

Workday Change Control Fact Sheet



Things You Need to Know



Why is Workday Change Control needed?

CMSD’s internal and external audit procedures require us to follow a disciplined approach to evaluate, approve, and test any changes to Workday that:

- Impacts the integrity of CMSD financial statements or requires Board approval.
- Creates risk of financial exposure for the District.
- Affects EMIS reporting (State & Federal).
- Impacts business processes in other functional areas.

When will the Workday change control process go into effect?

May 1, 2018



Who will oversee the Workday Change Control process?

The Change Advisory Board (CAB) will oversee the Workday Change Control process.

Who are the members of the Workday Change Advisory Board (CAB) and what is their role?



The CAB is a cross-functional team responsible for assessing change requests in terms of business need, cost/benefit, viability, and potential impacts to existing systems or processes. The CAB decides whether to approve, defer, reject, or deny changes and assigns a priority level to the change. The CAB will also make recommendations related to change implementation. Below are the current CAB members.

Member	Functional Area	Role
Derek Cluse	Finance	Member
Angele Latham	Grants/Budgets	Member
Blessing Nwaozuzu	Enterprise Applications	Member
Irene Dunbrook	Talent Operations	Member
Angie Foraker	Procurement/Supplier Accounts	Member

Michael Bowen	Accounting/Customer Accounts	Member
Mychael Henderson	Payroll/Time Tracking/Absence	Member
Laura Mulvaney	Talent Recruiting	Member
Stephen Christian	Talent	Member

Which Workday changes require CAB approval?

Requires CAB Approval	Do Not Require CAB Approval
Business process changes	New or updated job aid instructions
Security : Domains / business process permissions, activation of new policies, creation of new roles, and changes applied to existing roles	Updated notification wording
Tenant setup	New or updated security role assignments
Eligibility or condition rules	Regular system maintenance
New notifications	Enterprise Interface Builder creation / load
Integrations	Changes to reports for individual or departmental use
Additional help text	Minor configuration changes
In some rare cases changes to reports for district wide use	New or updated job aid instructions
Other significant transactional changes (i.e. new org setup)	Updated notification wording
Changes that impact other functional areas and / or require > 16 hours to complete	Change requiring <16 hours to complete with no impact on other functional areas

How are the Workday changes classified?

EMERGENCY: If the **Request for Change (RFC)** has immediate (urgent) priority, the change manager must escalate it as soon as possible to the E-CAB for urgent evaluation (see the roles and responsibilities section for a list of E-CAB members).

Additional Information



NORMAL: If the RFC is categorized as “Normal”, the change manager will pass the RFC along the typical change process, sending the RFC to the CAB for evaluation and approval.

STANDARD: RFCs that are determined to be standard, or minor and/or repetitive in nature, will initially need to be approved by the CAB but will thereafter be expedited through the change process by the change manager without CAB intervention.

LATENT: A Latent RFC is pushed through a minimal workflow by the change manager. Since a Latent change is one that has already been implemented, it does not go through CAB approval. The change is entered into the system mainly for documentation purposes.

If the RFC is approved, the CAB needs to decide when the RFC will be implemented into production. Business units are usually competing for scarce IT resources.

Where do I find the Workday Change Request form?

Click [here](#) to access the Workday Change Request form.

How do I submit a Workday Change Request?

- All Workday change requests must be entered into BMC (Footprints).
- [Click here](#) for detailed instruction on submitting a Workday Change request.

What documentation should I attach to the Workday Change Request?

- Project plan (if applicable)
- Information relevant to the change that is not already captured on the change request form



Who do I reach out to with questions?

You may contact any member of the CAB via email or phone.