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)

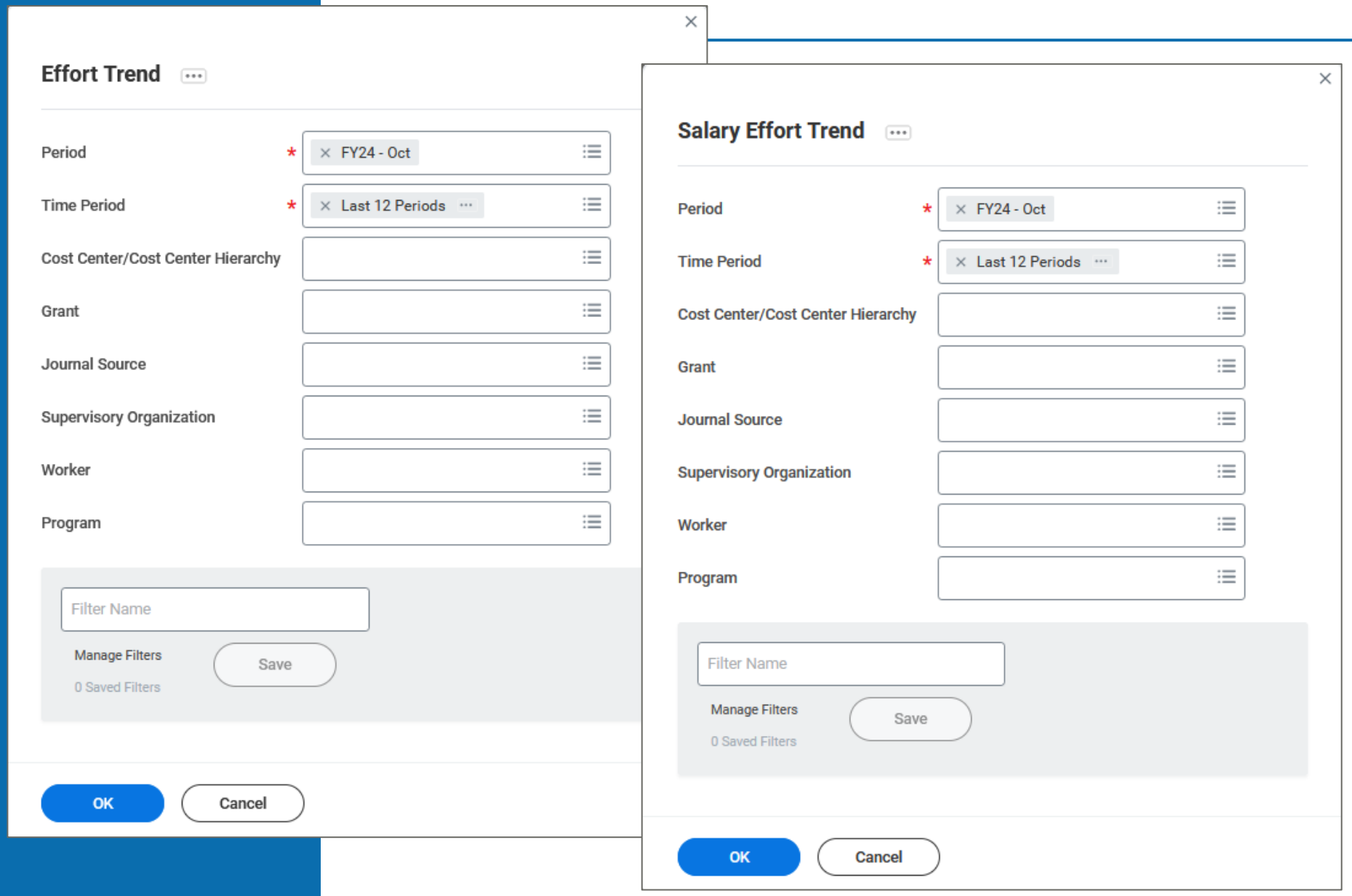
Why: Effort compliance, review, progress reports, planning discussions

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



Suggested Prompts

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.

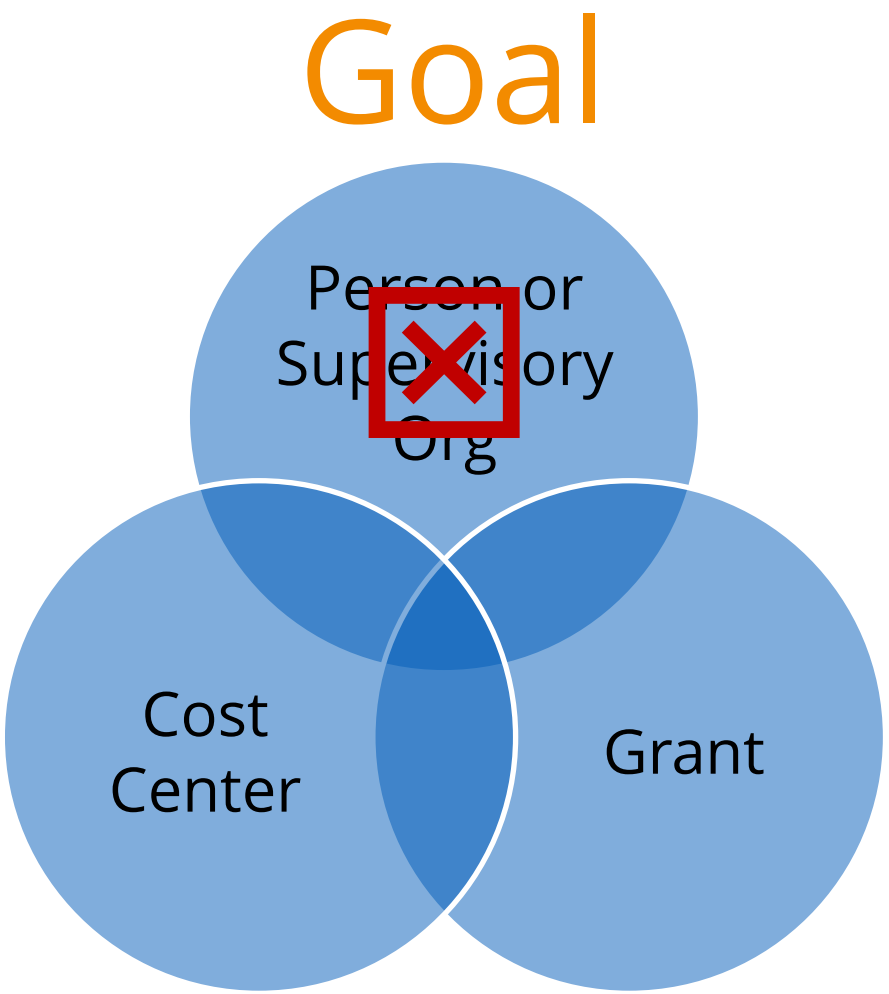
Access the Guide – Link

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
• Manager • HCM Business Manager • HCM Business Assistant with Compensation	• Cost Center Manager • Cost Center Financial Analyst with Payroll Details	• Grant Manager • Grant Financial Analyst

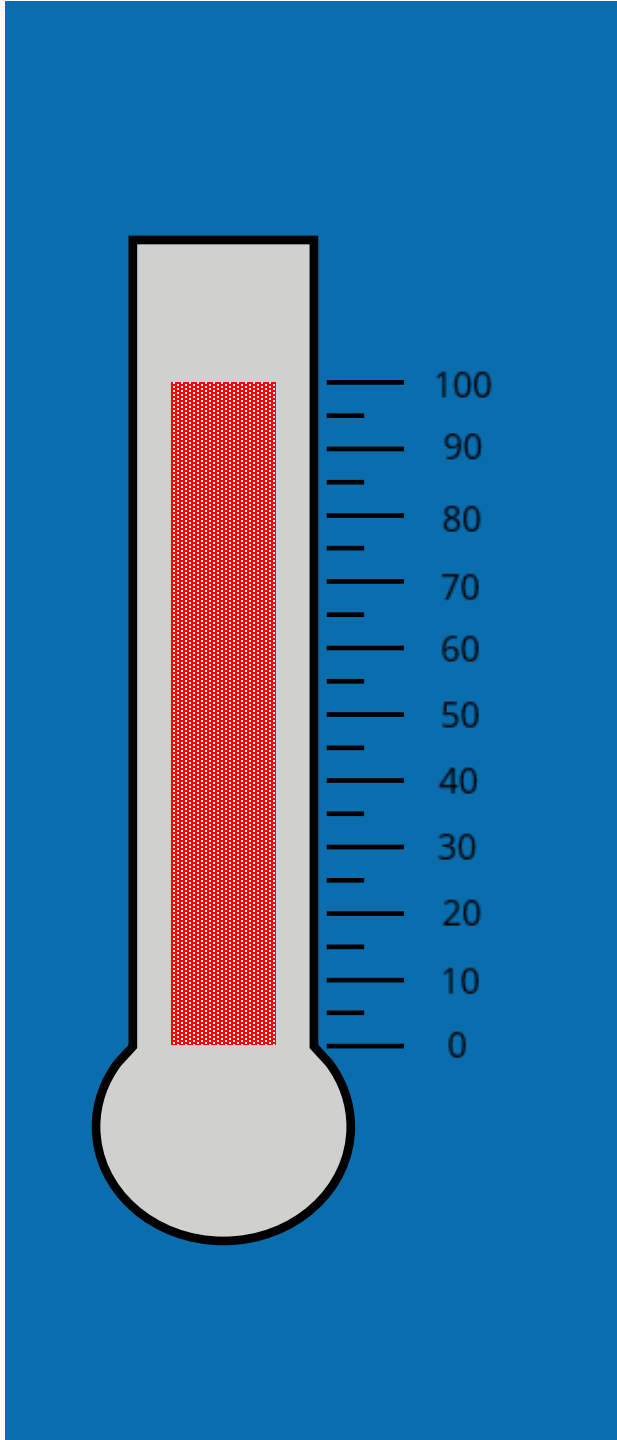
- Evaluate additional reporting needs
- Obligations (future expected effort)

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

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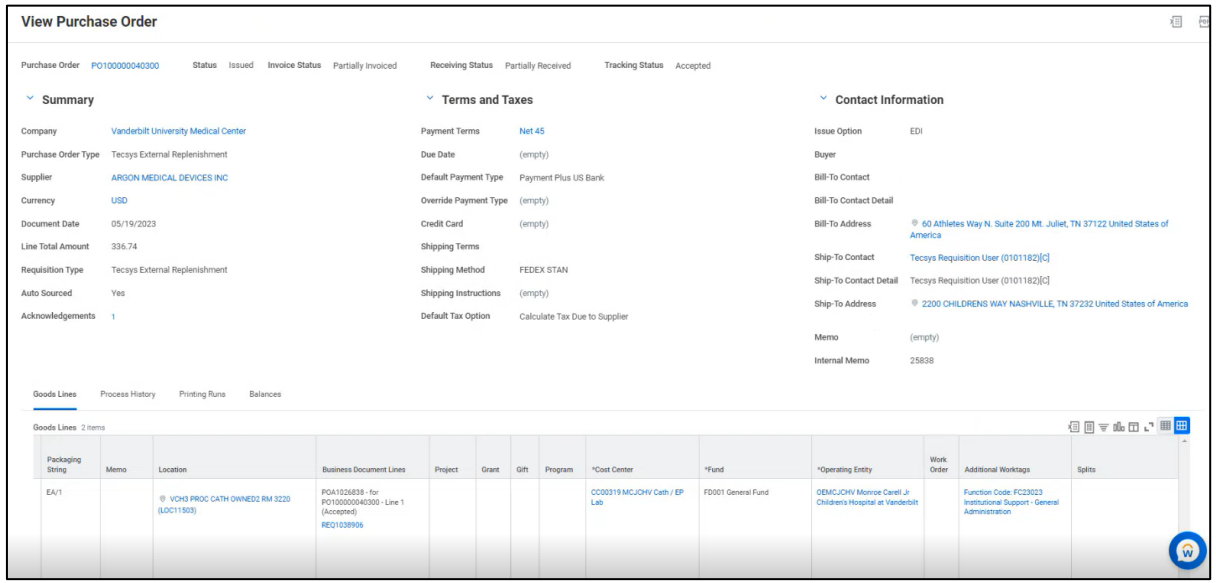
Please continue to upload PO's from the Legacy systems into Workday.

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



Weekly Research Update

Office of Research

The WU is distributed every Friday

To subscribe go to www.vumc.org/oor/ and click:

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