

Research Workday Town Hall

October 5, 2023

Research Workday Town Hall Agenda

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- Welcome
- Effort Trend Report
- Labor Reporting Security Improvements
- Conversion Correction Update
- Supply Chain Update
- Weekly Research Update
- Upcoming Workshops
- Q&A

Effort Trend Report

As Discussed in the September 21 Town Hall:

Prepare for Effort Certification – Actions Needed Now

Effort Reporting and Certification in Workday

Review Payroll Costing Allocations now:

- Is the plan as expected?
- Are any grants expired?

On an ongoing basis, proactively communicate and update the individual's Payroll Costing Allocation when changes occur:

- New awards begin
- Existing awards close
- Work increases, decreases across various awards

First Certification will be generated after September close, likely towards the end of the week of October 16 for the period of:

- March 26, 2023 – September 30, 2023



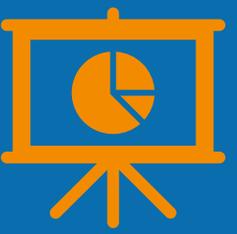
Institutional practice and expectation:

Regular effort conversations on a monthly, no less than quarterly, basis for all individuals with federal funding sources.

THANK YOU for the tremendous EFFORT you have been making to keep this going without having the DMS reports we all lived by...



Effort Trend Report



Access/Roles based on:

- Grant—Grants Managers, Grants Financial Analyst
- Cost Center—Cost Center Manager, Cost Center Financial Analyst with Payroll Details
- Supervisory Organization—Manager, HCM Business Manager, HCM Business Assistant with Compensation

What: This report provides by Worker effort percentages for the prior 12 months (Note: We are building history in WD - so currently the prior 12 months begins from go live forward - 3/26 for biweekly, 4/1 for monthly)

Why: Effort compliance, review, progress reports, planning discussions

When: Often!

- To view how a person's effort is being charged
- To view who is being charged to your grant, cost center, program, gift
- To view how your faculty and staff are being charged from a supervisory org or cost center hierarchy perspective

Notes: This report is similar to the DMS Effort Trend by Person and DMS Effort Trend by Center

EFFORT TREND
REPORT DEMO



Salary Effort Trend Report



Access/Roles based on:

- Grant—Grants Managers, Grants Financial Analyst
- Cost Center—Cost Center Manager, Cost Center Financial Analyst with Payroll Details
- Supervisory Organization—Manager, HCM Business Manager, HCM Business Assistant with Compensation

What: This report provides by Worker the dollars AND effort percentages for the prior 12 months (Note: We are building history in WD – so currently the prior 12 months begins from go live forward – 3/26 for biweekly, 4/1 for monthly)

Why: Effort compliance, review, progress reports, planning discussions

When: Often!

- To view how a person's effort is being charged
- To view who is being charged to your grant, cost center, program, gift
- To view how your faculty and staff are being charged from a supervisory org or cost center hierarchy perspective

Notes: This report is similar to the DMS Salary and Effort Trend Historical Dollars & Effort Section

Effort Trend and Salary Effort Trend Reports

Effort Trend

Period *

Time Period *

Cost Center/Cost Center Hierarchy

Grant

Journal Source

Supervisory Organization

Worker

Program

Filter Name

Manage Filters 0 Saved Filters

Salary Effort Trend

Period *

Time Period *

Cost Center/Cost Center Hierarchy

Grant

Journal Source

Supervisory Organization

Worker

Program

Filter Name

Manage Filters 0 Saved Filters



Next Steps

Run the Effort Trend report today!

Rejoice in being able to see what you need to see to support effort reporting compliance!

Run the Effort Trend report again!

Take a deep breath – we are pulling back the curtain to a lot of information.

Effort Certification Reviewers will soon receive communications with meeting dates and training/support available.

Access the Guide – [Link](#)

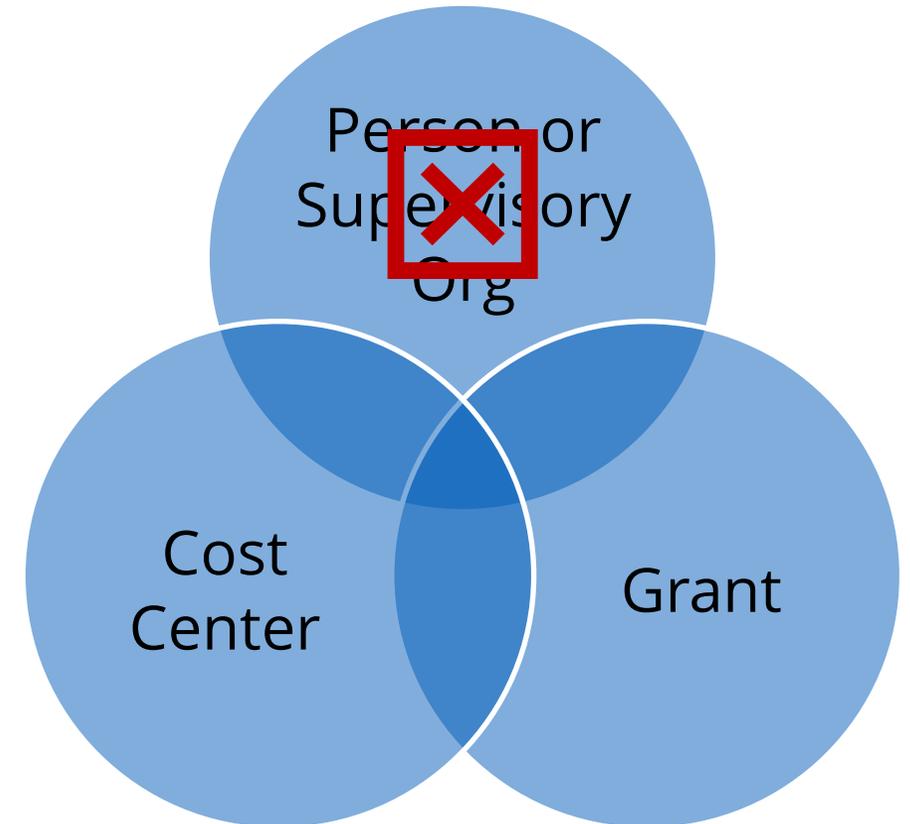
Labor Reporting Security Improvements

Labor Reporting Security Improvements

As an R1 institution, VUMC requires more functionality regarding labor and effort reporting than Workday currently offers. The main issue we were unable to resolve in our current labor reporting is a holistic security model that allow a person to view the information by person (supervisory organization), by grant or by cost center.

Our current labor reporting from the journal lines data source is unable to accommodate access granted on a supervisory org.

Goal



Effort Certification Module

Alternatively, the Effort Certification Lines data source CAN accommodate our security needs offering security based on Supervisory Organization, Grant and Cost Center.

However, there are real limitations to the data within this data source.



We are only certifying effort on employees who have federal effort. As a result, large populations of our employees are not represented in this data.



The data within this source is not real time and is dependent upon effort certification processes being run. With PAAs being completed daily in Workday the data from this source would become stale quickly.

Workday PRISM Analytics

PRISM analytics is a solution within Workday, that allows us to gather and store disparate data within a data hub. It also allows us to govern the data using our existing Workday security framework in a more flexible way.

The solution engineered for Labor Reporting combines the security framework from [Effort Certification Lines](#) with the data held in [Journal Lines](#).

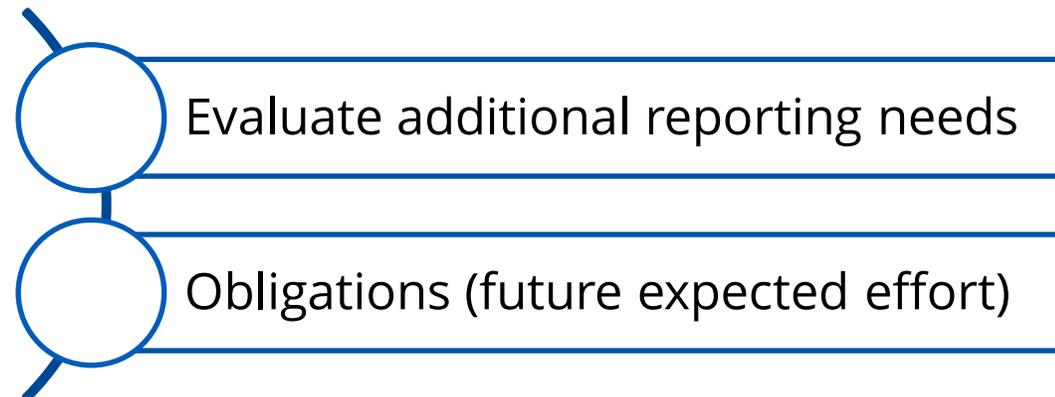
PRISM is accessed directly from the Workday application and appears seamless to users. Data from Workday is loaded to PRISM in an overnight process.

The Effort Trend and the Salary Effort Trend reports are the first two reports to be written and published from the PRISM data source.



Roles and Roadmap

Supervisory Organization	Cost Center	Grant
<ul style="list-style-type: none">• Manager• HCM Business Manager• HCM Business Assistant with Compensation	<ul style="list-style-type: none">• Cost Center Manager• Cost Center Financial Analyst with Payroll Details	<ul style="list-style-type: none">• Grant Manager• Grant Financial Analyst

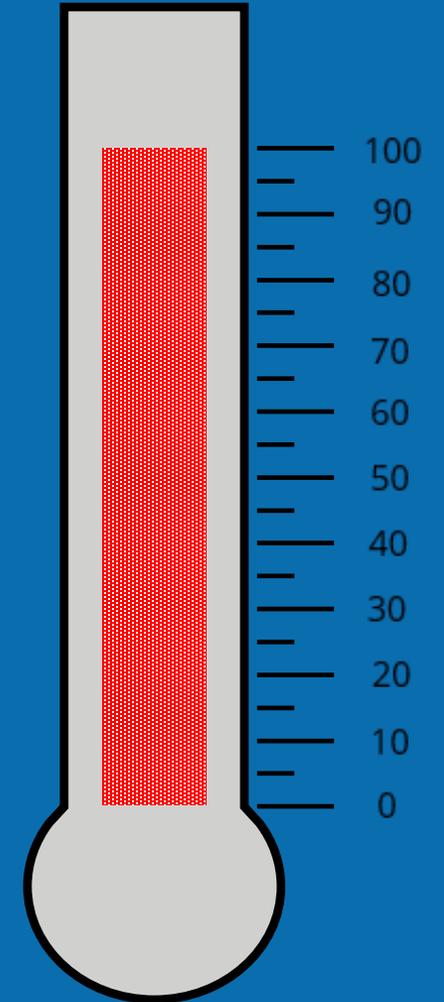


Conversion Correction

Data Conversion Update

Correction Status for LTD balances

- Successful completion of correction process in production at 99%
- Communication will be sent to grant managers and grant financial analysts when complete



Supply Chain Update

Supply Chain Update

Please continue to upload PO's from the Legacy systems into Workday.

There are a large number of invoices in the system that reference Legacy PO's which have still not been uploaded into Workday.

View Purchase Order

Purchase Order: PO10000040300 Status: Issued Invoice Status: Partially Invoiced Receiving Status: Partially Received Tracking Status: Accepted

Summary

Company: [Vanderbilt University Medical Center](#)
Purchase Order Type: Tecsys External Replenishment
Supplier: [ARGON MEDICAL DEVICES INC](#)
Currency: USD
Document Date: 05/19/2023
Line Total Amount: 336.74
Requisition Type: Tecsys External Replenishment
Auto Sourced: Yes
Acknowledgements: 1

Terms and Taxes

Payment Terms: Net 45
Due Date: (empty)
Default Payment Type: Payment Plus US Bank
Override Payment Type: (empty)
Credit Card: (empty)
Shipping Terms: (empty)
Shipping Method: FEDEX STAN
Shipping Instructions: (empty)
Default Tax Option: Calculate Tax Due to Supplier

Contact Information

Issue Option: EDI
Buyer: (empty)
Bill-To Contact: (empty)
Bill-To Contact Detail: (empty)
Bill-To Address: 60 Athletes Way N, Suite 200 Mt. Juliet, TN 37122 United States of America
Ship-To Contact: Tecsys Requisition User (0101182)[C]
Ship-To Contact Detail: Tecsys Requisition User (0101182)[C]
Ship-To Address: 2200 CHILDRENS WAY NASHVILLE, TN 37232 United States of America
Memo: (empty)
Internal Memo: 25838

Goods Lines: 2 items

Package Setting	Memo	Location	Business Document Lines	Project	Grant	Gift	Program	*Cost Center	*Fund	*Operating Entity	Work Order	Additional Worktags	Splits
EA/1		0 VCH3 PROC CATH OWNED2 RM 320 (LOC11503)	POA1026838 - for PO10000040300 - Line 1 (Accepted) REQ1038906					CC00319 MCJCHV Cath / EP Lab	FD001 General Fund	OEMCJCHV Monroe Carell Jr Childrens Hospital at Vanderbilt		Function Code FC23023 Institutional Support - General Administration	



Weekly Research Update



Weekly Research Update

from the VUMC Office of Research

September 29, 2023



- Highlights and Accolades
- Workday Resources for VUMC Research Teams
- Events
- Funding Opportunities

Office of Research



The WU is distributed every Friday

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Office of Research



Upcoming Workshops

Upcoming Workshops

- Goal Setting (FY24): Tuesday, 10/17 (1:00-1:30)
- HR Reporting and Dashboards: Wednesday, 10/18 (10:00-10:30)
- Open Enrollment: TBD (week of 10/23)
- Click [here](#) to sign up for these workshops



Questions?



workday



Demo

