The Enterprise Project is a business transformation and systems implementation that will leverage Workday.

A Better Work Day
- Standard Processes across the University
- Automate manual processes
- Integrate university-wide data
- Greater options for self service transactions
What is Workday?

Workday is a cloud-based application that will serve as a single system for Ohio State’s finance, HR, payroll and student information and processes.

The benefits of Workday for Ohio State include:

• Mobile and secure access to information
• Improved data utilization and reporting
• Greater visibility into university transactions and processes
• More frequent software upgrades to keep us current
A Brief Timeline

- **2004** Last PeopleSoft Finance Upgrade
- **2014** Decided to move to the Cloud
- **2016** Selected Workday for Finance
- **2017** Expanded to Finance, HR, Student AND internal process improvement: the Enterprise Project
- **July 1, 2020** Go live with Finance, HR modules
- **July 1, 2021** Go live with Student module
Process Transformation

Value Stream Mapping to identify and develop process improvements.

A series of multi-day workshops across business functional areas.
Our work is organized into the following areas:

- **July 2021**
  - Student

- **July 2020**
  - Human Resources and Payroll
  - Finance and Supply Chain Management

Technology and Business Intelligence, Analytics and Reporting

Organizational Change Management
Scope - Impacts to Research

- Supply chain / procurement
- Post-Award Grants management
- (Pre-Award will stay the same)
- Travel and expense
- Financial data and reporting
- Recruiting and hiring
- Effort certification
- Student Fee Authorization
Some Benefits

• Single Portal for most PI grant management needs
  • Certification, travel, subaward cost approval, cost transfers, etc.

• Much more timely finance and HR data from a single data source.

• ‘Anywhere, anytime’ access via the cloud

• Financial reporting across a portfolio including grants as well as other external and internal funding sources.

• Workday staff have been very responsive to addressing our functional needs and seem genuinely interested in helping us to succeed.
Risk and Challenges

• An extremely big change with an ambitious timeline
  • HR, Finance, and Student modules.
  • Not just software – also business process transformation
• Workday structure is not always well-mapped to grants management
  • Supplier invoices must be settled before sponsor billing
  • Workday doesn’t commit F&A at present
• Maintaining sound and timely grant billing practices in a ‘one university’ system
  • Invoice timeliness with strict project end date restrictions
  • Procurement pre-certification
Lessons Learned

• This was a bigger FTE commitment than we originally thought
  • 10-15 hrs/week for 7-10 OSP people serving as SMEs
• Engage an SME with functional business knowledge as the Grants lead.
• Dig early and often to understand the implementation details
  • Question everything – assume nothing
  • F&A commitment issue uncovered late was nearly a show-stopper for us
• Be prepared for some workarounds for grant management elements that do not (yet) map well to the software.
  • Talking to earlier adopters has been helpful
Thank You