

An aerial photograph of Richmond Town Hall, a large brick building with a prominent Gothic-style tower, surrounded by dense green trees. The sun is setting in the background, creating a warm orange glow across the sky and casting long shadows. The text "Workday @ Richmond" is overlaid in a large, white, serif font.

# *Workday @ Richmond*

MAKING YOUR DAY WORK BETTER.

Workday Town Hall

October 10, 2024

# Housekeeping & Context



**Julie Farmer**

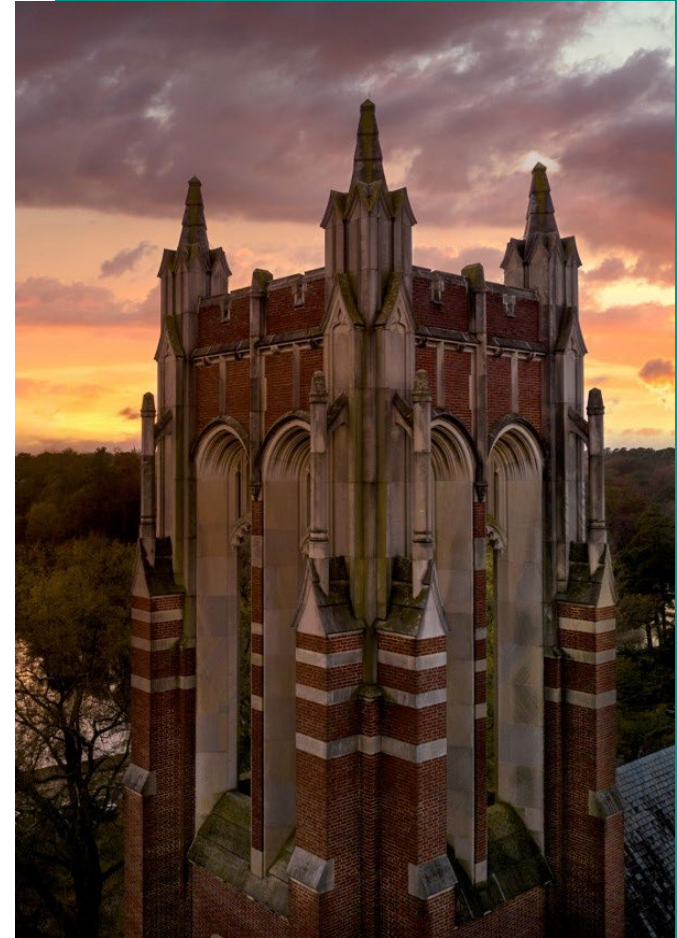
Workday Program Lead &  
Director of Change Management



# Agenda

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- 1 Housekeeping & Context
- 2 Leadership Remarks
- 3 Major changes in HR, Payroll, and Finance
- 4 Demo
- 5 Training Update
- 6 Q&A
- 7 Closing Remarks



# We have nearly 200 colleagues supporting this University initiative

Change  
Ambassadors

Core Project  
Team

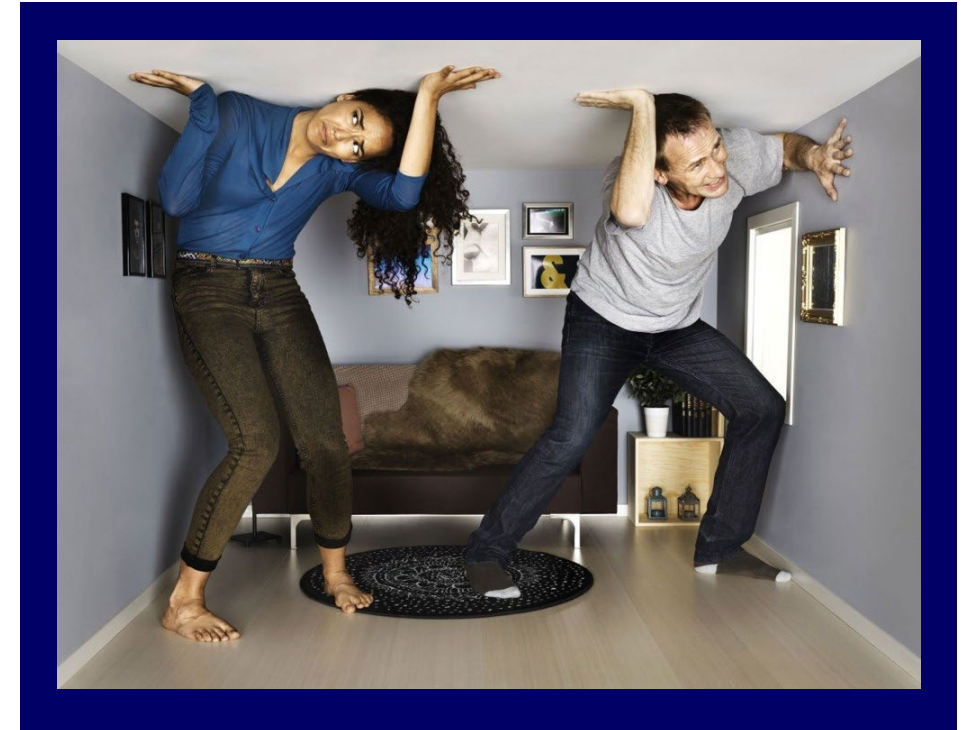
Steering &  
Executive  
Committees

Subject Matter  
Experts

# Institutional Need for Change

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University's strategic goals and tactical needs have evolved to include automated workflows, dashboards, forecasting tools, and easier reporting that **cannot** be accommodated in our existing Enterprise Resource Planning (ERP) system.





# Students create personal pages on World Wide Web

## Richmond gets on-line

### Professors take advantage of new Internet system

## Congestion on the University's road to the Internet



PHOTO BY SALLIE HIRSCH

E-mail is a popular form of communication for Richmond students, but the connections are often busy. The best connections are found in the computer lab.

ERIN FOELLMER  
STAFF WRITER

If you're trying to check your e-mail at 10 p.m., it takes you five tries at dialing the system access number to finally connect to URVAX, the University of Richmond's online server. When you log in, the computer seems to move slower than a glacier.

What you're doing is accessing URVAX from the modem pool, a set of 44 phone lines, or ports, that services the entire University's faculty and students. While there are tie-ups now, the problem was much worse last year when there were about half as many ports, Susan Ballantine, manager of the technical services department of University Computing, said.

"Dialing into virtually any network

"The demand for the information superhighway has outstripped the resources."

— Bill King

today is a sometimes thing," Bill King, director of University Computing, said. "The demand for the information superhighway has outstripped the resources. There has been an explosion in usage."

The reason the system moves so slowly when accessed through the modem pool is that this method of access can only process 14.4 kilobits of information per second, said Will Caudel, manager of the on-campus computer store, College and University Computers (CUC).

While this number means little to the average student accessing URVAX, there is a much faster and more reliable method to hook into the system. A network card, which can be purchased at CUC, processes 10 megabits of information per second (nearly 700 times more than a

► SEE URVAX PROBLEMS, 18

## E-mail lets students talk to friends free

By Jennifer Gross  
Assistant Copy Editor

University of Richmond students have the opportunity to correspond with friends at other schools or even in foreign countries without racking up huge

applies the concept of modern foreign language classes using E-mail to supplement the curriculum by providing the students with "electronic pen pals."

In addition to Essid, professor Karen Klenke of the Jepson School of Leadership Studies



Shawn Burke, Deb Scalise, Kirk Meloney and Anthony Gotzis huddle at their terminal. Belgium has access to an E-mail system.

UR spends  
\$100K on  
modem  
upgrade

# What's Changing

**Today**, in Banner you submit timesheet/leave report, view paystub, download W2. You **log in separately** to various other HR/Finance systems that integrate with Banner.



**Beginning January 2025**, you will use Workday as your **one stop hub** for all HR, Payroll, and Finance business processes. Workday will also be accessible via a mobile app.

University of Richmond | BannerWeb

Personal Information Faculty Services Employee Web for Finance

Search  Go

Main Menu

**Welcome to BannerWeb, the University of Richmond Web Information System!**

Duo is required to access BannerWeb from off campus. Please see <https://is.richmond.edu/accounts-passwords/duo/index.html> for enrollment additional information. NOTE: New incoming first-year and transfer students do NOT need Duo until the start of their first semester. If you have problems, please contact the Help Desk.

**Personal Information**  
Update addresses, review name or social security number change information; Change your PIN.

**Faculty & Advisors**  
Enter Grades, View Class Lists and Student Information

**Employee**  
Employee Dashboard: My Profile, My Team, Full Leave Balance Information, Pay Information, Earnings, Benefits, Taxes, Job Summary, My Activities: Time Sheet, Leave Report, Approve Time, Approve

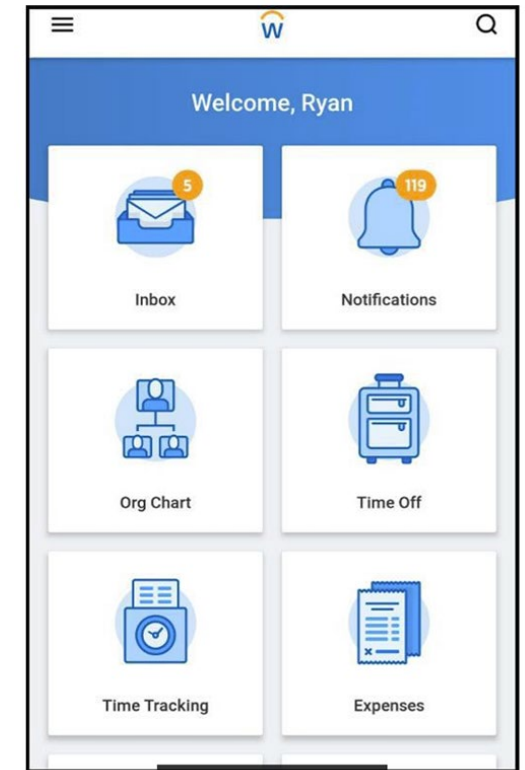
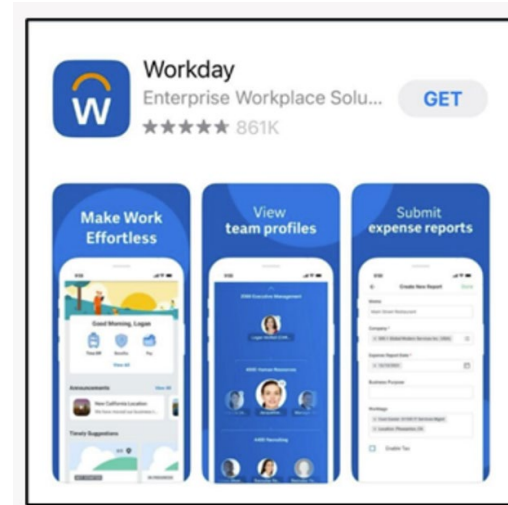
**Web for Finance**  
Query Budget & Encumbrance data; View financial document details or their approval history.

**Onecard Services Main Menu**  
Check your Spidercard balance and other Onecard related functions.

**Online Check Request**  
For reimbursement of an individual's University-related expenditures (not travel-related)  
Effective January 27, 2020, all reimbursement and refund requests must be processed through Chrome River. Requests submitted on this form prior to January 27th will be processed as normal. Previous requests should not be resubmitted in Chrome River as this may cause duplicate requests. All other payment requests will continue to be processed on this form.

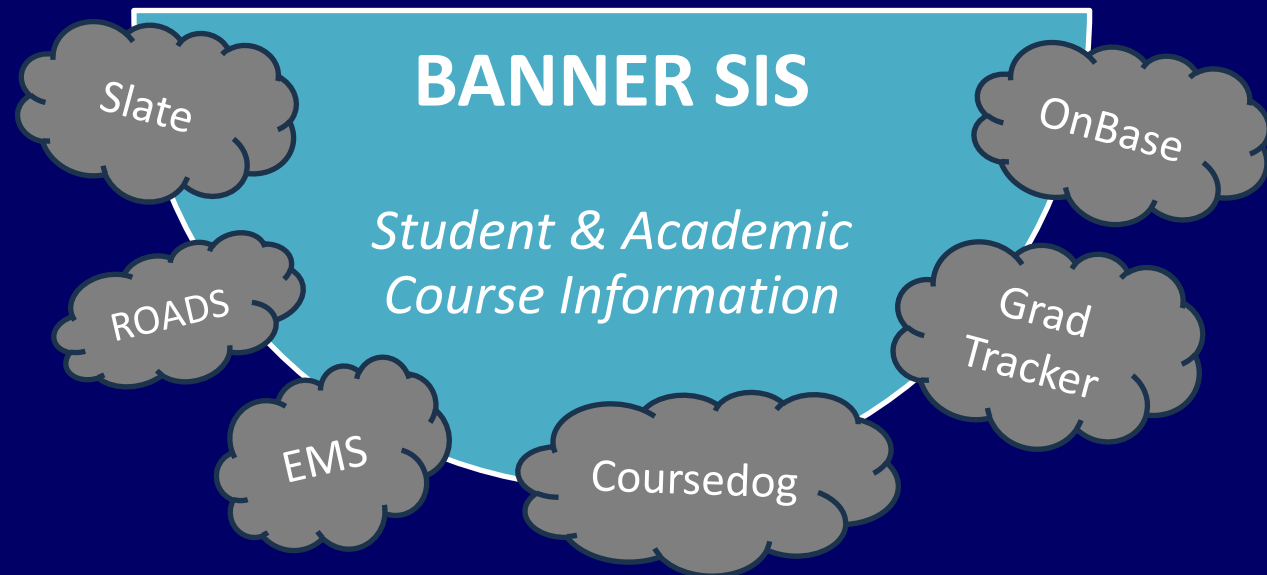
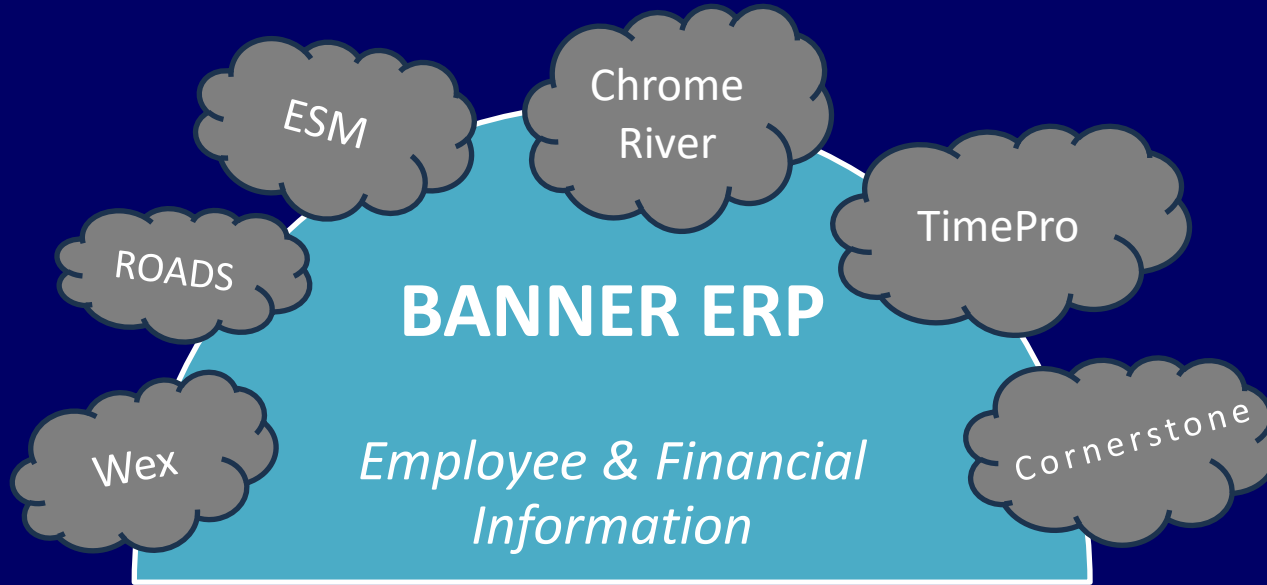
**University New Vendor Request**  
Request Accounts Payable create a new vendor in Banner for future payments/reimbursements.

**Manage Direct Deposit and Personal Information**  
Update Addresses, Phone Numbers and Direct Deposit Information

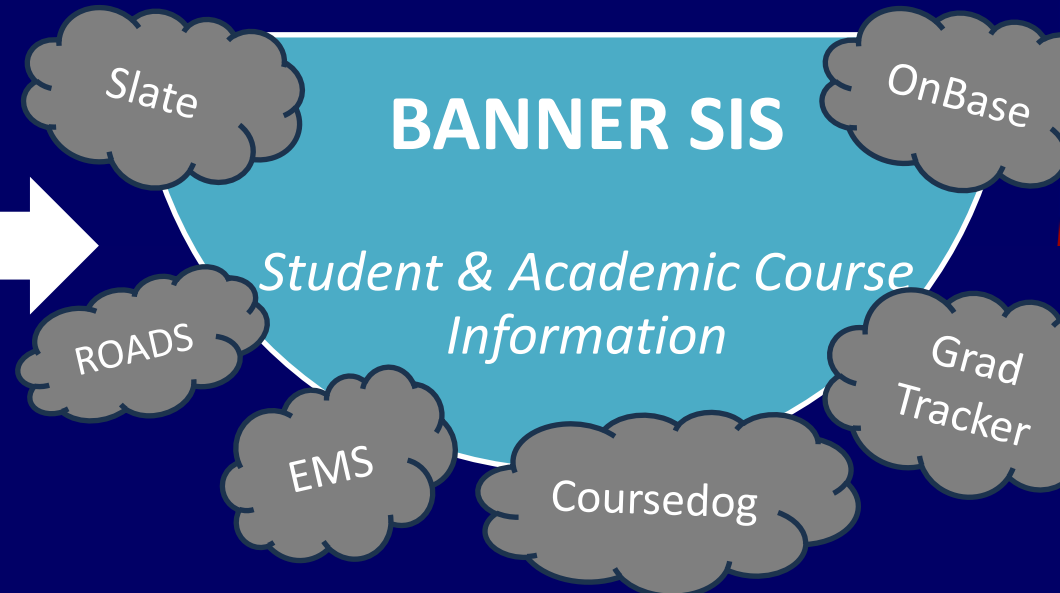


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# CURRENT



# FUTURE





# What are the benefits to my team and campus?



**Simplification &  
Consistency**



**Efficiency**



**Experience &  
Service**



**Quality Data**

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# Leadership Remarks



**Dave Hale**

Executive Vice President and Chief Operating Officer

# Our Workday Excitement:



**Stephanie Dupaul**

Vice President for Enrollment  
Management



**Meghan Harris**

Associate Vice President,  
Financial Planning and Budget



**Lori Schuyler**

Vice President for  
Planning & Policy



**Geraldine Sullivan**

Chief Human Resources Officer

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# High Impact Changes: Human Resources

## Employee Self-Service

- Employees will have a more seamless experience with the consolidation of systems.
- Employees will be able to view and edit own info.
- Benefit and retirement enrollment will be done in Workday, and supported internally in HR.
- Mobile app has nearly all the same functionality in your pocket.

## Manager Self-Service

- PAFs are obsolete and replaced by electronic workflows in Workday.
- Managers will now have visibility into more information about their team including time off calendars, anniversary dates, and compensation information.

## Business User Processes

- High impact positive change for HR business users: Electronic workflows, clearer roles and responsibilities, can see where the work is in the process.
- Business users will receive additional training

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# High Impact Changes: Payroll

## Time Entry

- Time Pro replaced by Workday.
- Hourly employees in Dining Services, Facilities, and Public Safety will clock in and out using their mobile devices or a Workday kiosk.
- Student employees will clock in and out using their mobile device vs manually entering in/out times on self-service timesheet.
- Students will not have multiple timesheets for multiple jobs. When clocking in, they will choose the appropriate position for time tracking.

## Time Approval

- Managers will approve time for all staff and student employees.
- Timesheets not approved by the deadline will be mass approved by Payroll.
- Managers will be sent a follow up inbox task to review and confirm that the mass approved hours are accurate. If adjustments are needed, the manager will contact Payroll. Mass approvals will be tracked and audited in Workday.

## Timekeeper Role

- Timekeepers will be assigned in certain areas to support time corrections.
- Current Time Pro administrators will be timekeepers for Workday.

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# High Impact Changes: Finance

## Purchasing

- ChromeRiver will be replaced by Workday for Expenses and Reimbursements
- University Credit Cards (new process)
  - Reduction of # of Pcards
  - Introducing the Travel Card (new concept)
- Centralized invoice collection (new process)

## New Concepts

- Foundation Data Model (FDM) will replace the Chart of Accounts
- Purchase Requisitions (new concept)
- Self-service Catalogues for purchasing routine items (new concept)
- Receiving process to confirm the item purchased has been received (new concept)

## Business Users

- High impact positive change for Finance business users: Electronic workflows, clearer roles and responsibilities, can see where the work is in the process (business users will need training)
- Cost Center managers can proactively manage budgets
- Expense will validate if funding is available or prompt for exception process to be followed



# How can employees buy things in the future?

## *All Employees*

Self-Service Catalogue  
*(Staples, Amazon, and Grainger)*

Partner with your buying  
specialist

Reimbursement

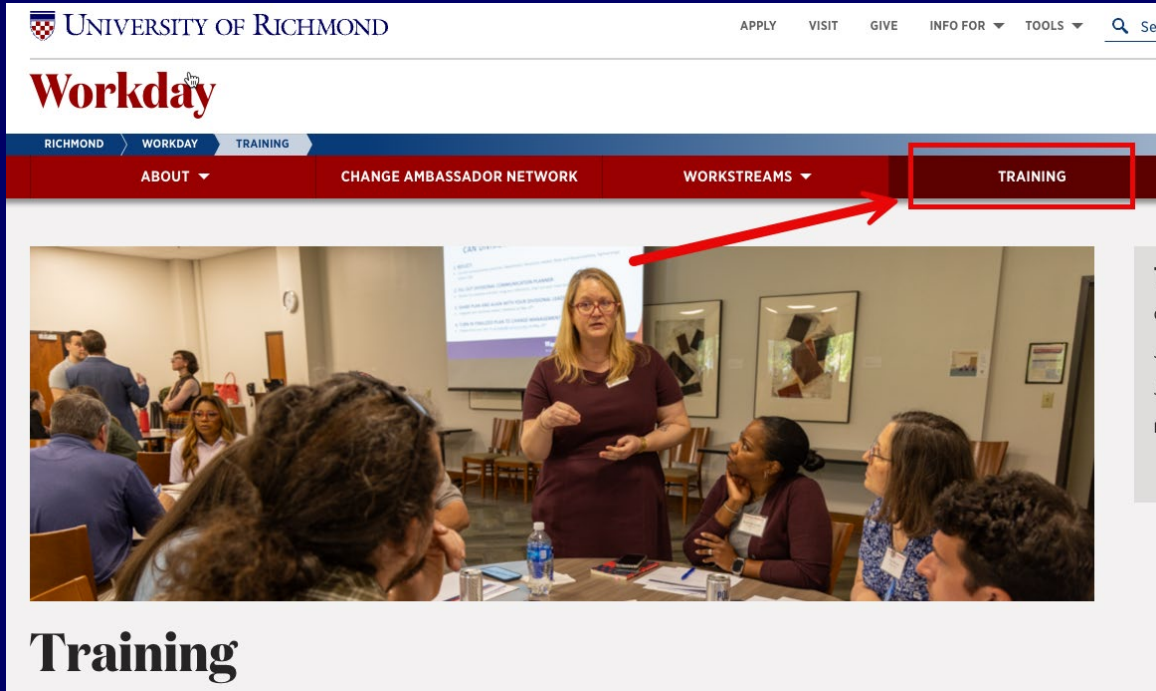
*Employees whose University  
jobs require a card*

Travel Card &  
Purchase Card

# Demo

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# Training



Training for end-users will be offered beginning in November. (Just-in-Time)

Training material samples and up to date training information can be found at [workday.richmond.edu/training](https://workday.richmond.edu/training)

Training has been designed with our diverse community in mind: Just-in-time, curated learning paths, LOTS of live and recorded sessions and DIY materials will be available.

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# Training



## Before Training Begins:

- Help Desk can assist – Plan ahead!
  - NetID & Password
  - Install DUO MFA
  - URWIN wifi network
- Posters & wallet cards will be available to hourly employees who clock in/out
- Spanish guides for clocking in/out

# Foundation Training & Specialty Courses will be available

## Foundation Courses

### All UR Staff and Faculty

Workday Essentials for Staff: 60-90 min (Employee Self Service)

Workday Essentials for Faculty: 60 min

### All UR Managers and Supervisors

Workday for Managers: 60 min (Manager Self Service)

Workday Mobile for Employees: 30 min (self-directed)

Workday Mobile for Managers: 30 min (self-directed)

Workday Essentials for Student Workers: 30 min (self-directed)

### HR Specialty Courses

For those with HR responsibilities

#### Examples may include:

- Hiring
- Processing job changes
- Processing period activity pay
- Processing additional faculty scenarios
- Timekeeping

### Finance Specialty Courses

For those with Finance responsibilities

#### Examples may include:

- Financial basics
- Expenses & reimbursements
- Procurement
- Budget management

# Workday Training will be offered in many formats to support just in time learning for all members of our community

## Live Training Options

### Instructor Lead Workshops

Workshops where attendees follow along and then try themselves (various dates, times & instructors)

### Virtual Webinar

Zoom Sessions available across varying dates & times

### Learning Labs

Practice in the Workday Training tenant, hands-on experience

### Office Hours

Available one-on-one sessions with a Subject Matter Expert

## Available On Demand

### Online Tutorial/ Video Demos

Online tutorial that guides the user on learning a specific topic

### Web Courses

Self-paced, online courses that meet key learning objectives

### Job Aids

A step-by-step guide on one or more Workday business processes

### Cheat Sheets

A visual one pager that provides need-to-know information; tips or tricks related to a specific topic



# Q&A

# Q&A Panelists



**Caitie Hoeckele**  
Student Employment



**Dustin Engels**  
HR Faculty & Reporting Project Lead



**Jillian Zemp**  
HR Project Lead



**Meghan Harris**  
Finance Steering Committee

# Next Steps



## Remain patient with us, yourself, and the system

*Workday is new to everyone at the University and we are working hard to prepare campus for this important ERP transformation.*



## Follow our pre-go-live checklist

*To prepare for go-live in January and to stay engaged.*



## Email us any questions or feedback

*Please send any feedback or questions we did not have space to address to [workday@richmond.edu](mailto:workday@richmond.edu)*