



Session 15: Web Self-Service and Portal
February 7, 2014
Workday

Name _____

Functionality	Comments
1. Demonstrate the delivery of numerous enterprise applications (e.g. email, ERP, learning management, calendaring) through a portal.	
2. Demonstrate the end user's ability to personalize the delivery of his/her content. How are the portal page(s) customized to show content specific to the user? Namely, when I log in, I want to see my YTD benefits, PTO, Sick Leave and announcements that need my attention (with direct links to items that need my attention).	
3. Demonstrate the integration of personal/desktop applications (e.g. MS Excel, Outlook) with the enterprise nature of the portal.	
4. Demonstrate how task lists and notifications from workflow are accessible via the portal.	
5. Demonstrate how this will work over tablet, phone and other devices.	
6. Briefly demonstrate the delivery of the following real-time self-service functions through a portal:	
a) External person's ability to submit an application for employment.	
b) Staff member's ability to submit an electronic timesheet for approval.	
c) Staff member's ability to request leave of absence, overtime, or comp time.	
d) Staff member's ability to submit a purchase requisition.	



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7. Demonstrate the ability to track the completion of employee evaluations and when the next evaluation is due:	
a) Demonstrate the ability to automate a report that is then sent to the reporting division and/or department.	
8. Demonstrate the ability to track job-specific certifications and activities (e.g. flex time).	
9. Automatic warnings for those who approach the maximum allowable amount of sick time, compensation time, personal necessity and/or vacation time.	
10. Ability to calculate taxes based upon gross wages less pre-tax deductions. Ability to calculate a given tax scenario for employees based on various tax status and number of dependents.	
11. Demonstrate how enterprise security is implemented, enforced, and maintained.	
12. Demonstrate single sign-on features with the portal.	
13. Demonstrate the use of tools that enable a customized look and feel of the presentation layer.	
14. Demonstrate how work-flow for on-line forms is established and maintained	
15. Demonstrate the development of standard content that is delivered to all user groups and individuals (e.g. institutional announcements).	



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16. Demonstrate the development of content that is delivered to particular groups/cohorts.	
17. Demonstrate the development of content that is delivered to particular individuals.	
18. Demonstrate the use of particular tools that enable the generation, delivery, and ongoing management of content.	



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Evaluation Form	
Name of Evaluator:	
Perceived Strengths:	
Perceived Weaknesses:	
Additional Comments:	
Acceptability of Vendor Solution: Yes ____ No _____	