



Cross-Functionality Planning

Adding Learning Management



Workday Oregon Cross-Functionality Planning Meeting.



Welcome

Madilyn Zike – Chief Human Resources Officer

Madilyn joined the Department of Administrative Services (DAS) in January 2014 as the State of Oregon's Chief Human Resources Officer. In this role she oversees statewide HR policy development and coordination, classification and compensation, executive recruitment, labor relations and workforce development.

We are pleased to introduce to you the LMS Replacement Project's Executive Sponsor, Madilyn Zike, for some welcoming remarks.

Madilyn welcomed the group, talked about modernization efforts and thanked everyone for pushing this project to go-live during this unprecedented pandemic.

Purpose

Connect agency Workday Oregon support roles with their Workday Learning Partners in preparation for the transition from iLearnOregon to Workday Learning.

Help facilitate agency conversations about:

- Where current Workday functionality impacts Learning
- What Learning will add to current Workday functionality
- Communication and Support needs



The LMSRP Team and Learning Partner community is happy to have you all here with us today. We are so close to implementing Learning as part of the Workday Oregon suite, we would like to thank you for your support, encouragement, and guidance getting us to this point and all the way through to go-live! Go-live, if you have not already heard, is Wednesday, June 16th, it will be here before we know it.

The purpose of this meeting is to connect agency Workday Oregon support roles with their Workday Learning Partners in preparation for the transition from iLearnOregon to Workday Learning. We want to facilitate conversations about system cross-functionality amongst these roles to build awareness and to help prepare agency planning for Workday role and support needs and use of new functionality.

Today is intended to be a catalyst for future conversations within agencies to identify points to consider as you prepare for the transition. Our intention is not to direct your business or assign work, but to offer considerations for decisions concerning the integration of Workday Learning with Workday in your agency.

I want to stress; this is not training; we will discuss future training a little later. This is an awareness and conversation starter.



Participants

- HR Executives
- HR Partners
- Security Partners
- Talent Partners
- Learning Partners
- Report Writers
- Agency Readiness Coordinators



Who's here with us today? We have HR Executives and Partners; Security and Talent Partners, Report Writers, Agency Readiness Coordinators, along with other valued coworkers.



Agenda

- Making Connections, building relationships
- System Security
- Training Resources
- Communication
- Take away



Agenda:

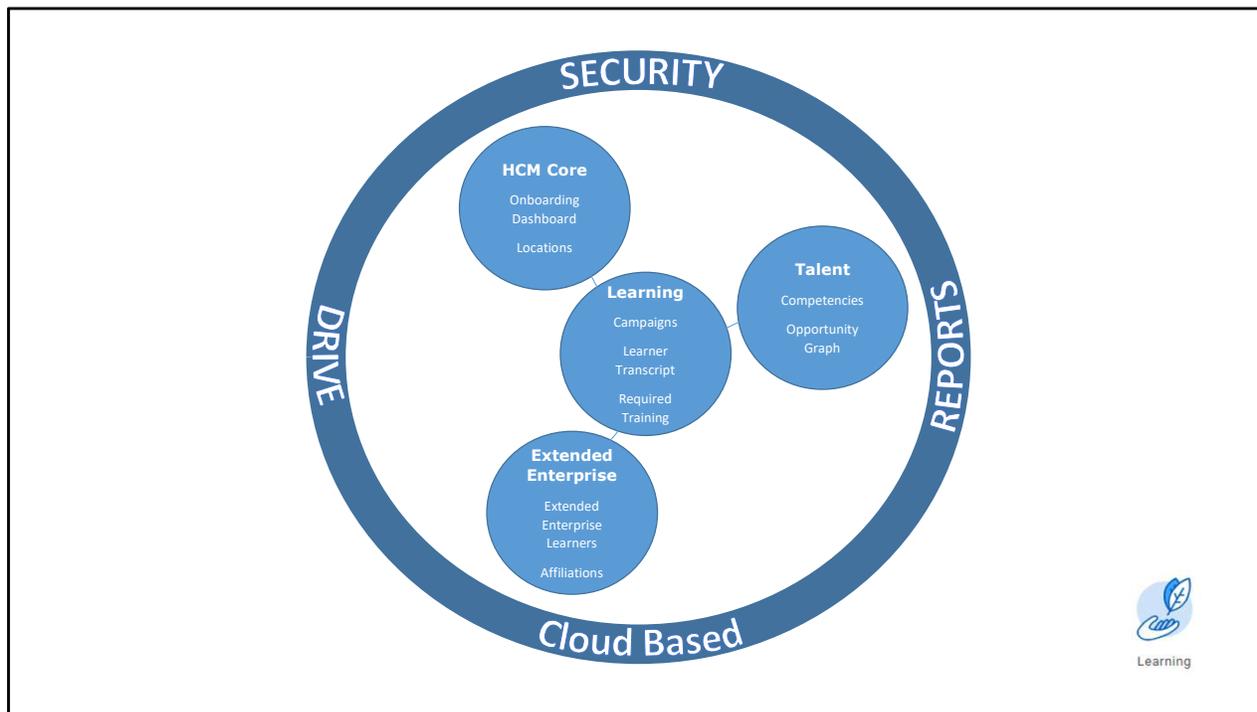
Making Connections, building relationships

System Security

Training Resources

Communication

Take away



Here is a visual representation of what cross-functionality looks like as it relates to learning.

Learning is in the center as it is our focus. The main functional areas that interact directly with learning are identified as their own bubbles:

- HCM Core
- Talent
- and Extended Enterprise

The outer circle represents the areas that interact and impact all the functional areas, with one caveat, the Extended Enterprise.

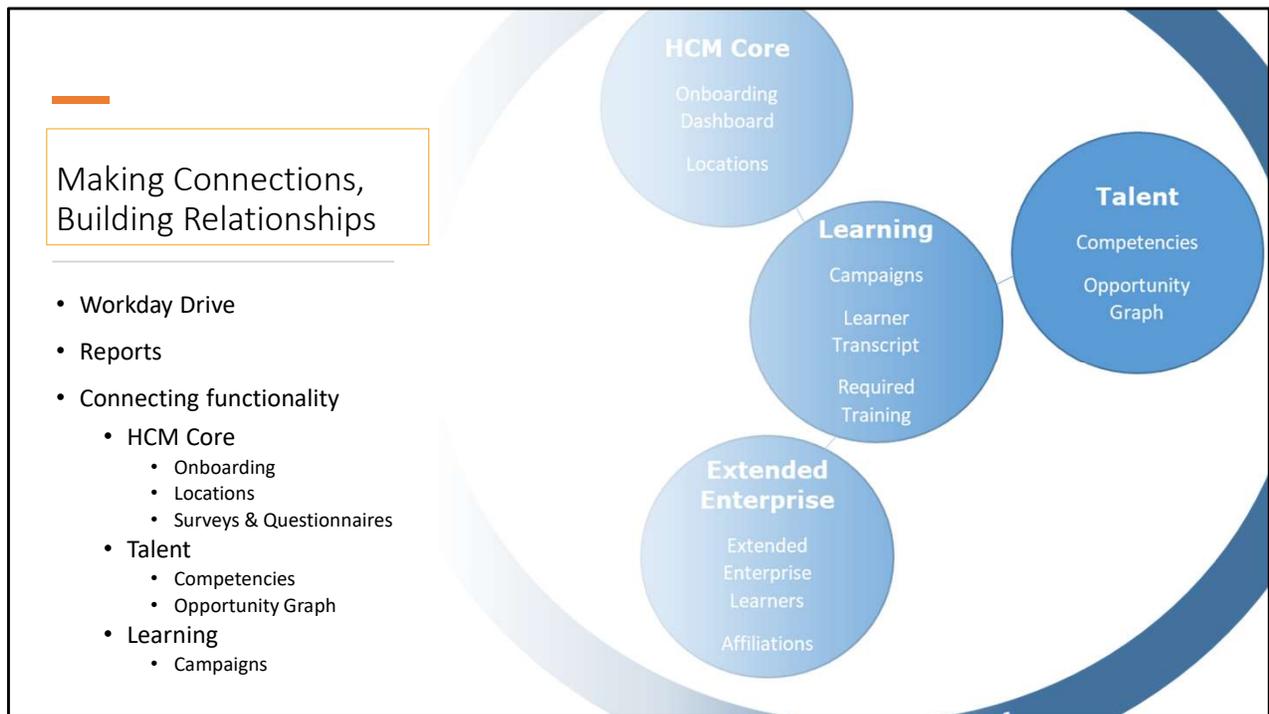
Right now, I'm only going to touch on the Extended Enterprise because it is its own unique area, we don't need to go into much detail in this meeting.

The Extended Enterprise is an add-on to Learning only, it does not have any interaction with any of the other functional area of Workday. As the name suggests, the Extended Enterprise is where our Extended Enterprise Learner, you may be familiar with the term 'Agency Partner', accounts will be held.

Security and access for the Extended Enterprise Learner is limited to only the Extended

Enterprise space as they are only here to take state sponsored training, there will not be any connection to Workday Oregon.

The Extended Enterprise will not have access to Drive or the development analytics that workers will have. We, the state, will manage this space with a role called an Affiliation Manager, this role will be able to assign training to and report on Extended Enterprise Learners.



Making connections and building relationships.

Learning Partners will need to connect with HR Partners, HR Executives, Security Partners, and Talent Partners when completing their tasks in the Learning functional area. Interactions and support are not limited to the identified roles; however, tasks and information regarding these roles are closely related in Workday.

Drive allows you to share documents throughout your agency and even with your counterparts in other agencies. How is this different than MS Teams you may be asking? Well depending on how each agency is utilizing MS Teams, you may not be able to share material through that platform with another agency.

How many of you have tired to share a .zip file? For the learning world, this is a common and often painful occurrence, we love to share our hard work when it comes to eLearning. Workday Drive will also allow you to share .zip files.

If you collaborate with learning professionals inside your agency to create learning content, you will be able to share, store, and access content all in the same place!

Reporting is everything in Workday, the system is designed to provide reports. When

Learning happens inside of Workday, keeping track of where employees are with required training, and in their professional development, will be at the fingertips of their managers.

Connecting functionality:

Inside of **HCM Core** the Onboarding Dashboard, Locations, and Surveys & Questionnaires are the main areas of interaction.

Learning can *enhance* the already existing agency **onboarding process** for new employees.

Existing **Locations** inside Workday may have training rooms added to their profiles. Whenever locations are added, removed, or edited communication with Learning Partners will be critical to make sure any impact to scheduled and futures offerings are addressed ahead of time.

Surveys and Questionnaires can be created to be utilized inside courses and programs, but are not part of learning, Questionnaire Administrators may need to work with Learning Partners to create learning specific surveys or questionnaires.

Talent and Learning will be closely related and heavily influence each other.

Competencies can link positions to relevant training, helping employees find and navigate their development path.

I want to highlight the **Opportunity Graph** here for a couple of reasons. The first reason is to say, this tool along with learning analytics, will be able to help employees see where logical next steps are for career growth. The second is the roll out of some key learning tools will follow a very similar roll out of the Opportunity Graph. For some tools to make valuable recommendations, they must first have enough data to provide those recommendations.

Finally on this slide, what can **Learning** do for you? Instead of needing to access a separate system or asking someone to pull a report for you, HR professionals will be able to see what Learning employees have completed. Managers will be able to use the same space they already monitor and manage their employees from to see how their team is doing on their required training completions.

There are many ways that adding learning will help fill out the employee profile, encourage engagement & development, and there is one powerful tool that Learning will provide to Workday Oregon, **Campaigns**.

Campaigns deliver information in a predetermined order and timeframe. Campaigns share information, not just learning content, but only Learning Partners will have the ability to create campaigns, so anyone in need of this tool will have to work directly with their Learning Partner to get it set up.



How does your agency currently support Workday Oregon?

Do you have a centralized helpdesk that routes support requests to the correct person, or do employees reach out the SME's directly?

Regardless of how your agency supports workday, all support will need to be aware of the addition of Learning and potentially Extended Enterprise Learners. If you have not already done so, bring your Learning Partners into conversations about how your agency supports workday sooner than later to help the transition of adding Learning. This will help you be prepared to support learners at go-live and enhance the experience for your customers needing support, internal and external.

Contingent Worker or an Extended Enterprise Learner; this has become a hot topic in the last few months. A Contingent Worker is a profile that needs to be created and managed through an HR shop or a Volunteer Coordinator role, it cannot be created by a Learning Partner. While having Learning Partners as part of the conversation to identify who your agency partners are, the decision for who will fall into which role needs to be made by HR.

If your agency has not decided who should fall into which category here are the definitions - I will repeat the definitions twice, they are available in various resources provided by DAS

CHRO, and they will be in the notes from this presentation.

Extended Enterprise Learner Definition: A person who only completes training through our Learning Management System, because their sole interaction with Workday is to complete training offered by the state.

Contingent Worker Definition: Any person, either paid or unpaid through a contract, who is conducting business on behalf of the state that requires insurance coverage, system access, and/or access to sensitive data (level 2 or higher) to complete their tasks for the state.

A very important piece of information for agencies to understand is around the enterprise-wide requirement for contractors and volunteers who need to take the OSCIO Information Security: Foundations training.

This training will not be made available to Extended Enterprise Learners, if your contractors or volunteers fall into taking this required training, they will have to be Contingent Workers.

Possible Discussion Points for Making Connections

- How can our agency utilize Workday Drive
- What are our reporting needs
- What HCM Core functionality do we use that can impact Learning
- Where can we bring Talent and Learning together
- Are Campaigns a useful tool for our agency to share information
- Are we ready to support the addition of Learning to our current Workday support model
- Contingent Worker or Extended Enterprise Learner

Here are a few possible discussion point for you agency.

1. How can our agency utilize Workday Drive
2. What are our reporting needs
3. What HCM Core functionality do we use that can impact Learning
4. Where can we bring Talent and Learning together
5. Are Campaigns a useful tool for our agency to share information
6. Are we ready to support the addition of Learning to our current Workday support model
7. Contingent Worker or Extended Enterprise Learner



System Security

- Learning data is Level 1 “Published”
- Reporting
- Request Framework
- Password Reset

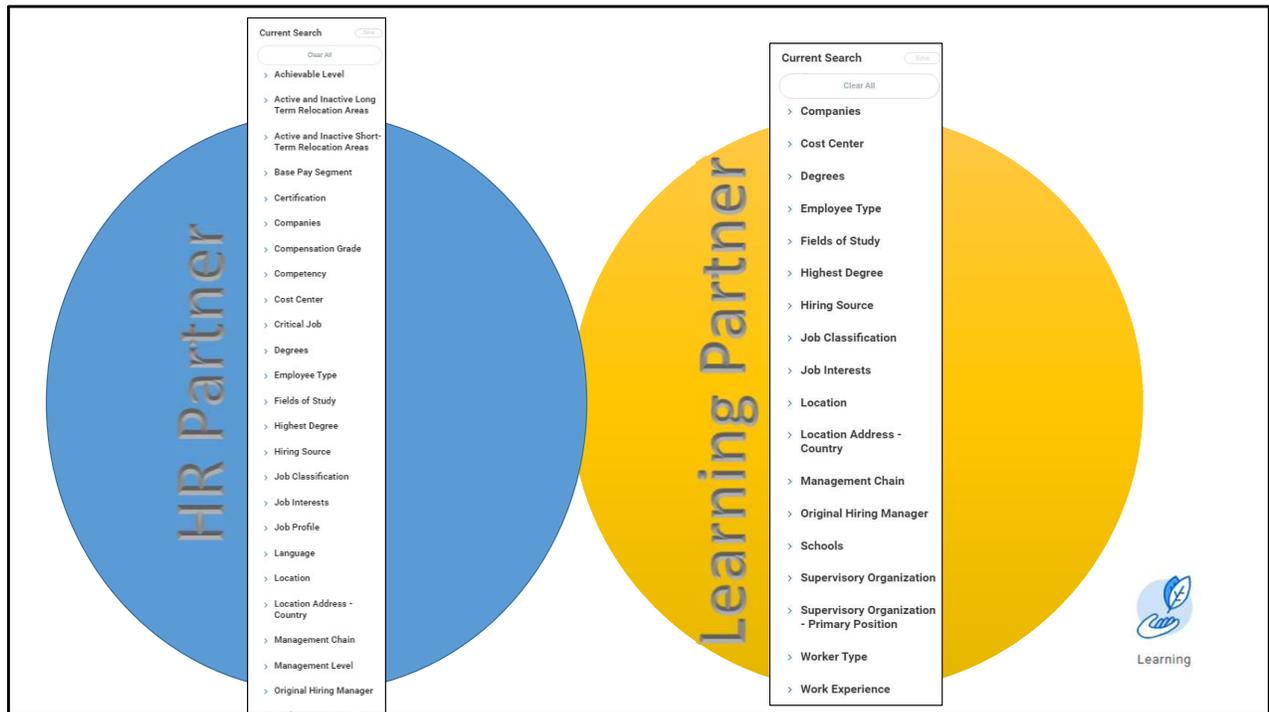
Learning data is classified as level 1, published while most HR data will fall between Levels 2 & 4. I call this out just to say, adding learning is not increasing security considerations to Workday Oregon.

Security and Reporting, this is an area that the project team and Learning Partners have spent some time talking about, understanding what can or should be seen.

Some of our Learning Partners also have elevated HR roles so they can see more data elements than a Learning Partner at a different agency whose highest elevated roles *is* a Learning Partner.

Workday will always display the highest level of data security allowed based on the roles held by a position. HR roles will be able to *view* learning data (transcripts and course completions), but unless they are **also** a content creator or Learning Partner, they will not be able to take action on learning data.

Let’s look at the difference between the reportable facets of the Find Workers Report between an HR Partner and a Learning Partner.



On the left is just a partial list of what an HR Partner can see, and *all* of what a Learning Partner can see on the right.

This is just a quick, very simple, visual of the difference in access to data based on the security attached to different roles. Reports are not necessarily restricted based on roles, but the data elements visible will depend on what type of security access the person running the report has.



System Security

- Learning data is Level 1 “Published”
- Reporting
- Request Framework
 - Learning Admins assign - Learning Partners
 - Learning Partners assign:
 - Affiliation Managers (Extended Enterprise)
 - Content Creators
 - Instructors
- Password Reset

Now let's talk about Request Framework and assigning elevated learning roles in Workday. We are going to take a hybrid approach that incorporates the assignment approvals of iLearnOregon into the Workday Oregon Request Framework structure.

The Learning Administrator role that will sit centrally with the Workday support team at DAS and will assign the Learning Partner roles for agencies.

Learning Partners will assign the Affiliation Managers, Content Creators and Instructors for their agency.

Let me take a second to remind you about the Affiliation Manager role. This role will manage and support the Extended Enterprise Learners for their agency.

The decision was made to continue to utilize the approval structure already in place for iLearn due to the specialized nature of the elevated learning roles and the Learning Partners executing the learning plans/visions for their agency. We did not want to overload the already busy Security Partners with the addition of managing this additional workload. Because Learning Partners and Security Partners will be operating in the same Request Framework space, we encourage communication between these two roles.

Employees will have to request elevated learning roles separately than other elevated Workday roles.

We have explored and are comfortable with many combination of elevated learning roles with other elevated Workday roles we have found. It is possible that there will be a combination of roles that we have not thought of and we will want to monitor for any unintended access due to role combinations, this is just something for us all to be aware of.

Password Reset: this is a very important piece to understand how this will work.

Learning roles will **not** come with the ability to **reset passwords** for *employees*.

The Affiliation Manager role will have the ability to reset Extended Enterprise Learner passwords *only*.

If an agency has a Workday helpdesk that will need to have the ability to reset Extended Enterprise Learner passwords, the Affiliation Manager role will need to be assigned in addition to whatever roles the position currently has.

Possible Discussion Points for System Security



Are Security Partners aware of the role Learning Partners will play in assigning elevated learning roles



Do we need to share information about how employees request elevated learning roles



Who has the ability to reset passwords inside our company for employees



Who should have the ability to reset Extended Enterprise Learner passwords

It's time to call out a few of the possible discussion point for you agency.

1. Are Security Partners aware of the role Learning Partners will play in assigning elevated learning roles
2. Do we need to share information about how employees request elevated learning roles
3. Who has the ability to reset passwords inside our company for employees
4. Who should have the ability to reset Extended Enterprise Learner passwords

Training Resources

- LMSRP Training Plan
 - Self-paced online courses
 - Help Documents
 - Webinars
 - Virtual Instructor Led Training (VILT)
- Agency offered training
 - Direct questions about your agency plan to your Learning Partner(s)



The LMS Replacement Project team has developed a training plan and it is being communicated out to the enterprise. Currently all Learning Partners have a copy of the plan and during the next Open House series and the Bi-weekly Bulletin the training plan will be highlighted. The first wave of training will focus on those with elevated learning roles then will move to learners.

We will heavily rely on self-passed online courses, help documents, and webinars. All instructor led courses will be conducted virtually. Training opportunities will be advertised on the LMSRP webpage including who the target audience will be for each course.

While the project team is providing training that will be available to all our learning customers, internal and external, some Learning Partners will choose to conduct agency specific training based on their identified workflows and unique instructions.

Important: Any questions about what your agency is planning to do regarding training, needs to be directed to your Learning Partner(s).



Communication

- Relationship building
- Identifying responsibilities
- Sharing information
- Preparing for increased support needs



Learning

What is the best way for us to prepare for the addition of Learning to Workday Oregon?

Communicate, communicate, and communicate some more.

The project team feels like all we do is talk about the transition from iLearn to Workday as our Learning Management System and we are *still* surprised to find employees that are unaware of this change.

Based on feedback we have recently received from our 90-day assessment, we know that employees are depending on their agencies to keep them informed on the information they need to know. So, we are asking you to do just that!

Connect with your Learning Partners, identify who is responsible for what, where might there be areas of overlap or even gaps? Develop a unified message then share it out to your employees, contingent workers and your extended enterprise learners, they all want to hear from you!

Don't overlook being prepared for June 16th, when Workday Learning is live to all. There will be an increase in support requests as more employees access the system and when our Extended Enterprise Learners see Workday for the first time.

Think of it this way; when all is said and done, this is a great test run to prepare for the payroll project!

Next Steps

- Connect
- Discuss
- Plan
- Communicate
- Support



As stated at the beginning of this presentation, to assist in the next steps, we provided you with a document to help facilitate conversations with your Learning Partners. This presentation along with my talking points and the Q&A section, will be made available on the LMSRP webpage for future reference.

While my request seems straightforward, the outcome will look different for agencies based on the plan you all put together.

The LMSRP team is here to provide support to all agencies, but we ask that you start with your Learning Partners to get the conversations rolling, they can request our support as needed.

Possible Discussion Points for Communication & Next Steps



Connect with my Learning Partner, how will our agency participate in training



Do our employees know about the transition to Workday for our LMS



Identify who is responsible for that parts of the system



How, what and when do we communicate



Let's ready for June 16th

One more time, here are a few of the possible discussion point for you agency.

1. Connect with my Learning Partner, how will our agency participate in training
2. Do our employees know about the transition to Workday for our LMS
3. Identify who is responsible for that parts of the system
4. How, what and when do we communicate
5. Let's ready for June 16th



Thank you!



Thank you for your time in learning more about the LMS Replacement Project!

Remember June 16th is our Go-Live date for Workday Learning!