Period

- Absence Calendar Changes

- ***LinkedIn topic mapping***

- 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

- 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
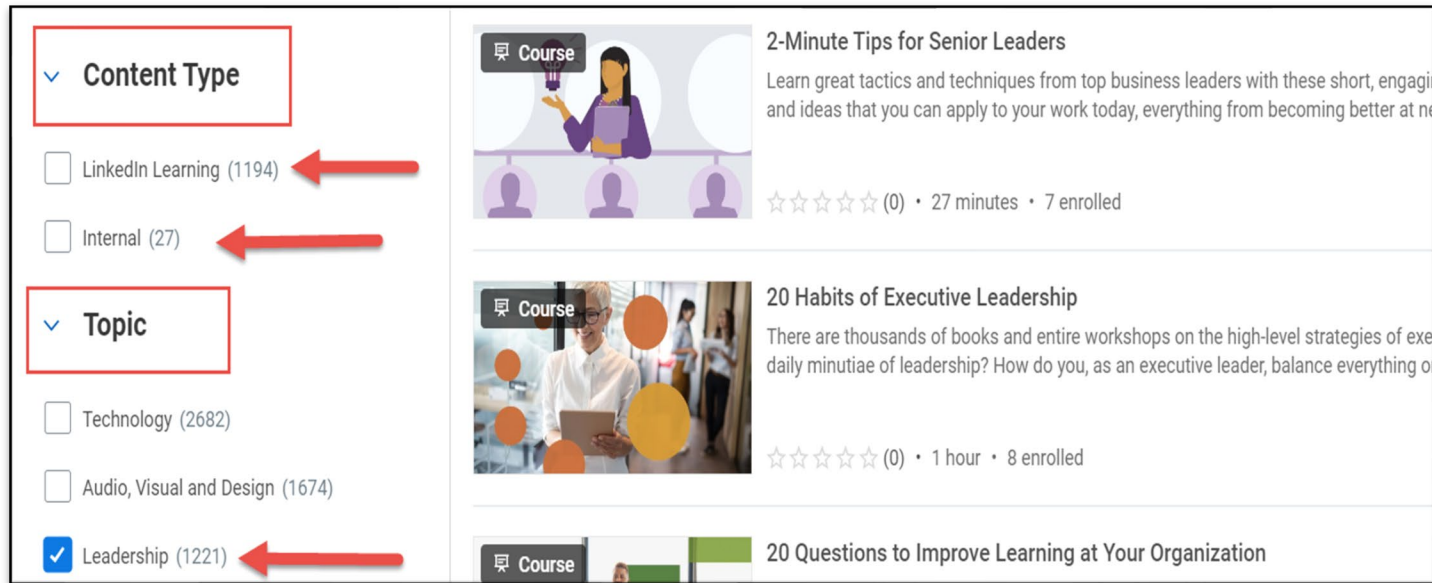
- LinkedIn Learning skills are mapped to Brown's enhanced learning topics to provide better support to find LinkedIn Learning content

- Search for Available Learning has been enhanced to view all LinkedIn Learning options inline with Brown's own learning content

LinkedIn Learning Update
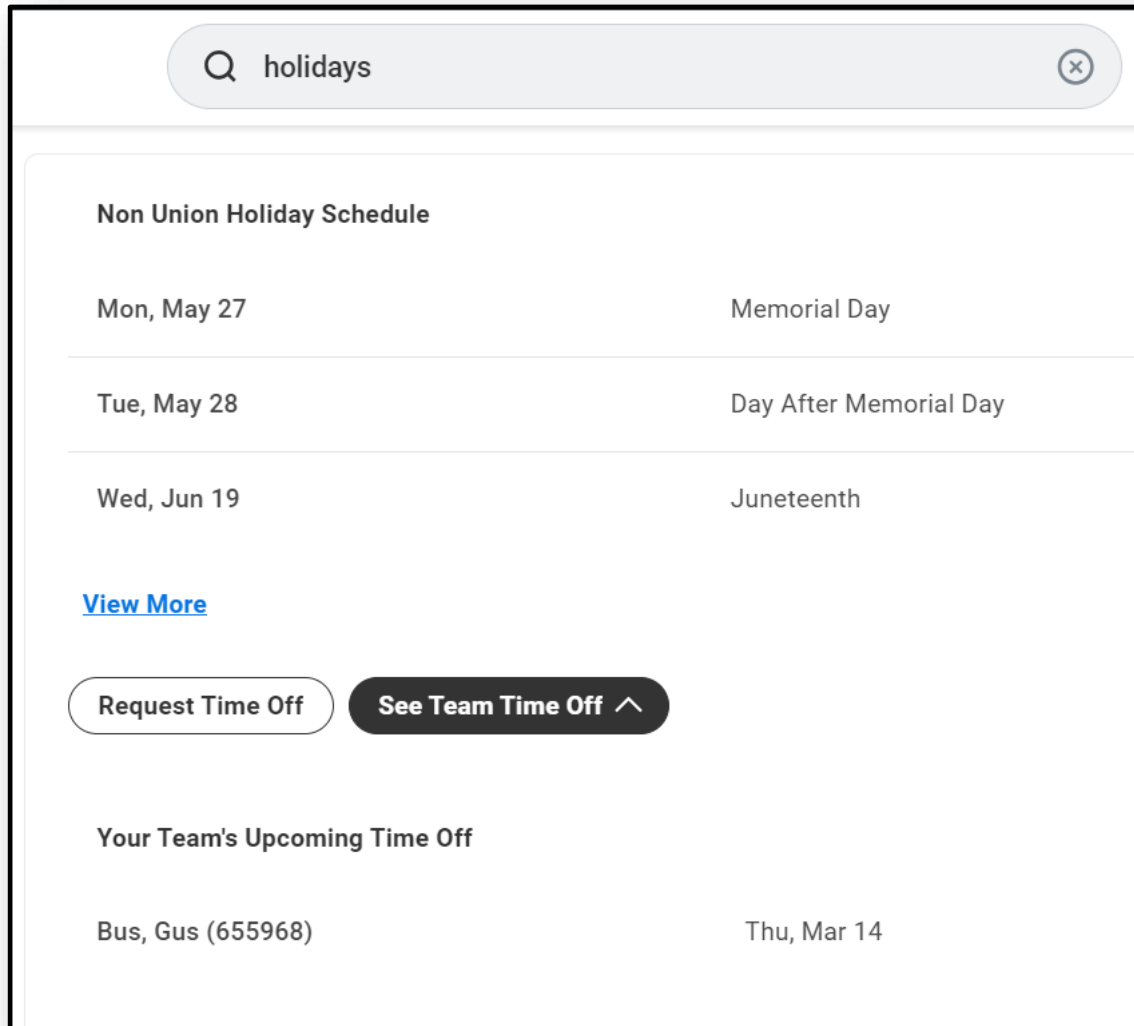
- Workday supports quick searches to display team time off and active holidays

- 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

- 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

Submit Time

You are about to submit time for the week 02/25/2024 - 03/02/2024.

Following date range will be submitted for approval.

February 25 – March 2, 2024 : 45 Hours

Total for February 25 – March 2, 2024

Regular	40
Overtime	1
Paid Holiday	0
Time Off	0
Non Worked Hours	4
Shift Differential Hours	0

Cancel   Submit

Submit Time

These periods contain unsubmitted time. Select a period to submit.

⦿ February 25 – March 2, 2024 : 45 Hours
○ March 3 – 9, 2024 : 37.5 Hours

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

- Review summary displays time totals for period

Enter Time by Period (cont'd)

Workday 43: Feature Highlights

Worksheets, Mobile and Miscellaneous Updates

- Worksheet Sharing

- Machine Learning Formulas

- Learning Actions

- Change Benefits via Mobile

- Update Payment Elections

- Miscellaneous Updates
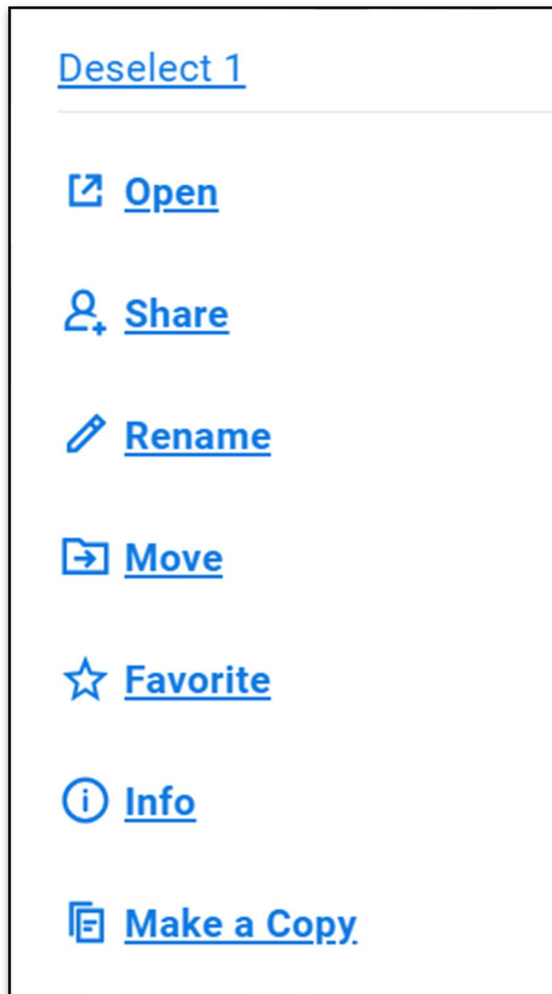
- Workbooks can now be shared, copied and downloaded/printed by those with edit access

- They can be copied and downloaded by those with view or comment access

Worksheet Sharing

- Worksheets GenAI Formula Writer automatically creates workbook formulas based on your description of what you want the formula to do.

- Insert the resulting formula into workbook, or use the generated formula as a guide and make edits to it

- You can also see an explanation of how a formula works by selecting a cell containing a formula, right-clicking the cell, and selecting Explain Formula

GenAI Formulas
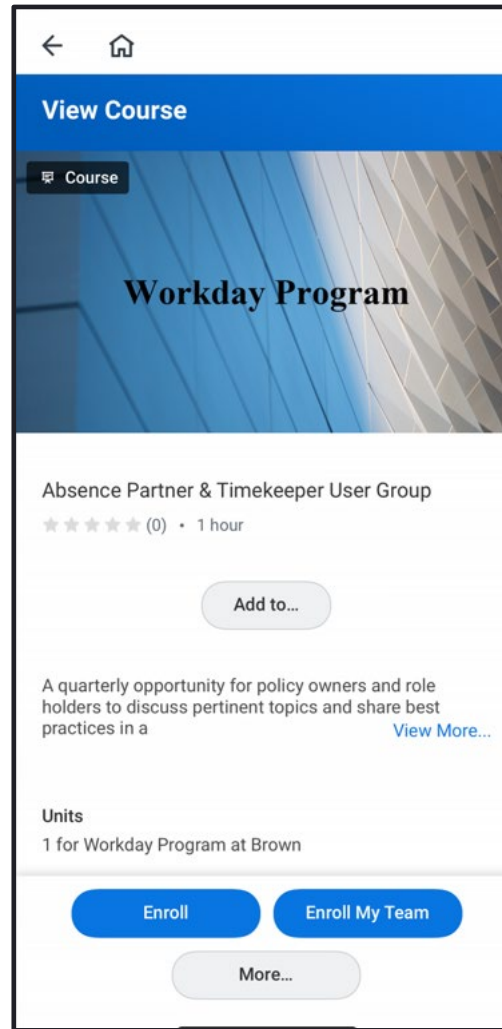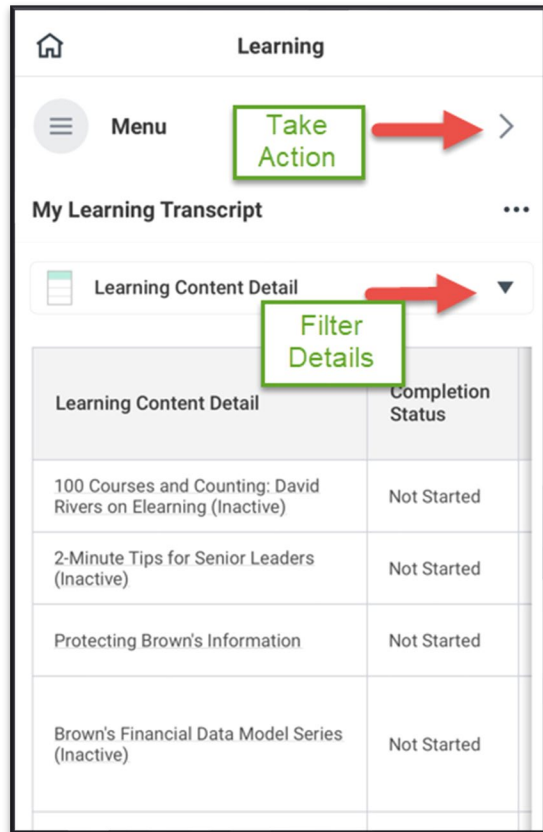
- Access learning activities and transcript details

- Take action to drop learning enrollments and enroll in additional content

- Continue learning directly from transcript for in progress, media-based content

Learning Access

- 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
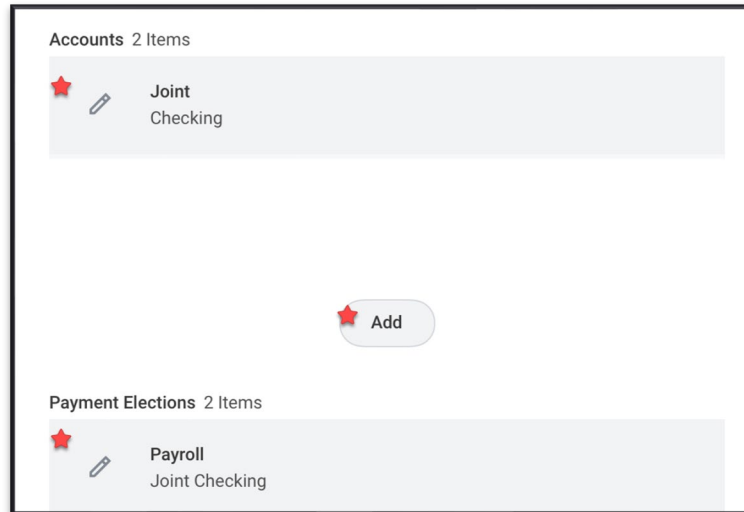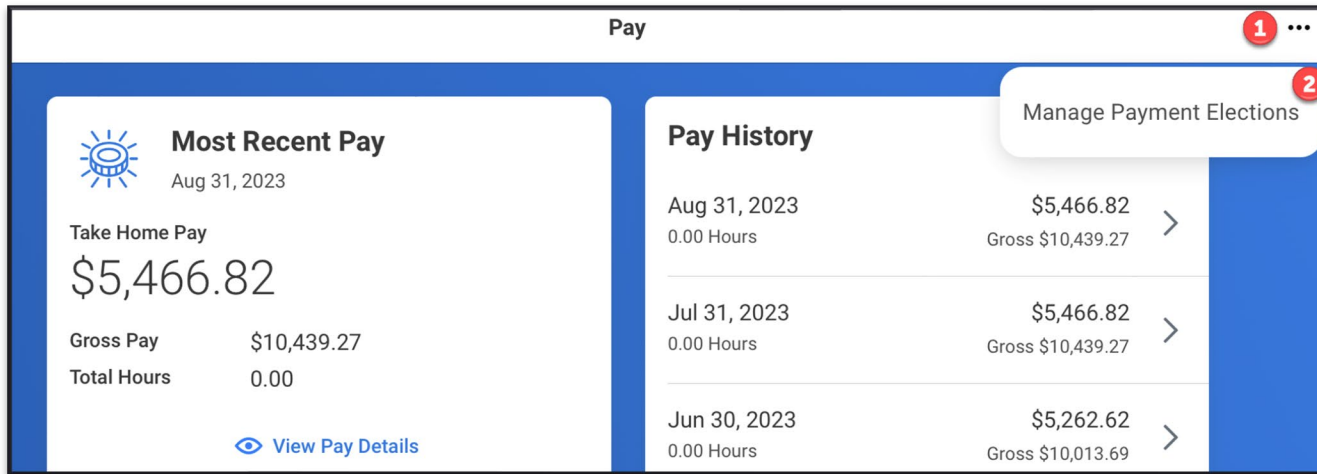
- Open Pay application from homepage

- 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

- Hiring Report removed from Offer step

- Location Changes moved out of Edit Position

- Removal of CIS review step from Create Requisition process

Miscellaneous Updates

- Next release of Workday functionality in March, 2025