

Workday 37 System Update September 11, 2021



Agenda

- Workday Update Methodology
- Feature Highlights
- Communications and Training
- Stay Tuned



Workday 37: 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



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Workday 37: Feature Highlights

User Experience Changes

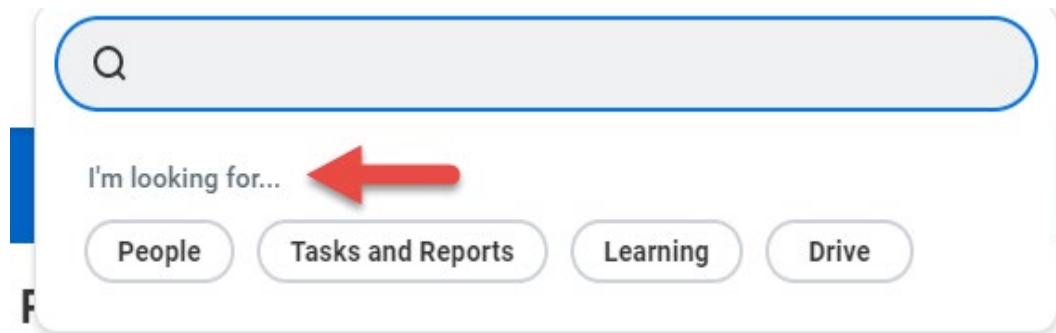
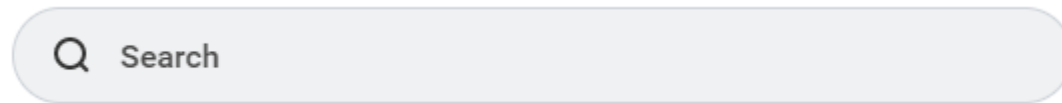
Workday has made a variety of enhancements as it pertains to the user experience including:

- Search enhancements
- Inbox management
- Next step of business process and task completion
- Shortcuts available on Home page
- View profile
- Responsive interface
- Launch report from Search
- Mobile interface enhancements



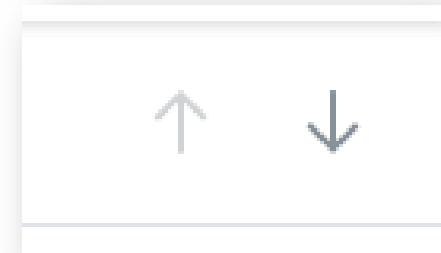
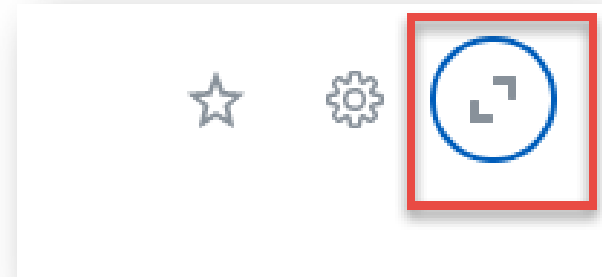
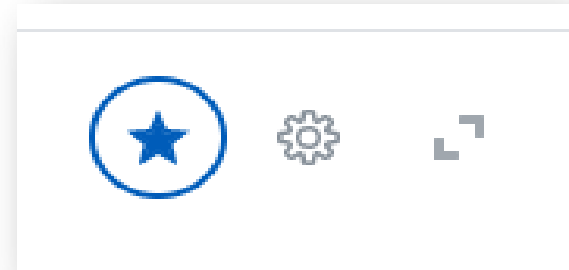
Search Enhancements

- Search moved to center of screen for ease of use
- Select category of your search via the *I'm looking for...*
- Enter your keyword after your search criteria to narrow your search results



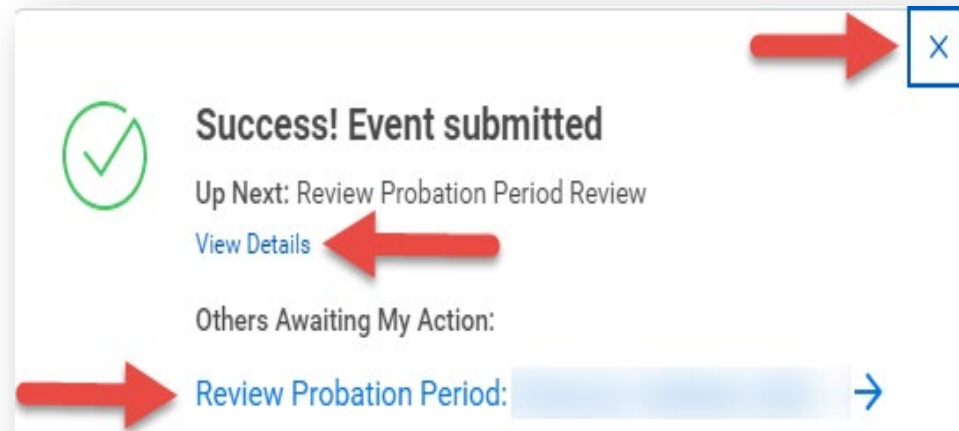
Inbox Item Access

- Clicking on any inbox task management items will encircle the task in blue for ease of viewing
- Expanding any item in your inbox will provide a full page view of your task
- Use the arrow buttons on the top of the task to scroll to the next inbox item awaiting your action



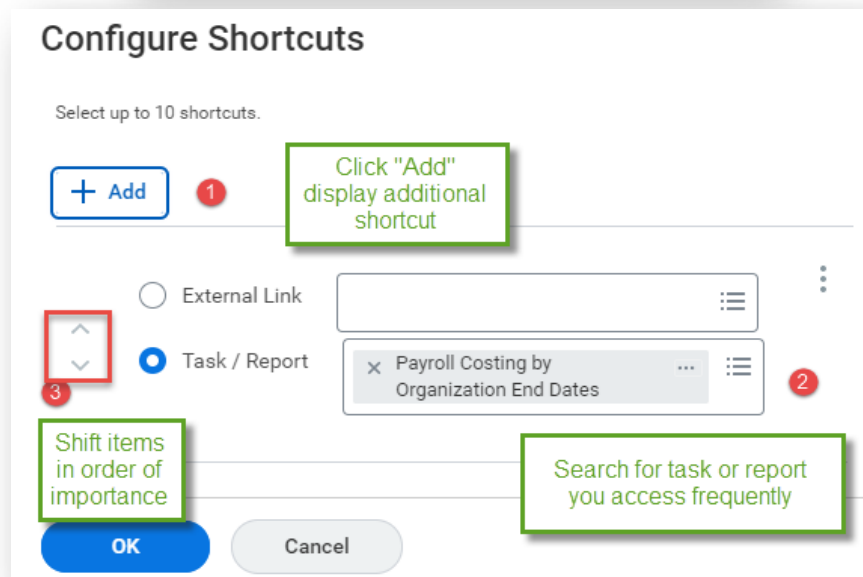
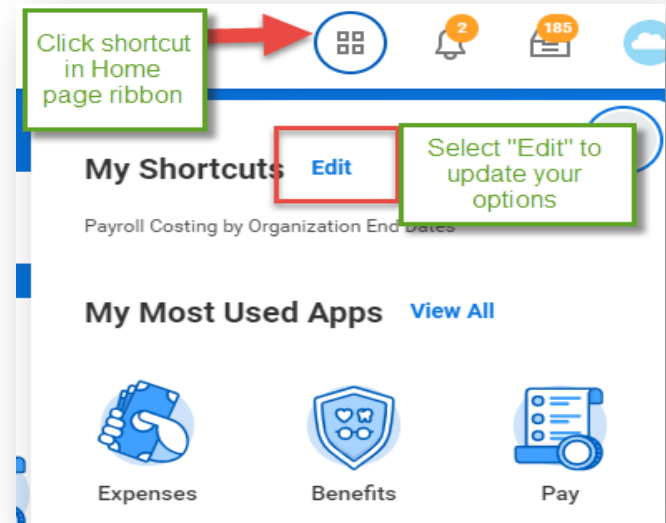
Advance to Next Process

- Once a process is reviewed or approved from your inbox, you will have a preview of the next step via the *Up Next:* and *View Details* link
- Once a process is reviewed or approved from your inbox, you will have the option to review the next item awaiting your action by clicking on the task under *Others Awaiting My Action:*
- You can also close out the completed confirmation by clicking on *X*



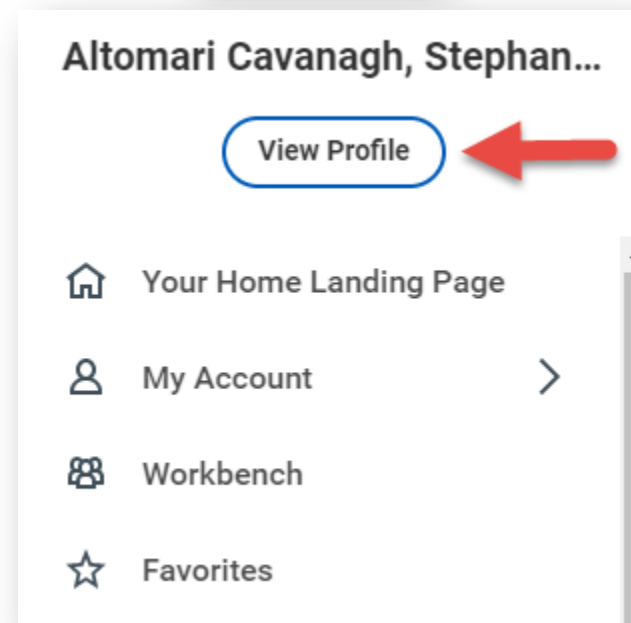
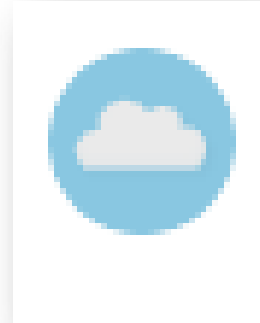
Shortcuts Available for Users

- Update shortcuts to Home page to easily access tasks or reports that are frequently used
- Click edit to update your shortcuts; up to 10 items are available
- Workday will identify your most used landing page apps to streamline your user experience and present them for ease of use



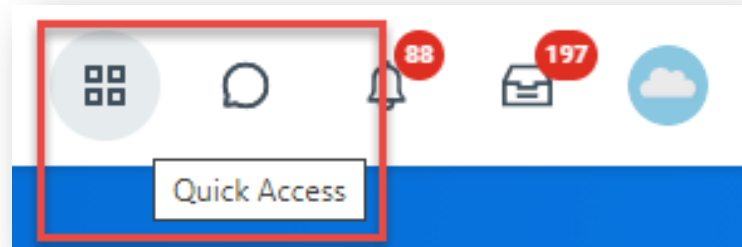
View Profile

- Clicking on cloud will display clearer user interface
- Click View Profile to display your full worker profile in Workday



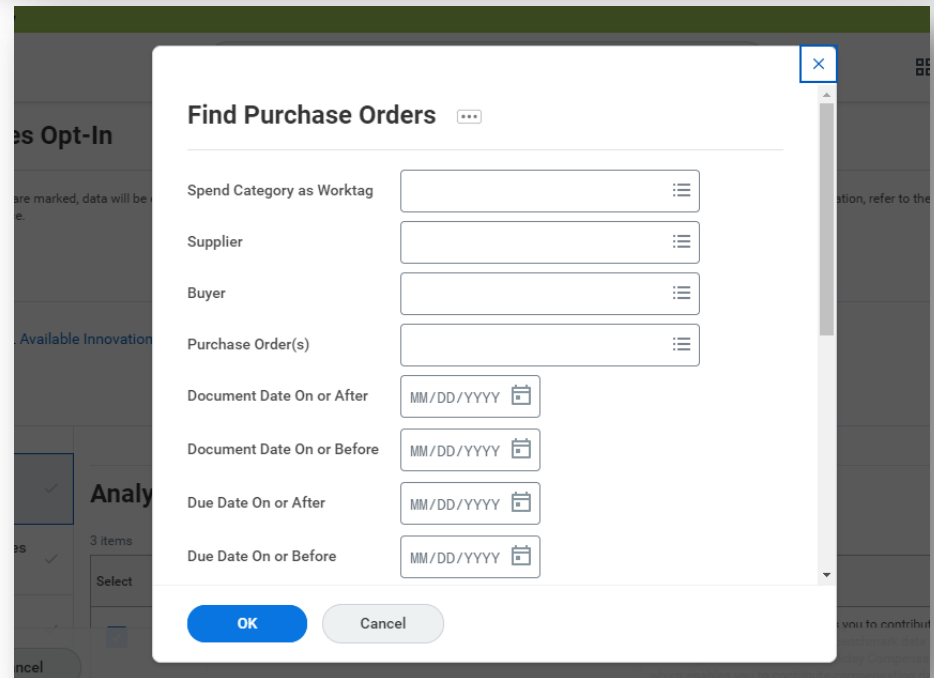
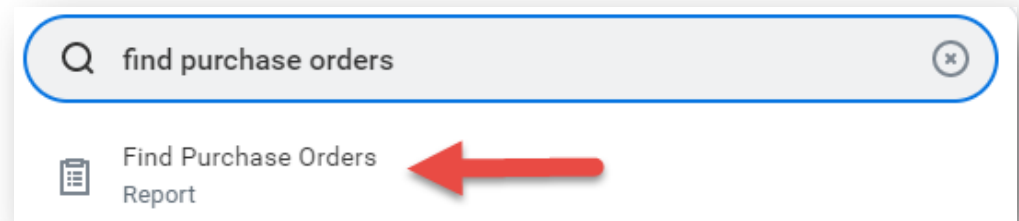
Responsive Interface

- Hovering on icons for shortcuts, inbox, notifications and profile view will display gray background and name of app



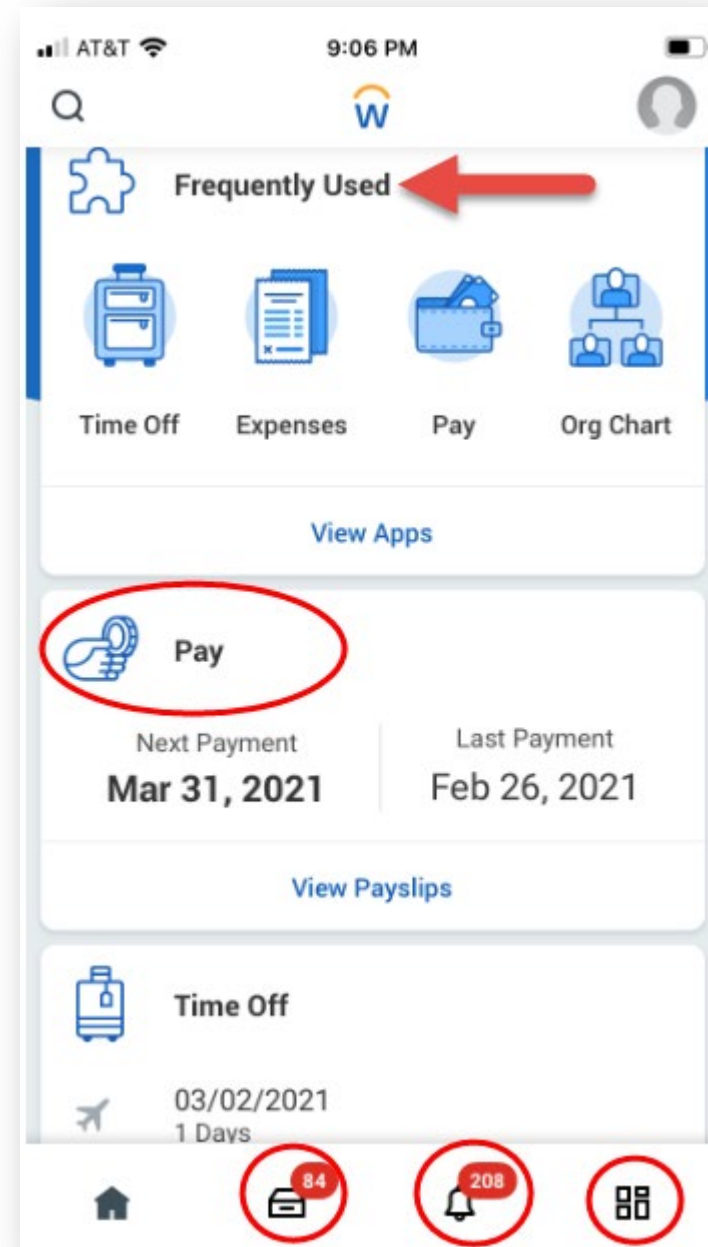
Launch Report from Search

- Search for report title
- Click report name
- Launch search parameters from search results



Mobile Interface

- Responsive design
- Prioritization of frequently used apps or a variety of apps available via your laptop
- Access review and approval of transactions
- Take action directly from application



Workday 37: Feature Highlights

Purchasing, Supplier Invoice and Expenses

Workday is making a variety of enhancements as it pertains to Purchasing, Receipting and Expenses including:

- Add reasons for requisition cancel and close as well as purchase order close
- Scan receipts via mobile app
- View purchase order change report available for department users
- View attachment for supplier invoice in split screen view
- Supplier duplicate management
- Add attachments to supplier contracts



Purchasing Reasons

- Reasons available to define the cancellation and closure of requisitions
- Reasons available for closing purchase order

Close Requisition

Are you sure you want to close the Requisition?

Reason

Comments

- Invalid Worktags
- No Further Spend
- Vendor Out of Business

Shipping Address

View Purchase Order Changes

- Search for report or use related action from the purchase order
- Displays full history of purchase order in Workday

View Purchase Order Changes

Purchase Order PUR-008898

From Date 01/01/2021 08:06:55

34 items

Timestamp	Task
05/10/2021 11:00:07 AM	Launch Print Service
05/10/2021 10:09:37 AM	Review Purchase Order

Actions

- Purchase Order
- Accounting
- Audits
- Budget Date
- Business Process
- Favorite
- Integration IDs

- Edit Without Change Order
- Close
- Close Lines
- Close Lines for Receiving
- Copy
- Create Change Order
- Issue
- Printable Version
- View Purchase Order Changes

View Purchase Order Changes

Purchase Order * PUR-0088982

From Date * 01/01/2021 08:09:55 PM

To Date * 09/06/2021 08:09:55 PM

Filter Name

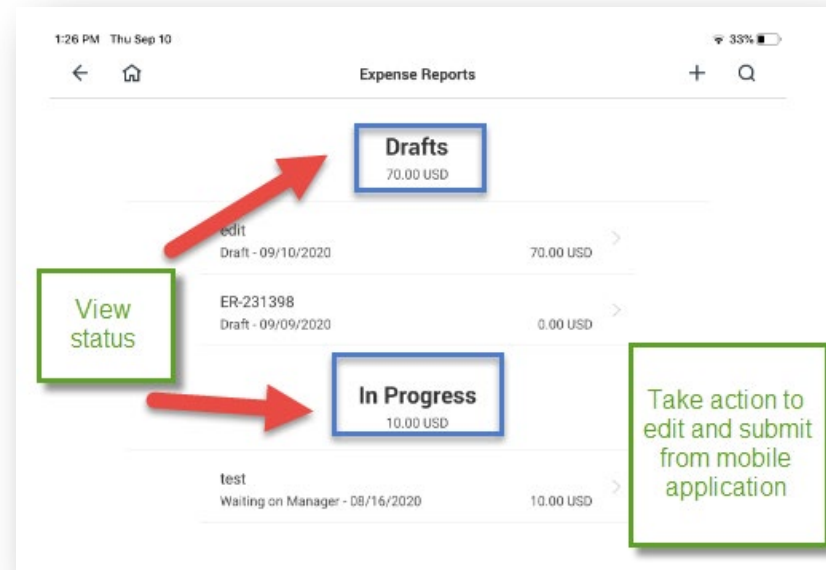
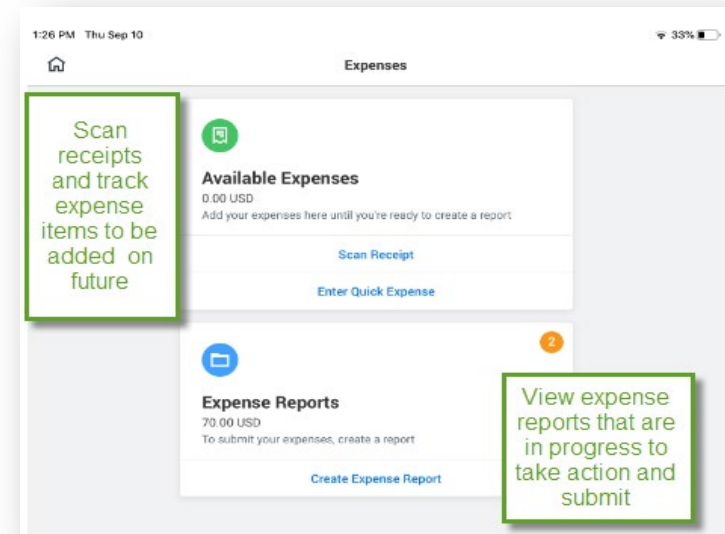
Manage Filters Save

0 Saved Filters

OK Cancel

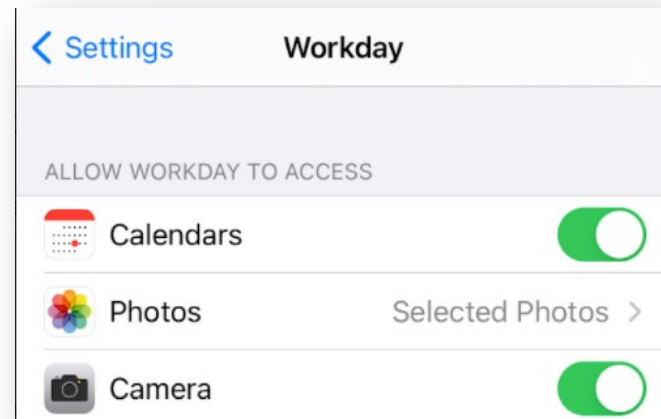
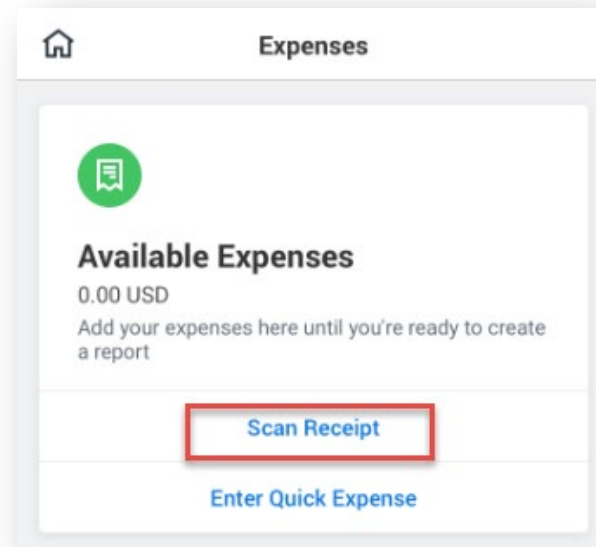
Mobile Expenses

- Start, edit, or submit expense reports
- Create expense items and scan receipts to be used in future reports
- Check status of expense reports and payments



Receipts from Mobile App

- Receipts can be scanned on your smart phone to Workday mobile app and will prepopulate with data from the receipt
- You must ensure your camera is available to the Workday mobile app via your phone's Settings
- Receipts loaded to the app are accessible to create a mobile expense report or via your desktop



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Supplier Attachment Split Screen

View Supplier Invoice

Supplier Invoice Invoice Number INV-0904564

Status In Progress Payment Status Unpaid

Invoice Information

Company [Brown University](#)

Supplier [Airgas USA, LLC](#)

Currency [USD](#)

Invoice Date 08/15/2021

Invoice Received Date (empty)

Total Invoice Amount 16,364.61

Amount Due 16,364.61

Attachments Receipt_Required_(Total_PO...) 2

Receipt_Required_(Total_PO...) 1 of 1

View Condition Rule: Receipt Required (Total PO Amount >= \$3K) 09:55 AM 08/06/2018 Page 1 of 1

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Description Receipt Required (Total PO Amount >= \$3K)
Comment Receipt is required if the Total Amount of the PO is \$3000 or more.
Category
Derived Logic MR Supplier Invoice Line has PO Line equal to Y And CF-PO Greater Than or Equal to \$3000 is not empty

And/Or	(Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value)
And		MR Supplier Invoice Line has PO Line	equal to	Value specified in this filter	Yes	
And		CF-PO Greater Than or Equal to \$3000	is not empty	Value specified in this filter		

Rule Usage

Used by Workflow Step Supplier Invoice Event (Default Definition) step e1 - Action
Supplier Invoice Event (Default Definition) step e - Action

- Attachments added via Supplier Invoice business process will be available for viewing in split screen view when reviewing invoice
- If more than one attachment is available, use the Attachments box or arrow to view additional attachments



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Supplier Duplicate Management

- Supplier duplicate management based on key indicators
- Identifies potential duplicates for merging or management

Find Supplier Duplicates ... 6/16 19/1

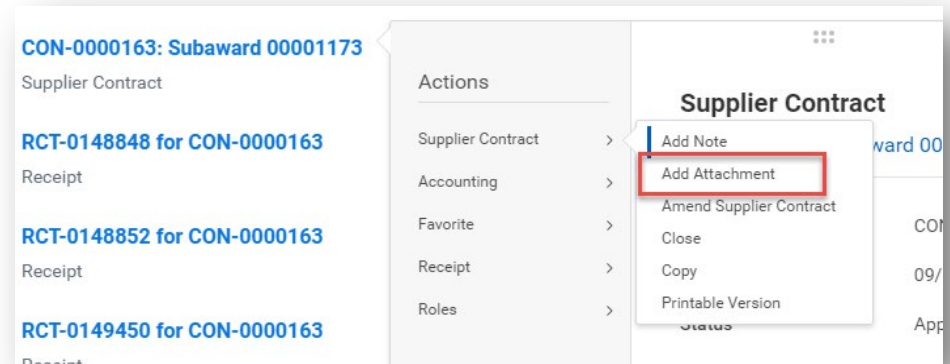
Supplier [US Department of Education](#) Search Duplicates by [Supplier Name](#)
[US Department Of Education](#)

6 items

Supplier	DUNS	Tax IDs	Emails	Settlement Bank Accounts	Supplier Contacts Phone Numbers	Supplier Contacts Emails	Supplier Duplicate
US Department of Education							US Department of Education Consolidation Refunds (Inactive)
US Department Of Education							US Department of Education Consolidation Refunds (Inactive)

Supplier Contract Attachment

- Attachments can be added via related action to supplier contract with any status
- Once an attachment is added, the process will not re-route for approval



Workday 37: Feature Highlights


Recruiting Changes

Recruiting changes are available for those managing the recruiting process:

- Personal reminders on candidate profiles
- Candidate job posting interface updated to support candidates
- Job requisition workspace available for recruiting users to support mass review of requisitions
- Edits to Career Profile user interface to support internal applicants




Recruiting Personal Reminders

- Set personal reminders on candidate profiles to follow up on tasks as needed
- Reminders will generate alerts based on your email preferences or will appear in your notification bell 



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Create Reminder


1 Remind me about: * 

Title 2 *

When Tomorrow
 One Week
 One Month
 None of the above

Time Morning
 Afternoon
 Evening
 None of the above

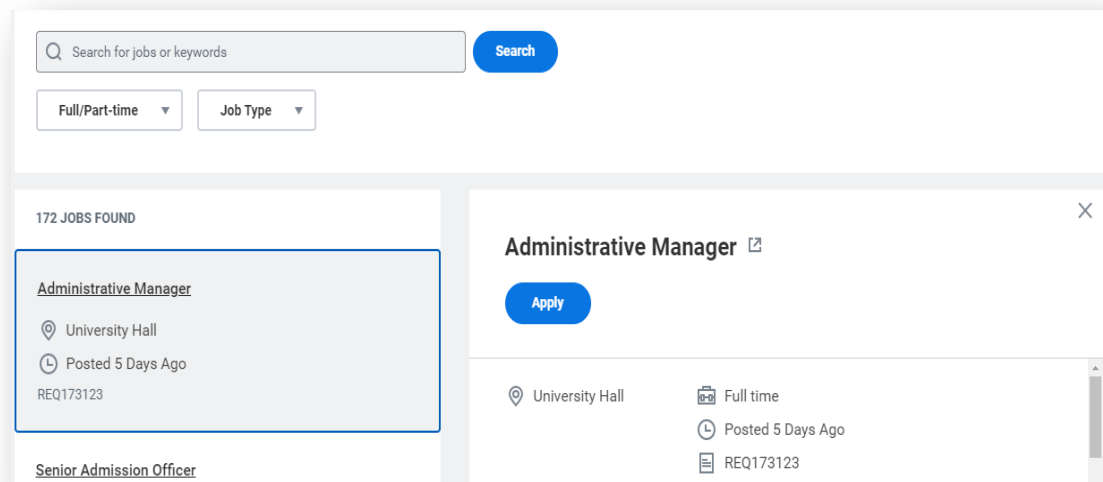
3 Due Date * 

4 Approximate Time * 

Notes

External Career Site

- Career site updated for external candidates
- Responsive design, filters and search available to enhance user experience
- Preview of requisition details supports candidates review details and retains access to available positions



Job Requisition Workspace

- Support department, division and central level recruiters in viewing and taking action in job requisitions
- Take action directly from workspace
- Filter by requisition status, manager and location to support your searches

Job Requisition	Status	Hiring Manager	Review ↓	Screen	Referenc
REQ165027 Research Assistant	Posted 183 days ago		163 >		
REQ161987 Research Assistant	Open		93 >		
REQ163446 Lab Assistant	Open		84 >		

Edit Career Profile

- Workers can update their education, job history, and skills via “Edit Career Profile”
- Career Profile data updated in Workday will be used when applying for jobs internally at Brown via “Find Jobs” report

The screenshot displays the 'Edit Career Profile' interface. On the left, a blue sidebar contains a navigation menu with five items: 'Certifications' (1), 'Education' (2), 'Job History' (3), 'Skills' (4), and 'Summary' (5). The 'Summary' item is highlighted with a red box. A callout box points to the 'Add information to each section' text above the sidebar. At the bottom of the sidebar, a printer icon is highlighted with a red box, and a callout box indicates 'Download and print if a hard copy is needed'. The main content area is titled 'Edit Job History' for 'Bus, Gus (640042)'. It features an 'Add' button and a table with columns for 'Job Title', 'Company', 'Start Date', and 'End Date'. A callout box points to the 'Summary' view option, stating 'Use Summary view to display full profile'. At the bottom, there are 'Back', 'Next', and 'Close' buttons.

Workday 37: Feature Highlights

Time Tracking and Absence

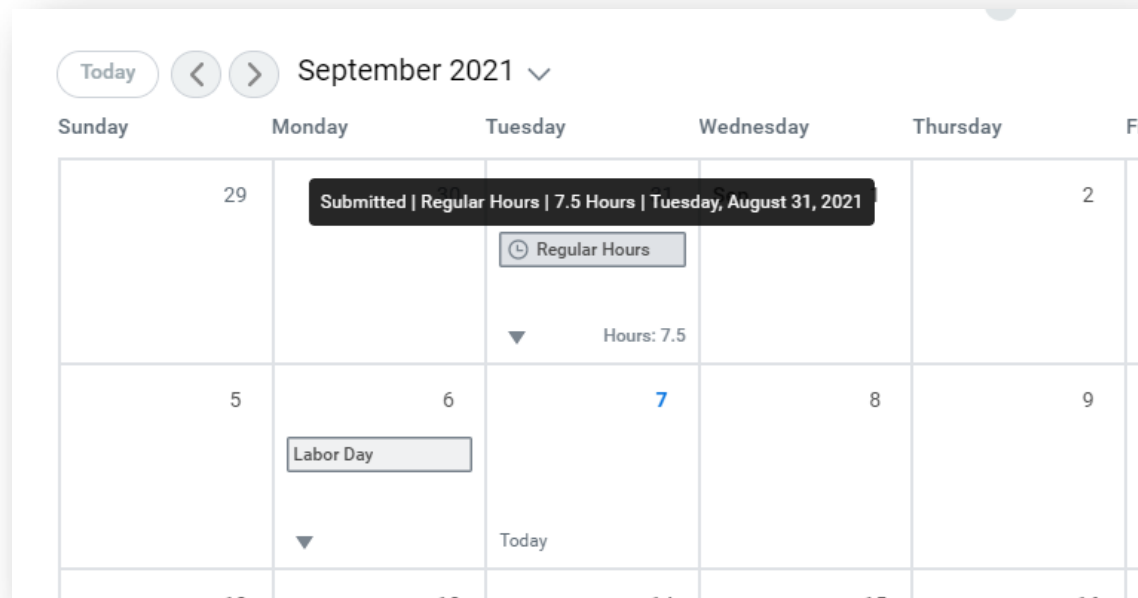
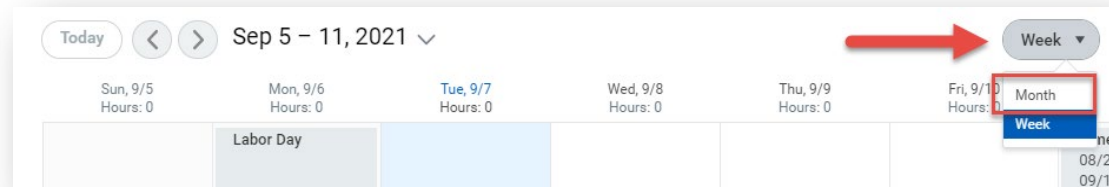
Brown and Workday have made several reporting enhancements to Time Tracking and Absence including:

- Time entry for monthly period available
- Time off requests display update
- Enter multiple days for a single time off request
- Mobile time off requests can be added to your Brown or home calendar directly from your smartphone app



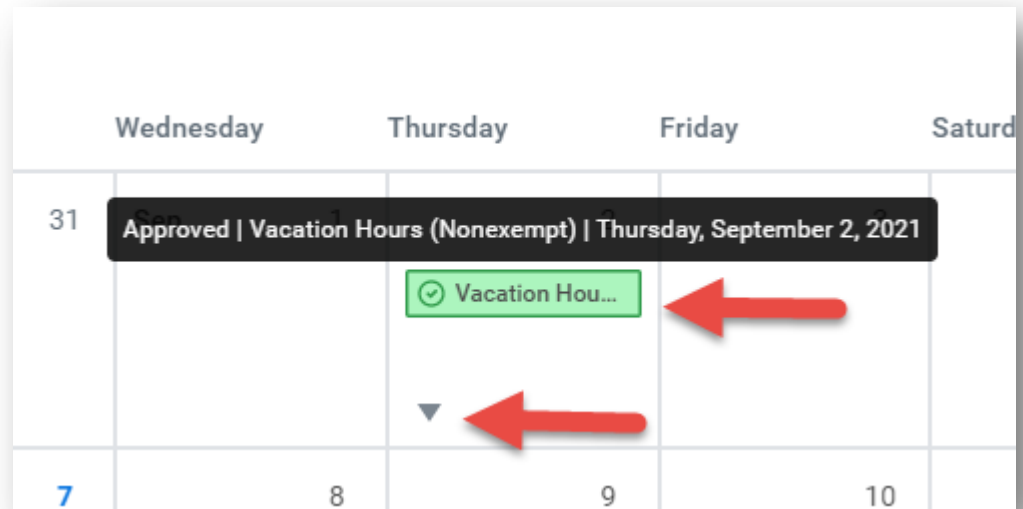
Time Entry by Month

- Users who would like to view or enter time for a monthly period can do so by selecting “month” as default view
- Monthly view supports users viewing multiple types of time on a single day by hovering or clicking on details



Time Off Detail View

- Hover on time off request to view details
- Click arrow to view details



The screenshot shows a calendar interface with columns for Wednesday, Thursday, Friday, and Saturday. A date range from 31 to 10 is visible. A tooltip is displayed over the Thursday column, containing the text "Approved | Vacation Hours (Nonexempt) | Thursday, September 2, 2021". Below the tooltip, a green button with a checkmark and the text "Vacation Hou..." is visible. A red arrow points to this button. Below the button, a small grey downward-pointing triangle is visible, with another red arrow pointing to it.

Wednesday	Thursday	Friday	Saturday
31	Approved Vacation Hours (Nonexempt) Thursday, September 2, 2021		
	<input checked="" type="checkbox"/> Vacation Hou...		
	▼		
7	8	9	10

Multiple Time Off Requests in Single Entry

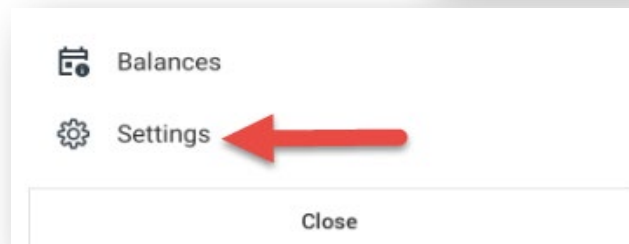
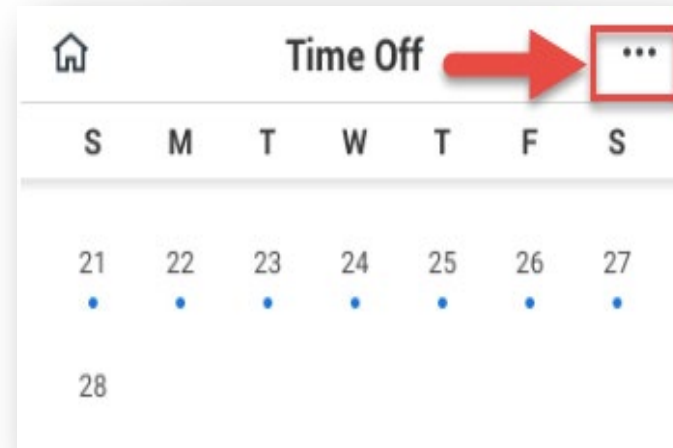
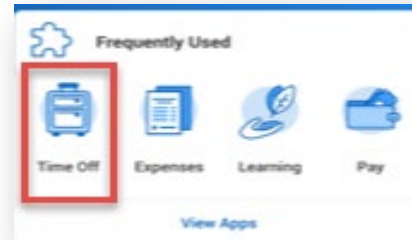
- Click multiple days of same time off type and click submit
- A single time off entry will be routed to your respective approvers

The screenshot shows a time off request form with a calendar grid. The grid has columns for days 12, 13, and 14, which are highlighted with a red box. Below the grid, there is a blue button labeled "3 Days - Request Time Off" with a red arrow pointing to it. The form also displays the following information:

Vacation Bonus Hours (Nonexempt) 0 Hours (Payout Vacation Bonus Hours (Nonexempt), Vacation Bonus Hour (Nonexempt))	12	13	14
Vacation Hours (Nonexempt) 106.48 Hours (Payout Vacation Hours (Nonexempt))	19	20	21

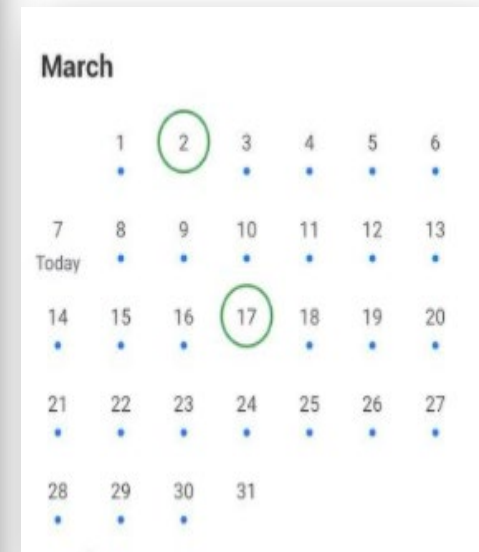
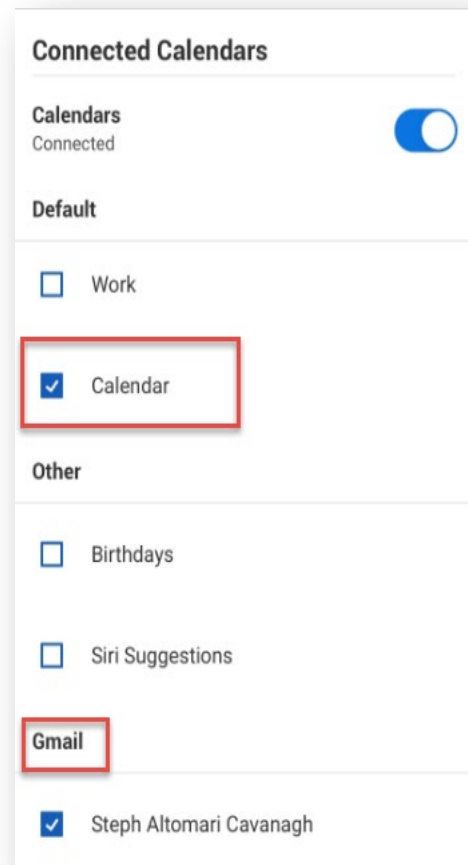
Time Integration with Smart Phone Calendar

- Accessing **Time Off** from your mobile app will allow you to import calendar details to assist with planning time off requests
- Click ●●● to access calendar settings
- Click **Settings** to link to your smart phone calendar



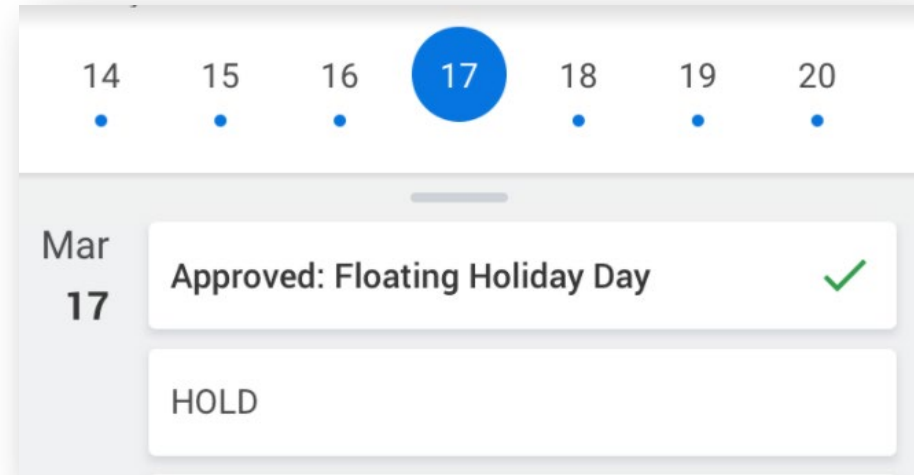
Time Integration with Smart Phone Calendar

- Select all applicable calendars including Home and Gmail to enable viewing of Brown calendar in application
- Blue dots indicate active schedule item for review
- Green circles signify approved time off



Time Integration with Smart Phone Calendar

- When clicking on day both in the app and in your smartphone calendar the approved time off will appear



Workday 37: Feature Highlights

Learning Changes

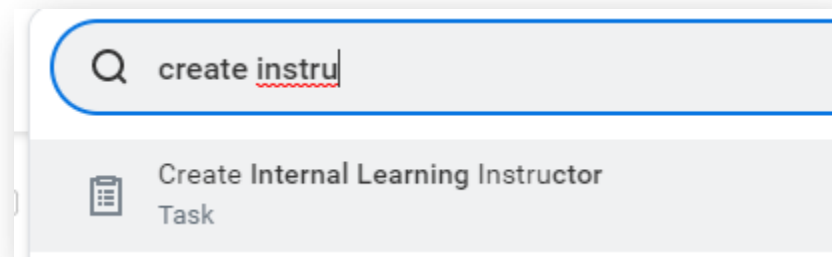
Learning updates taken by Brown in this update include:

- Create internal learning instructor
- Courses tagged with competencies
- Comments for learning coordinators
- Cancel learning enrollment or drop enrollment from a single participant
- Save course to watch later or add to Learning Path
- Learning Programs now support Mass Enrollment to require learning for teams
- Continue Learning on Learning app will allow you to continue to engage in content that you have not completed



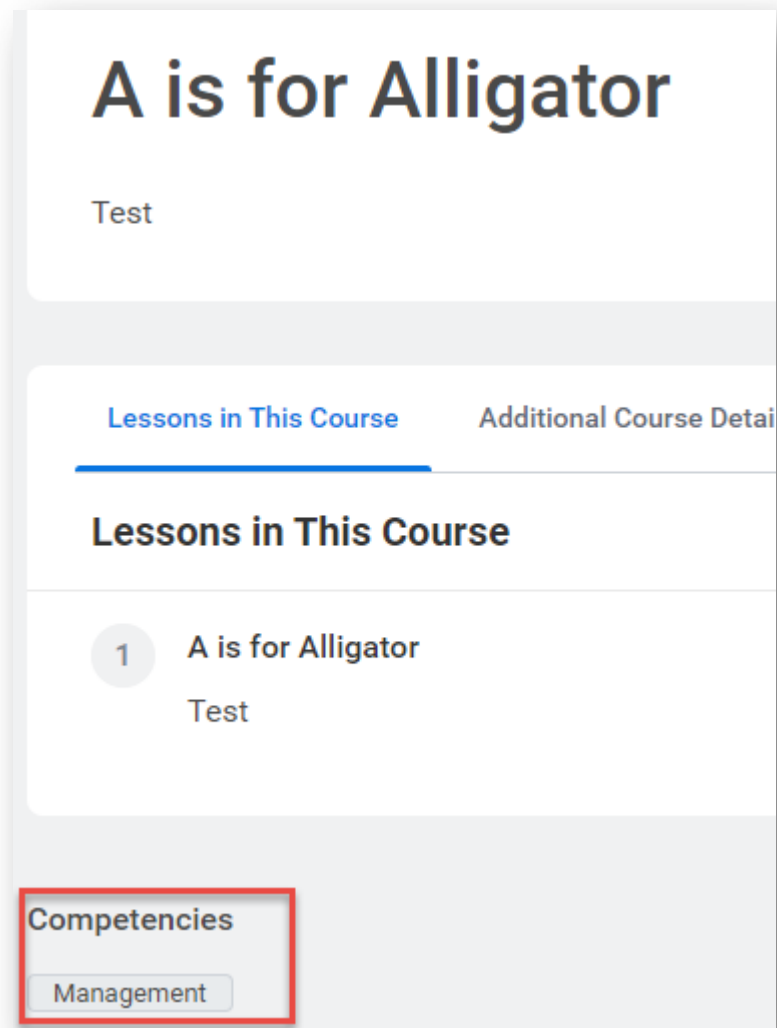
Create Internal Instructor

- Create internal instructor updated from manage instructor
- Ensure instructor is saved as active



Tags on Courses

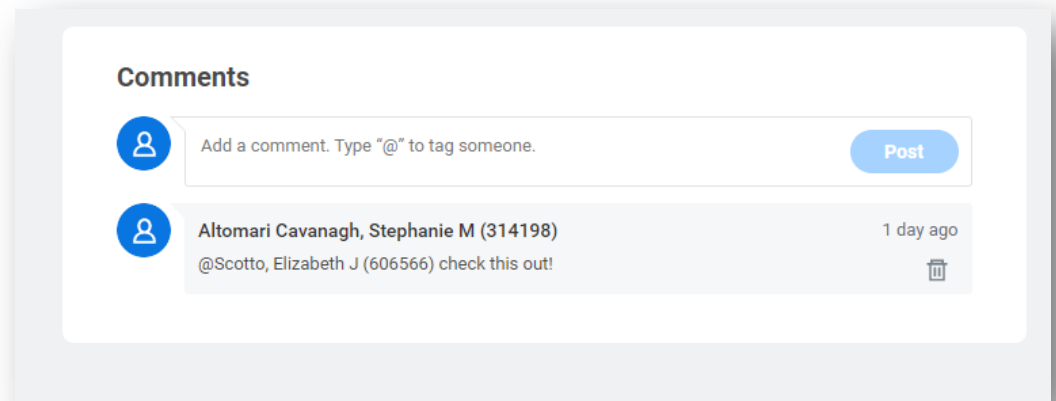
- Internal content tagged with competencies
- External courses tagged by provider with skills



The screenshot shows a course page for "A is for Alligator". The title "A is for Alligator" is at the top, followed by the word "Test". Below this is a navigation bar with two tabs: "Lessons in This Course" (which is selected and underlined) and "Additional Course Details". Under the "Lessons in This Course" tab, there is a list of lessons. The first lesson is "1 A is for Alligator" with "Test" listed below it. At the bottom of the page, there is a section titled "Competencies" which contains a button labeled "Management". This "Competencies" section is highlighted with a red rectangular border.

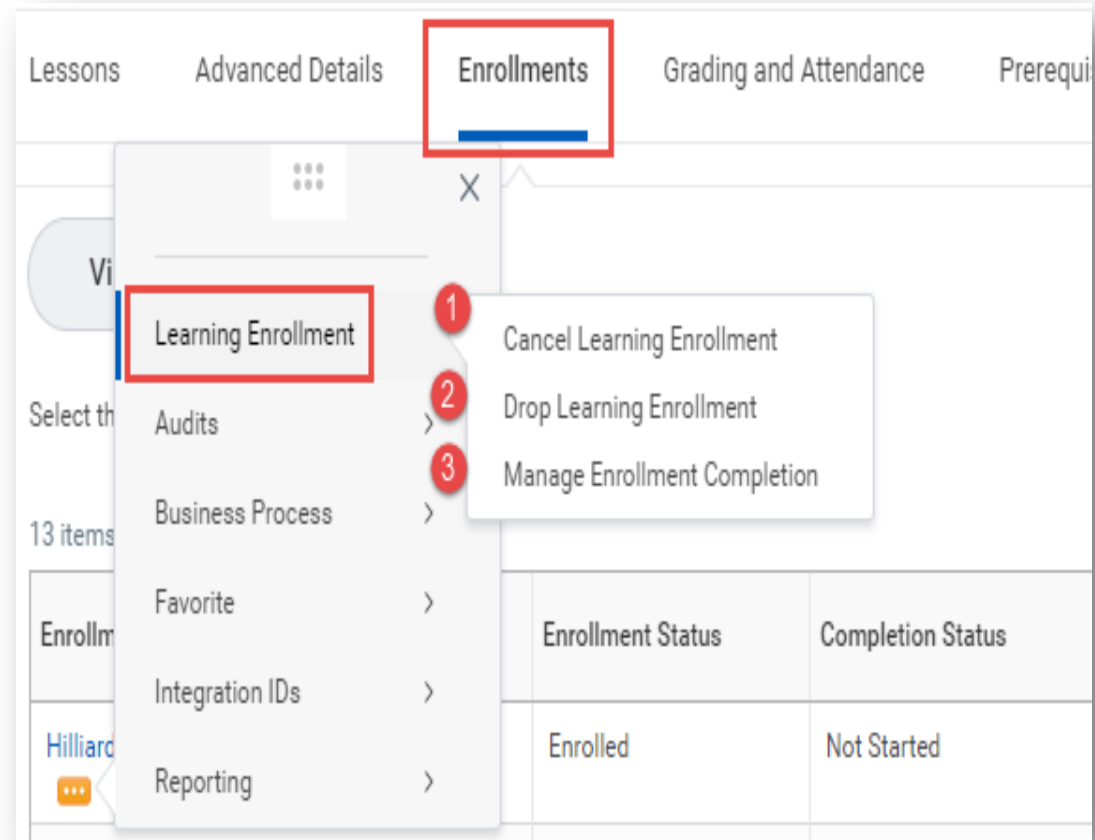
Comments on Content

- Learning Coordinators and Learning Administrators can tag users in content comments
- Notification will appear for tagged user to review content



Cancel Learning Enrollment

- Support Learning Coordinators, HR Coordinators, Instructors and managers to cancel learning enrollments as needed
- Navigate to enrollments and click related action, “Learning Enrollment” and “Cancel Learning Enrollment”



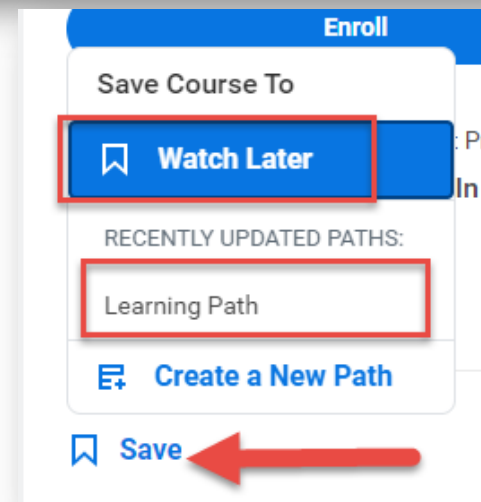
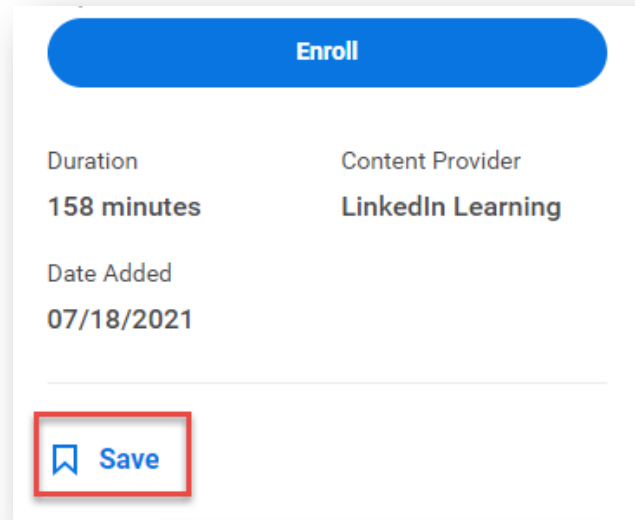
The screenshot shows a software interface with several tabs: 'Lessons', 'Advanced Details', 'Enrollments', 'Grading and Attendance', and 'Prerequisites'. The 'Enrollments' tab is selected and highlighted with a red box. A context menu is open over the 'Enrollments' tab, listing several actions: 'Learning Enrollment', 'Audits', 'Business Process', 'Favorite', 'Integration IDs', and 'Reporting'. The 'Learning Enrollment' option is highlighted with a red box. A sub-menu is open for 'Learning Enrollment', showing three options: 'Cancel Learning Enrollment', 'Drop Learning Enrollment', and 'Manage Enrollment Completion'. The 'Cancel Learning Enrollment' option is highlighted with a red box and a red circle containing the number '1'. A red circle containing the number '2' is next to 'Drop Learning Enrollment', and a red circle containing the number '3' is next to 'Manage Enrollment Completion'. Below the context menu, a table is visible with columns 'Enrollment Status' and 'Completion Status'. The first row shows 'Enrolled' and 'Not Started'.

Enrollment Status	Completion Status
Enrolled	Not Started



Save Content to Launch at Later Date

- Clicking “Save” on content to determine path for future review
- Accessible again via My Library in Learning app



Learning Program Mass Enrollments

- Learning Programs group content of different types in a single experience
- Learning Program can now support enrollment either through mass enroll (assigned learning) or direct user enrollment

H is for Hippo

test

Assign as Required Learning

Yes
 No

Due Date

Due Date Type: select one
select one
Date
Duration

Workers 1 item

Photo	Name	Location
	Hilliard, Angel (314800)	South Street Landing

OK Cancel

Workday 37: Feature Highlights

Miscellaneous Updates

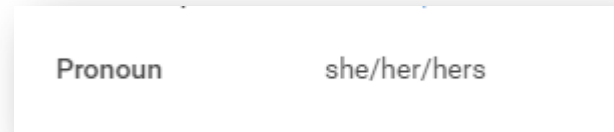
Updates to employment, effort certification and grants deployed by Workday in this update include:

- Updating pronoun in Workday
- Effort certification work area
- Recertification of effort report
- Correcting award business process
- Correct supervisory organization on hire
- Correct hire date



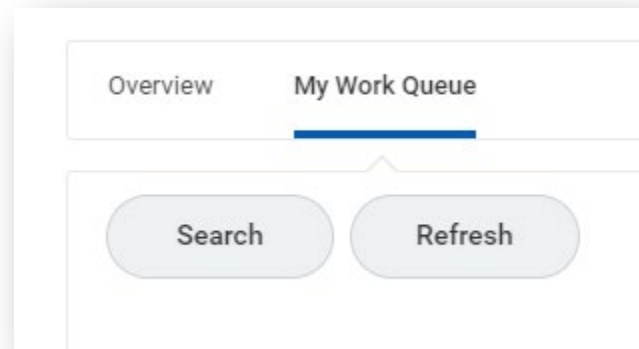
Pronoun in Workday

- Pronoun availability for update by employees
- Visible on worker profile



Effort Certification Work Area

- Supports Effort Certification Partners who have responsibility to manage multiple effort certifications
- Supports actions efficiently in a single place



53 items

	Effort Certifica	Worker	Modified	Start Date	End Date	Effort Certification Type	Step	Awaiting Me
<input type="checkbox"/>	Q		No	07/01/2020	12/31/2020	Faculty and Exempt Employees	Administrative Review	<input type="button" value="Review"/>
<input type="checkbox"/>	Q		No	07/01/2020	12/31/2020	Faculty and Exempt Employees	Administrative Review	<input type="button" value="Review"/>
<input type="checkbox"/>	Q		No	07/01/2020	12/31/2020	Faculty and Exempt Employees	Administrative Review	<input type="button" value="Review"/>

Recertify Effort Certifications

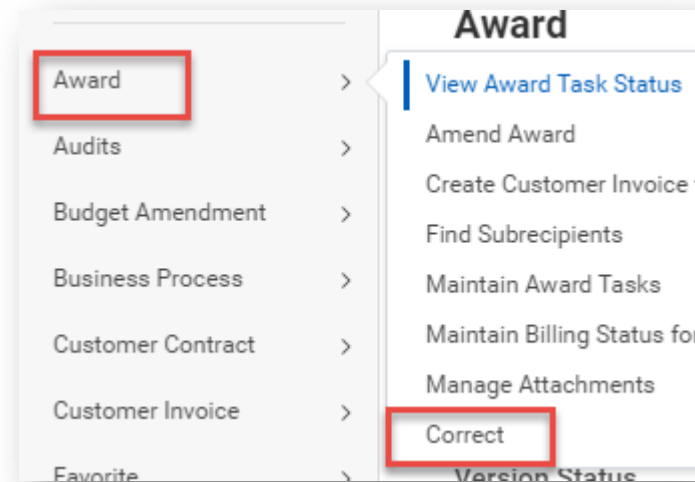
- Identifies effort certifications that require re-certification because of a change
- Administered by central office

Recertify Effort Certifications

Company	*	<input type="text"/>	☰
Effort Certification Type	*	<input type="text"/>	☰
Effort Certification Date From	*	<input type="text" value="MM/DD/YYYY"/>	📅
Effort Certification Date To	*	<input type="text" value="MM/DD/YYYY"/>	📅

Correct Award

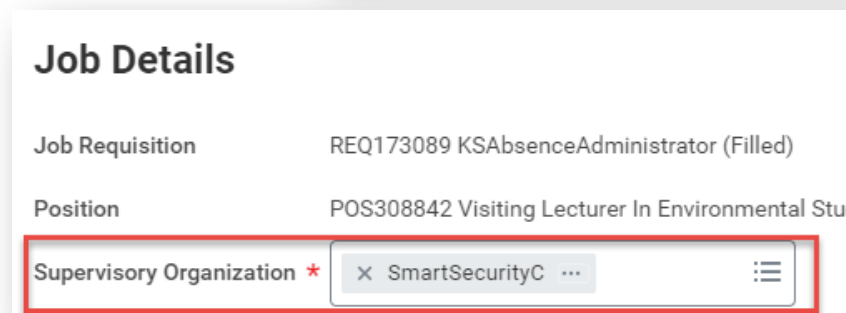
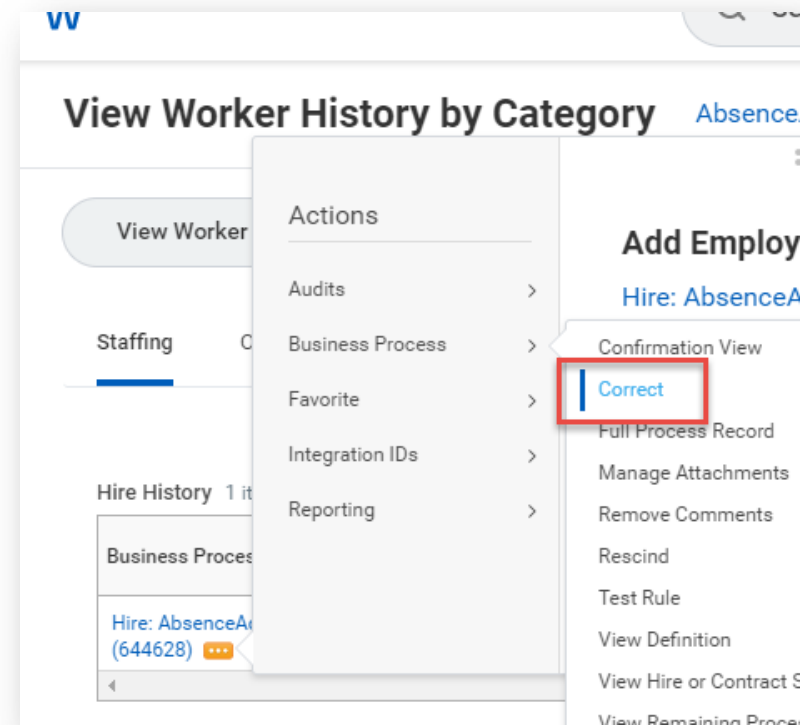
- Award correction reasons updated
- Corrections routed dependent on reason
- Administered by central office



A screenshot of a software form for award amendments. The form has a navigation bar at the top with tabs: Overview, Award Lines, Notes, Attachments, Special Conditions, Committed Effort, Plan, NSF Code Allocations, Award Credits, and Other Information (highlighted with a red box). The main content area is divided into two sections: 'Amendment Information' and 'Correction Information'. The 'Amendment Information' section includes fields for Reason (with a dropdown menu showing 'No Cost Extension'), Effective Date (03/03/2019), Signed Date (MM/DD/YYYY), and Number. The 'Correction Information' section includes a field for Reason (highlighted with a red box).

Correct Supervisory Organization

- Use correct on hire to update supervisory organization
- Process will not re-route once corrected



Correct Hire Date

- Use Request Worker Start Date Correction to begin the process
- Select manually or automatically correct in the subprocess or downstream processes after the hire
- Select the appropriate group for the notification of the process change

Job Details

Job Requisition	REQ173089 KSAbsenceAdministrator (Filled)
Position	POS308842 Visiting Lecturer In Environmental Stud
Supervisory Organization *	<input type="text" value="x SmartSecurityC ..."/>

Request Worker Start Date Correction

Worker *	<input type="text" value="x AbsenceAdministrator, KS (644628) ..."/>
Current Hire Date	08/15/2021
Proposed Hire Date *	<input type="text" value="09/27/2021"/>

Stay Tuned...

- Next release of Workday functionality in March 2022