



Loyola Marymount  
University

# Workday Forward Updates

June 12, 2023

# Discovery Phase



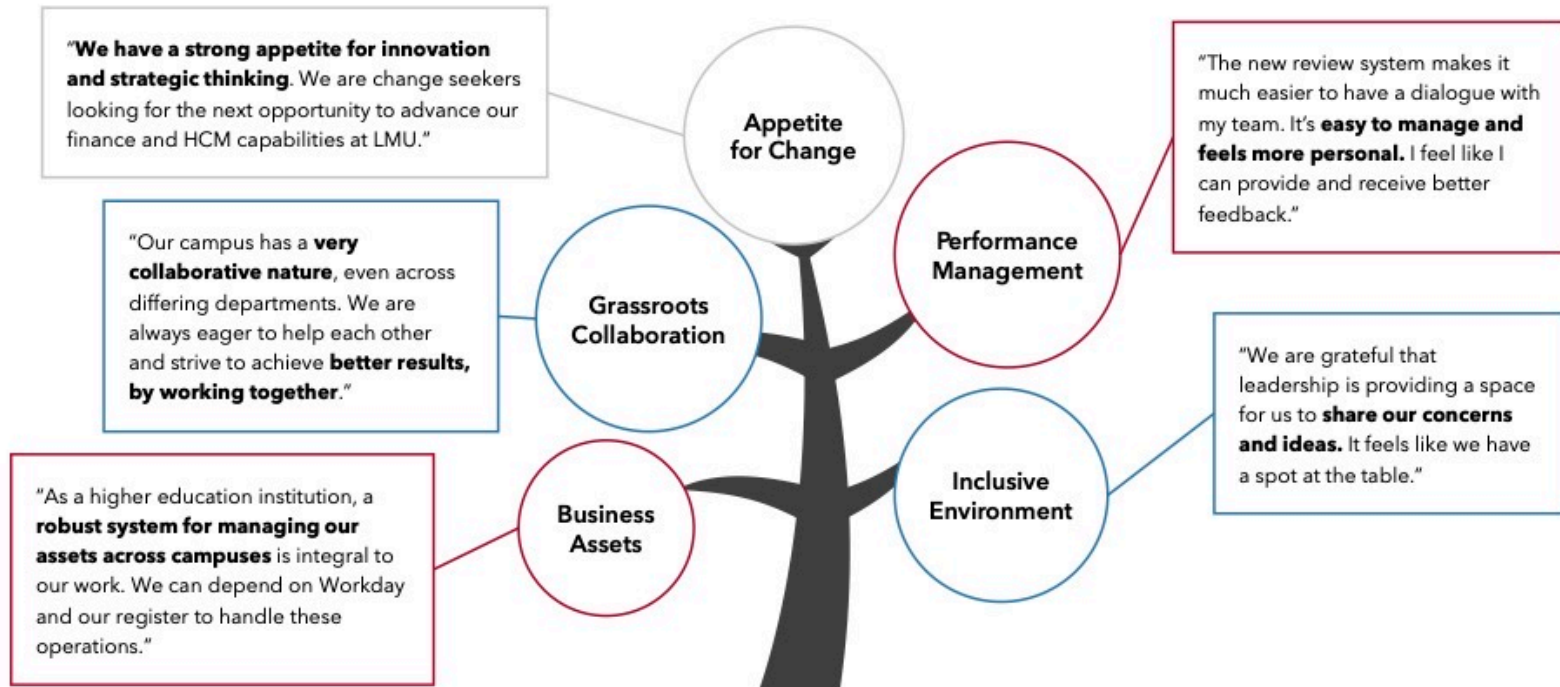
# Discovery Phase Overview

- **Objective:** Identify optimization opportunities for LMU's Workday implementation thereby improving the user experience.
- **Approach:**
  - Conduct listening sessions with the LMU community including:
    - 19 listening sessions
    - 146 staff and faculty from across LMU
  - Review business processes
  - Review system configurations
- **Outcome:** The results of the discovery phase serve as our north star to identify and prioritize improvements, and develop an implementation plan to roll out in the months ahead.



# What We Heard: Strengths to Retain and Amplify

Across 19 Discovery Sessions, LMU stakeholders shared their perceived strengths of LMU's implementation of Workday. From these strengths, opportunities for growth also presented themselves.



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# What We Heard: Opportunities for Improvement

Across 19 Discovery Sessions, LMU stakeholders shared their perceived strengths of LMU's implementation of Workday. From these strengths, opportunities for growth also presented themselves.

"It would be nice to **automate processes and notifications to increase the efficiency of our operations**. There are many ideas that we would like to implement but do not have time for as we are focused on day-to-day operations."

"Students are at the core of what we do, but it feels like we **don't always prioritize initiatives or tools** that work for them."

"I think there is a lot of **functionality in Workday that is not fully utilized**. We could all benefit from training and communication on the features/functions already implemented."

"LMU is built upon a culture of collaboration and teamwork. We **always want to help each other but struggle to do so when we have different permissions and roles** in Workday."

"Because the system is configured to work for everyone, it ends up **not fully meeting the needs** of anyone."

"Many **budgets and reports are managed offline outside of Workday**. The system is not intuitive to navigate and difficult for us to rely on."



# What We Heard: Opportunities for Improvement

While numerous benefits and advantages were shared during the discovery sessions, several themes for improvement emerged, including:

- Trainings are often outdated, and many features lack documentation altogether
- Reports are difficult to use and appear to lack data integrity, resulting in shadow systems
- User roles/permissions seem inconsistent and/or not widely understood
- Business processes/mappings are not well documented and knowledge transfer is informal
- Ticketing systems can be difficult to navigate and often do not result in satisfying solutions



# Resulting Action Plan

Finance, Human Resources, and ITS are actively working to address opportunities identified during the discovery phase including:

- 'Quick Win' improvements (in the coming weeks and months)
- Process and system improvements (scheduled as part of the overall Workday Forward action plan)
- Retire legacy reporting system
- Automate Workday testing to expedite delivery of improvements
- Improve communication of Workday releases and their impacts to LMU users



# Communications





# How Will I Receive Information?

- The revised Workday Forward website will continue to be updated with detailed information about improvements, training opportunities, etc.
- The larger LMU community will receive high-level quarterly updates in *LMU This Week* and via the Workday Forward website ([lmu.edu/workday](https://lmu.edu/workday))
- User participation may be requested for various Workday analysis, design, and testing efforts.

# How Long Will Workday Forward Last?

The implementation of a large Enterprise Resource Planning (ERP) system such as Workday typically requires a multiyear stabilization period.

- While many adjustments and improvements have been made since go-live in July 2021, significant future adjustments and improvements should be expected in the coming months and years.
- Workday Forward strives to prioritize, plan, implement, support, and communicate Workday improvements, all while bringing transparency and community engagement to the stabilization efforts.

# Look Back

## Spring 2023



# Completed Project Activities

- Conducted discovery listening sessions with the LMU community to identify optimization opportunities
- Leveraged discovery results to prioritize and schedule process and system changes
- Training on finance & budget processes and Workday features including:
  - Workday overview and data modeling,
  - Invoices and suppliers
  - Expense and travel cards, procurement card, purchasing
  - Budgets and associated budget reports

# Completed Improvements and Fixes

- Resolved prior budget inconsistencies (including budget cycle planning and rollover between fiscal years)
- New budget reporting features offer enhanced searching, categorization, and additional details
- New alert feature notifies student workers and their supervisors when their remaining award amount drops below \$300
- Retired legacy systems for HR, Finance and Student Employment and secured the historical data
- Implemented Workday Assistant
- Implemented Workday Learning module, including integration with LinkedIn Learning, compliance training, and 20+ other LMU-specific course offerings



# Improvements and Fixes (continued)

- Implemented key reports for HR liaisons to facilitate HR and payroll-related processes
- Expanded one-time payment process to include principal investigator roles as applicable
- Improved business process for PT faculty job requisitions, to avoid errors when moving candidates
- Permitted cost center budget manager security role to now see supervisory organization staffing details
- Added disposition reasons for job applicants
- Revised messaging to newly hired student employees about required onboarding tasks
- Implemented vacation donation program



# Look Ahead

## Summer 2023



# Planned Improvements

- Ongoing updates to the LMU Workday website and general improvements based on feedback from campus listening sessions.
- Areas impacted include:
  - Inbox management and customization features
  - Absence management
  - Accounts payable
  - Budgets
  - HR
  - Procurement
  - Recruitment



# Planned Improvements (cont.)

- Expand training offerings to include new topics and a wider variety of formats (more in-person sessions, 30 sec. videos, etc.)
- Implement Workday Prism to replace legacy financial reporting
- Enable long-range budget planning
- Grant Management module redesign
- Google Maps integration for improved expense report mileage tracking
- Improved Workday integration with Brightspace to gain efficiencies and ensure data consistency

# How Do I Get Help?

- **Workday Forward website** ([lmu.edu/workday](https://lmu.edu/workday))
- **Workday training resources and schedule** ([lmu.edu/workday/trainings](https://lmu.edu/workday/trainings))
- **Workday Support Desk** - You can submit questions to Finance or Human Resources, or any feature request at [lmu.edu/workdaysupport](https://lmu.edu/workdaysupport)
- **Workshop Recordings** - You can find Expense Reports, Purchasing, LMU Credit Cards, and more at [lmu.edu/workday/trainings](https://lmu.edu/workday/trainings). Check back for future recordings.
- **Quick Reference Guides** - Find step-by-step instructions on numerous topics in the Workday Support app (the life buoy icon on the Workday dashboard).
- **Workday Assistant** - This new automated chatbot can answer many of your basic questions, and is an easy option to find what you're searching for. For ex. if you want to view your existing requisitions, simply type "purchase" into the Workday Assistant search field, and it will provide a list of all recent purchases.





**Forward**

