

# Research Workday Town Hall

## October 5, 2023

# Research Workday Town Hall Agenda

October 5, 2023

---



- 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:

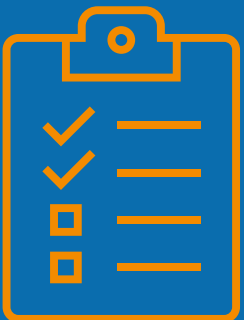
- Is the plan as expected?
- Are any grants expired?

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:

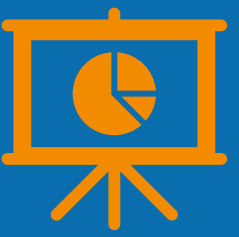
Regular effort conversations on a monthly, no less than quarterly, basis for all individuals with federal funding sources.

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

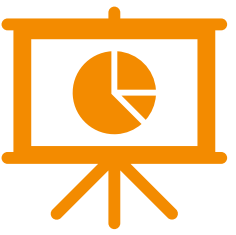


EFFORT TREND  
REPORT DEMO



# 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.



# 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

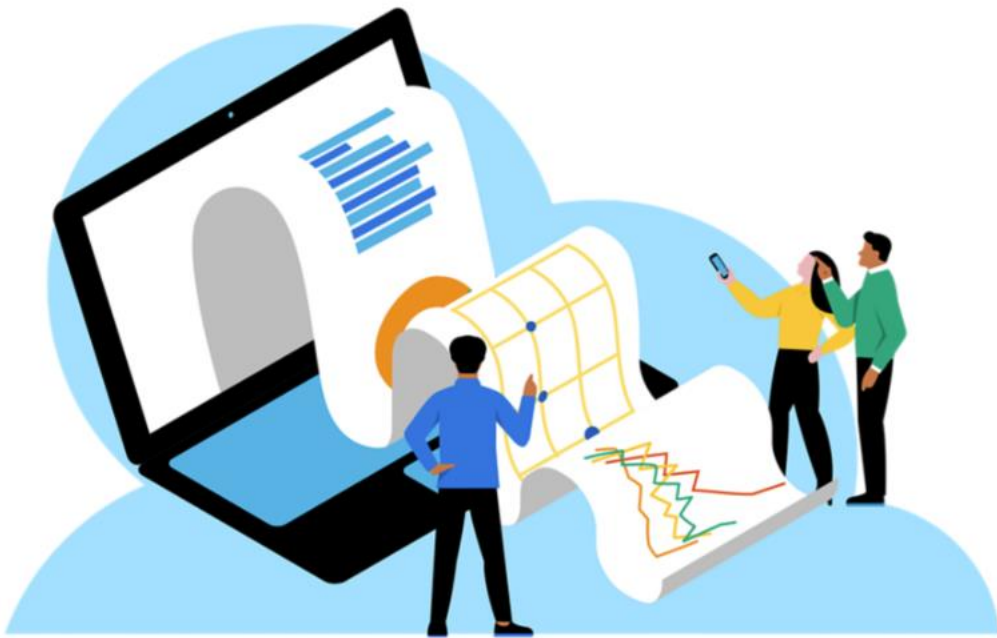
---

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.

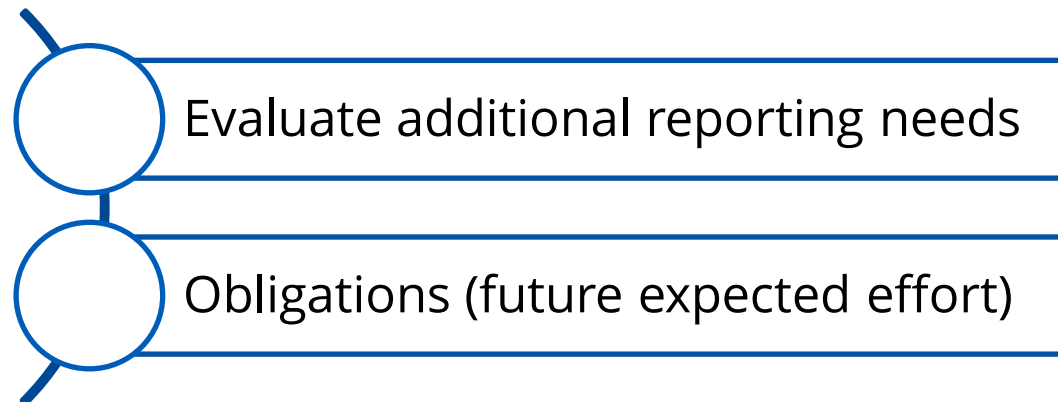




# Roles and Roadmap

---

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



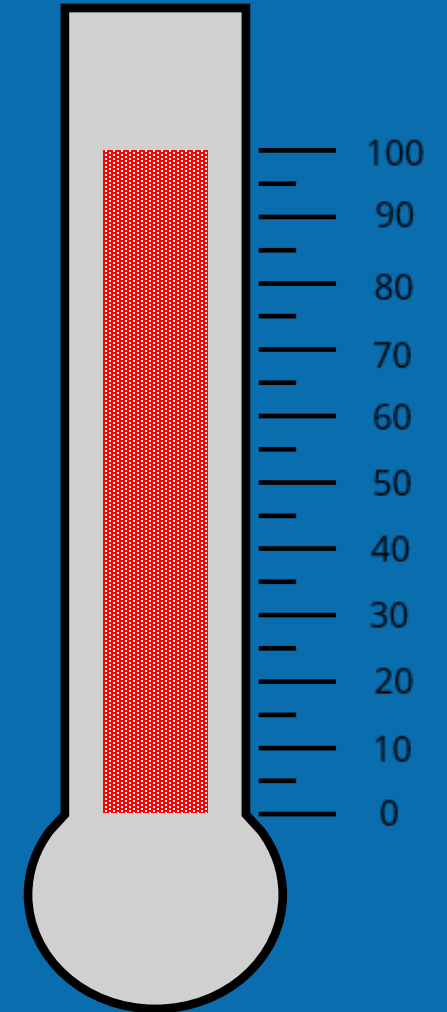
# Conversion Correction

# 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

Packageing 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

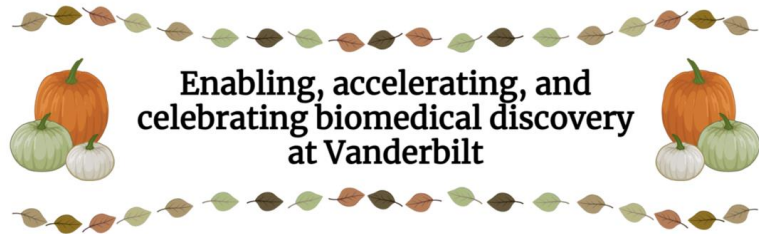




# Weekly Research Update

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**

To subscribe go to [www.vumc.org/oor/](http://www.vumc.org/oor/) and click:

*Interested in receiving the latest information  
in the Research Enterprise?*

SUBSCRIBE HERE FOR THE

**Office of Research**

 **Weekly Updates**

# 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*

