

Workday Historical Data Conversion

Data Description	Data brought into Workday	Notes
General Ledger (GL) Account-Level Summary Data	3 fiscal years of account-level summary for financial reporting (July 2020-June 2022)	
GL Transaction Detail Data	Fiscal year-to-date transaction-level data for financial reporting, July 2022 – February 2023	
GL Transaction Detail Data March 2023	March data will be brought into Workday after March close (~April 12th)	March month-end financial reviews and reconciliation should be completed in legacy systems
GL Account-Level Project-to-Date Summary Data for active Research Projects	Project-to-date account-level summary for financial reporting	Transaction-level detail prior to FY24 can be accessed through legacy systems
Performance Reviews	Previous 3 years for active employees	Overall rating, manager, and review dates
Job History	Data for active employees	Experience category, relevance, responsibilities, and period
Disciplinary Actions	Previous 3 years for active employees	Disciplinary action type, period, and manager
Candidate Experience & Education	All data for active candidates open requisitions	Work experience & education provided in the candidate profile in Taleo, includes internal and external experience.
Prospects	Active prospects from Taleo as of Jan 1, 2022	Includes contact information and prospect source.
Purchase Orders	Open PO line items will be brought into Workday	
Invoices	Open invoices will be brought into Workday	

