



Workday@OK



GOVERNANCE PLAYBOOK





Workday@OK

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**The Charter 1.0 version has been retired. The Governance documentation has been rebranded as a playbook and simplified to meet the operational goals of OMES Human Capital Management.

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INTRODUCTION

The Office of Management and Enterprise Services oversees the State of Oklahoma's Human Capital Management (HCM) system, Workday. The state-specific configuration is branded as Workday@OK and will be referred to as such throughout this document. The system is managed by **three guiding principles**:

1. Compliance with state and federal law.

2. Adherence to industry best practices.

3. Harmonization of state HR and payroll practices.



PURPOSE

The purpose of this playbook is to create a clear, consistent and transparent method for maintaining and updating Workday@OK tenants. It will serve as both an operational guide and a strategic source document to align the Human Capital Management and Information Services teams as they maintain Workday@OK tenants.



Workday@OK

DEFINITIONS

Governance:	The process and structure to guide and enforce decisions within an entity.
Workday@OK:	The state-specific configuration of the Workday system.
Human Capital Management (HCM) system:	An all-inclusive HR system that manages the entire lifecycle of an employee; to avoid confusion with the similarly named OMES division, this document will refer to the state's HCM system as Workday@OK.
Human Capital Management (HCM):	The division of OMES that oversees statewide HR functions and initiatives.
Information Services (IS):	The division of OMES that oversees statewide IT functions and initiatives.
Workday@OK Center of Excellence:	The HCM team responsible for driving Workday functionality and adoption.
Workday@OK Operations:	The HCM team primarily responsible for configuring Workday functionality.
Workday@OK Technical:	The IS team primarily responsible for Workday@OK integrations and reports.
Workday@OK Payroll:	The HCM team primarily responsible for configuring the Workday payroll, time and absence functionalities.
Workday@OK User Group:	The collective of HR, payroll and benefits professionals across the state that contribute feedback to increase the utilization of Workday@OK.
Functional teams:	Teams within HCM (or other divisions) that have subject matter expertise that guides the design of Workday@OK functionality.
Product owner team:	The leaders of functional teams that make decisions on Workday design.
Workday@OK Releases:	The Workday@OK team pushes out releases approximately once a month with new functionalities for State of Oklahoma HR, payroll and benefits staff. Customers receive an invitation to review such functionalities the week before each new release goes into production.
Workday Biannual Release:	Workday releases twice-annual updates to all customers. The Workday@OK team reviews these releases for customer impact and provides notes to State of Oklahoma HR, payroll and benefits staff.
Workday@OK Baseline:	The identified functionality and processes supported by the current Workday@OK configuration.

GOALS

Keeping its guiding principles at the forefront, the Workday@OK team sets the following goals:



STRATEGIC ALIGNMENT

Align technology with HR best practices & law.

OPERATIONAL EXCELLENCE

Create an efficient and effective HR and payroll environment with an emphasis on statewide alignment.

MODERNIZATION

Modernize processes to become an employer of choice for HR & payroll professionals.

RISK MANAGEMENT

Identify, escalate and resolve risks related to data, compliance and nonutilization of Workday@OK.

DATA-DRIVEN DECISIONS

Leverage system data to identify efficiencies gained, new functionality and statewide HR metrics.

ROLES AND RESPONSIBILITIES

The most effective governance of the Workday@OK system requires participation from multiple entities, including the Workday@OK User Group.

Workday@OK User Group

The Workday@OK User Group is comprised of agency HR, payroll and benefits professionals. Agencies participating in the Workday@OK governance process have the following responsibilities:

- Be actively engaged in the Workday@OK User Group.
- Review Workday@OK newsletters and communications; take appropriate action, such as adjusting internal processes and sharing with employees in your agency as applicable.
- Escalate ideas, concerns and risks for Workday@OK governance review through the [HCM Consulting ServiceNow catalog](#) item.

Workday@OK team

The Workday@OK team is comprised of the following teams:

- Workday@OK Center of Excellence.
- Workday@OK Operations.
- Workday@OK Technical.
- Workday@OK Payroll.

The Workday@OK team works with a variety of functional teams to implement, optimize, educate about and communicate Workday@OK functionality. This team is vital to the governance process in reviewing system functionality for feasibility, compliance and benefit to the state. The Workday@OK Center of Excellence also coordinates the governance process to ensure decisions are made consistently and in compliance with this playbook.

Workday@OK product owner team

The product owner team, which is the first level of decision-making in the governance process, is comprised of team leaders in the following areas:

- Workday@OK Center of Excellence.
- Workday@OK Operations.
- Workday@OK Technical.
- Workday@OK Payroll.
- HCM Benefits.
- HCM Talent Management.
- HCM Statewide Learning Services.

Workday@OK executive decision team

The executive decision team holds the final decision-making authority for Workday@OK. The executive decision team is comprised of the senior director of enterprise systems, the chief human resources officer, the state chief information officer, and – when necessary – the OMES director and deputy director(s). The executive decision team focuses on high-impact, strategic decisions, such as:

- Project prioritization/resource allocation.
- Project roadmap approval/changes.
- Enterprise system integrations.
- Agency exception requests.
- New functionality requiring purchases and budget allocation.
- Escalation resolution.

DECISION-MAKING

Workday@OK governance addresses the following types of decisions. Any additional items that may arise will be reviewed by the executive decision board for guidance.

DECISION TYPE	DEFINITION
Guiding principles and goals	The overall strategic goals of the Workday@OK system to use technology to further the state's HR and payroll functions.
Cohesion and scalability	The integration of overall system decisions to create cohesive and scalable functions for the state.
Release and application management	The process of determining what features are implemented in Workday@OK through both internal releases and Workday biannual releases. Managing opt-in features and retirements to ultimately roadmap functionality for the most positive impact to customers.
Integration architecture	Decisions related to how data is exchanged between enterprise and agency systems.
Data management	The determination of what data elements are needed to support statewide reporting, transparency and compliance; aid HR, payroll and benefits operations through leveraging data in the system on dashboard and reports; and defining how HR data elements are utilized both within and outside of Workday@OK.
Functional	Subject matter-specific topics in areas such as HR, payroll and benefits related to the practice of those specialties and delivered through system functions.
System exception requests	Exception requests to core and noncore functionality, including configuration, business process workflow, reporting, templates, agency-specific integrations and alternative tools.

GOVERNANCE PROCESS

The intention behind the governance process is to review every item that impacts the Workday@OK baseline. The overall goals of the governance process are to ensure that any changes are in line with the goals of this playbook and utilize the state's investment effectively.

Process map for requests

The link to the process map for governance requests is provided below. This is the overarching flow; there are also subprocesses that may occur depending on the request.

<https://oklahoma.gov/content/dam/ok/en/omes/documents/workday-coe-customer-map.pdf>

Governance participation

These are the areas of involvement (or participation) for each team within the Workday@OK governance process.

PRODUCT OWNER TEAM

Make decisions on everyday Workday@OK functionality.

Present recommendations to the executive decision team.

Provide opportunities for the User Group to be involved in and preview functionality.

Define business processes.

Update the executive decision team on regular release items.

EXECUTIVE DECISION TEAM

Review and approve/deny roadmaps, enterprise system integrations, exception requests, purchases, agency exceptions and escalated items.

Receive/review regular release updates.

Communicate Workday@OK functionality and resource requirements to Legislature and executive leadership to ensure proper adoption and utilization of the HCM platform.

USER GROUP

Submit all requests for enhanced or new functionality through the [HCM Statewide Consulting catalog](#) item in ServiceNow.

Respond to surveys and information requests.

Attend release sessions to review and provide feedback on functionality.

Participate in focus groups and trial functionality as requested.

EXECUTIVE DECISION TEAM APPROVALS

For items requiring formal approval from the executive decision team, the Workday@OK Center of Excellence will gather and present a business case to the chief human resources officer (CHRO). The business case will provide the following information:

- Any background information that applies to the request.
- A statement of item(s) under review.
- Any potential barriers, time/resource constraints or other valid concerns for consideration.
- A summarized list of requested decisions/actions from the executive decision team.

The CHRO will then facilitate the executive decision team's response and provide it back to the Workday@OK Center of Excellence for execution and communication.

POSSIBLE WORKDAY@OK GOVERNANCE DECISIONS:

APPROVED

The requested change will be managed and implemented into production and the baseline by the Workday@OK team based on the guidance from the executive decision team.

DENIED

The requested change will not be implemented into production or the baseline.

DEFERRED

The requested change will not be implemented at the current time but will be kept available for future consideration. Deferred votes should be used when the change is viable but may not be currently funded or when the change needs further process alignment to be successful.