EXECUTIVE SUMMARY

The Workday@Yale Program modernizes Yale’s administrative services, to support its excellence in research, teaching, and practice. Workday Financials, which launches in July 2017, delivers real-time reporting, standardizes business processes, and minimizes administrative work for the Yale community.

Additional detail on the following information will be provided in the coming months.

KEY GOALS

Simplify and standardize processes
Minimize administrative work for faculty and staff
Lower operating costs and improve effectiveness

Highlights

Charging instructions will change: Oracle PTAEOS and VIP numbers will change to Workday Chart of Accounts (COA). Your business office has been working to map and convert financial information.

Staff will be impacted: From May through June, your staff will need to attend information and training sessions. After Go-Live in July, staff may need more time to provide support as they learn this new tool.

Expense Report Approval will change: For out-of-pocket expenses, you will need to visit your Workday inbox rather than rely on emails through Outlook. Only out-of-pocket expenses will require approval.

Reports will function differently: Your Account Holder information will be available for you in Workday as well as through your business office.

Effort Report Certification will change: This process will now take place in Workday.

MILESTONES

Testing: Representatives from throughout the University will test Yale’s financial business processes and other Yale systems in Workday to ensure they function as intended.

Training: Many forms of training will be available to ensure that you and your staff are prepared for changes to effort certification, reporting, grants and other relevant processes. Training options include auditorium sessions, clinics, instructor-led training, videos, and guides.

Support: Post Go-Live support will be available through the Finance Support Center (FSC), the ITS Help Desk, and the Employee Service Center (ESC).