



Workday and Brown University

A Unified Approach Brings New Insight

As one of the world's top universities, Brown is clearly a leader in education and research. It's also a leader in change management, bringing not only new efficiencies and cost savings but also new ways of working to its 11,000 workers. The university's strategic partner in this brave new approach to managing human capital and finance? Workday.

To accomplish its ambitious goal, Brown has committed to the full Workday suite of applications. The university has already deployed Human Capital Management (HCM), including Benefits, Absence Management, and Employee and Manager Self-Service. Brown is also live on Payroll and Time Tracking. Workday Financial Management, Expenses, and Procurement are coming next.

Karen Davis, vice president for human resources at Brown, is clearly proud of her world-class workforce but she understands her employees' expectations as well. Before Workday, Brown was using a legacy mainframe system installed in 1991. While adequate at the time, it had long since outlived its usefulness.

"When we hire talented people," Davis says, "it's important to give them the tools they need to do the work of this great university. It's been very challenging to work without good data and without easy access to the functions that come with a modern-day system."

Maxed-Out Legacy System

Roberta Gordon, project director for Human Capital Management and Finance system replacement at Brown, agrees.

"After about 10 years, we maxed out the system," she says. "We needed it to do things that it couldn't do." For example, the system couldn't accommodate new compliance requirements. "We had used up each and every field, so much so that when the EEO reporting categories were changed from race and gender to race, ethnicity, and gender, we had no way to store that additional data element."



BROWN

Brown University Case at a Glance

11,000 Workers

2013 Budget Expenditures Projected at \$865.2 million, Revenues at \$855.8

Headquartered in Providence, Rhode Island

Workday Solutions

Human Capital Management

Financial Management

Payroll

Time Tracking

Expenses

Procurement

Cloud Connect

Summary of Institutional Benefits

Single source of accurate, actionable data for decision-making

Re-allocation of resources through elimination of paper-based, manual processes

Employee and manager self-service for more up-to-date information

Easier compliance with regulatory and union requirements, including Section 508 support

Anytime, anywhere access to key information, including mobile devices

More strategic role for HR

The legacy system was inaccessible to all but a few people, making employee or manager self-service impossible as well. “Probably fewer than 50 people had access to it, and those were the people who entered the data into the system,” observes Gordon. “Nowadays people are used to doing things on their own—online banking, online purchasing, online everything. And our HR system didn’t have that.”

Most important, the university wanted a unified approach—consistent data accessible from a single source for actionable analytics and reporting.

As Gordon says, “We wanted what we considered to be a unified administrative system to be able to do seamless reporting.” With the legacy system, they had to pull data from different sources, drop it into a data warehouse, and then use another reporting tool. “It wasn’t easy,” she says.

Removing the Data Center Burden

In early 2011, Brown made the decision to move ahead with the Workday unified suite of applications. Brown was already a cloud-friendly institution, as a user of Google Apps for Education. The staff understood the efficiencies of having, as Gordon says, “everybody on the same line of code.”

“And we really liked the thought of not having an on-premise system which put, we felt, the burden on us,” she says. “Instead, with cloud solutions, there’s no data center or IT infrastructure to maintain or update.” As a result, staff can be reassigned to more strategic work.

As Gordon puts it, “Do we want our people maintaining the systems or do we want them focusing on mission-critical work? And what we are finding already is that our IT staff can focus on work like teaching technology and research computing. So we’re already seeing a shift there.” Gordon’s team also likes the pricing model. “We only pay for what we use and what we need.”

The biggest draw, though, was Workday’s innovation through its regular updates, compared with costly and time-consuming upgrades to the legacy system. Previously, “shadow systems” arose at Brown because the HCM system couldn’t keep up. Gordon observes, “Upgrades to legacy systems, were few and far between, so much so that you are reluctant to upgrade until forced to do so because of the amount of work involved.” But now Workday does the updating for them.

Building Excitement for the New Way

Well aware that the university community would need time to adjust to the new system, Gordon and her team started early. A year before deployment, the team released the message, “Workday is coming to a cloud near you,” generating interest and intrigue. They followed up with “Say hello to Workday” sessions, mini-demos, and meetings with key stakeholders. And people began to fall in love with the system, even before it was deployed.

“We made the analogy that if you can order a book on Amazon.com or if you can order shoes on Zappos, you’ll be able to use Workday,” she says. The reaction to the demos? As Gordon put it, “Oh, is that all it is? Oh, that’s easy. Oh, I can do that.”

Even better, thanks to Gordon’s efforts and Workday’s exceptional ease of use, the Brown staff began eagerly anticipating the new approach. “People would walk away from our training session and say, ‘I can’t wait until it gets here. It’s going to be great.’ And that had a huge impact on user adoption.”

Easy Access from Any Device

Within a few months of the HCM deployment, Gordon and her team saw major benefits from employee and manager self-service. Now, she says, “Brown employees can go in and view their benefits, their time off, their mailing addresses, their emergency contacts right from a single place. It’s really, really easy to use.”

Previously, she says, “We had these forms that you had to fill out with supporting documentation and we had to carry them from this building at Brown to that building at Brown—in the heat of summer and the dead of winter. So Workday streamlined a very paper-driven, manual, labor-intensive process.”

And for managers? “Workday gives them a lot of insight into their teams that they never had before,” says Gordon. Previously, only a handful of people had access to the HR system; now managers can see their teams and make better-informed decisions about hiring, staffing, reallocations, succession planning, and career development.

“The ability to access the system from mobile devices was a huge ‘wow factor’ for us,” Gordon continues. “We have over 250 buildings. People are all over and they need to approve things. Now they can just go in Workday from their handheld device and do it. It’s so quick.”

Another popular aspect is Workday’s workflow feature that allows the system to send a notification if action is needed. “I get an email that says you have something to approve, and there’s a link that brings me right to Workday. It’s right in my workflow. I click ‘approve’ and I log out in less than three seconds,” says Gordon.

Also important is Workday’s Section 508 support, which assists with the mandate that universities and public-sector entities use software accessible to the disabled (in this case, the sight impaired). “It’s been very, very well received,” says Gordon. “The folks who are using the screen reader have been very pleased with the results and the usability of the application.”

New Role for HR

Workday has eliminated a host of time-consuming, paper-based processes that occupied the Brown HR staff previously. For example, Workday has made it easy to track the requirements of union contracts, such as step salary increases, which were handled manually before. “We have a number of different bargaining units and hundreds of union employees,” says Gordon. “Well, now we do it all in Workday.” Workday has also been a help with compliance to the Fair Labor Standards Act (FLSA). “We think it’s great and it treats all employees the same way,” says Gordon. Another time-saver is the integration between absence management and time tracking. “If I submit a vacation day it automatically carries through to my time sheet,” she says. “That’s been really nice to have.”

Now that so many tasks are automated, the HR staff has begun working in a completely different paradigm. Eight individuals previously dedicated to data entry have now been reallocated to data analysis. “Elimination of manual data entry enables those staff to operate at a higher level, and instead perform data quality audits,” says Gordon. “Their role has changed from data entry to data evaluation.”

Next Step: Workday Financials

Committed to the efficiencies and benefits of a unified suite, Brown is deploying Workday Financials, which will allow the university to match financial resources with organizational structures more easily. Boosted by the success of Workday HCM—which was delivered on time and under budget—Brown is following a similar, change-management process, starting with reviewing their chart of accounts, analyzing effort reporting, and setting up workflows and routings. Like other universities, Brown receives government and private sector funding for many programs, all with complex compliance requirements. Workday will make it easier to set up internal controls to track and audit these transactions.

Best of all, for the first time, the university will be able to get a clear picture of all its resources—human capital and financial—in a single place. Consistent, up-to-date, actionable data will be available to decision-makers anytime they need it.

“Workday will help us in analyzing and reviewing resource allocation and deciding which objectives are critical to the institution. The unification of HR and finance facilitate getting at that real-time information, something that we haven’t had in our systems,” says Don Schanck, Assistant Vice President and University Controller at Brown.

“The bottom line is we would really rather spend our people resources using that data to make better decisions instead of bogged down in manual processes,” Roberta Gordon concludes. “And Workday has the data that will support decision-making and strategic planning.”



Workday, Inc. | 6230 Stoneridge Mall Road | Pleasanton, CA 94588 | United States
1.925.951.9000 | 1.877.WORKDAY (1.877.967.5329) | Fax: 1.925.951.9001 | www.workday.com



Workday and Cornell University: Efficiency Meets Individuality

Colleges and universities cherish individuality. Every institution is different, and all contain schools and units with distinctions of their own. But there is still a drive to efficiency, especially in this era of diminishing resources. How do you combine the decentralized requirements of a university with its need to operate more effectively?

For Cornell University, Workday Human Capital Management and Payroll solutions provide the answer.

“We are one of the largest private research universities in the country, with seven undergraduate colleges on the Ithaca campus and three professional colleges,” said Mary Opperman, vice president of human resources and safety services.

“We don’t run like a corporation. Our innovations come from the faculty and the collaborations that occur across disciplines. We need administrative systems that recognize this, that can adapt very quickly and don’t get in the faculty’s way,” she said. There was a need to streamline administrative functions in order to free up resources to put towards the university’s core missions.

“We are very decentralized, and we recognize that we do things in different ways for very important reasons,” she continued. “We need flexibility that matches our academic enterprise. Workday allows us to do that.”

Poised for the Future with Workday

The decision to bring in Workday was part of a larger effort, called Reimagining Cornell, designed to look at the university and its administrative functions in a new light. The initiative had two components: first, making sure the university was doing everything it could to streamline administrative operations; and second, aligning people and resources toward the university’s long-term goals in academics, scholarship, research, and service. In one aspect of the administrative review, a forward-looking team led by the dean of information sciences suggested looking at cloud technology for administrative systems.

“Workday really stood out for us as matching the way we do our business,” Opperman said. “It allows us to take the system right down to the desktop. And for us, the manager self-service and employee self-service components



Cornell University Business Case at a Glance

Public and Private Research Institution
22,000 workers based in Ithaca, NY

Workday Solutions

Human Capital Management,
Benefits, and Payroll
Talent and Faculty Management
Cloud Connect

Project Drivers

Consolidation of administrative
Human Resources and Payroll
operations into a unified shared
service environment

Legacy System

PeopleSoft Human Resource/
Payroll System

are very important.” These vital elements are missing from Cornell’s current system. Because Cornell employees and managers can do their own routine transactions, the human resources team will lower its transaction costs and be able to focus

more of its resources on strategic HR work. And because the Workday user interface is exceptionally friendly, employees find it easy to use. “Our academic department managers have looked at the desktop application and they feel that it’s very intuitive,” she said.

“Workday’s promise of a flexible, configurable software-as-a-service system, one that remains up-to-date without the need for disruptive upgrades, should be of real business benefit to Cornell.”

Ted Dobbs
Chief Information Officer

Workday Payroll Adds New Efficiencies

For Cornell, having payroll combined with the HR system was a key benefit for them. “There are a lot of parts of higher education that are very fast-paced,” Opperman said. “It isn’t necessarily obvious just how vibrant the workforce really is. In our research area, for example, when we have a major research award come in, we’ll need to do a lot of hiring very quickly. It’s important that the systems be linked so we can get that award up and running very, very fast,” she continued.

“We decided early on that the decision to make any changes in the HR payroll system would be made as a community,” Opperman said. “It’s a big decision, and if we were going to do it, we were going to do it together.” The university asked department managers, business leaders in the colleges, IT staff, payroll specialists, and key human resources staff to review the system. The result? “We’re all very excited about it,” Opperman said.

The Same, but Different

With Workday, Cornell will be able to automate approval processes but still make them specific to individual colleges and units. “That feature is a big, big selling point for us,” said Opperman. “Right now we’re doing a lot of business process work to make sure that where we can be the same, we’ve made the commitment together to be the same, because that is most efficient. But where it makes sense for colleges and universities to have different approval processes or procedures, the system allows us to do that, too,” she said.

“Workday allows us to do a lot of things in human resources that we haven’t been able to do to date,” Opperman continued. “A major benefit is that we can move forward faster. We aren’t bogged down by difficult and time-consuming upgrades.” Workday allows the university to decide what features to turn on with each update.

“It’s also a very efficient system in terms of our ability to purchase it and our ability to run it,” she said. The appeal of lower maintenance costs and less complexity were deciding factors for them.

“Workday allows us to do a lot of things in human resources that we haven’t been able to do to date,” Opperman continued. “A major benefit is that we can move forward faster. We aren’t bogged down by difficult and time-consuming upgrades.”

Mary Opperman
Vice President of Human Resources

Workday Collaborates with Higher Education

Cornell is one of the first higher education clients to sign on with Workday. The university was attracted to the idea of becoming a strategic design partner, collaborating with Workday on the design of the applications specific

to the academic enterprise. “We feel as though Workday’s really listening to the higher education community,” Opperman said.

Choosing Workday was part of a lengthy, collaborative process for Cornell. But in the end, the answer was clear. “Our board agreed with us, our leadership agreed with us, and most important, our college partners agreed with us.” Opperman concluded. “There’s a lot of enthusiasm for it on the campus.”



Workday, Inc. | 6230 Stoneridge Mall Road | Pleasanton, CA 94588 | United States
1.925.951.9000 | 1.877.WORKDAY (1.877.967.5329) | Fax: 1.925.951.9001 | www.workday.com

Workday and Georgetown University: Unified Administrative Operations

Georgetown University, founded in 1789, is a major international research university that includes four undergraduate schools, graduate programs, a law school and a medical school. Based in Washington, DC, the university employs 7,000 staff and faculty members and uses hundreds of contractors. In July 2010, Georgetown University became Workday's first customer in higher education.

Following a competitive review, Georgetown determined that Workday, delivered through a software-as-a-service (SaaS) model, was the best system for meeting its human resources (HR), payroll, and financial systems requirements. Those requirements include employee and manager self-service, automated paperless processes, on-the-fly HR and financial reports, a modern and secure system architecture, and deep integrations between HR and financial systems.

By choosing Workday, Georgetown University also receives numerous benefits not available with traditional, on-premise software applications. Georgetown gets automatic system updates, easily configurable processes, freedom from constant upgrades and customizations, and avoidance of high up-front software and hardware implementation costs and ongoing maintenance fees.

Kevin Murphy, interim CIO at Georgetown, says Workday provides significant cost savings compared with the on-premise software the university evaluated, and will allow IT employees that were focused on maintenance and customization of legacy applications to work on other projects more directly tied to the university's core academic mission.

“Workday will let us redirect IT resources to systems that directly create value for the Georgetown community.”

Kevin Murphy
Interim CIO at Georgetown



GEORGETOWN UNIVERSITY

Georgetown University

Private Research Institution
15,000 workers based in Washington, DC

Workday Solutions

- Human Capital Management, Benefits, Payroll
- Talent and Faculty Management
- Core Accounting, Budgeting & Planning, Spend Management
- Initiatives, Grants, Effort Reporting, Endowment Accounting
- Cloud Connect

Project Drivers

- Consolidation of the administrative Human Resources, Payroll and Financial operations into a unified shared service environment

Legacy Systems

- Genesys Human Resource/Payroll System
- PeopleSoft Financial System



The Search for Unified HR and Financials

Two years ago, Georgetown began the search for modern, unified human resources and financial systems to replace end-of-life systems with limited integration capability and functionality. It considered offerings by major software vendors, higher-education niche providers, and open-source solutions.

During months of close evaluation, Georgetown learned that in addition to the cost benefits of SaaS, Workday would meet or exceed its functional requirements for modern, unified human capital management, benefits, absence, payroll, talent and faculty management, financials, budget and planning, sponsored research, endowment accounting, and spend management systems.

“We are excited that we’ll be able to do an HR transaction and have the financial and budget information about that position,” says David Rubenstein, Georgetown University vice president planning and financial analysis and CFO for the University’s Medical Center. “We anticipate that it will really streamline the decision making and approval process since we won’t have to look at two different systems to do one transaction. That should be an enormous savings in terms of time, and I think it will prevent errors.”

Workday is Easy to Use

Vice President and Chief Human Resources Officer Mary Anne Mahin’s staff has started putting job description data into the job profiles available in Workday. “With Workday, we’ll create templates based on industry standards and other data about what jobs look like and how they’re paid. That will make it easier to create new jobs and determine how they should be paid,” she says.

“Workday is easy to use and configure, which helps very much with innovation and creativity in our department. It’s already sparked new ideas and new ways of looking at how we do things.”

Mary Anne Mahin
Vice President and Chief Human Resources Officer

Georgetown’s legacy HR system requires employees to write descriptions of every new job, with no simple way to pull up historical information about similar jobs. Workday, Mahin says, will let HR staff spend more time on research and analysis of job roles and descriptions, and far less time on data input.

“The system allows us to put information together in better ways, and is so much more logical than what we currently have,” she says. The self-service capabilities in Workday will provide managers with individual and team views of their employees without the assistance of HR. Mahin expects that this capability, along with the reduction in data input, is going to create more growth and development opportunities for the HR staff.

Workday Is Global at the Core

Workday will bring together all of Georgetown's HR and benefits data in one place, says Chief Benefits Officer DeSantis. "Current systems have very bifurcated lines. As a result, our administrative systems have stopped us from doing things we want to do," he says. "We will no longer have to say, 'Oh, we can't do that because the system doesn't allow it.'"

For the first time, employees will be able to sign up for benefits and make family status and benefits changes online, eliminating the current process of reading about benefits on the Web, then filling out and submitting required paper forms. In addition, Workday will make it easier for DeSantis and others to develop personnel and benefits reports for compliance with local, state, and federal regulations. He says, "Until now, I've had to call the IT group and ask, 'How quickly can I get this report?'"

The Workday system is well equipped to handle Georgetown's growth, DeSantis adds. Georgetown learned the challenges of setting up an international facility when it opened a campus in Doha, Qatar, in the Middle East. Workday's centralized SaaS architecture and configurability will ease the rollout of HR, benefits, and other systems to additional global sites.

Workday Security Is State of the Art

Interim CIO Murphy says Georgetown did have some concerns about security of the SaaS model—which was new to the university—since software is located offsite in Workday's data centers, but those concerns disappeared following a full investigation of Workday's architecture, policies, and processes.

"We spent a lot of time making sure the controls were in place to mitigate any risk and worked closely with legal counsel to make sure Workday was compliant with government regulations," Murphy says. Rubenstein says on the security front, Workday's modern architecture is superior to alternatives reviewed by the university.

“Academics is very different from the for-profit world. Our community expects to work with people to get answers and reach a consensus, and Workday will provide a single system for members of our community to participate in decisions.”

Charles DeSantis
Associate Vice President for Benefits and
Chief Benefits Officers

Workday Collaborates with Higher Education

Georgetown University will collaborate with Workday, as a strategic design partner, to specify and design functions and features that particularly address the needs of higher education. That knowledge and experience will benefit Workday's future customers.

"It's a true partnership with Workday, and feels very much like we are hand-in-hand on this," says Charles DeSantis, associate vice president for benefits and chief benefits officer at Georgetown University. "Our current systems have limited our ability to innovate. We're very excited because Workday offers the promise and potential we never had."

"Now we get to be at the very forefront of delivery of Workday SaaS in the academic arena," DeSantis says. "We'll have cutting-edge, current software in a configurable system that wasn't available three or four years ago."

Georgetown plans to go live with Workday HCM and Payroll in 2011, followed by Workday Financials at a later date. Already, Georgetown personnel are delighted by what they're discovering in their initial use of Workday.

"It's a true partnership with Workday, and feels very much like we are hand-in-hand on this. Our current systems have limited our ability to innovate. We're very excited because Workday offers the promise and potential we never had."

Charles DeSantis
Associate Vice President for Benefits and
Chief Benefits Officers



Workday, Inc. | 6230 Stoneridge Mall Road | Pleasanton, CA 94588 | United States
1.925.951.9000 | 1.877.WORKDAY (1.877.967.5329) | Fax: 1.925.951.9001 | www.workday.com