WorkCyte Change Management
February 21, 2019

Agenda

• Deployment Tracker (2 min)
• Training Activities Roadmap (2 min)
• Grants Workshop (5 min)
• Learn@ISU Training Enrollment (5 min)
• Grants Cydewalk (5 min)
• New and Helpful Workday Grants Reports (10 min)
• Cleanup Campaign (5 min)
• What’s Coming Next? (2 min)
• Open Q&A
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Deployment Tracker

WorkCyte

Training Activities Roadmap

Develop/Review Training Content
Training material includes:
Instructor-Led Training (ILT)
Computer-Based Training (CBT)
Job Aids
Sep '18 – Mar '19

Registration and Attendance Tracking
Registration opens through LMS, Learn@ISU
Apr '19 – May '19

Sustainment Plan
Knowledge transfer plan
Documentation available
Review evaluations and feedback
Incorporate changes
Jun '19 – Jul '19

Post Go-Live Support
Transition to ISU support model
Jul '19 – Sept '19

Deployment Plan
Go-Live

Go-Live

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WorkCyte
Where Your Workday Begins
Grants WorkCyte Workshop

How do I get more Workday Grants info?

- WorkCyte Workshops serve as an introduction of terminology and business process features within Workday
  - Workshops include a presentation as well as system demonstrations by ISU subject matter experts
  - WorkCyte Workshops are designed to be high level and do not replace instructional training!
- Two Grants Workshops scheduled:
  - April 2, 2019
  - April 17, 2019
- Register for workshops via Learn@ISU

Learn@ISU Training Enrollment

How do I enroll in training?

- All training courses will be posted to the LMS, Learn@ISU for enrollment
- Courses will note targeted audiences
Grants Cydewalk is Now Live!

- The Grants Cydewalk is live on the WorkCyte Website under the “Embrace the Change” tab!
- A crosswalk of current to future state terms
- Printed cards available

### Workday Grants Management Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants Management Dashboard</td>
<td>Worklet that will give an overview of all awards and expiring awards.</td>
</tr>
<tr>
<td>SPA Financial Report</td>
<td>This report will show the detail for an award, this is similar information to the SPA Financial Report within eData.</td>
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</tbody>
</table>
Other Workday Updates

- Clean-up Campaign
- RMM ICR Distributions
- Award Lifecycle Updates
- Handling of Membership/Field Trial Invoicing

Cleanup Campaign

- Review payroll
- Review expense transactions
- Ensure any summer salary entered for June is done prior to payroll cut off
- Lead unit changes
- All transactions in action lists resolved
- Outstanding Effort Certification Forms returned
- SPA closing expired awards, subawards, POs, etc.
RMM ICR Distributions: Current State

What’s changing with Workday?

- Kuali Coeus allows for two decimal places on both the PI incentive and the RRC Distribution

RMM ICR Distributions: Future State

What’s changing with Workday?

- Workday limits the entries to whole numbers
- Conversion approach for Workday:
  - Percentages are truncated
  - Excess added to:
    - Lead PI for Incentive Distributions
    - Lead Unit for RRC Distributions
RMM ICR Distributions: Future State

- Things to know about this process:
  - Full and Allowable indicator in KC drives this process
  - Will only come into Workday if Full and Allowable
  - Allocation information located within the Award Credits tab of the Workday Award

Outline of Lifecycle of Awards

Start
- All funds received, SPA initiates closing activities
- Award signed with Sponsor
- Award entered into KC
- Award comes to Workday, subawards established
- Award established in Workday with Grant Worktags

Same proposal and awarding processes
- Verification of expenditures posted, EASE forms submitted, CS docs, submit reports and final invoice
- 90 days prior to end date, award shows on dashboard, notification sent
- Workday notification goes to inbox of Grant FS, PI, GC, etc.
- Set up budget and invoicing in Workday, expenditures processed

End of Lifecycle / SPA
- IAWD-07146-00001: Transgenic Approaches to Managing Basal Cell Skin (1/01/2013 - 12/31/2018)

Color Key
- OSPA/OIPTT
- SPA
What’s Coming Next?

What can I expect at future meetings?

- April GCN Meeting
  - Key cutover dates and activities
  - Post-training user labs and support resources
  - Status check on registering for training
  - Demo of Grants Module in Workday
  - Demo of additional reports

Questions?
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