Welcome to the September 14th Change Network Meeting!

We will begin shortly.

If meeting attendance exceeds 1,000, subsequent attendees will have a ‘view only’ experience. They may submit questions using the form https://forms.office.com/r/GRBYLqaqui

workday

VANDERBILT UNIVERSITY
MEDICAL CENTER

workday

Change Network 2023 R2 Meeting: September 14, 2023

Change Network Agenda

September 14, 2023

- Release Update
- Human Resource Update
- Finance/Research & Grants Update
- Supply Chain Update
- Resources
- Q&A

Release Update

Release Update

Workday 2023 R2 went live
Saturday, September 9th

Human Resources

Human Resources: Change Network Questions

- If you encounter a message or action in the system that you feel is incorrect, please log a ticket to notify us, and include the transaction that was done, the error message, etc.

- **Delegation**

  - When individuals go out on a leave of absence or terminate from the organization, a task is typically sent to the individual and/or manager asking for them to review their roles in the system to determine if they need to be delegated to someone else. If no action is taken, the transaction can get "stuck". We continue to work on identifying a potential solution to removing these items.

  - Delegation is intended to help provide assistance in approving or initiating transactions when a manager is out of the office. The process is not intended to provide all access as though the person being delegated to as if they are manager.

  - The ideal reason to use delegation is for when an individual will be out of the office for a period of time for PTO or a Leave of Absence.

Human Resources: Change Network Questions

- **Time Off**
  - Hourly employees are not required to place time off requests in Workday. If your department uses VandyWorks, you should continue to use that system, otherwise, we do recommend using Workday, but it is not required. But as noted in the last session, you will need to be consistent, and you need to make sure that requests in Workday are in a completed status prior to the end of the pay period.

  - You can utilize the team calendar to view, but you are not able to approve time off requests directly from the team calendar.

- **Security Requests**
  - When submitted any security requests in Pegasus, please be sure you select the appropriate role, provide the necessary information, such as supervisory org (or cost center if it is a Finance or Supply Chain request).

  - Requests can get delayed if this information isn't provided.

Human Resources: Change Network Questions

- **HR Security Roles**
  - ➢ The HCM Business Manager and HCM Business Assistant roles are available to provide support to a manager.
  - ➢ Suggest you have a full understanding of these roles before requesting, as they provide access to information/processes that some consider very confidential.
  - ➢ Different entities have determined how they want to use these roles, so be sure to check with your leadership before requesting this access.
- **Access to personal information**
  - ➢ Currently managers are not able to view personal information on their team, such as home address, home phone, or cell phone, unless they are made public.
  - ➢ Working to provide this access to individuals with the Manager and HCM Business Manager roles.

Human Resources: Change Network Questions

- **Upcoming Workshops**
  - HCM Reporting
  - Recruiting and Onboarding
  - Time Off/Absence

Finance

Finance: Change Network Questions

- **Spend Category - How do I identify the most appropriate spend category when the account translator offers multiple or different options?**
  With Workday, spend categories are auto-assigned on requisitions based upon purchase items organized by UNSPSC categories (a universal coding system for goods and services) where mappings could be established. Changes did occur to spend category designations and groupings as a result of this. Similarly, spend categories are auto-assigned on expense reports based upon expense items. In payroll, spend categories are auto-assigned primarily based upon a combination of pay component and job category. If a spend category needs to be designated, select the spend category that most closely aligns with purchase being made or expense being incurred.

- **Payroll Accounting Adjustment (PAA) - If an expired grant worktag is submitted in a PAA, will that post to the expired grant or to the default cost center?**
  The expired grant worktag can be entered and will post to the expired grant (not the default org assignment cost center) if the PAA is approved.

- **Petty Cash - How do we obtain petty cash for our clinics now that we have transitioned to Workday?**
  The process for obtaining petty cash was not changed with the Workday implementation.

Finance: Change Network Questions

- **Grant Balance - How can I view the center balance for my grants?**
  Status Summary by PI report. This is a great report to send to PIs.

- **Effort Reporting – How do I get effort reporting for each grant?**
  Current solution is the Pro Forma Effort Certification. It can be run for federal awards by the Grant Manager and provides a report for each individual charged to the award.

- **Compensation/Salary View - As a cost center financial analyst with access to personnel detail, is there a report I can run to pull someone's salary or pay rate to use in calculating the amount that should have posted on my center?**
  The Cost Center Financial Analyst with Payroll Details role unfortunately does not include any access to employee compensation. This role only allows users to view employee level detail on payroll journals posted to the general ledger. The request for a view only role into employee compensation has been documented and is being evaluated.

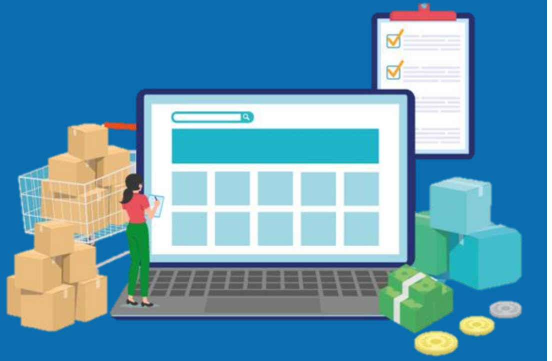
- **Is there a report available to show everyone's default center?**
  Yes, you can try the Current Worker Detail report or Payroll Costing by Organization report.

Supply Chain

Supply Chain: Change Network Questions

- **Receipts:**
  - **How/where to attach receipts for grant purchases?**
    If the purchase is for <$10K, attaching of documents is not required.

- **Purchasing:**
  - **Are we able to update worktags on purchase orders not yet received ourselves?**
    Worktags can be updated on a purchase order via a Change Order and will require approval.
  - **Will there be a way to add the shipping charge after the invoice is received but prior to "receiving" the order so that exceptions are not generated?**
    With the implementation of Workday, freight charges for non-capital purchases are expensed to a centralized cost center in SCM. However, additional fees, installation cost, etc, should be included as a separate line item when requisitions are submitted for approval.
- **Tax Id:**
  - **Can the Tax ID # for the Supplier be added to the Remit-to Connection information when selecting the appropriate remit to address?**
    The supplier Tax ID cannot be added to the remit. Some of our suppliers are individuals and their SSN is used as the Tax ID and incorrectly expose this information
- **Overview of PO Process:**
  - **If a vendor calls about when an invoice is going to be paid where I can go to find that. Match exceptions topic; Blanket POs**
    With the implementation of Workday, we now have a Supplier Portal that allows the supplier (not employees) to view issued purchase orders and invoices entered in the system. Some suppliers have already registered to receive access. Suppliers (not employees) can send a request for portal access to vumcdsvendormaintenance@vumc.org



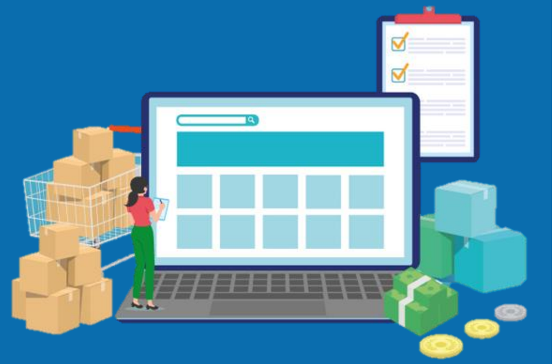
Supply Chain: Change Network Questions

- **Supplier Contract -**
- **How do you determine what contract to use on a requisition? Some suppliers look like they have several contracts.**

  The Sourcing Officer that helped to execute your agreement should provide this information at the time the contract is completed. If this was not completed, please reach out to sourcing. Contact information is available on the Finance Website under Supply Chain with the contact list.

- **Expense Reports -**
- **Can "personal car mileage expense reimbursement" process be updated in Workday so that one entire day's route of multiple locations traveled can be input as "one expense line" as a route like previously in Concur i.e. (Location A to B to C to D etc.)?**

  Yes. Workday requires you to enter the origin address and the destination address. For the origin address, enter your starting point. For the destination address, enter your second address stop. You will then need to enter the total miles for your trip on the given day. You will enter this information in the field "Trip Distance Including Diversions". Please attach your supporting documentation to the expense report. The expense report will stop in the travel office for review to ensure alignment of the supporting details.



2023 R2 Release Resources

Resources

- MyWorkday Website: New Release Features

New Release Features

View | Edit | Delete | Revisions | Replicate

Twice a year, in the spring and fall, Workday will automatically upgrade with new release features. This twice-a-year upgrade will provide VUMC with the newest Workday features. While many of the upgrades are 'behind-the-scenes' system enhancements, there will be some changes that will impact the user experience.

See below for important dates, information, and resources for the latest Workday Release.

IMPORTANT DATES:

2023R2 Release date: September 9, 2023

CHANGE NETWORK MEETINGS*:

September 7th *(2 options)*

9:00 am or 1:00 pm

**Note: The content presented will be the same in each meeting, and the recording will be posted and available on September 8th.*

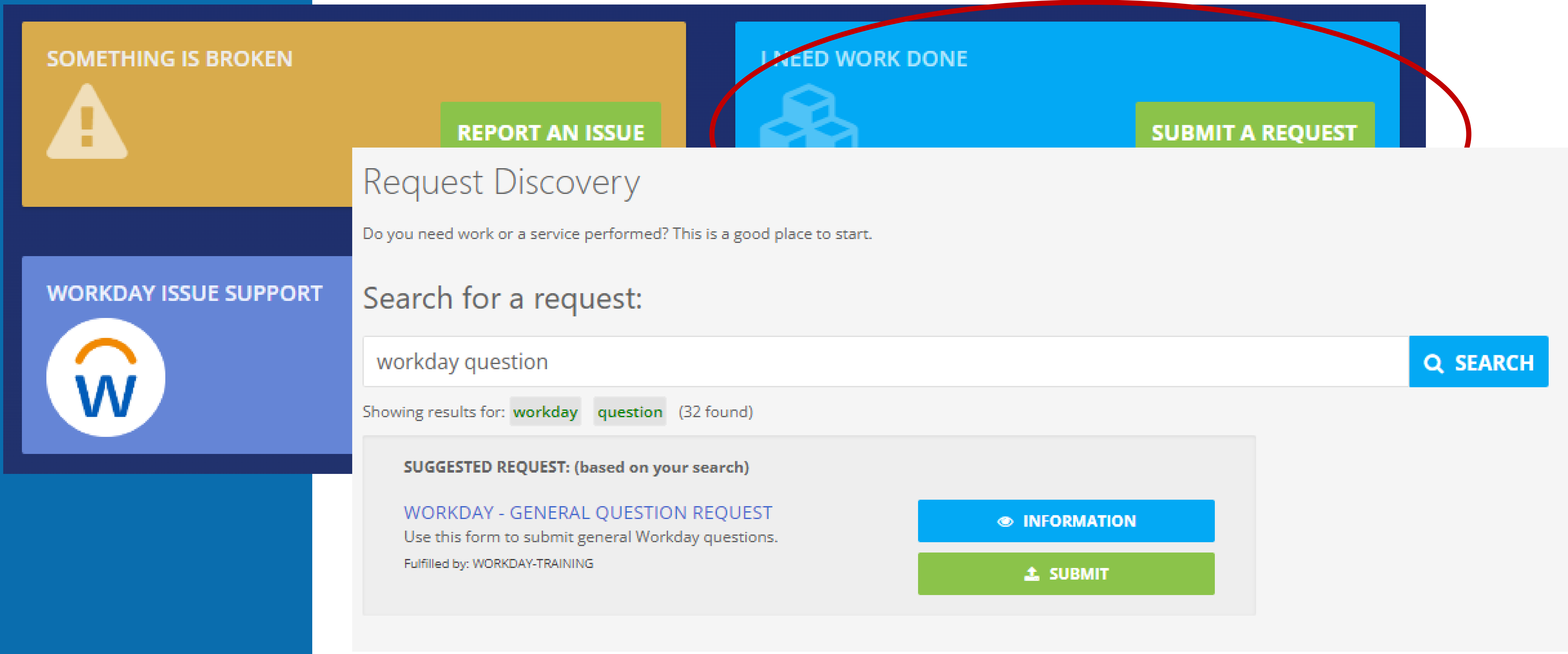
2023R2 RELEASE HIGHLIGHTS:

Manager's Home Page

- **Important Dates:** highlights upcoming dates for your team.
- **Team Highlights:** allows you to quickly navigate to employee's page.
- **Quick Review:** This button for managers in the "Awaiting Your Actions" section of the home page, allows review and approval of employees' time off

Resources

- Pegasus ticket: General Workday Questions



Questions?

Thank you!