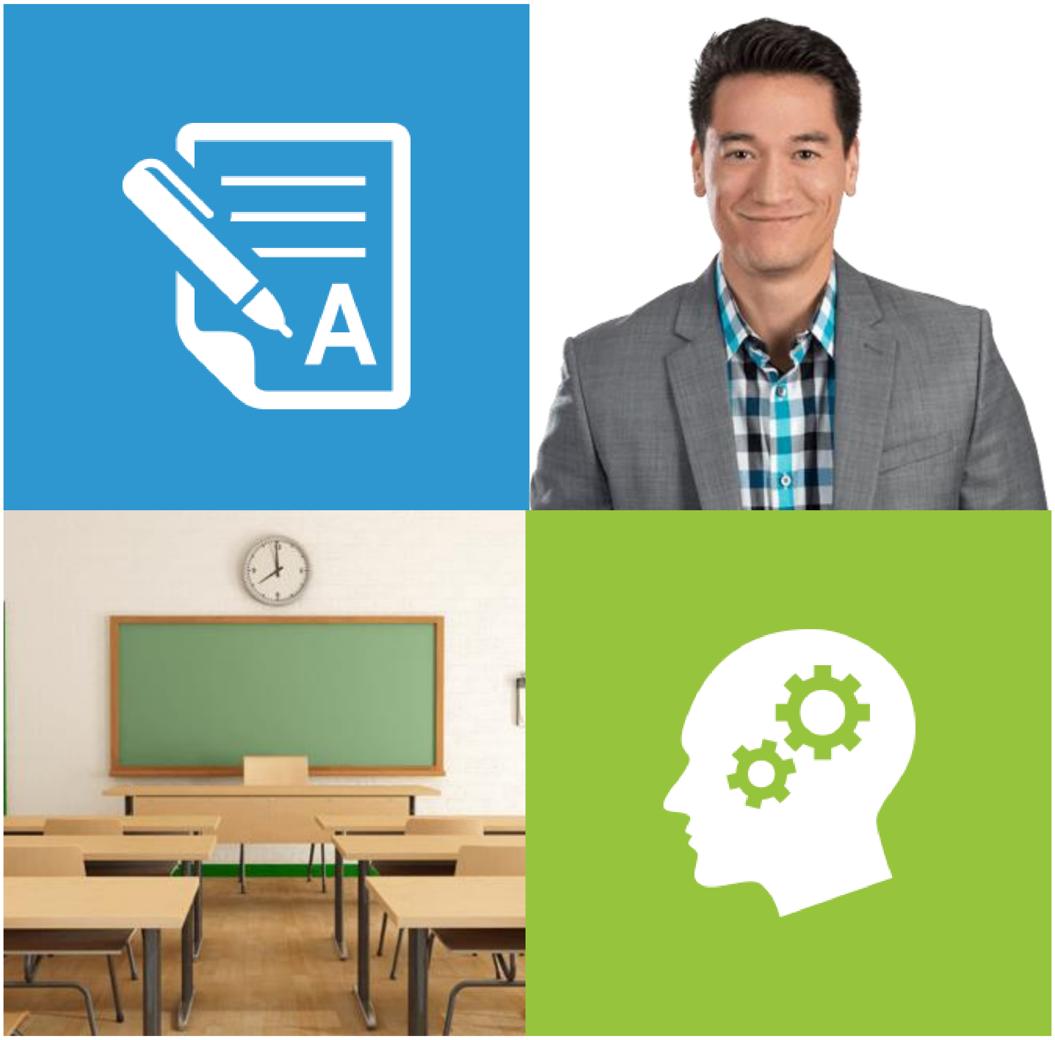

HCM Transactions

Course Manual and Activity Guide

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CONTENTS

HCM TRANSACTIONS FOR WORKDAY 29

DESCRIPTION

Workday allows you to manage, administer, and support your workforce. This includes tracking employee data, pre-hires, and contingent workers.

GOALS & OBJECTIVES

In this class, we will be performing many basic transactions and discussing the steps and core concepts that drive those transactions. These activities will help you become more familiar with the Workday system and methods of navigation.

AGENDA

Navigation:

- Landing Pages
- Search
- Hyperlinks and Related Actions

Workday Core Concepts:

- Organizations, Job Profiles, and Positions
- Compensation

Transactions in Workday:

- Hiring
- Contracting Workers
- Converting Contingent Workers
- Job Changes
- Termination
- Cancelling and Rescinding Events
- Correcting Events
- Reassigning and Delegating Tasks

CHAPTER 1 – NAVIGATION AND SEARCH IN WORKDAY

OVERVIEW

Navigating through Workday is made simple by using powerful search capabilities and multiple navigation tools. In this chapter, we will review these tools and discuss the multiple methods you can use to find tasks, reports, and business objects. In many cases, there is more than one way to perform an action on an object. While discussing navigation, we will touch on the following:

- Core Concept Overview
- Business Objects
- Basic Navigation
- Landing Pages
- Related Action Menus
- Search
- Hyperlinks
- Additional Navigation Topics
- Actionable Reports
- Single and Multi-select Prompt Fields
- Standard Screen Icons
- Task Page Icons
- Inbox
- Landing Page Configuration Options

Keep in mind that all tasks and reports are secured, and access requires that you be in the appropriate security group. If you cannot see a task, report, or object described in this guide, it is because you do not have permission to access it. Security is configurable, so during this training, we will be using Workday-delivered “vanilla” security for our discussions. We will be discussing more about security in the Core Concepts section.

OBJECTIVES

By the end of this chapter, you will:

- Explain the power of objects.
- Execute general system navigation techniques.
- Learn how to configure landing pages.
- Use search techniques.

NAVIGATION BASICS

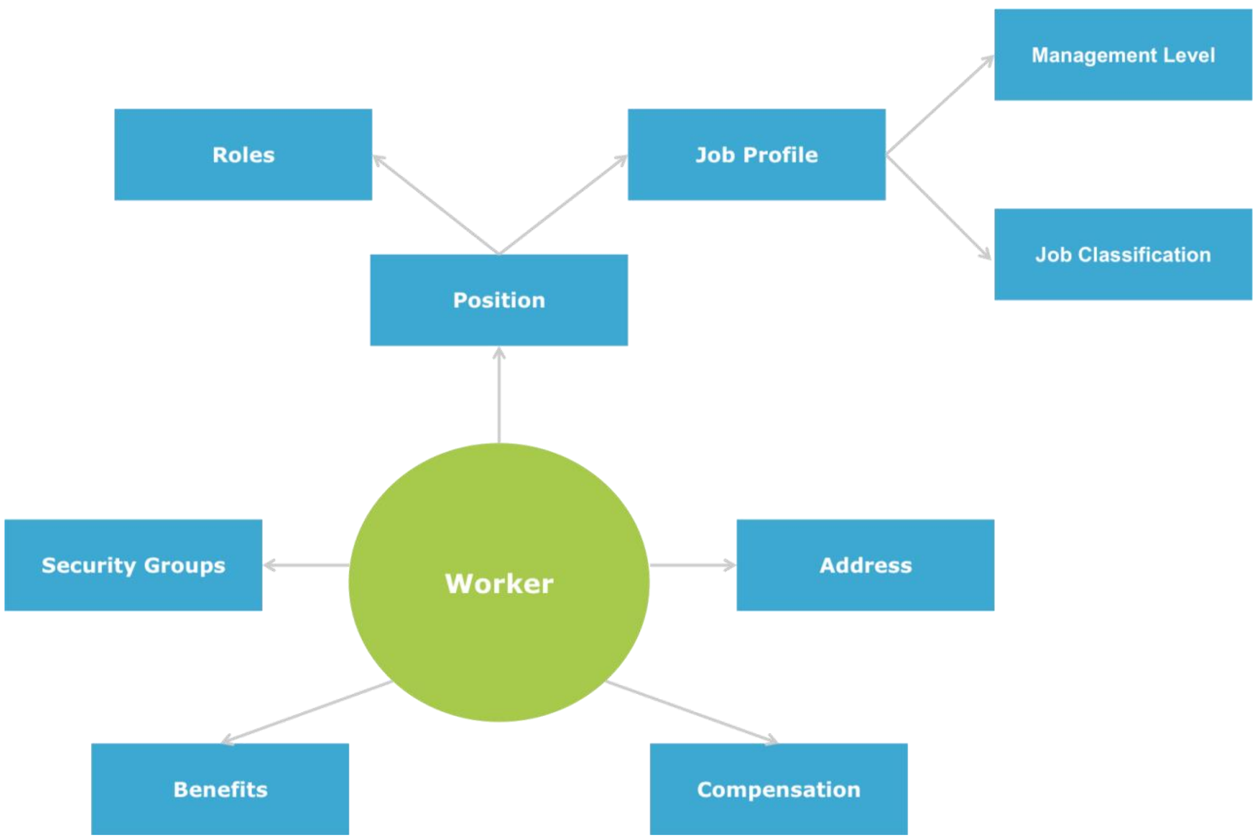
BUSINESS OBJECTS

Workday uses a very powerful object-action model that drives navigation and reporting. When you view a page in Workday, most of the items on the screen are objects displayed as links and have a Related Actions icon next to them. This feature makes reports and viewable pages actionable in Workday.

Workday stores data as business objects (e.g., organizations, workers, positions), which are similar to database tables or worksheets in Excel. Just as a database table or worksheet has columns and rows, a Workday business object has fields and instances. Workday automatically links related business objects together. For example, a worker is associated with a position; the position is associated with a job profile; and the job profile is associated with a management level, job classification, exempt status, etc.

The Power of Objects means that when you see something in Workday, you can perform an action on it.

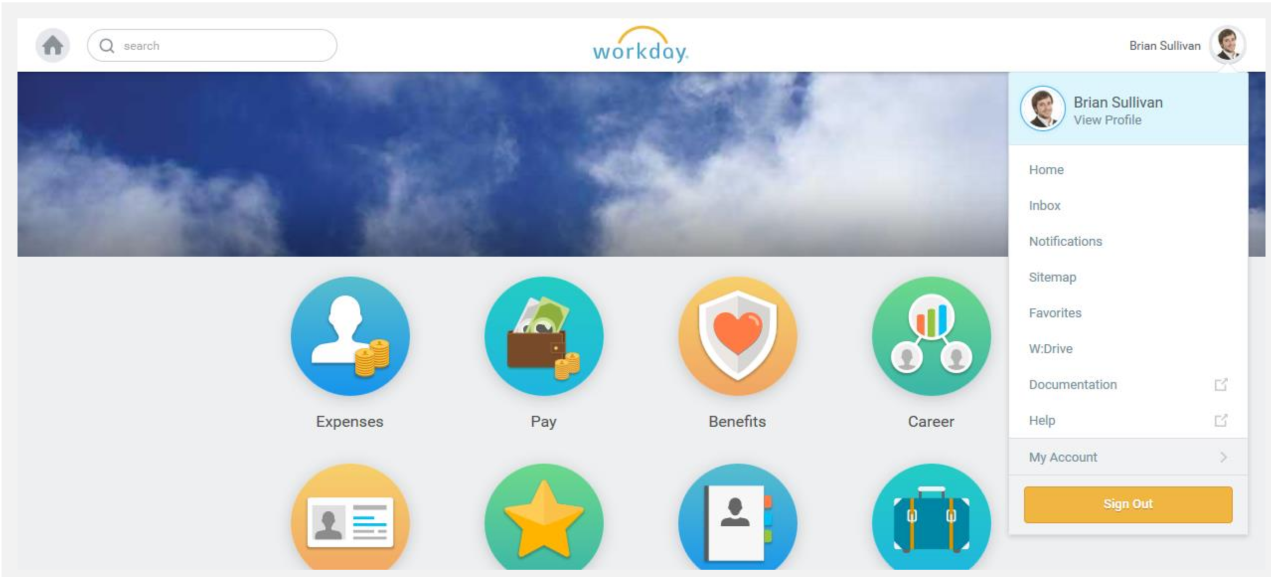
In the diagram below, the Worker is the primary object, linking to related objects or groupings of objects.



BASIC NAVIGATION

Workday is designed to give you multiple ways of doing the same task. To navigate the system, you need to be familiar with the following:

- Navigation tools
- Single and multi-select fields
- Standard screen icons



WORKLETS

A worklet is a report that can be displayed as an icon on a Workday landing page. They provide users quick access to frequently referenced data and tasks common to a specific functional area. The image above displays the Home landing page. Worklets can be identified as required or optional based on the user's security group(s). Required worklets cannot be removed from the page, while optional worklets can be added or removed by the user.

Security determines which worklets are available. For example, the Personal Information worklet is available to Employee-as-Self, in which every employee is a member, while the My Team worklet is only available to managers.

APPLICATION HEADER

The following chart describes the elements of the Application Header.

Element	Description
Home Icon	Displays the default landing page or Preferred Home Page, if set on the Change Preferences task.
Search	You can search for tasks, objects (such as workers, pre-hires, and organizations), and reports using the search bar. Type-ahead, predictive suggestions return common matching results based on your security configuration. Selecting a category on the left side of your search results page allows you to target your search to an area of interest, producing faster and more accurate results. You can set a preferred search category in your Preferences. That default category is used when you sign in to Workday. If you manually select a different category, it applies to just that search and returns to your default category for the remainder of the session. Search prefixes also allow you to narrow your results to a specific type of search result. If you use a search prefix, Workday searches all items of that type and returns all the results available to you. Examples of common search prefixes include “org:” for organizations and “bp:” for business processes. To find all search prefixes you have access to, type “?” in your search box. You may also choose to use categories to further refine your results when using a search prefix. If enabled and configured, you can search for synonyms for Workday terms that you would like to find when searching, as well as suppress types of results that you do not want to see in search results.
Workday Icon	Displays the default landing page or the Preferred Home Page, if set on the Change Preferences task.
Profile Photo	Displays your profile photo and provides access to menu options such as Worker profile, Home, Inbox, Notifications, Preferences, and more.

MENU OPTIONS

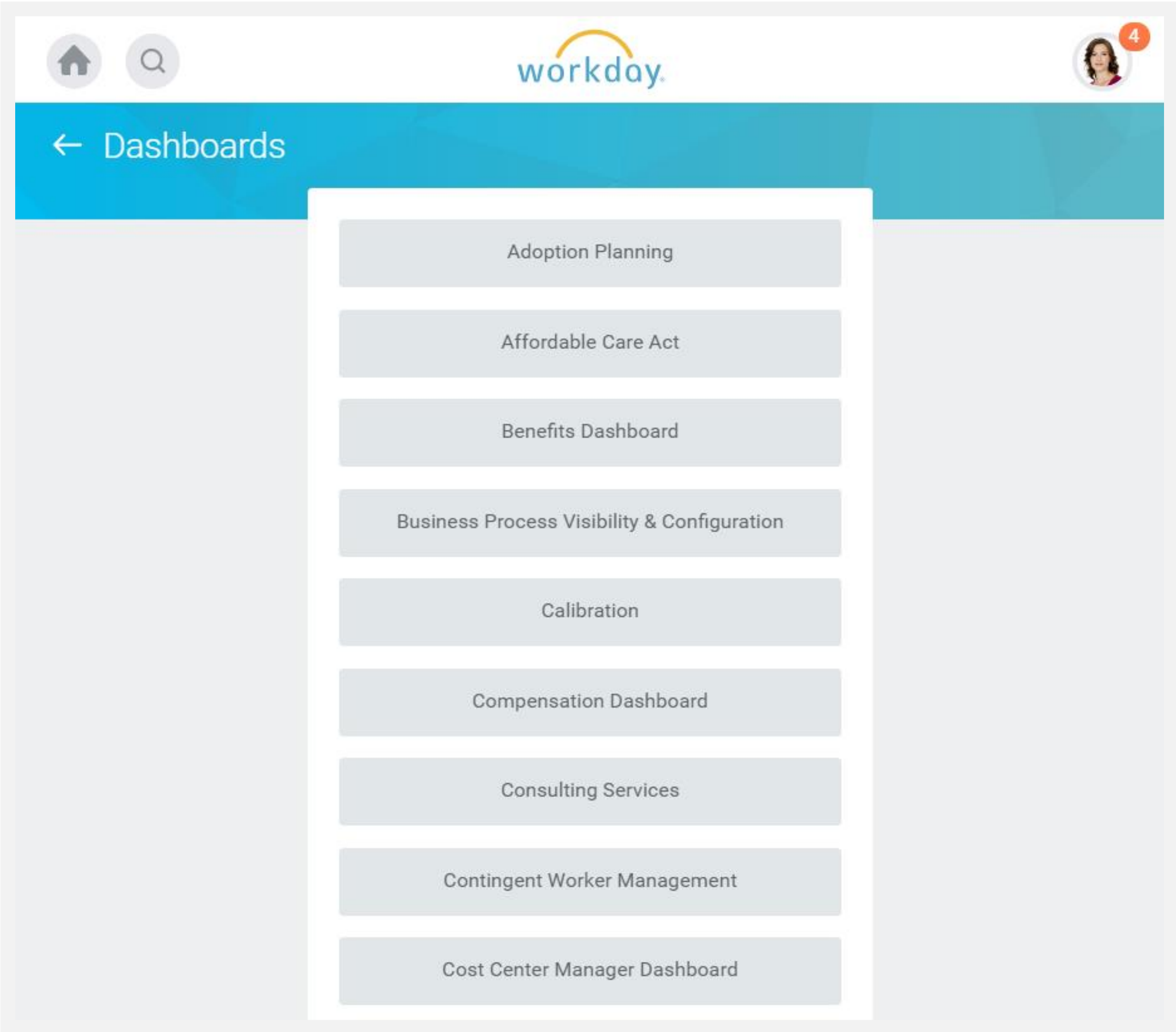
Element	Description
Home	The Home page uses one consolidated view to display worklets giving employees, contingent workers, and managers access to information and commonly used tasks for self-service.
Inbox	The content in the Inbox is divided across two tabs: Actions, which displays tasks, approvals, and to dos; and Archive, which displays historical actions and business processes within the last 30 days.

Notifications	Displays notifications regarding business processes and rules-driven alerts, such as birthdays and time off.
Sitemap	A categorized list of all reports and tasks displayed based on your security group.
Favorites	This page provides access to a configurable list of favorite business objects, reports, and tasks. Favorites can also be used when searching in prompts.
W: Drive	The Workday Drive is a virtual drive where you can store generated reports. Managers will find the same information through the Reports worklet on the Home or My Team landing pages. When a new report is available in your W: Drive, a notification will display. You can also tag reports sent to your W: Drive to make them easier to locate.
Documentation	Workday documentation can be used to obtain information on attributes of objects, the system, or procedures. This link will take users to the Documentation section in the Workday Community.
Help	Configured link to a web page. The setup for this link is located on the Tenant Setup – System page.
My Account	Contains a menu of personal configuration options that includes Change Password, Manage Password Challenge Questions, and Change Preferences.

ADDITIONAL NAVIGATION TOPICS

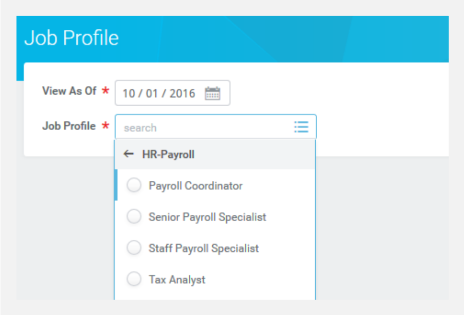
DASHBOARDS

Accessible through a worklet on your Home page, dashboards hold key management reports and actionable items in one location. Workday provides standard dashboards intended for managers in distinct functional areas and enables you to create custom dashboards. You can have an unlimited amount of types under Dashboard, but only six worklets per type. These same dashboards are also used with the Workday iPad application.



PROMPTS

Workday uses prompts to help users navigate in search fields. Prompts display all available content for that field, allowing you to drill into folders or levels to more easily find the value(s) you desire. As you navigate through prompts, a trail of folders displays as breadcrumbs at the top of the pane, allowing you to return to a previous level. If the prompt only contains one folder or available level to choose, it will open by default.



ACTIONABLE REPORTS

Workday uses a very powerful object-action model that drives Workday navigation and interactive reports. When you view a page in Workday, most of the items on the screen are links, with some having Related Actions icons next to them. These features are what make our reports and viewable pages actionable.

SINGLE-SELECT FIELDS

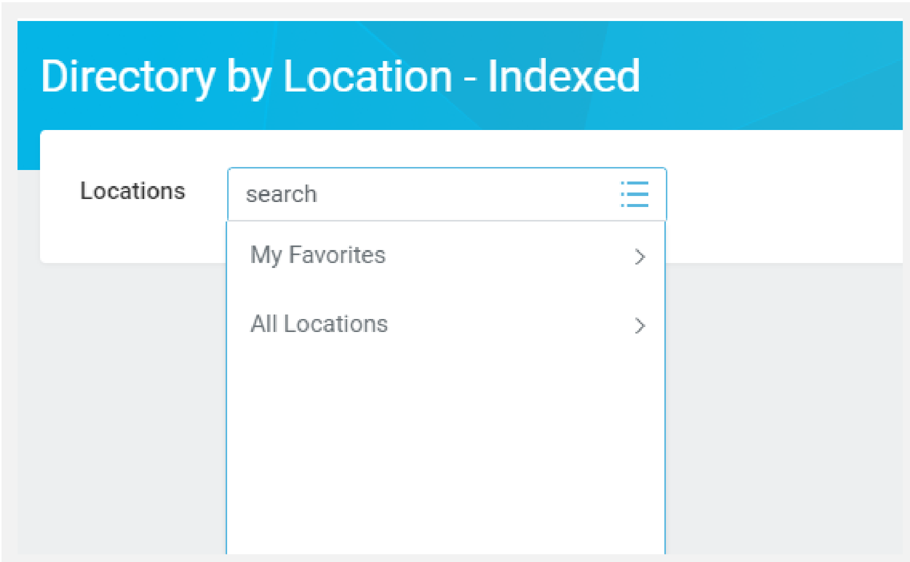
If a field displays a prompt list icon, you are required to use one of the prompt values. In single-select fields, only one value is allowed, and the prompt list will disappear once a value is chosen.

MULTI-SELECT FIELDS

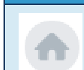
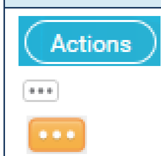
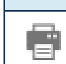
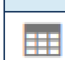
If a field permits more than one value, the prompt list will stay open until you close it in order to allow you to choose as many values as necessary. The field expands as you enter additional values, and you can click the X to remove entries.

FAVORITES

As mentioned previously, your favorite business objects, tasks, and reports can be found on the Favorites tab of the Main Menu. You can mark any item in Workday as a favorite by using the Favorite > Add Related Actions option from an item in the system. This allows for easy access to the items that you use most often in the system, and your prompt boxes will display a folder for easy access to your favorites.



STANDARD SCREEN ICONS

Icon	Description
	Takes you to your Home page
workday.	Brings you back to your default landing page
	Allows you to view your worker profile; access menu items including landing pages and your Inbox; manage your user preferences; or sign out of your Workday session.
	Displays the Related Actions menu for an object (available only if the user has permission to perform additional actions on that object).
	Used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns.
	Click to view this page as a PDF file that you can print. This can be restricted using the Export to PDF and Excel domain.
	Click to view this page as an Excel file. This can be restricted using the Export to PDF and Excel domain.
	Click to export to a Workbook.

	Used to indicate that the report can be viewed as a chart.
	Talent Pool Tag: Click to put a worker(s) into a selected talent pool.
	Task Actions: Appears in the upper right hand side of landing pages, such as Home, dashboards, or select worklets, and acts as a menu or settings option.
	Open the associated instance, replacing the current view page (only available on select view pages).
Alerts: 1	Soft warning message that alerts you about system limitations based on configuration. You may continue your process or configuration.
Errors: 1	Hard warning message that alerts you of a critical error. Must be corrected to move forward in a process or to enable your configuration to function.

PAGE ICONS

Icon	Description
*	Required Field indicator: A field with an asterisk indicates that you must enter a value for this field before saving or submitting the page.
	Prompt: Displays a list of available values sorted in folders (if applicable)
	Calendar: Opens a calendar to select your date
	Delete Row: Removes the current row from the grid.
	Add Row: Adds a row to the current grid.
OK	OK Button: Accepts your changes
Submit	Submit Button: Accepts your changes and moves you to the next step in the business process.
Done	Done Button: Closes the confirmation screen
Cancel	Cancel Button: Disregards all changes.
Save for Later	Save for Later Button: Saves the item in your Inbox until action is taken
More	More Button: There will be several choices from this button depending on the business process.

INBOX

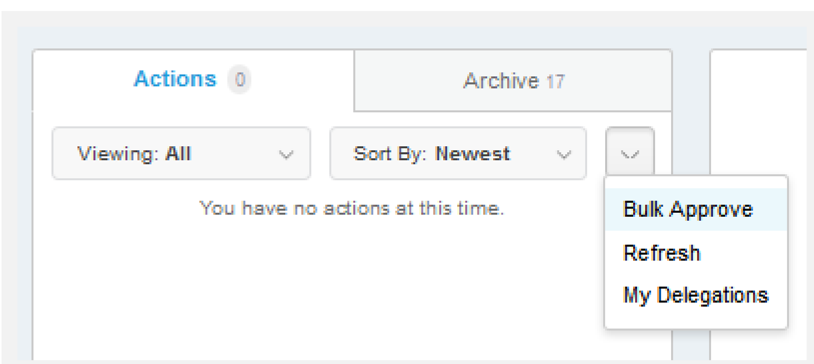
The Inbox is an activity stream that displays business process tasks, approvals, and to dos. When the Inbox is selected, it opens in full-screen mode, and the content is divided across two tabs called Actions and Archive. The Actions tab displays tasks, approvals, and to dos, while the Archive tab displays historical actions and business processes within the last 30 days. You can also choose to add the Inbox as a worklet on landing pages.

Each tab of the Inbox displays item totals specific to the tab you are viewing. The Actions tab also displays filter options based on items in your Inbox, and you can choose to create your own filters using configurable condition rules. The standard filter options are:

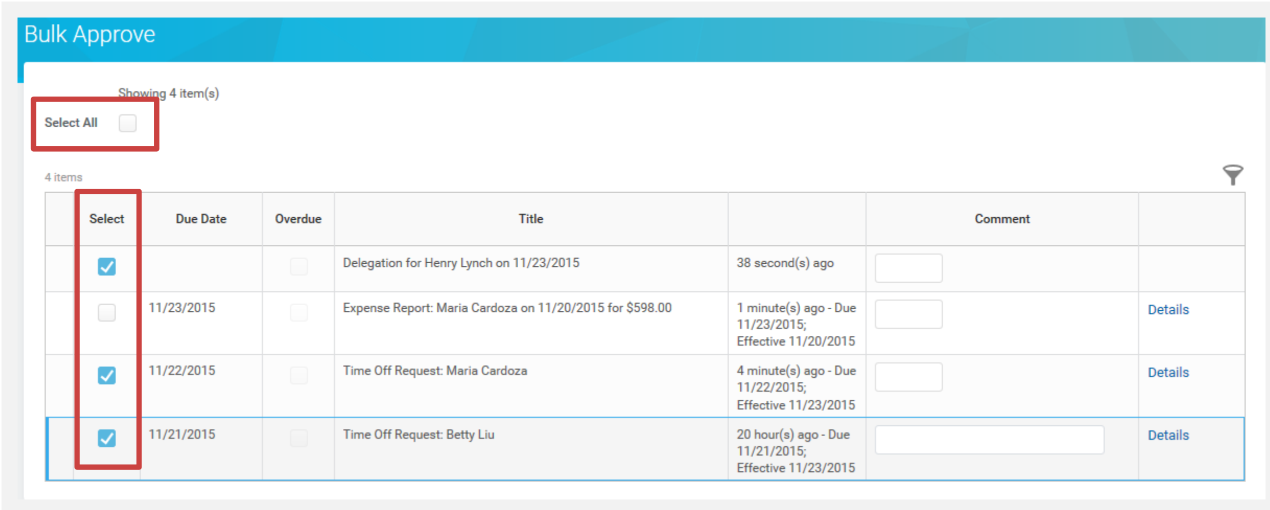
Filter	Description
All	All current business process tasks, approvals, and to-dos awaiting your attention.
Favorites	Inbox items you starred as favorites.
Overdue	Business process items past their due date.

BULK APPROVALS

In the Actions tab of your Inbox, the pull-down menu on the top right gives managers the option to bulk approve items in their Inbox. This selection is only available for Approval or Review steps pending action.

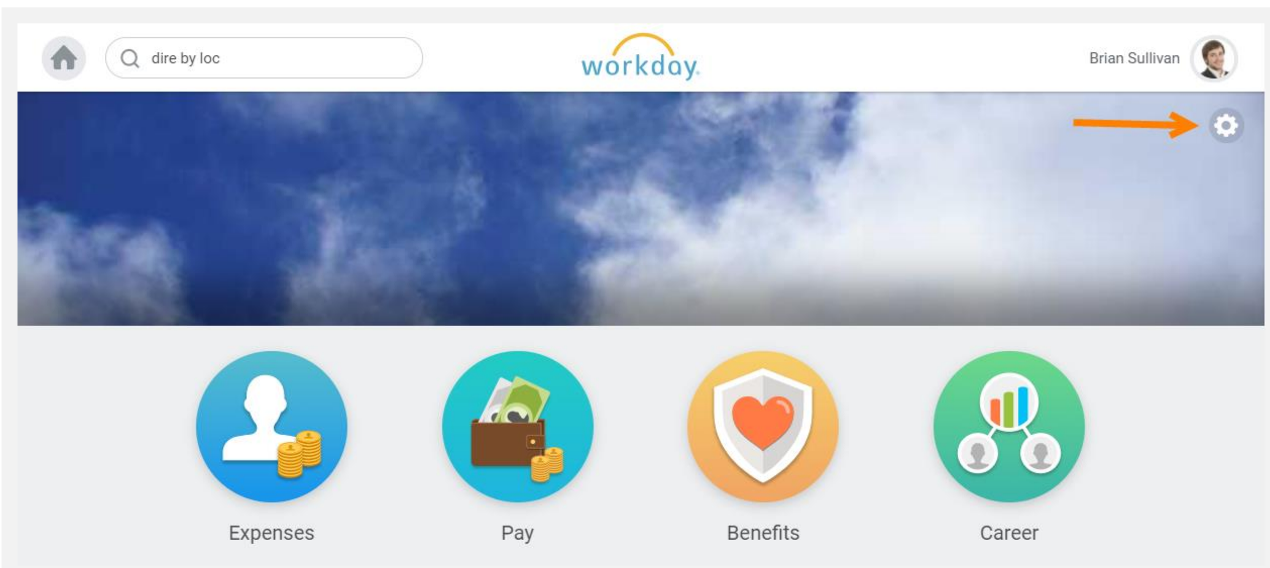


When you select this option, a Bulk Approve screen opens with only approval items from your Inbox. You can check the Select All box, or you can select individual items to approve in bulk.



CONFIGURATION OPTIONS

At the top-right corner landing pages, such as Home, dashboards, or select worklets, you will see the Task Actions (looks like a gear) icon. This icon allows you to personalize these pages by adding or removing optional worklets. You can also specify the order in which you would like these worklets to appear.



USING SEARCH IN WORKDAY

The search box is a commonly used way of accessing reports, tasks, and data. Using certain techniques will minimize excess data return. Typing “position,” for instance, would give you the option of “editing,” “creating,” “closing,” and “seeing” reports with the word “position” in them.

Workday has predictive search, meaning that you only type a few letters of a word, and the system will help complete the word for you. Typing “comp” would give you everything having the word compensation in it, but it would also give you tasks, reports, and data relating to “company.” Your best results will be obtained by the minimum entry necessary to provide you with scalable results – where you can identify the task or report you are looking for quickly.

Furthermore, if you wanted to do a Maintain Pay Results – Class Report Field Mapping, which is used to map payroll pay components to class report fields for use in creating reports, you could type the whole series of words, but if you made an error, you would get the wrong result or no result at all. Instead, you should use a partial search by typing keywords such as “Maintain Class.” You will get eight results, one of which is the one you need. Similarly, typing the word “pay” returns more data than you need; so narrowing it to “run pay” may be sufficient. Experimenting with strings and searches will help you understand these intricacies of search.

As you become more accustomed with what to search for, prefacing keywords that are often used in search include:

- “Edit” when you need to modify existing data in a non-grid/table format. You would, for instance, edit a position or a compensation package.
- “Maintain” is used to add new data or modify existing data in a grid/table format. You will use “maintain” for Payslip configuration and Paycheck delivery methods, for example.
- “View” is used to view data usually in the form of an actionable report.
- “Delete” works as you would expect, just remember no data is truly deleted; there is always a record of the data with its deletion in the audit trail. Deleting applicants, or pre-hires as they are called in Workday, is one task that is used in HCM.
- “Run” enables you to run tasks such as payroll calculation, accounting, and completion.
- “Set Up’ is used for creating a Compensation Step Adjustment, Merit Plans, or Bonus Plans. These processes are then ‘launched.’

Keep in mind that all of these words, when used in search, are also searched for as words themselves. Therefore, when you search for the word ‘run,’ you not only get ‘run pay calculation,’ But you get ‘Pay Run Group’ because of the word ‘run’ in that word string.

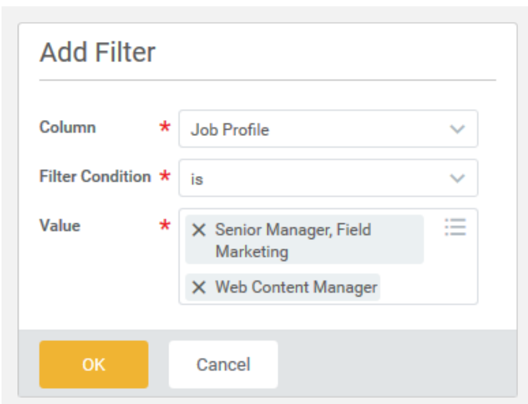
Indicating a search category to the left of your search results page allows you to target your search to an area of interest, thereby producing faster and more accurate results. You can set a default search category in your preferences. Unless manually changed, that default category applies to all searches when you sign in. If you select a different category, it only applies to the current search and returns to your default for the remainder of the session.

You can also use prefixes to narrow your search results. To do this, enter a search prefix in the search box followed by a colon and then the search text. For example, if you are searching for the Benefits Department, you can search for "org: benefits," and Workday will return all organizations with "benefits" in their name.

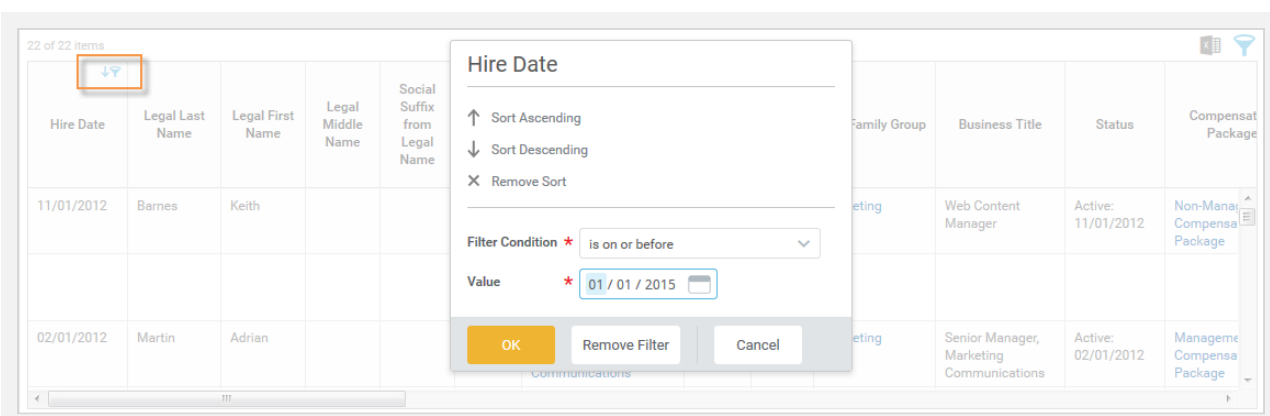
To see a list of supported search prefixes, enter a question mark (?) into the search box, and submit the search.

FILTERS AND SORTING FOR REPORTS

After you search for a report in Workday, you may want to further filter or sort the results. There are two ways to do this, starting with the Filter icon in the upper-right side of the report. Click this icon to create one or more filters, based on the data in the report results.



The second filter option is to click the header of the column you want to filter, and select whether you want ascending or descending order, as well as any filters. The filter is removed once you navigate away from the report, to ensure the next time it is run, all results are returned. The blue arrow on the column indicates if a selected sort order is ascending or descending, and the filter icon is displayed if a filter condition is configured.



ACTIVITY 1.1 – SEARCH AND NAVIGATION

Business Case: Understanding how to navigate in Workday is important, and the search box is one of the most useful features in Workday.

TASK #1: SEARCH

1. Sign in as Brian Sullivan (*bsullivan*).
2. Enter *market* in the Search box and click the **search** icon or press your **Enter/Return** key. How many search results do you receive?
3. Click on Brian's **Worker Profile** in the upper-right corner to access the menu and select **My Account** > **Change Preferences**.
4. For the Preferred Search Category, select **All of Workday** and click **OK** and **Done**. You will need to sign out, and sign back in to see the change.
5. Repeat the search for *market*. How many search results do you receive?
6. Enter *Headcount by location* in the Search box and view the predictive search results. Then enter *head by loc* in the Search box and note your results. Notice that searching on partial and abbreviated words will still return the same results.
7. Enter *Donna Owens* in the Search box and click the **search** icon.
8. Change the Category on the left side of your results to **People**. What are the search results you receive?

TASK #2: ADDING FAVORITES

1. In the search bar, enter *Dallas*.
2. Select the **Dallas - Location** object from the predictive search results.
3. Click the **Related Actions** icon to add this as a Favorite (**Favorite** > **Add**).
4. Click **OK** to confirm and save.
5. From the **worker profile** menu, select **Favorites**.
6. Click the **Manage Favorites** button.

7. Under Favorite Tasks/Reports category, add **Hire Employee** and **Create Position**.

8. Under Favorite Business Objects, use the prefix **loc:** to search for the following locations: **San Francisco**, **New York**, and **Chicago.**

9. Click **OK** and **Done**.

TASK #3: NAVIGATION

Perform the following navigation tasks. To make the exercise more challenging, you will not be provided with additional steps.

1. Add the Open Positions worklet to the Home page.

2. Run the **New Hire Staffing and Compensation** report for the Marketing supervisory organization and its subordinates. No other criteria are needed. What is the hire date of the most recent hire?

3. Find the worker Betty Liu. What is her location?

Activity Complete

CHAPTER 1 KNOWLEDGE CHECK

1. True or False: If you are assigned a task to complete, you will find it in your Inbox.
2. True or False: To find a task, report, or object, you can search using partial words, but it will not find a match if a word is misspelled.
3. What is the name and location of the icon you should select when you want to act on, or make changes to an object?

CHAPTER 2 – ORGANIZATIONS, JOB PROFILES, AND POSITIONS

OVERVIEW

In Workday, there are many organization types, but the primary organizational structure for HCM is the supervisory organization. An employee is hired into a supervisory organization, and every supervisory organization must be associated with a staffing model. There are two staffing models that are used to determine how jobs are defined: Position Management and Job Management.

If the Position Management staffing model is selected, you create an unfilled position prior to initiating a hire. In comparison, when using the Job Management staffing model, a job is created during the hire process. Regardless of the staffing model, positions and jobs use job profiles as their foundation.

There are several required data fields that must be populated during the hire process, including a job profile which enables you to specify general characteristics of the position, as well as identify special skills, training, or other qualifications.

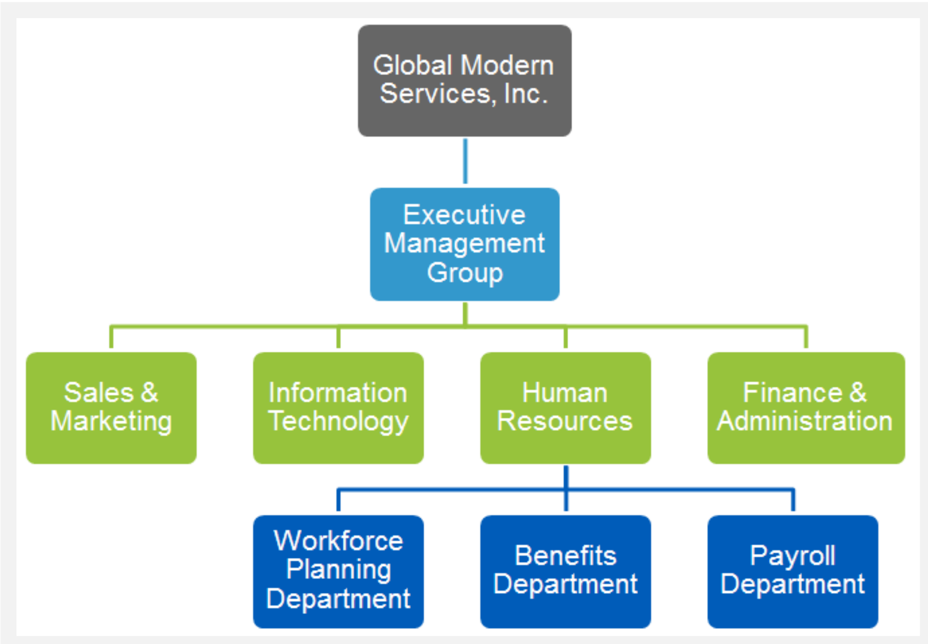
OBJECTIVES

By the end of this chapter, you will:

- Explain the purpose of supervisory organization hierarchies in Workday.
- View the various types of organizations assigned to workers.
- View assignable roles to understand the connection between supervisory organizations, role based security groups, and business processes.
- View existing job profiles.
- Set hiring restrictions for a job management.
- Create a position.

SUPERVISORY ORGANIZATIONS

Workers are grouped and tracked within supervisory organizations. Other organizational structures can be put into the system to represent multiple organization views, but the primary HCM structure is the supervisory organization, not the cost center or department costing structure.



Supervisory organizations group workers into a management hierarchy. Workers are hired into jobs and positions, which are created within supervisory organizations.

There are three key characteristics unique to a supervisory organization:

1. Positions are only created within a supervisory organization.
2. Employees must be hired and contingent workers must be contracted into a supervisory organization.
3. Assignable Roles have support responsibilities within a supervisory organization.

As the primary HCM organizational structure, supervisory organizations will be the focus of this section. If you view a supervisory organization you will see multiple tabs, starting with the members tab. The table below has a description of each tab.

Organizational Types	Use
Members	List of all employees and contingent workers currently hired or contracted into the supervisory organization

Details	Displays the type of organization, the subtype, and where the organization exists within the hierarchy as well as what the superior organization is and if there is a subordinate.
Roles	Lists all the assignable roles, such as HR Partner, and specifies who is filling that role. If Logan is a manager for a supervisory organization, and a member of the organization has a job change that needs to be approved by the manager, it is the assignable roles on the supervisory organization that tells the system who to route the approval task to.
Security Groups	Provides additional detail about the assignable roles, the security groups they are linked to, and access rights of each.
Organization Assignments	Lists other organization types that are important to your organization, and if an employee should automatically become a member of hired or transferred into the supervisory organization.
Additional Data	Customer fields may be created to track information that is not tracked by Workday. If you do not see an Additional Data tab on your supervisory organization, it is because you do not need to use this option.

Note: A supervisory organization can be configured to allow more than one manager.

ORGANIZATION TYPES

Workday defines and delivers the most common types of organizations. Within each type, you can define organizations to reflect your company's requirements. You can create unlimited numbers of each type of organization and then use them for different types of reporting. Some types of organizations can be combined in a hierarchy to represent a structure that can be used for reporting or other business routing decisions. The following table lists some of the types of organizations provided:

Organization Types	Hierarchical	Description
Supervisory	Yes	A functional organization that has an assigned manager and support roles. When placing a worker in a supervisory organization, you are assigning a manager to the worker.

Company	No	Represents a legal entity. Required for Workday Payroll.
Cost Center	No	Used for financial reporting, such as a financial department, to track revenue and expenses.
Region	No	Reflects the area of responsibility for a worker instead of work location.
Matrix	No	Establishes an indirect manager relationship.
Pay Group	No	Groups workers with similar payroll processing parameters. Required for Workday Payroll.
Custom	Configurable	Allows you to define grouping attributes for reporting purposes. It is also used to define company, cost center, and regional hierarchies.
Location Hierarchy*	Yes	Used to assign the locations and organizational roles that support them. Allows for multiple relationships of locations for reporting purposes. *Locations are not organizations.

MEMBERSHIP

Workers can reside in a number of organization types. They must be hired into a supervisory organization, but can also be part of a company, cost center, region, and custom organizations, just to name a few.

Betty Liu is a member of all of the following organizations:

Member of These Organizations 10 items

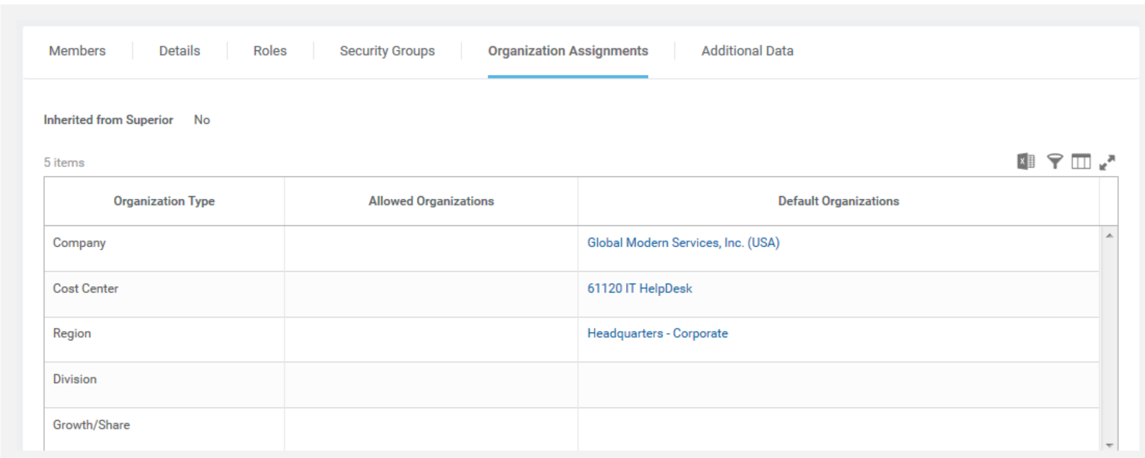
Organization	Organization Type	Organization Subtype
Global Modern Services, Inc. (USA)	Company	Company
GMS North America	Company Hierarchy	Company
41200 Payroll	Cost Center	Cost Center
Payroll	Cost Center Hierarchy	Function
USA - Western US	Location Hierarchy	Geographic Division
HRIS	Matrix	Matrix
USA Semi-monthly Professional Corporate	Pay Group	Pay Group
Global Modern Services Regions	Regional Hierarchy	Region
Headquarters - Corporate	Region	Region

ORGANIZATION ASSIGNMENTS ON SUPERVISORY ORGANIZATION

Supervisory organizations have an Organization Assignments tab. Use this to identify other organization types you can assign as defaults during staffing changes. This allows employees who are hired, or moved into a supervisory organization, to automatically become members of other types of organizations, such as companies and cost centers.

These default organization assignments can be set up for each supervisory organization or for an individual position, and you can edit the assignments for individual employees.

There is an Allowed Organizations field where you can enter one or more organizations. This controls which organizations will be available in the prompt list when assigning organizations to a position or employee. The Default Organizations field is the organization that the position or employee is automatically associated with when moved into the supervisory organization.

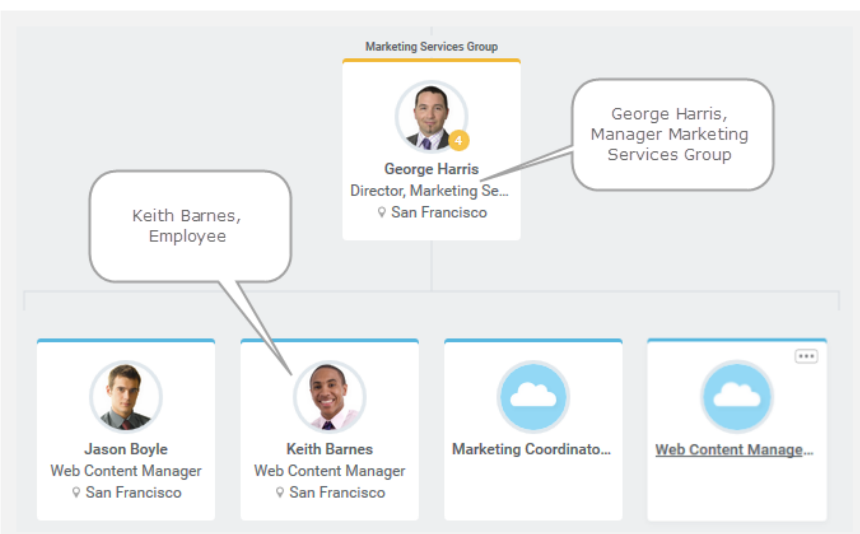

Members | Details | Roles | Security Groups | Organization Assignments | Additional Data

Inherited from Superior No

5 items

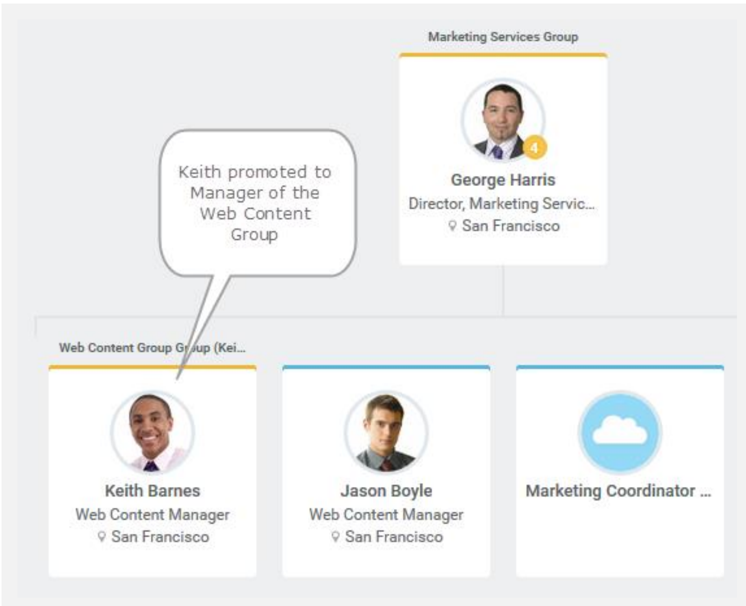
Organization Type	Allowed Organizations	Default Organizations
Company		Global Modern Services, Inc. (USA)
Cost Center		61120 IT HelpDesk
Region		Headquarters - Corporate
Division		
Growth/Share		

If an employee's organization assignment needs to be changed for individual employees, you can use the Change Organization Assignments task to change the organization assignments for one or more workers in a supervisory organization.



MANAGING SUPERVISORY ORGANIZATIONS

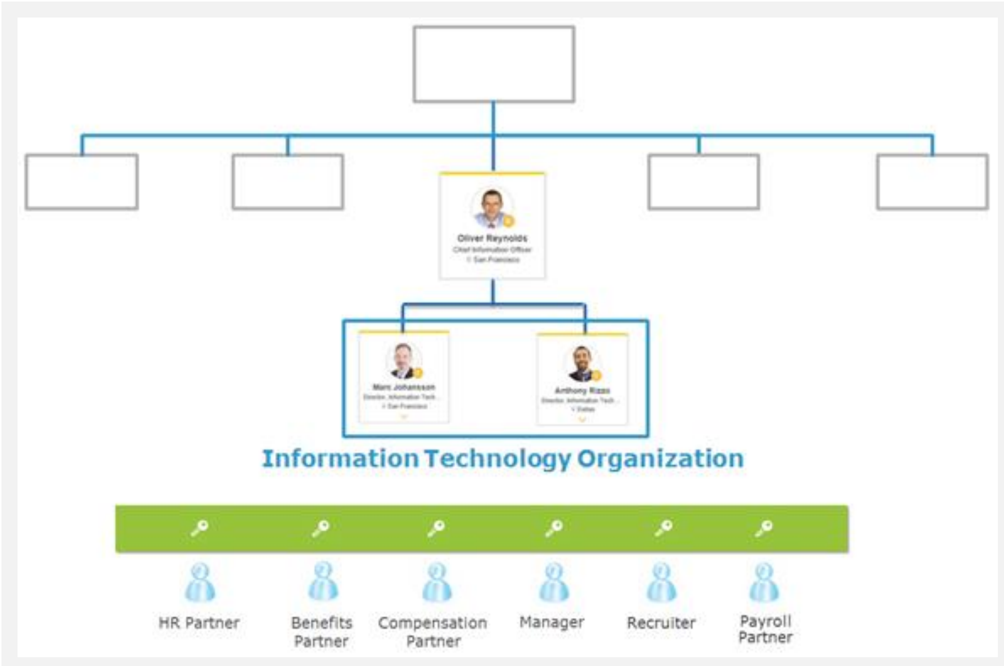
Managing changes to the supervisory organization hierarchy is part of any business. A common scenario occurs when an employee is promoted to a manager position with newly identified direct reports. Managers are members of the organization that is superior to the organization of their direct reports, so a new supervisory organization may be required. Workday easily facilitates any structural changes you may require.



Note: These reorganization activities can be initiated by the Supervisory Administrator/Owner.

ASSIGNABLE ROLES SUPPORT SUPERVISORY ORGANIZATIONS

Assignable roles drive security tasks, determine access to employee data, and define involvement in business processes. Assignable roles reside in each type of organization (e.g., Supervisory, Location Hierarchy). Roles are used in business processes to assign tasks; they can be inherited from a superior organization, specifically assigned to an organization, or default in. These role assignments and the security groups to which they are linked are critical for business process routing and notifications.



ASSIGNABLE ROLES AND ROLE-BASED SECURITY GROUPS

- Roles are equal to responsibility in an organization.
- Workday defaults assignable roles from the superior organization, if not filled (inherited).
- An assignable role is linked to a role-based security group of the same name.
- Role-based groups can be assigned to steps in a business process. This allows the same business process steps to be used throughout your organization and assigned to the different individuals supporting the organizations.
- Roles are found in the Roles selection on a supervisory organization’s navigation ribbon.
- Examples of delivered role-based security groups include:

HR Partner	Manager	HR Analyst
Payroll Partner	Recruiter	Compensation Partner
Security Partner	Facilities	Benefits Partner

ACTIVITY 2.1 – VIEW ASSIGNABLE ROLES

Business Case: In this activity, you will make the connection between supervisory organizations, role-based security groups, and business processes.

TASK #1: REVIEWING ROLE-BASED SECURITY ASSIGNMENTS

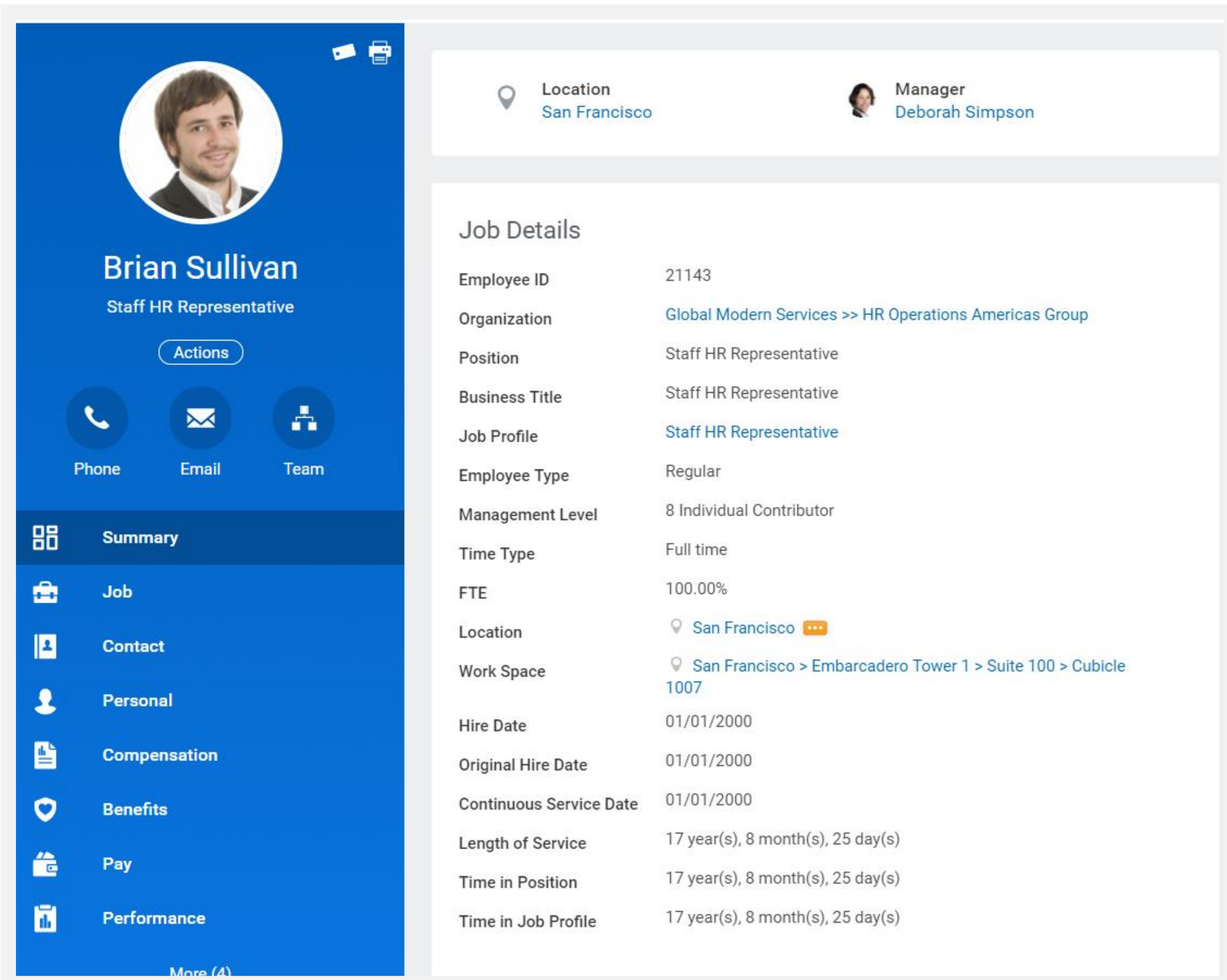
1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for *org: Marketing Services Group*.
3. Select the supervisory organization object, and then click the **Roles** tab.
    A. Who is the Manager for this supervisory organization?
    B. Who is the HR Partner for this supervisory organization?
4. Next, search for the *Payroll Department* supervisory organization. Who is the HR Partner supporting the members of this organization?

Activity Complete

VIEWING PERSONAL DATA

Your role and security group will control how much personal information you will be able to see about others and if there will be any actions you can perform on an object. If you sign in as Jeff Gordon, a worker with no administrative or assignable roles, or as Jack Taylor, who has the assignable role of Manager, the information you can see changes. Workers in the system have been assigned membership in multiple security groups. These are system-granted by virtue of being hired and having a Workday account set up. When the Hire business process is complete, an employee is added to the All Employees security group. When a Workday Account is created, the employee is added to the All Users and Employee-as-Self security groups so that self-service can be enabled.

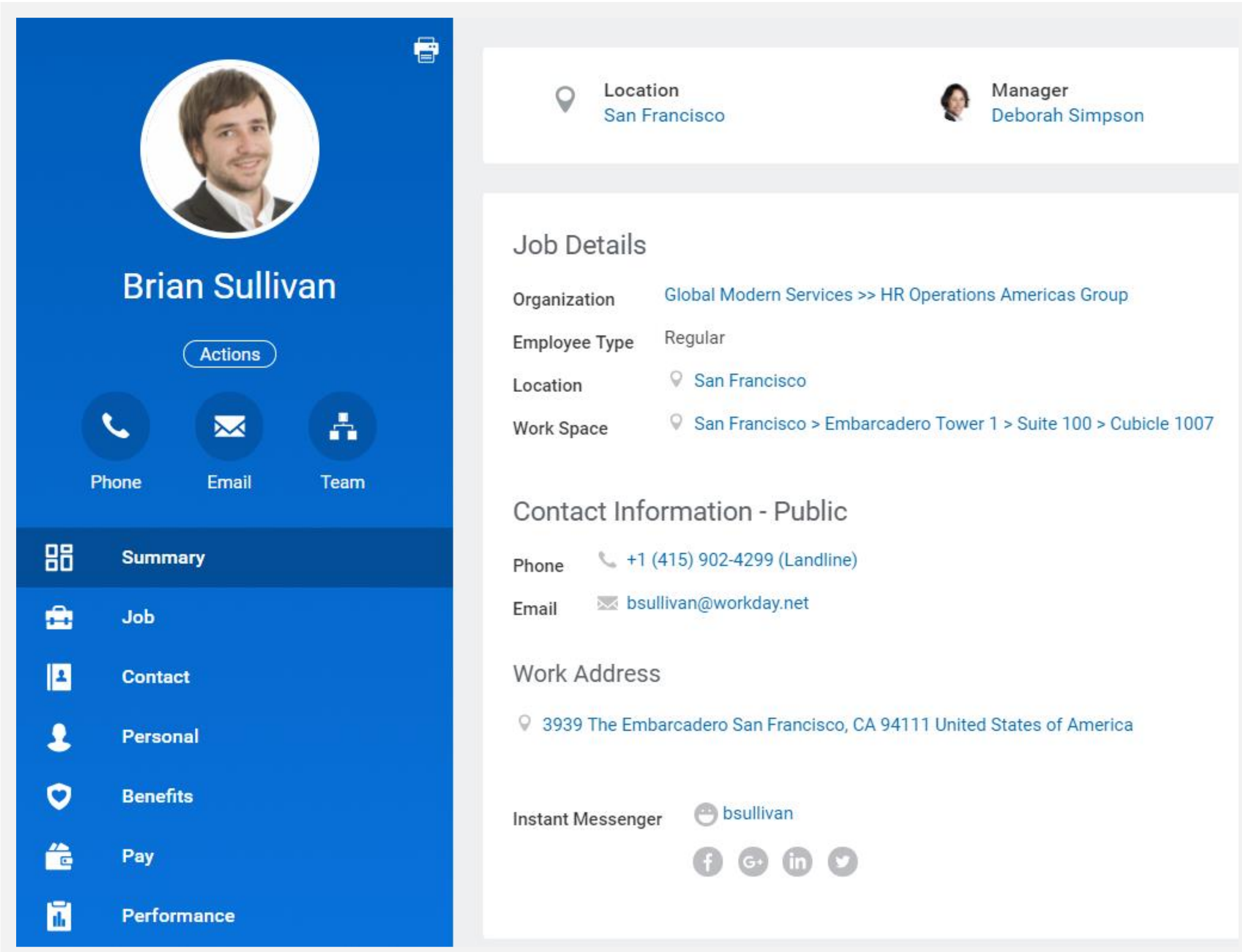
Employee's view of their own data:



The employee's view of their own data is usually the most complete view. With the exception of certain combinations of security groups, such as super user, Logan McNeil, there is rarely a view of an employee as complete as the employee or worker's own view of his or her personal data.

Benefits, Pay History, and Personal Data are available for the employee to view, while the manager cannot see this information for their direct reports. A manager cannot view an employee's year of birth, although they can see the day and month. Information such as home contact information or social security number, for instance, is also secured.

Employee's view of another employee's data:



An employee's view of another employee's data is very minimal. Workday allows all employees to view all other employees' basic data, such as their job, management chain, work contact information and the organizations they are a part of, including department, cost center, etc.

ACTIVITY 2.2 – VIEW DATA AND SECURITY (OPTIONAL ACTIVITY)

Business Case: You will log in as Brian Sullivan, an HR Partner, to see an example of how access is different when viewing the data of an employee you support, compared to employees you do not support.

TASK #1: VIEW SECURITY

1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for and select **Keith Barnes** and verify that you can view and edit his emergency contacts. You can find Emergency Contacts in the Contact section of Keith's worker record.
3. Search for and select the worker record for **Jeff Gordon** and verify that you cannot view his emergency contact information.

   Note: You do not support Jeff's supervisory organization as an HR Partner, and therefore, cannot view this data.

Activity Complete

STAFFING MODELS

Both of these staffing models provide a different level of control over staffing and support different staffing goals. Your organization may use one or both of these staffing models. It is important for you to know which staffing model you are using in your Workday system.

POSITION MANAGEMENT

- A single position is created.
- Hiring restrictions are set on individual positions.
- To hire, promote, demote, contract, or transfer into a position, there must be an approved and available position as of the worker's start date.
- Positions can be moved from one supervisory organization to another as part of a job change.
- A position can be closed if it is no longer needed.

JOB MANAGEMENT

- Hiring restrictions are established at the organization level.
- No quantity is defined for the number of jobs available for hire within an organization.
- A job no longer exists after a worker is transferred, demoted, promoted, or terminated, unless moved with the employee.

HIRING RESTRICTIONS

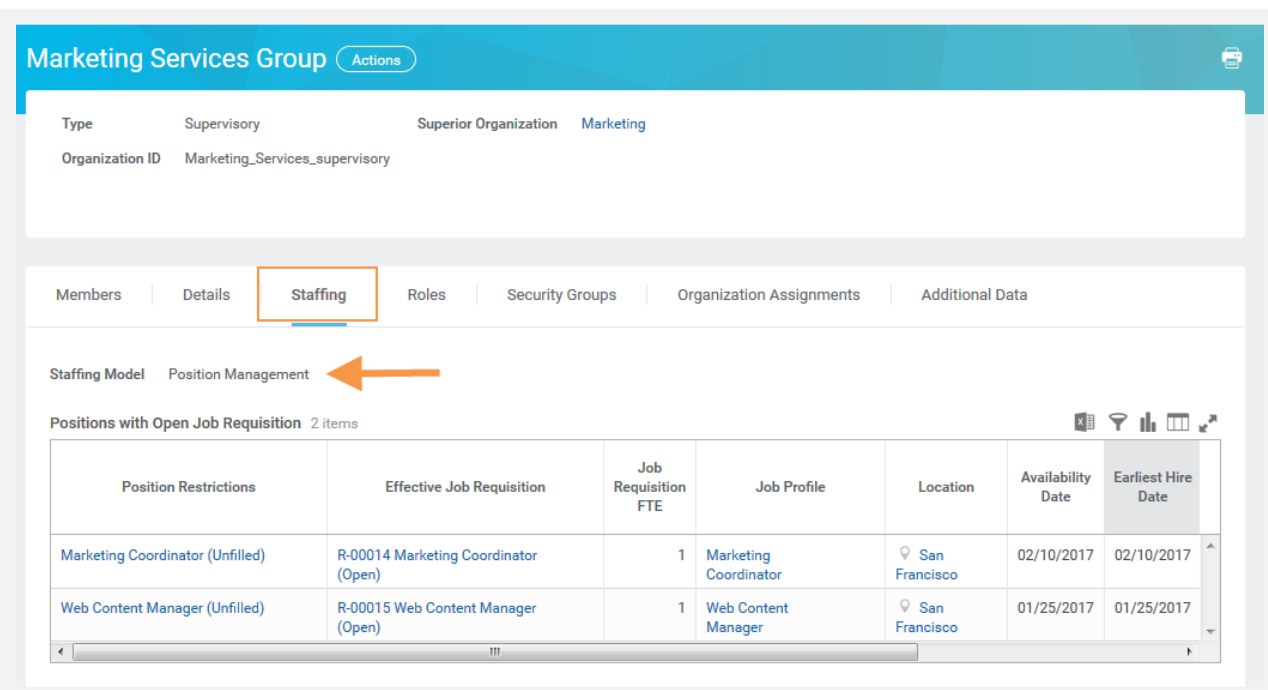
A position consolidates key job information, such as job family, job profile, worker type, and location, as well as whether the worker is full-time or part-time. You may also define required qualifications, experience, and education levels for positions. Hiring restrictions allow you to limit or restrict who is hired into your position or job management organization.

The following is a list of Hiring Restrictions you can select:

Fields	Description
Job Family	Select a job family as a restriction so all job profiles in that family are available to select from when hiring.
Job Profile	Limits what job profiles you can select.
Location	Limits what location you can select.
Worker Type	Select from employee or contingent worker. (If you select employee, the Contract Contingent Worker task will not be available.)
Worker Sub-Type	There is a list of configured subtypes for both employees and contingent workers. These values can be tired to eligibility in areas such as compensation and benefits.
Time Type	Limits what time type you can select; either full or part-time.

Optionally, your organization can relax your hiring restrictions by selecting an option to Allow Override of Restrictions on Staffing Events. If used, any pre-determined hiring restrictions will default in the corresponding fields during staffing events, but you can select a value outside of the specified restrictions.

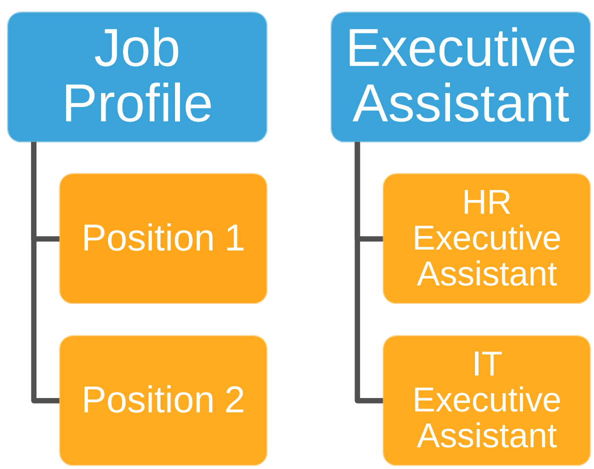
You will find the selected staffing model information under Staffing on the navigation ribbon of the supervisory organization.



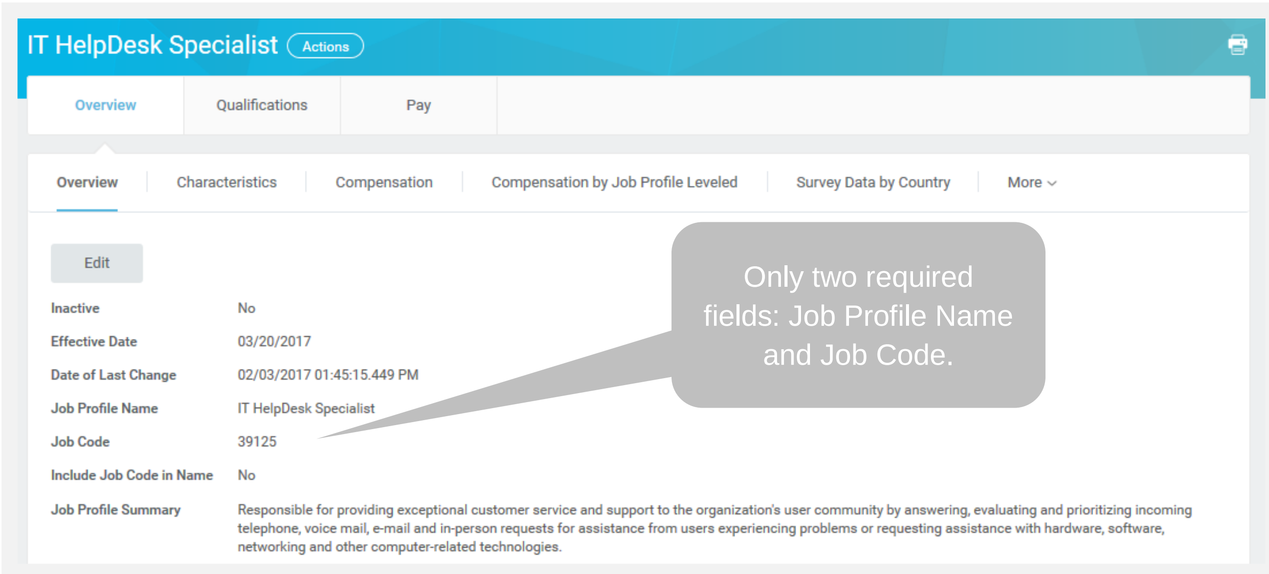
Although all hiring restrictions are enforced during the hire and contract contingent worker events, the job profile restriction is the only hiring restriction enforced during job changes, such as transfers. The other restrictions are not enforced during these events, and no job restrictions are enforced during the Edit Position event.

JOB PROFILES

A job profile can be used to create multiple positions or jobs within organizations. Workday allows for the categorization of job profiles using job families. Job families in turn may be grouped and organized using job family groups.



Of all the available fields in a job profile, only two are required: Job Profile Name and Job Code. All other fields track information that your company needs to maintain for reporting purposes. Values, such as Management Level and Job Classification, are defined by the customer and loaded into Workday as part of deployment.



A job profile definition consists of the following fields:

- Job Profile Name (required)
- Job Code (required)
- Include Job Code in Name (checkbox)
- Job Title Default
- Restrict to Country
- Management Level
- Job Level
- Job Family: categorization
- Job Category (direct or indirect labor)
- Company Insider Type
- Referral Payment Plan
- Job Classification, e.g., EEO Professional
- Job Profile Summary
- Job Description and Additional Job Description
- Job Exempt or Non-exempt
- Work Shift Required
- Pay Rate Type
- Compensation Grade and Rules
- Union Membership
- Metrics (Difficult to fill or critical job)
- Qualifications: Knowledge, Skills, Experience, Certifications, etc.

If the data listed above is not populated on a job profile, you may need to enter it manually.

JOB PROFILES AND LOCALIZATIONS

Some of the fields listed above provide the ability to enter country-specific information. When you staff a job or position using a job profile with country-specific values, Workday determines the default country to apply to the employee based on the primary business address and country of the location entered during the staffing change.

The fields that allow localization are:

- Job Classification
- Workers Compensation Code

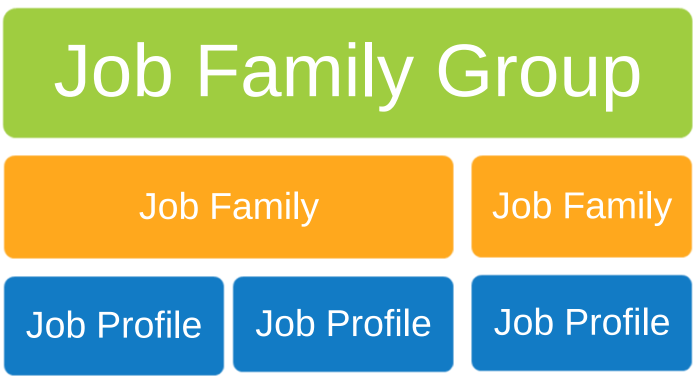
- Pay Rate Type
- Certifications
- Job Exempt
- Restrict to Country

The Restrict to Country field allows you to restrict job profiles by country, making it easier for managers to select the appropriate job profile in the Change Job business process. You can limit a job profile to one or more countries, or leave this field blank to make a job profile valid for all countries.

JOB FAMILIES AND JOB FAMILY GROUPS

The use of job families and job family groups is optional, but they can help to organize and group your job profiles and allow you to use these groupings as criteria in condition rules or compensation eligibility rules.

Another use for a job family and job family group is as a filter for locating a specific job profile in a prompt list, as well as when writing reports related to your job profiles.

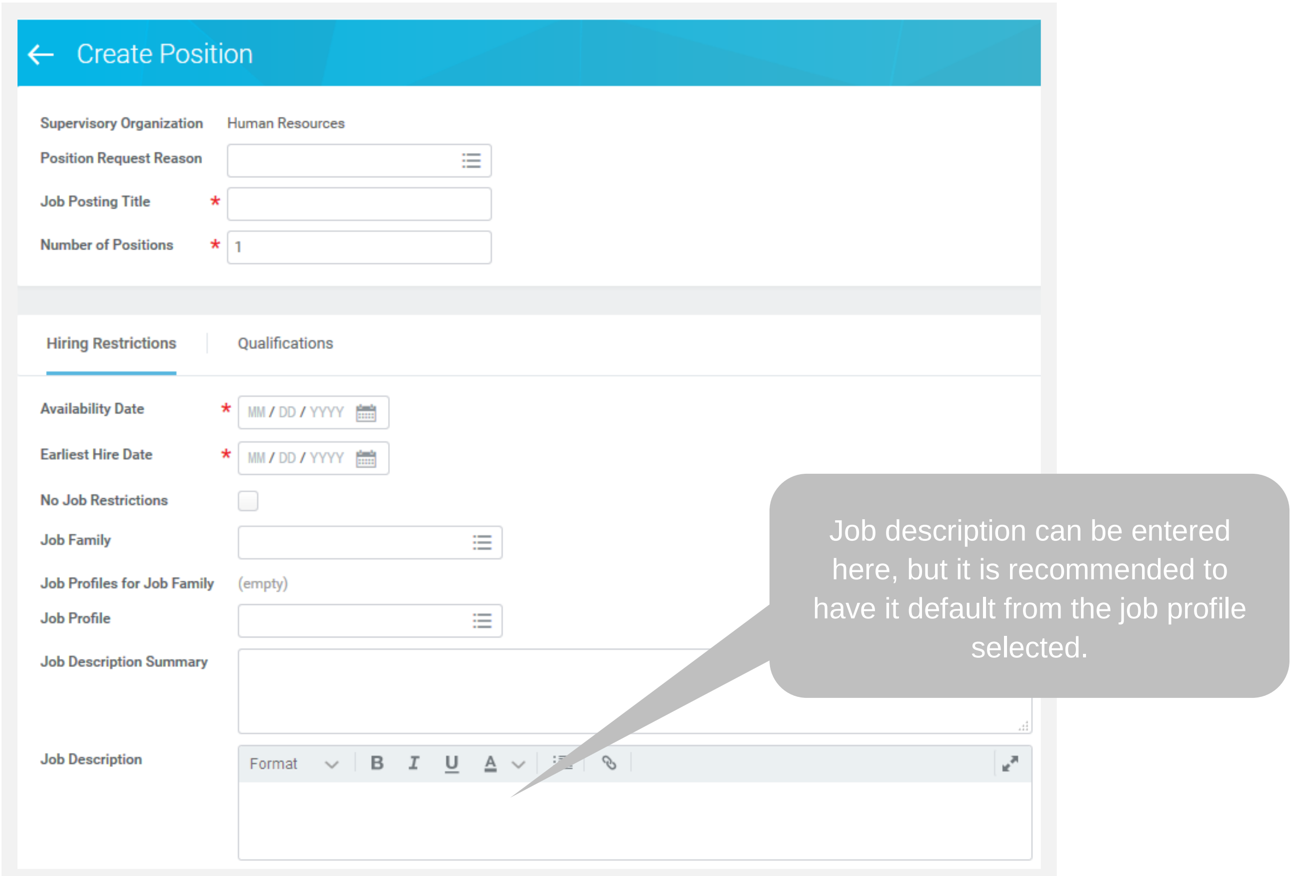


CREATING POSITIONS AND JOBS

When a position is created in Workday, it is built within the context of a supervisory organization. All staffing transactions in Workday, including hires, promotions, and transfers, take place within or between supervisory organizations. If you are using the Position Management staffing model, you must have an open position before you can staff a supervisory organization.

The only required fields in the Create Position task are the posting title, the number of headcount allocations, the availability date, and the earliest hire date. There is also the ability to set hiring restrictions, but it is not required. If no restrictions are going to be selected, then the No Job Restrictions checkbox must be selected; otherwise, at least one restriction must be entered.

When you fill a position, if information such as a job description summary or qualifications is entered both on the position as well as on the job profile, the qualifications on the position will be used, since they are considered specific to this unique position.



<u>Note</u>: The job description is also used by Workday Recruiting. What is entered here is visible to applicants applying for positions. This field provides rich text options including hyperlinks.

The process of filling a position with either an employee or contingent worker will use whatever information is provided in the unfilled position and the information in the Job Profile that defaults from the position or entered at point of hire.

ACTIVITY 2.3 – CREATE A POSITION

Business Case: A new position is required in the Field Marketing Group. Create the position with hiring restrictions that limit hiring to certain locations and the Business Analyst job profile. Complete the steps assigned to Brian Sullivan, the HR Partner, and then sign in as other people to complete the business process. Note: the additional steps and their assignment may vary based on your enterprise's business process.

TASK #1: CREATE A NEW POSITION

1. Sign in as Brian Sullivan (*bsullivan*).
2. On the Home page, select the Favorites worklet.
3. Click **Create Position**.
4. In the Supervisory Organization field search for and select the **Field Marketing Group** Supervisory Organization.
5. Click **OK** to continue.
6. Enter the following information:

Field Name	***Entry Value***
Position Request Reason	Create Position > Position Request > Understaffed
Job Posting Title	Senior Marketing Specialist
Availability Date	1st of this month
Earliest Hire Date	Today's date
Job Profile	Marketing Specialist
Location	San Francisco
Worker Type	Employee
Worker Sub-Type	Regular

7. Click **Submit** to move to the next step of the business process.

TASK #2: CHANGE ORGANIZATION ASSIGNMENTS

1. Click on the Open task on the confirmation page.

2. The organizations (company, cost center, and region) have defaulted based on the supervisory organization assignments for this supervisory organization. Review the default organizations, but you aren't going to make any changes to these assignments.

2. Click **Submit**.

3. Sign out.

TASK #3: DEFAULT COMPENSATION

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).

2. Click the **Worker Profile icon** on the top right of your screen.

3. Select **Inbox**. The Default Compensation: Field Marketing Group task should open for you.

4. You will NOT be completing this task. Instead, you will skip it by clicking on the **Task Actions** icon in the upper right corner (looks like a gear) and selecting **Skip this Task**.

5. Click **OK** and then **Done**.

6. Sign out.

TASK #4: APPROVAL CHAIN FOR NEW POSITION CONTINUES

1. Sign in as the Manager's Manager, Yumiko Sato (*ysato*).

2. Click the **Worker Profile** icon on the top right of your screen.

3. Select **Inbox**. The Create Position: Senior Marketing Specialist task should open for you.

4. Review the data, and the options at the bottom of the page.

5. Click **Approve** and then **Done**.

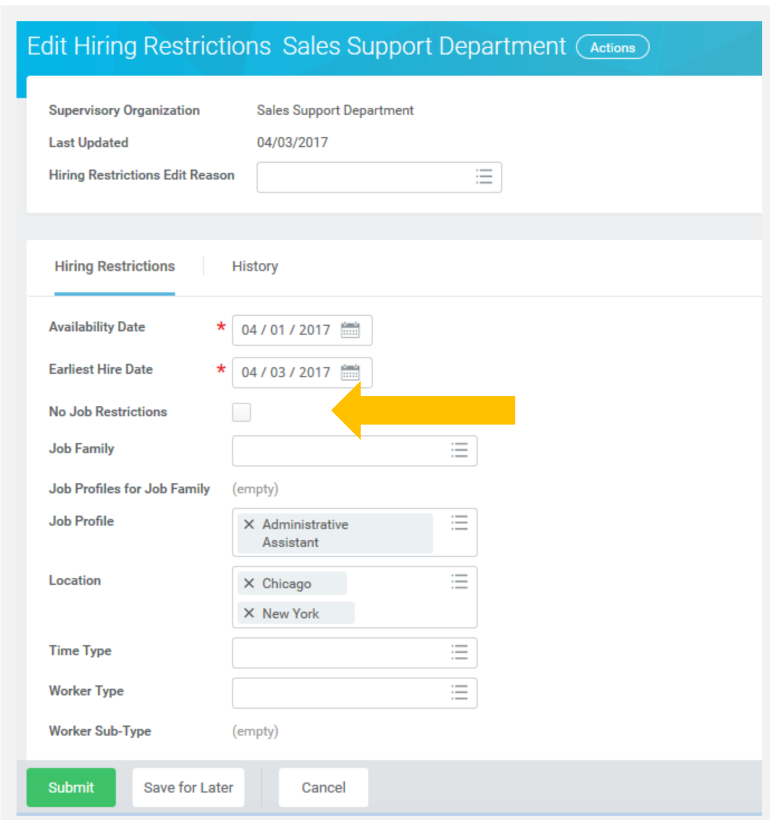
6. Sign out.

Activity Complete

SETTING HIRING RESTRICTIONS

When using the Job Management staffing model, you are still hiring into a supervisory organization, but you do not need an open position before you can staff a supervisory organization. Instead you set hiring restrictions directly on the supervisory organization.

The only required fields when establishing a hiring restrictions on a supervisory organization is the availability date and the earliest hire date. The other restrictions that you saw on a position are also available, but not required. If no restrictions are going to be selected, then the No Job Restrictions checkbox must be selected; otherwise at least one restriction must be entered.



There is no limit to how many workers can be hiring into a job management supervisory organization once the hiring restrictions have been set. The hire business process will most likely have one or more approval steps, which will control an individual's ability to hire without oversight.

ACTIVITY 2.4 – SET HIRING RESTRICTIONS FOR A JOB MANAGEMENT ORGANIZATION

Business Case: In this activity, you will need to set hiring restrictions for a supervisory organization. It is helpful to understand how to review the restrictions that apply to that organization.

As the HR Partner, Brian Sullivan, you will be setting hiring restrictions for the Sales Support Department supervisory organization.

TASK #1: SET HIRING RESTRICTIONS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to the **Sales Support Department** supervisory organization and click the **Staffing** tab. What is the staffing model for this organization?
3. Click the organization's **Related Actions** icon.
4. Select **Organization** > **Set Hiring Restrictions**.
5. Enter the information required on the Set Hiring Restrictions page:

Field Name	***Entry Value***
Hiring Restrictions Request Reason	Create Job Group > Job Group Request > New Organization
Availability Date	The first of this month
Earliest Hire Date	Today's date
Job Profile	Administrative Assistant
Location (open the prompt and select the My Favorite filter)	Chicago New York

6. Click **Submit**.
7. Click **Done**.
8. Navigate to the **Sales Support Department** supervisory organization and click the **Staffing** tab.
9. Confirm the hiring restrictions you just entered are displayed, but reflect the business process is "In Progress" and must be approved by the manager, Joey Kowalski.
10. Sign out.

TASK #2: APPROVE NEW HIRING RESTRICTIONS

1. Sign in as the Manager, Joey Kowalski (*jkowalski*).
2. Navigate to your **Worker Profile** in the top right of page.
3. Select **Inbox**. The Hiring Restrictions: Sales Support Department task should open for you.
4. Review the data, and then click **Approve**.
5. Sign out.

TASK #3: QUESTIONS

1. True or False: If you select the No Job Restrictions checkbox, a hiring restriction is not required.
2. True or False: You can hire into the supervisory organization before the earliest hire date. This date provides guidance.
3. Based on the hiring restrictions you set up, can we hire someone into the San Francisco location?

JOB REQUISITIONS

You may require that a job requisition be created before a worker can move into an open position. You can also add a Create Job Requisition step to business processes that vacate jobs or positions, such as <u>Termination</u> and <u>End Contingent Worker Contract</u>. Job requisitions can be used with either the Position Management or Job Management staffing models.

If you are using Position Management, you can decide if a job requisition is required during all staffing events (e.g., hire or a job change into a different position) based on rules configured on business processes. If a requisition is required, you must have an open job requisition when you plan on moving a worker into an unfilled or filled position so that you can recruit or hire for the position.

<u>Note</u>: Job requisitions are required if you are using the Workday Recruiting feature.

When creating a new position, you can choose to create a new job requisition or attach a job requisition to an existing position in the system. A guided editor takes you through recruiting information, hiring restrictions, qualifications, and any desired attachments for the requisition and/or new position.

Create Position	Create Job Requistion	Create Job Requisition and New Position

Options that are available for you to track recruiting activities include:

- Which employee the job is replacing.
- Recruiting instructions that give guidance on internal and external job postings.
- Recruiting start date, target hire date, and target end date (if applicable).

POSITION, REQUISITION, AND OFFER COMPENSATION

When creating a position, job requisition, or going through the Workday Recruiting offer process, you have the option to build into the business process a step to assign compensation. This allows you to associate compensation details with the position, job requisition, or negotiate compensation through the offer process. The compensation assigned can include a compensation package, compensation grade, which defines a salary range, and appropriate compensation plans. This information can be edited at any point, including during the hire process.

One benefit of using one of these subprocesses is it provides the ability to establish the estimated cost of unfilled positions.

ACTIVITY 2.5 – CREATE A JOB REQUISITION

Business Case: A new position and an open job requisition is required in the Marketing Communications Group. Create the requisition and position using the same transaction.

TASK #1: CREATE AN OPEN REQUISITION

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to the **Marketing Communications Group** supervisory organization and click the organization's **Related Actions** icon.
3. Select **Job Change** > **Create Job Requisition**.
4. Select the **Create New Position** option.
5. Click **OK** to continue.
6. Enter the following information on the Recruiting Information page:

Field Name	***Entry Value***
Reason	New position > Requesting additional staff
Recruiting Instruction	Posting Not Required
Recruiting Start Date	Today's Date
Target Hire Date	Today's date

7. Click **Next** to move to the Job page and enter the following information:

Field Name	***Entry Value***
Job Posting Title	Senior Manager, Marketing Communication
Job Profile	Senior Manager, Marketing Communication
Worker Sub-Type	Regular
Time Type	Full Time
Primary Location	Chicago

8. Instead of using Next, use the menu on the left and select **Compensation** to navigate directly to the Compensation page and review the information.
9. Scroll down to the Salary section and click the **Edit** icon.
10. Enter the amount of **120,000**.

11. Click **Next** twice to advance to the Summary page.

12. Click **Submit**.

TASK #2: MANAGER APPROVAL

1. Sign in as the Manager's Manager, Yumiko Sato (*ysato).*

2. Click the **Worker Profile icon** on the top right of your screen.

3. Select **Inbox**. The Create Position: Senior Manager, Marketing Communication task should open for you.

4. Review the data, and then click **Approve**.

5. Navigate back to view the **Marketing Communications Group** and click on the **Staffing** tab. What is the job requisition ID that was auto-generated?

6. Sign out.

CHAPTER 2 KNOWLEDGE CHECK

1. Where in the application can you look to determine how many workers are in a supervisory organization?

2. Where can you look to determine who the HR Partner is for a supervisory organization?

3. What are the two staffing models and where are the hiring restrictions set on each?

4. True or False: A job profile must have a one-to-one relationship to a position.

5. True or False: When hiring a person, there are required fields – one of which is the job profile.

6. Where on the supervisory organization can you check to see if the positions were successfully created?

CHAPTER 3 – COMPENSATION

OVERVIEW

The compensation structure in Workday comprises components which allow your organization to track compensation at both the enterprise-wide and individual worker level. If you are a compensation administrator, you create and maintain the Workday compensation structure for your organization.

The compensation structure consists of grades and plans which are grouped together into a package. Compensation grades provide guidance with reference pay ranges, and compensation grade profiles allow for localization or variation of the pay range for different geographic populations. Compensation plans represent various types of pay components, such as Salary, Allowances, or Bonus. The Compensation Package groups the grades and plans and helps to facilitate the automatic assignment of compensation to a worker during a staffing event, also known as defaulting.

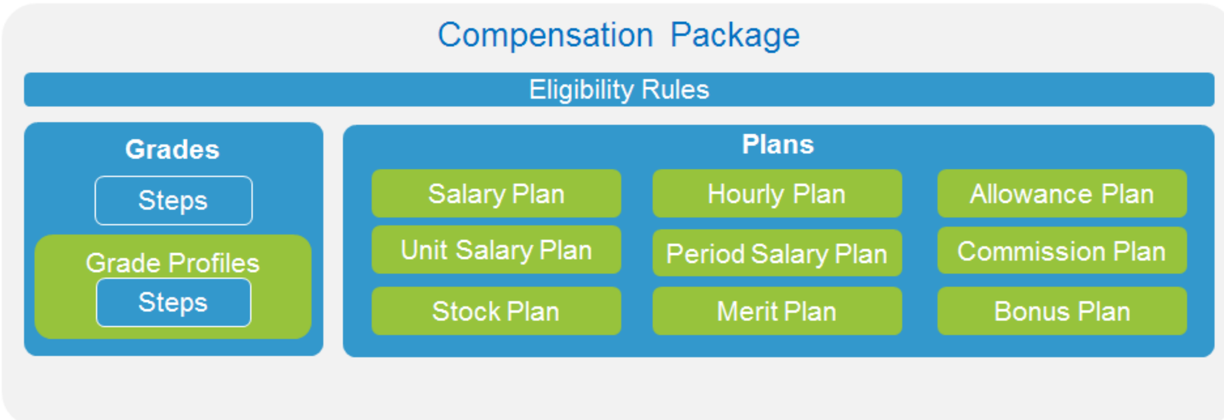
OBJECTIVES

By the end of this chapter, you will:

- Explain the importance of defaulting compensation during a staffing event.
- View a compensation package and describe what is included in the structure and who is eligible for it.
- Initiate a compensation change for an employee.

DEFAULTING COMPENSATION

There are different options available in Workday to automate the assignment of compensation components during a staffing event.



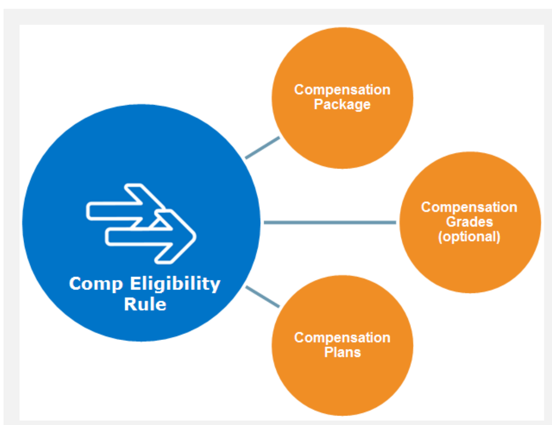
Defaulting Method	Description
Compensation Eligibility Rules	Compensation eligibility rules are defined to indicate which workers are eligible for which compensation components. By assigning compensation eligibility rules to the compensation components, the components can default into an employee's compensation during a staffing event, such as a hire or a job change. Defaulting of grades and plans will only occur if the package component defaults first.
Assigning Compensation Grades to a Job Profile	Grades can be assigned directly to a job profile. In that case, the grade on the worker's job profile will default in a staffing event, and ignore any eligibility rules that may be assigned to the grade.
Position and Requisition Compensation	The option of defining default compensation for a position or a job requisition is in addition to using compensation eligibility rules. The compensation components are assigned directly to the position, usually through a step in the Create Position business process called Request Default Compensation for Position. When using default compensation for position, compensation eligibility rules are used to populate compensation components and an estimated salary or hourly rate is entered. The compensation components, as well as the salary amount, will default during staffing events.

Defaulting Method	Description
Offer Compensation (Recruiting)	The Offer business process includes the optional step of Propose Compensation Offer. If compensation is associated with the job requisition, it will populate into the offer. If not, compensation eligibility rules will be used to default compensation components into the offer compensation. Offer compensation can be configured to go through approval during hire, or populate and skip all review or approval steps. This option is only available when using Workday Recruiting.

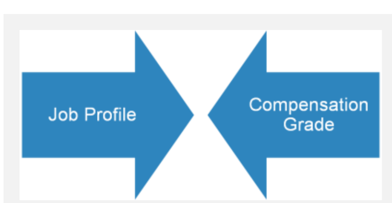
Note: Defaulting does not guarantee participation. Any compensation component that defaults during a staffing event can be changed at the employee level.

In order for compensation packages, grades, and plans to default, the following has to be true:

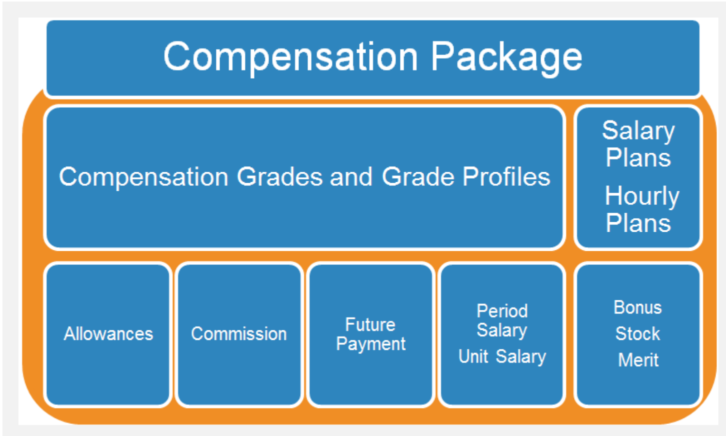
1. Compensation Eligibility Rules are attached to all components, starting with the package. If the employee is not eligible for the package, nothing in the package can default.



2. Instead of a compensation eligibility rule being attached to the compensation grade, you can have the grade linked directly to a job profile instead.



3. The compensation grade(s) and compensation plans must be in the compensation package for defaulting to occur.


Compensation Package
Compensation Grades and Grade Profiles
Salary Plans
Hourly Plans
Allowances
Commission
Future Payment
Period Salary
Unit Salary
Bonus
Stock
Merit

ACTIVITY 3.1 – VIEW A COMPENSATION PACKAGE

Business Case: Though you may not be creating, editing, or assigning a compensation package, it is helpful to understand how the compensation process works and how to review compensation elements.

As Brian Sullivan, you will be reviewing the Team Member compensation package.

TASK #1: VIEW THE COMPENSATION COMPONENTS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Enter *comp pack* in the search box, and then click the **Compensation Package** report.
3. Keep the default date of today.
4. Select the **Team Member** package.
5. Click **OK**.

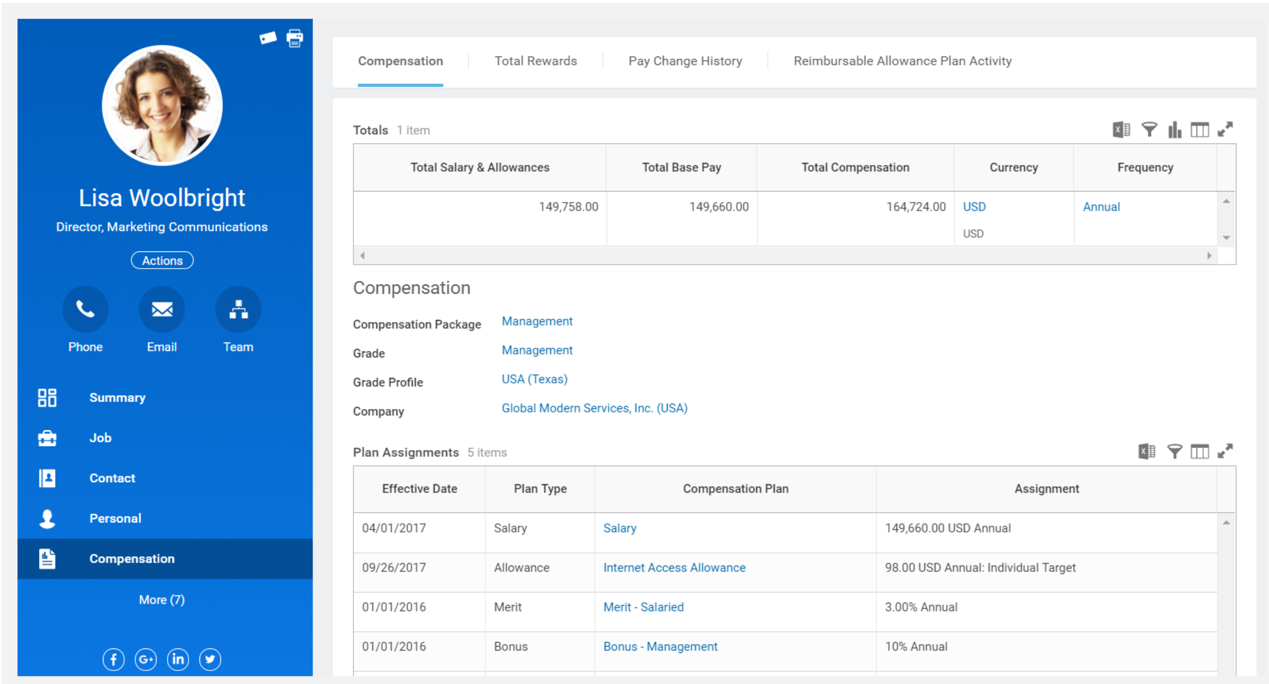
TASK #2: QUESTIONS

1. Look at the compensation eligibility rule attached to the package, and click on the rule's Related Actions icon. Select **Compensation Eligibility Rule** > **View**. How many rule conditions are listed?
2. Based on the Rule Conditions, which management levels are eligible for this package?
3. Use your browser's **back** button to navigate back to the compensation package. On the Compensation Grades tab, what compensation grade is included in the package?
4. Click on the Team Member grade hyperlink to drill into the details. What is the minimum and maximum of the Total Base Pay range on the Team Member grade?
5. Use your browser's back button to navigate back to the compensation package. On the Compensation Plans tab, how many bonus plans are listed?

Activity Complete

VIEWING AN EMPLOYEE'S COMPENSATION INFORMATION

An employee's compensation information can be easily viewed from the Compensation tab on their worker profile. With appropriate security permissions, an employee's package, grade, and all plan assignments will display.



ACTIVITY 3.2 – VIEW AN EMPLOYEE’S COMPENSATION DATA

Business Case: You need to review an employee’s current compensation as you prepare to initiate a compensation change for an underpaid worker.

TASK #1: VIEW EMPLOYEE’S CURRENT COMPENSATION

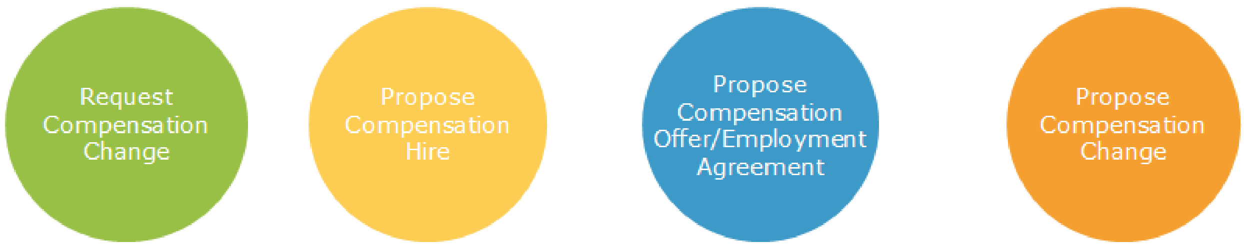
1. Sign in as Brian Sullivan (*bsullivan*).
2. Enter *marketing comm* in the search box.
3. Click the **Marketing Communications Group** supervisory organization.
4. On the Members tab, find Matt Knox and click on his name to navigate to his worker profile.
5. Click on the **Compensation** section.
6. What is Matt’s current salary?
7. Click the **Pay Change History** tab.
8. What is the date of Matt’s last pay increase?
9. Click the Related Actions icon below Matt’s name.
10. Select **Compensation** > **View Compensation**
11. In the View As Of field, enter *01/01/2016* and click **OK** to view his compensation. What is his salary amount?
12. Click the Workday back arrow to re-enter a date in the View As Of field, and enter *01/01/2017*.
13. Stay on this page.

Activity Complete

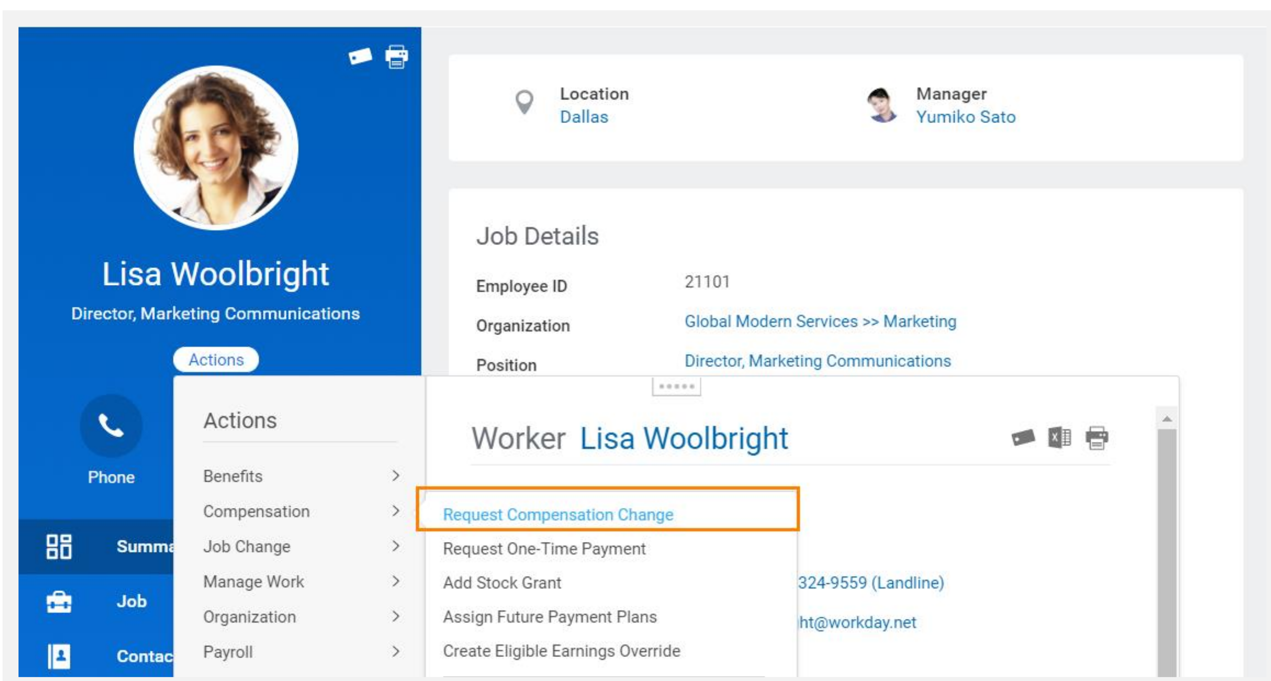
INITIATING COMPENSATION EVENTS

In Workday, at a minimum, all employees must be assigned a package, grade, and either a Salary or Hourly Plan. During the Propose Compensation process, if compensation is defaulting from a position or compensation eligibility rules are used, then this should be a straightforward process since most of the data will populate for you and only edits will be necessary.

Compensation events can be initiated as a single event for an individual employee or as part of another HR change such as a Change Job event, which uses the Propose Compensation Change subprocess or Hire Employee, which uses the Propose Compensation subprocess. When included in a staffing business process, the compensation task will automatically be sent to the appropriate Inbox to be completed.



Requesting a compensation change outside of a staffing event is done from the worker record's Related Actions and will initiate the Request Compensation Change business process. Since this compensation change is not associated with changes to job data, eligibility rules are not used. The employee's current compensation components and salary amount are pre-populated and allowed to be edited.



PROPOSE COMPENSATION FOR A NEW EMPLOYEE

As part of the Hire business process, the Propose Compensation Hire subprocess launches and is routed to the defined security group. The Propose Compensation Hire subprocess is only available as a step in the Hire Employee, Add Additional Job, or Start International Assignment business processes and not as an ad-hoc task. When the Hire process is initiated, assigning compensation will be part of that process.

Process History 18 items

Process	Step	Status	Completed On	Due Date	Person
Hire	Hire	Step Completed	11/11/2015 01:14:50 PM	11/18/2015	Brian Sullivan
Background Check	Background Check	Submitted	11/11/2015 01:15:21 PM	11/12/2015	Brian Sullivan (HR Partner)
Background Check	Select Background Check Overall Status	Submitted	11/11/2015 01:16:52 PM	11/13/2015	Brian Sullivan (Initiator)
Background Check	Make Background Check Decision	Not Required		11/12/2015	
Propose Compensation	Propose Compensation	Submitted	11/11/2015 01:20:32 PM	11/13/2015	Logan McNeil (Compensation Partner)
Propose Compensation	Review Compensation	Not Required		11/13/2015	
Propose Compensation	Approval by Controller	Not Required		11/13/2015	
Hire	Approval by Works Council	Not Required		11/18/2015	
Hire	To Do: Enable Workday Account	Not Required		11/18/2015	
Hire	Request Worker from Hire	Not Required		11/18/2015	

ACTIVITY 3.3 – INITIATE A COMPENSATION CHANGE

Business Case: There may be a number of security groups that can initiate a compensation change in your organization. It could be initiated by a manager, and reviewed by an HR Partner, or a Compensation Partner; or it could be the other way around. In this activity, Brian Sullivan will be initiating as the HR Partner.

TASK #1: INITIATE A COMPENSATION CHANGE

1. If you are still on Matt Knox's View Compensation page, scroll up to the top of the page to find his name or search for and select **Matt Knox**. Click Matt's **Related Actions** icon**.**

2. Select **Compensation** > **Request Compensation Change**.

3. The effective date will default to the start of the next pay period. Enter the reason **Adjustment** > **Market Adjustment**.

4. Click **OK**.

   Note: A set of reports have opened from an icon in the upper-right corner. These can be configured by your organization to provide "just in time" analytics within a business process. To close them, click the Related Information icon, or anywhere on the page.

5. In the set of reports that opened, find the Employee Base Pay History report. What is the % increase of Matt's last pay increase?

6. Close the report and scroll down to the Guidelines section. What is Matt's pay range?

7. What is the mid-point of Matt's pay range?

8. Click the **Salary** section to enter a *5%* salary increase to bring him closer to the mid-point of his pay range. Click the Save checkmark icon. What is the new salary amount?

9. Click **Submit**.

10. Sign out.

TASK #2: REVIEW THE COMPENASTION CHANGE

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).
2. Access the **Inbox** and navigate to the Compensation Change: Matt Knox – Senior Manager, Marketing Communication task.
3. Scroll down to view the Salary section.

   Note: The blue dots indicate a change to the data, and the previous value is displayed next to the new value.
4. Click **Approve**.
5. Sign out.

TASK #3: MANAGER APPROVAL

1. Sign in as the Manager, Lisa Woolbright (*lwoolbright*).
2. Access the **Inbox** and complete the Compensation Change: Matt Knox – Senior Manager, Marketing Communication task.
3. Scroll down to view the Plan Assignment Changes section, and the current and proposed salary.
4. Click the **More Details** button to see all Matt's components of pay.
5. Use your browser's **back button** to go back to approve the task.
6. Click **Approve**.
7. Sign out.

CHAPTER 3 KNOWLEDGE CHECK

1. True or False: Compensation details will automatically populate during a staffing event, such as a hire. This information can be edited.

2. What two compensation components will always need to be entered, either manually or through defaulting?

   A. Salary and bonus plan

   B. Compensation package and bonus plan

   C. Compensation package and compensation grade

3. True or False: A change to a worker's compensation can be done anytime using the Request Compensation Change business process, and may include multiple approval steps.

CHAPTER 4 – HIRE

OVERVIEW

Once the structure of your Workday deployment has been loaded, including your supervisory organizations, job profiles, compensation structures, business processes and more, you are ready to start testing your configuration by using basic transactions such as hiring, job changes, and terminations. Knowledge of how a transaction is initiated, what values are used, and how the business process controls what occurs during the transaction will help you understand and complete testing.

The hire process can begin through Workday HCM, Workday Recruiting, or a third party applicant tracking system. Either way, there is always the business process of Hire Employee as the foundation of the event.

OBJECTIVES

After reviewing this chapter, you should be able to:

- Hire a worker and propose compensation in a supervisory organization that uses the staffing model of position management.
- Hire a worker and propose compensation in a supervisory organization that uses the staffing model of job management.
- Manage service dates.

CREATE A PRE-HIRE

To begin the hire process, the pre-hire must exist in Workday. A pre-hire record includes basic information such as name, address, phone, email address, as well as nationality and sourcing information for pre-hires. If you are not using Workday Recruiting, this information can be entered manually or flow over from an integration with a third-party applicant tracking system. Once a prospect is identified as a candidate for a position you can track them through the evaluation process to pre-hire.

What you need to know when entering a pre-hire:

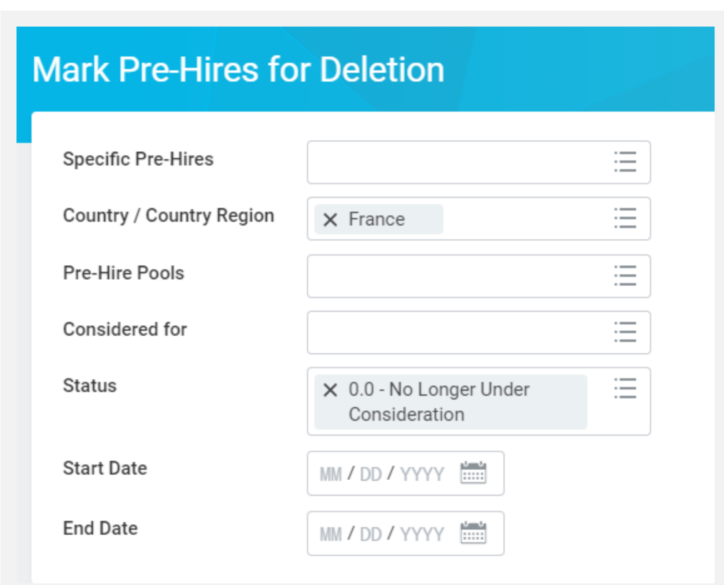
- A pre-hire must have at least one piece of contact information: a phone number, email address, or street address.
- A pre-hire pool can be created for an organization, location, job family, or job profile.
- Pre-hire status applies to a position, not the pre-hire.
- Interviewers must be assigned in order to be able to enter interview results.

MANAGING PRE-HIRES

In locations around the world, there are different requirements regarding data privacy and how to appropriately handle pre-hire information. In many instances, companies cannot retain pre-hire data after a certain amount of time and need to remove that data from company records.

To allow this requirement, Workday has created a deletion process. The Mark Pre-Hires for Deletion task identifies specific pre-hires, or pre-hires by location, pools, position considered for, and interview status. Once these are identified, you can run the Delete Pre-Hire process.

You may not be able to access this task if you do not have the correct access, which is commonly provided to the HR Administrator security group.



WORKDAY RECRUITING

Workday Recruiting is an end-to-end talent acquisition application built to help you find, share, engage, and select the best internal and external candidates for your organization.

Candidates may be prospects when they are first manually entered into Workday Recruiting. When a prospect is linked to a job requisition, they become an active candidate. Anyone who applies through the external or internal career site also becomes an active candidate. At the initiation of the Offer or Background Check business processes, their status changes to pre-hire. Once hired, the person is a worker. If an external candidate is hired, the Hire Employee business process is engaged to complete the hire. If an internal candidate is hired, the Job Change business process is engaged to complete the internal promotion, demotion, or transfer. If a worker is hired into a contingent worker job requisition, the Contract Contingent Worker business process is initiated.

As shown in the following graphic, a candidate is converted to a pre-hire when an offer is made or when a background check is initiated.

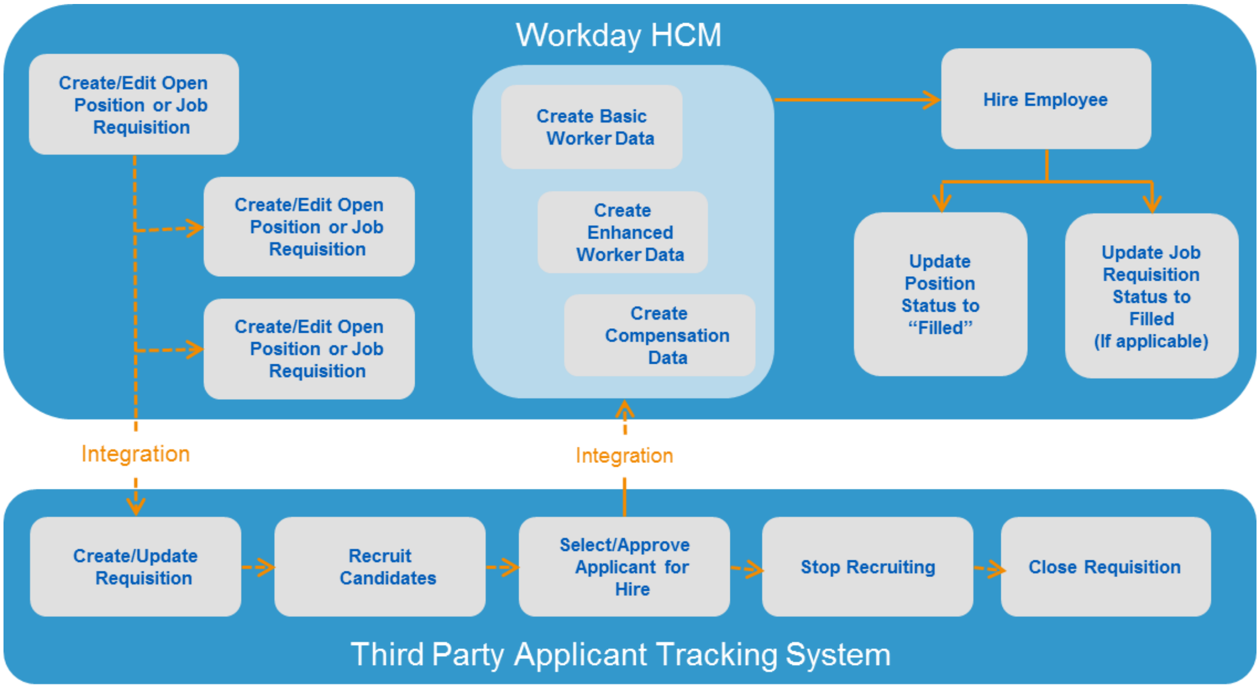
Object Lifecycle

<table>
<tr><th></th><th>Review</th><th>Screen</th><th>Assess</th><th>Interview</th><th>Reference Check</th><th>Offer</th><th>Background Check</th><th>Hire</th></tr>
<tr><td colspan="8">Candidate</td><td rowspan="2">Worker</td></tr>
<tr><td>Prospect</td><td colspan="4">Active Candidate</td><td colspan="3">Pre-Hire</td></tr>
</table>

PRE-HIRES AND INTEGRATIONS

As an alternative to using Workday Recruiting or manually entering pre-hires, you may have a Workday integration with other recruiting/applicant sourcing applications. How these integrations are built can vary from one recruiting application to another.

In most integrations, Workday creates a basic pre-hire profile from your applicant sourcing application requisition, and then imports enriched pre-hire data such as qualifications, job history, and base compensation. When a pre-hire is identified as ready to hire, the inbound integration is launched and the Hire business process is triggered. From this point forward, Workday is the system of record for employee information.



HIRE PROCESS

Hiring an employee includes recording information about the worker, assigning the worker to a position or job; and defining terms of employment such as location, hours, or compensation. When hiring, you can use an existing pre-hire or add a new pre-hire. Either way, you have an opportunity to record pre-hire source information.

Information required to complete an employee hire includes:

- Hire Date
- Position
- Job Profile
- Time Type (full or part-time)
- Location
- Scheduled Weekly Hours

Each customer's version of any business process will be different, based on the individual business requirements. A process such as hire, which has many possible steps and subprocesses, may vary dramatically.

BUSINESS PROCESS DEFINITION

Business processes are created using a combination of actions, approvals, approval chains, to dos, and/or checklists. An action can be a single task, or a subprocess, which is also a combination of actions, to dos, and/or checklists. Within the process, steps can be configured to be conditional. If the condition is met, the step occurs. If the condition is not met, the step is not required and will be skipped automatically. Notifications can also be defined to notify a Workday user or email address that a step has begun, completed, or that a particular review response was selected (e.g., approved, denied, or canceled).

The difference between actions, approvals, and to dos is:

- **Action**: Tasks or events within Workday.
- **Approvals**: Provides the ability to approve, deny, or send back the entire business process or a step in the business process. Does not include edit capabilities.
- **Approval Chains**: A sequence of approvals that starts with an individual and goes up their management chain until it gets to the top, or an exit condition is met.
- **To Do**: Reminder to do a task either within Workday or outside the system.
- **Checklist**: A group of To Dos.

To give you a better idea of the options, below is a list of the steps and subprocesses that can be included in the hire process:

Optional Subprocesses and Steps in Hire Employee Business Process				
Add Academic Appointment	Add Period Activity Pay	Add Probation Period	Assign Collective Agreement	Assign Costing Allocation for Hire Employee
Assign Matrix Organizations	Assign Pay Group	Assign UK Payroll ID	Assign Worker Record	Assign Work Schedule
Change Benefit Elections	Change Benefit Jobs	Change Emergency Contacts	Change Organization Assignments	Change Personal Information
Check Budget	Complete Form I-9 Section 3	Create Change Benefits Event	Create Provisioning Event	Create Workday Account
Edit Government IDs	Edit ID	Edit Licenses	Edit Notice Periods	Edit Other IDs
Edit Passports and Visas	Edit Service Dates	Edit Workday Account	Generate Document	Generate Wage Theft Notice
Maintain Employee Contract	Maintain Local Payroll Data	Manage Union Membership	Onboarding	Onboarding Setup

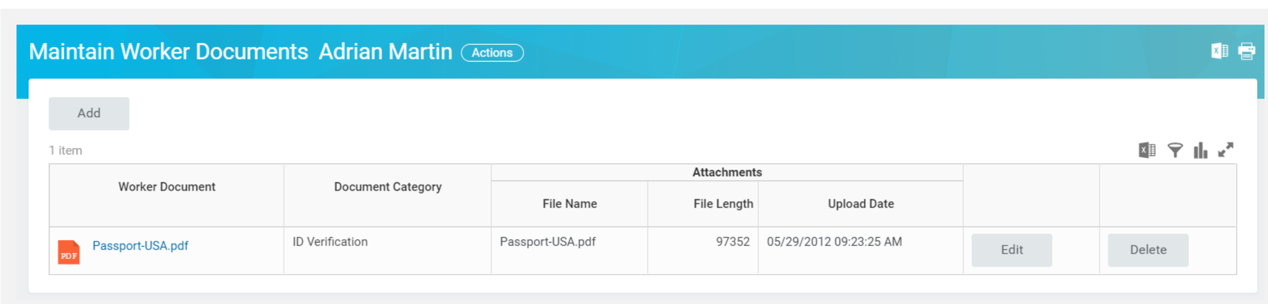
Propose Base Pay	Propose Compensation Hire	Remove Retiree Status	Request One-Time Payment	Request One-Time Payment for Referral by
Request Stock Grant for New Hire	Request Worker from Hire	Review Employee Hire	Review Payroll Interface Data	Start a Background Check
Verify Proposed Employee ID	Verify Student Employment Eligibility			

None of these steps are required, and most are subprocesses, with the one exception of Review Employee Hire. Subprocesses may include additional steps and approvals. This should give you some idea of how many variations of the Hire business process are possible.

WORKER DOCUMENTATION

When initiating a hire, as well as other business processes, you can insert worker documentation that is pertinent to the hire process such as I-9 verification, a resume, employment application, or offer letter.

Documents can be reviewed and managed later using the Maintain Worker Documents task.



BACKGROUND CHECK

A background check subprocess can be included in the Recruiting process, or as part of the Hire business process. There is an option to create a Background Check Package. This is used in conjunction with an outbound integration that sends the background check request to an external provider and an inbound integration that receives the background check information. Based on the information received, the background check status could then be updated.

Reports are delivered to help manage the Background Check process. This includes:

- Employee Background Check Status Summary
- Change Background Check Status

- Applicant Background Checks with Did Not Pass Status

Note: If you are using Workday Recruiting, it is likely that the background check would be included in the Recruiting Job Application business process, instead of the hire process.

ACTIVITY 4.1 – HIRE INTO A POSITION MANAGEMENT SUPERVISORY ORGANIZATION

Business Case: As Brian Sullivan, HR Partner, you will hire a new employee into the Field Marketing Group supervisory organization. Complete the Background Check.

But first, you will confirm the work we did yesterday.

TASK #1: REVIEW POSITION HIRING RESTRICTIONS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Click on the **Open Positions** worklet.
3. Scroll down to find the **Senior Marketing Specialist** position you created and select it (created in Activity 2.3).
4. Click on the **Position Overview** tab and confirm the position is in the Field Marketing Group supervisory organization.
5. Click the **Hiring Restrictions** tab and confirm the following hiring restrictions:

Field Name	***Entry Value***
Job Profile	Marketing Specialist
Location	San Francisco
Availability Date	1st of this month
Earliest Hire Date	Today's Date
Worker Type	Employee
Worker Sub-Type	Regular

TASK #2: HIRE EMPLOYEE

1. Click the Senior Marketing Specialist (Unfilled)'s **Related Actions** icon, and select **Hire** > **Hire Employee**.
2. In the Existing Pre-Hire field, search for and select the existing pre-hire **Jake Bateman.**
3. Click **OK**.
4. Enter the following information:

Field Name	***Entry Value***
Hire Date	Today's date
Reason	New Hire > Fill Vacancy
Time Type	Full time
Pay Rate Type	Salaried

5. Open the Additional Information section to change the Job Title and Business Title to **Senior Marketing Specialist** (The Business Title will automatically change based on Job Title).

6. Click **Submit**.

TASK #3: BACKGROUND CHECK

1. On the confirmation page click on the **Open** button for the Start a Background Check task.

2. In the Name field, select **Professional Check**.

3. Click **Submit**.

4. On the confirmation page, click the **Review** task for Select Background Check Overall Status.

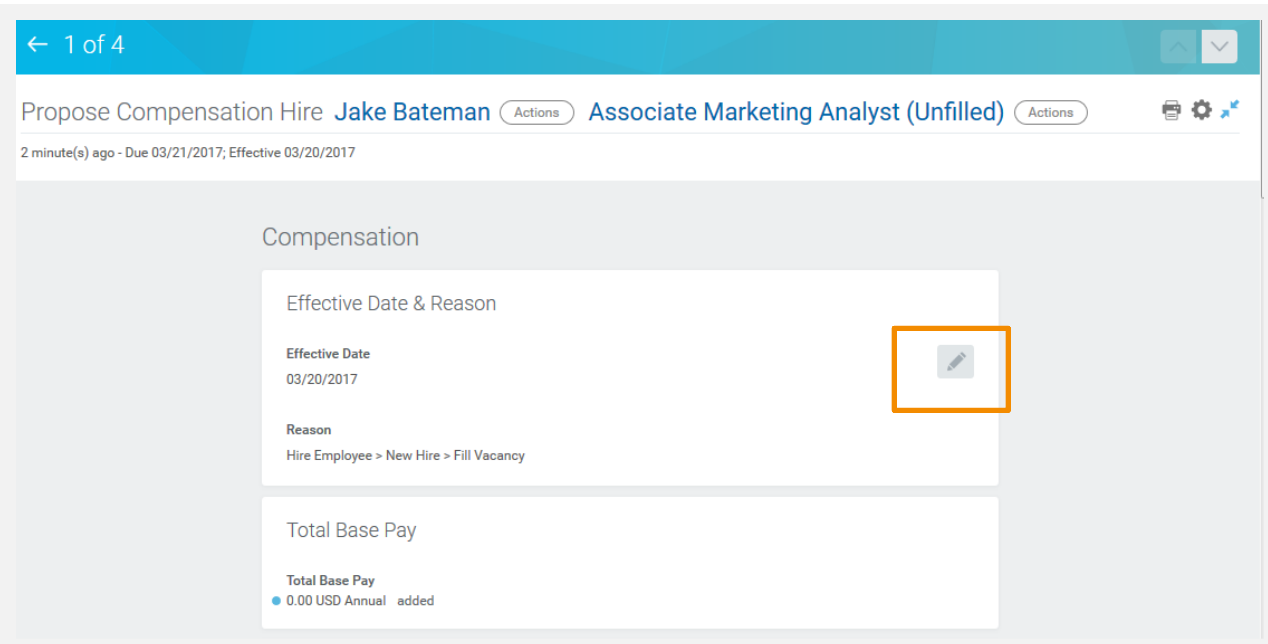
5. Select the **Passed** Status.

6. Click **Submit**.

7. Sign out.

PROPOSE COMPENSATION HIRE AND BEYOND

The Propose Compensation Hire step is typically early within the Hire business process. When opening the Propose Compensation Hire task in your Inbox, you will see any default values populated, and a blue dot to indicate where data has been entered or changed. Changes can be made using the edit icon, as shown on the following image. Package, grade, and grade profile are viewed and edited in the Guidelines section.



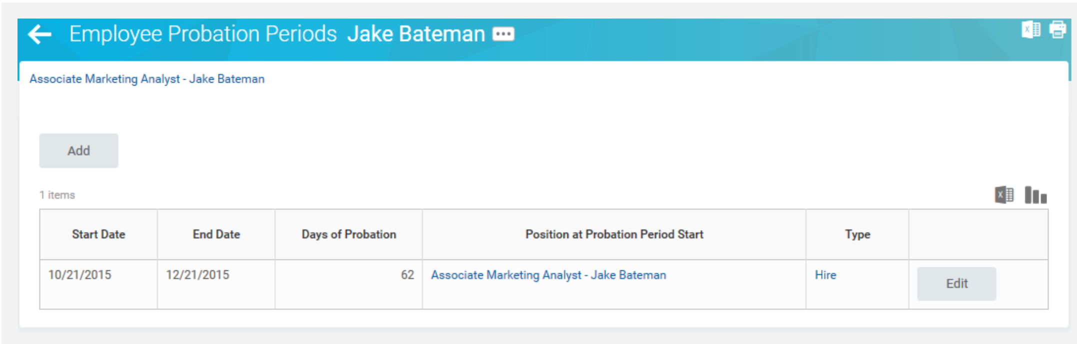
Note: If compensation eligibility rules have been set up, as well as default compensation for position, the compensation eligibility rules will be ignored and default compensation will take precedence and populate at time of hire.

PROBATION PERIODS

One of the many steps you may choose to include in your hire process is to track worker probation periods. Setup includes creating probation types, such as Hire or Performance Improvement. These probation types can be configured to be country-specific, so depending on the country in which the worker is hired or contracted, a type may not be available to select. Reasons are created, such as New or Job Change, and can be restricted by country. An extended end date can be entered, if necessary, to continue probation beyond the original date. This extending end date should be entered before reaching the original end date.

Adding a probation period to a worker can be done anytime using the worker's Related Actions and navigating to Job Change > Manage Probation Periods. It can also be done as part of the Hire Employee business process.

This type of step may be configured to be optional, which allows the step to be manually skipped, or it can be conditional, in which a condition rule is attached to the step. The step is not required unless the conditions are met.



ONBOARDING

The Onboarding business process enables you to engage new workers into your organization, coordinate their onboarding activities, and improve the productivity of your staff. This is available as a subprocess for the Hire and Contract Contingent Worker business processes. You can include the following actions in the Onboarding process:

- Change Benefit Elections
- Change Emergency Contacts
- Change Self-Identification of Disability
- Complete Veteran Status Identification
- Complete Federal Withholding Elections
- Complete Form I-9
- Complete Province Tax Elections
- Complete State and Local Withholding Elections
- Edit Government IDs
- Manage Payment Elections

Workday delivers two step types for business processes to simplify the onboarding experience for both new hires and HR Partners:

- A Tasks step combines multiple actions into a single step. You can add a Tasks step to include the Change Legal Name, Change Preferred Name, and Change Contact Information business processes.
- A Review Documents step distributes one or more documents and tracks acknowledgements or electronic signatures. You can use a review documents step to deliver your employee handbook, dress code, security policy, or other new hire documents as part of the Onboarding process. You may also include all documents in a single step or separate your documents into multiple steps for better status tracking. Additionally, you can also configure a review documents step to enable workers to upload documents (such as completed tax forms) as part of the step, and you can specify whether the upload is required or optional.

ACTIVITY 4.2 – PROPOSE COMPENSATION IN HIRE PROCESS

Business Case: As Logan McNeil, the compensation partner, you will propose compensation for the new employee in the Field Marketing Group organization. Complete all reviews and approvals.

In this configuration, these tasks are assigned to different roles, including Compensation Partner, and they can be assigned the HR Partner role.

TASK #1: ENTER COMPENSATION FOR NEW HIRE

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).
2. Click the **Worker Profile** icon on the top right of your screen.
3. Select **Inbox**. The Propose Compensation Hire: Jake Bateman – Senior Marketing Specialist task should open for you.
4. Scroll down to review the Guidelines (Pay Range, Compensation Package, Grade, and Grade Profile should have defaulted based on eligibility rules).
5. Look for the Salary section, and click the **Edit** icon to open the fields.
6. The Salary plan should have defaulted, along with the appropriate currency and frequency. Enter a salary amount of *82,000*.
7. Click **Submit**.
8. Sign out.

TASK #2: PROBATION PERIOD

1. Sign in as Brian Sullivan (*bsullivan*).
2. Click the **Worker Profile** icon on the top right of your screen.
3. Select **Inbox**. Confirm the Manage Probation Period: Jake Bateman task is selected.
4. Enter the following:

Field Name	***Entry Value***
Type	Hire
State Date	Leave the default of today's date
End Date	3 months from today's date
Reason	New

5. Click **Submit**.

TASK #3: EDIT GOVERNMENT IDS

1. On the confirmation page, click on the **Open** button for the Edit Government IDs task.

2. This is where you will enter Form I-9 information and/or other Government ID numbers. For this activity, click the **Add Row** icon, and then enter the following in the National IDs section:

Field Name	***Entry Value***
Country	United States of America
National ID Type	Social Security Number (SSN)
Identification #	Enter nine random numbers

3. Click **Approve**.

Activity Complete

ACTIVITY 4.3 – VIEW A BUSINESS PROCESS STATUS

Business Case: It is important to be able to find out the status of a transaction. Is it completed or in progress? If it is not completed, can you view who needs to do something to move the business process forward?

In this activity, Brian will use multiple methods to view the status of two business processes, starting with the hire you just completed.

TASK #1: VIEW BUSINESS PROCESS DETAIL FROM WORKER HISTORY

1. Sign in as Brian Sullivan (*bsullivan*) and search for *Jake Bateman*.
2. Click Jake's **Related Actions** icon, and select **Worker History** > **View Worker History by Category**.
3. Click the different tabs to see what types of transactions are tracked under each category.
4. Navigate to the **Staffing** tab to find the Hire: Jake Bateman business process.
5. Click the **business process** link to view the events. The Details tab displays data entered during the initiation step.
6. Click the **Process** tab to view the steps in the business process. Who completed the Edit Government IDs step, and what day was it completed? (The date format is month/day/year.)
7. Propose Compensation Hire is a subprocess of the Hire process. Click the **Propose Compensation Hire** step within the Propose Compensation Hire process. What is Jake's Total Base Pay?
8. Click the **Process** tab. How many steps are in this subprocess?
9. To navigate back to the Hire business process, find the Overall Process field, and click on the **Hire: Jake Bateman** link. Navigate again to the **Process** tab. How many steps are there in the overall process?
10. Many steps are not required. What is one reason a step might not be required?

TASK #2: FINDING BUSINESS PROCESS DETAIL IN ARCHIVE

1. Click the **Worker Profile** icon on the top right of your screen.
2. Select **Inbox,** and then click on the **Archive**.
3. You will see a list of transactions in which you completed a task.
4. Find the **Create Position: Senior Marketing Specialist** transaction and select it.
5. Click the **Process** tab to view the steps in the business process.
    A. What step was not required?
    B. How many steps are in this process?
    C. Which steps were manually skipped?

Activity Complete

CONDITION RULES AND OTHER OPTIONS

CONDITION RULES

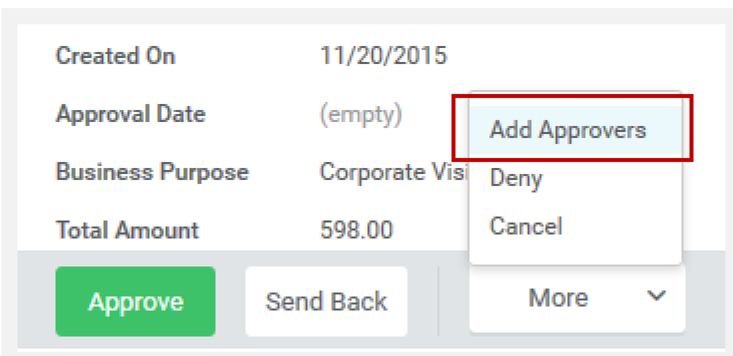
In order for a single business process, such as Hire Employee, to process differently for different populations, you need steps to be triggered, or skipped, based on business logic. By using a condition rule on a business process step, the system determines if the conditions of the rule have been met, and if so, the step is triggered. The rule consists of one or more logical statements, separated by the logical operators AND or OR.

AD-HOC APPROVAL

You can add additional approvers to an event while the business process is in progress, using the Add Approvers button on the business process toolbar and Inbox. For example, if you are a manager who is approving a new position as part of the Create Position business process, but would like the general manager to also approve the creation of this position, you can add the general manager as an additional approver.

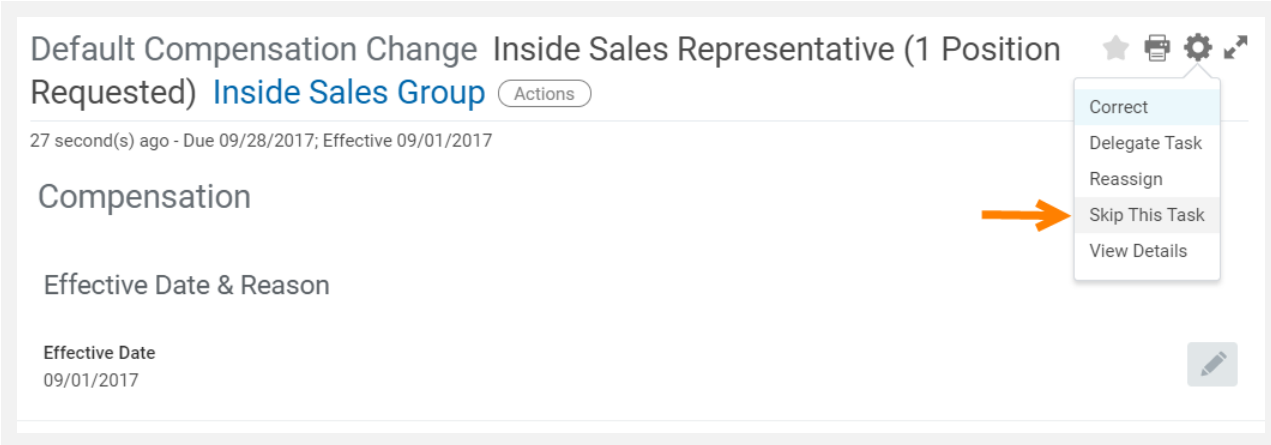
In addition to approving a business process, added approvers can also send back, deny, delegate, and reassign a business process. However, an additional approver can be added only one time per approval step, so an additional approver cannot then add more additional approvers to the business process.

To add approvers, you must belong to a security group with permission to the new ad hoc approve action on the business process security policy.



OPTIONAL STEPS

Optional steps can be added to a business process to allow a task to be skipped. Workday lists the task in the user's Inbox and displays Skip This Task as a Review option. If the user assigned to the role skips the step task, the business process then proceeds to the subsequent step.


Default Compensation Change Inside Sales Representative (1 Position Requested) Inside Sales Group
Actions
27 second(s) ago - Due 09/28/2017; Effective 09/01/2017
Correct
Delegate Task
Reassign
Skip This Task
View Details
Compensation
Effective Date & Reason
Effective Date
09/01/2017

ACTIVITY 4.4 – HIRE INTO A JOB MANAGEMENT SUPERVISORY ORGANIZATION

Business Case: As Brian Sullivan, you will rehire a previous employee, Glenn Gibson, into the Sales Support Department. The pre-hire has already been screened and is ready to hire. Be sure to complete all review and approval steps in the business process.

TASK #1: REVIEW HIRING RESTRICTIONS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to the **Sales Support Department** supervisory organization.
3. Click the **Staffing** tab.
4. Confirm the hiring restrictions are set:

Field Name	***Entry Value***
Job Profile	Administrative Assistant
Location	Chicago New York

TASK #2: HIRE EMPLOYEE INTO JOB MANAGEMENT ORGANIZATION

1. Use the supervisory organization's **Related Actions** icon.
2. Select **Hire** > **Hire Employee.**
3. Search for and select the Exisiting Pre-Hire **Glenn Gibson**.
4. Click **OK**.
5. Enter the following information:

Field Name	***Entry Value***
Hire Date	Today's date
Reason	Rehire > Fill Vacancy
Employee Type	Regular
Time Type	Full Time

Location	Chicago

6. Click **Submit**.
7. The next step presented is to Start a Background Check. This time, skip it by clicking the **Skip** link.
8. Click **OK**.
9. Sign out.

TASK #3: PROPOSE COMPENSATION FOR HIRE

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).
2. Click the **Worker Profile** icon on the top right of your screen.
3. Select **Inbox**. The Proposed Compensation Hire: Glenn Gibson – Sales Support Department task should be selected.
4. Find the Hourly section and confirm the hourly plan has defaulted based on eligibility rule setup.
5. Click the **Edit** icon in the Hourly section.
6. Enter the amount of *$18.00* and confirm the frequency is hourly.
7. Click **Submit**.
8. On the confirmation page, the next step presented is to Edit Workday Account. Skip this step by clicking the **Skip** link.
9. Click **OK**.
10. Sign out.

TASK #4: EDIT GOVERNMENT IDS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Click the **Worker Profile** icon on the top right of your screen.
3. Select **Inbox.** Select the ID Change: Glenn Gibson task.

4. Because Glenn is a previous employee, you already have his Government ID information. In the National IDs section, scroll to the right to select the **Set Verification To Current User** checkbox. This will reset the verification date and identify Brian as the verifier.

5. Click **Approve** and **Done**.

6. Do not complete the next task included in this transaction. It will be used in a later activity.

Activity Complete

MANAGING SERVICE DATES

When hiring an employee, there are service dates that are populated by default and other dates that are left blank. All of these dates can be entered or edited as needed.

The dates included in the initiation of a hire are as follows:

Field	Description
First Day of Work	Automatically populates from hire date.
Continuous Service Date	Defaults from hire date.
End Employment Date	Only available to populate if employee type selected is Fixed Term.
Benefits Service Date	Must be manually populated.
Company Service Date	Must be manually populated.

Other dates can be edited through the Service Dates Change business process, which can be processed at any time, or as a subprocess in other business processes, such as Hire, Termination, or Edit Position.

There is an extensive list of dates you can utilize; some of which auto-populate, as indicated below, while most dates must be manually entered. These service dates can be used throughout the Workday system in areas such as benefits, compensation, and absence, and often drive eligibility.

Field	Description
Original Hire Date (auto-populates if rehire)	Retirement Date (auto-populates when status changes to Retiree)
Time Off Service Date	Date Entered Workforce (enabled at tenant level for countries; Edit Tenant Setup – Global)
Retirement Eligibility Date	Days Unemployed (China only)
Expected Retirement Date	Months Continuous Prior Employment (China only)
Seniority Date	Defaults from Original Hire date
Severance Date	Date will be populated with termination is completed through the severance process
Vesting Date	Used for stock awards

ACTIVITY 4.5 – EDIT SERVICE DATES

Business Case: Brian Sullivan will need to update the service dates for Glenn Gibson since he is a rehire.

TASK #1: INITIATE A SERVICE DATES CHANGE

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to the **Sales Support Department** supervisory organization.
3. Find Glenn Gibson on the **Members** tab, and click Glenn's **Related Actions** icon.
4. Select **Worker History** > **Edit Service Dates**.
5. Enter the following changes to the service dates:

Field Name	***Entry Value***
Benefits Service Date	Today's Date
Company Service Date	Enter today's date minus 3 months to give credit for time previously worked.

6. Click **Submit** and **Done**.

Activity Complete

CHAPTER 4 KNOWLEDGE CHECK

1. True or False: Within a transaction such as a hire or job change, business processes control which steps are included, the order in which the steps occur, and who will complete the step.

2. Which is a true statement?

   A. If you are assigned an optional step, it will be in your Inbox and it will automatically be removed from your Inbox after 30 days.

   B. If you are assigned an optional step, you can make the decision to select Skip This Task and not be required to complete the step.

   C. If you are assigned an optional step, you can reassign the task to another user who will be required to complete the step.

3. A worker is hired into which type of organization?

4. True or False: A pre-hire entered into Workday must have at least one piece of contact information, such as a phone number, email, or address.

5. True or False: Every Workday customer will have to use the exact same Hire process.

CHAPTER 5 – CONTINGENT WORKERS

OVERVIEW

The process of contracting a contingent worker is similar to hiring an employee, but different in a few key details. In the case of a contingent worker, we are using the Contract Contingent Worker business process. In this next chapter, we will review this business process, become familiar with how to initiate it and view the differences between contracting a contingent worker and hiring an employee.

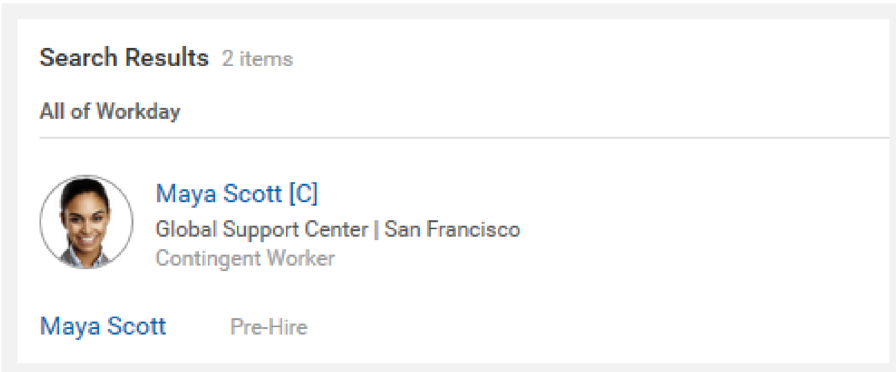
OBJECTIVES

After reviewing this chapter, you should be familiar with how to:

- Contract a contingent worker.
- Convert a contingent worker to an employee.
- View how security controls a worker's access.

CONTRACTING CONTINGENT WORKERS

Temporary workers are referred to as contingent workers in Workday. Although we are tracking contingent workers side by side with employees there are visible differences between the two populations. This starts with the [C] notation that you see displayed next to the contingent worker's name.



There is no ability to associate compensation with a contingent worker. Instead, the rate and frequency of payment information can be stored, either as a reference only or to be shared with the Workday, or an external, accounting system. Payment for a contingent worker is not sent to payroll.

The Contract Contingent Worker business process is similar to the Hire Employee process and shares many of the same optional subprocesses. There are differences, such as no steps for assigning pay groups or changing benefit elections, but many of the same types of steps need to be included.

Optional Subprocesses and Steps in the Contract Contingent Worker Business Process					
Assign Matrix Organizations	Assign Tax Authority Form Type	Assign Worker Record	Change Organization Assignments	Change Personal Information	Create Provisioning Event
Create Purchase Order From Contract Contingent Worker	Create Workday Account	Edit Government IDs	Edit ID	Edit Licenses	Edit Other IDs
Edit Passports and Visas	Edit Service Dates	Edit Workday Account	Generate Document	Onboarding	Onboarding Setup

Remove Retiree Status	Request Worker from Hire	Review Contingent Worker Contract	Verify Proposed Contingent Worker ID		

The Workers by Employee/Contingent Worker Type report allows you to view one or more of the contingent worker types, one or more of the employee types, or any combination of these populations. This is a delivered report that helps maintain visibility into this important population, and includes fields such as location, primary home address, and primary work address.

ACTIVITY 5.1 – CONTRACT A CONTINGENT WORKER

Business Case: Brian Sullivan will contract a contingent worker into the Sales Support Department to work until the end of next month.

TASK #1: INITIATE CONTRACT

1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for the *Sales Support Department* supervisory organization.
3. Click the Sales Support Department's **Related Actions**, and select **Hire** > **Contract Contingent Worker.**
4. Select the existing pre-hire, **Mary-Ellen Kennedy**.
5. Click **OK**, and then enter the following information:

Field Name	***Entry Value***
Contract Start Date	Today's date
Reason	New Contingent Worker > New Position
Contingent Worker Type	Contractor
Time Type	Full Time
Location	Chicago
Contract End Date	End of next month
Contract Pay Rate	80.00
Currency	USD
Frequency	Hourly

6. Click **Submit.**
7. Click the **Details and Process** arrow. Note the Overall Status of the process is Successfully Completed. Navigate to the Sales Support Department and confirm that Mary-Ellen is a contingent worker. What fields were new to you when contracting a contingent worker, as opposed to hiring an employee?

Activity Complete

CONVERT TO EMPLOYEE

There are two ways to convert a contingent worker to employee status:

- End the contract and then hire them as an employee.
- Use the Convert to Employee task.

The two-step process of ending the contingent worker's contract and then hiring them allows for a delay between these two business processes. It is common for a contingent worker to be hired months or even years after their contract ends.

The Convert to Employee task is a streamlined way to change a contingent worker to an employee, and uses a combination of the Change Job business process and the Hire Employee business process. It begins with ending the contingent worker's contract, and continues with the hire process.

It is common for a contingent worker to be hired into the position they currently fill. If that is not the case, the position or job the contingent worker will fill needs to be created and available. If using job requisitions, then there must be an open job requisition on the hire date, just like any other hire.

ACTIVITY 5.2 – CONVERT CONTINGENT WORKER TO EMPLOYEE

Business Case: A current contingent worker will be converted to an employee and moved from the Internal Systems Department to the Field Marketing Group.

Three different roles will participate in this transaction: Logan, HR Partner for the Internal Systems Department; Logan, who is also the Compensation Partner; and Brian, the HR Partner for the Field Marketing Group.

TASK #1: CONVERT A CONTINGENT WORKER

1. Sign in as the HR Partner, Logan McNeil (*lmcneil*).
2. Search for and select **Joseph Finley**.
3. Click Joseph's **Related Actions**, and select **Job Change** > **Convert to Employee.**
4. Change the supervisory organization from Internal Systems Department to **Field Marketing Group**.
5. Click **OK.**

   Note: The contract end date must be before the hire date. An error message will display until the dates are corrected.

6. Enter the following information:

Field Name	***Entry Value***
Hire Date	Today's date (error message will display until the contract ended is edited)
Reason	New Hire > Convert Contingent
Position	Senior Manager, Field Marketing

7. In the End Contract Details section, enter the following:

Field Name	***Entry Value***
Contract End Date	Yesterday
Reason	Voluntary > Contract Ended

8. Click **Submit.**

9. Sign out.

TASK #2: BACKGROUND CHECK (SKIP)

1. Sign in as Brian Sullivan *(bsullivan)*.
2. Click the **Worker Profile** icon on the top right of your screen.
3. Select **Inbox**.
4. The Background Check for Hire: Joseph Finley task will already be selected, but we are going to skip it. Click the **Task Actions** icon (looks like a gear) in the upper-right corner, and select **Skip this Task**.
5. Click **OK**.
6. Open the Details and Process section and click on the link for the Overall Process event of **Hire: Joseph Finley – Senior Manager, Field Marketing**.
7. What is the overall status of this event?
8. Click on the **Process** tab and then click the **Remaining Process** button. How many processes are remaining in this hire transaction?
9. Sign out.

Activity Complete

CHAPTER 5 KNOWLEDGE CHECK

1. What are the two methods used to convert a contingent worker to an employee?
2. How can you distinguish between an employee and a contingent worker?
3. True or False: When converting a contingent worker to an employee, their current compensation will automatically transfer to their employee compensation data.

CHAPTER 6 – STAFFING CHANGES

OVERVIEW

Change is the one constant in business. Part of managing your workers is tracking the job changes that occur. Knowledge of how a job change transaction is initiated, what values are used, and how the business process controls what occurs during the transaction will help you understand and manage your staffing changes.

OBJECTIVES

After reviewing this chapter, you should be familiar with the following:

- Initiate and complete the Change Job business process using the guided editor.
- Describe how the guided editor impacts the user interface and the approval process.
- Transfer a worker and promote a worker to a manager role.
- Perform ad-hoc data changes through the Edit Position business process.

STAFFING MOVEMENT

The Change Job process supports promotions, demotions, transfers, lateral moves, as well as changes to position data and locations. This process was designed to make staffing movements simple and intuitive. Based on your business process, there can be other steps such as reviewing, editing, and approving the staffing movement.

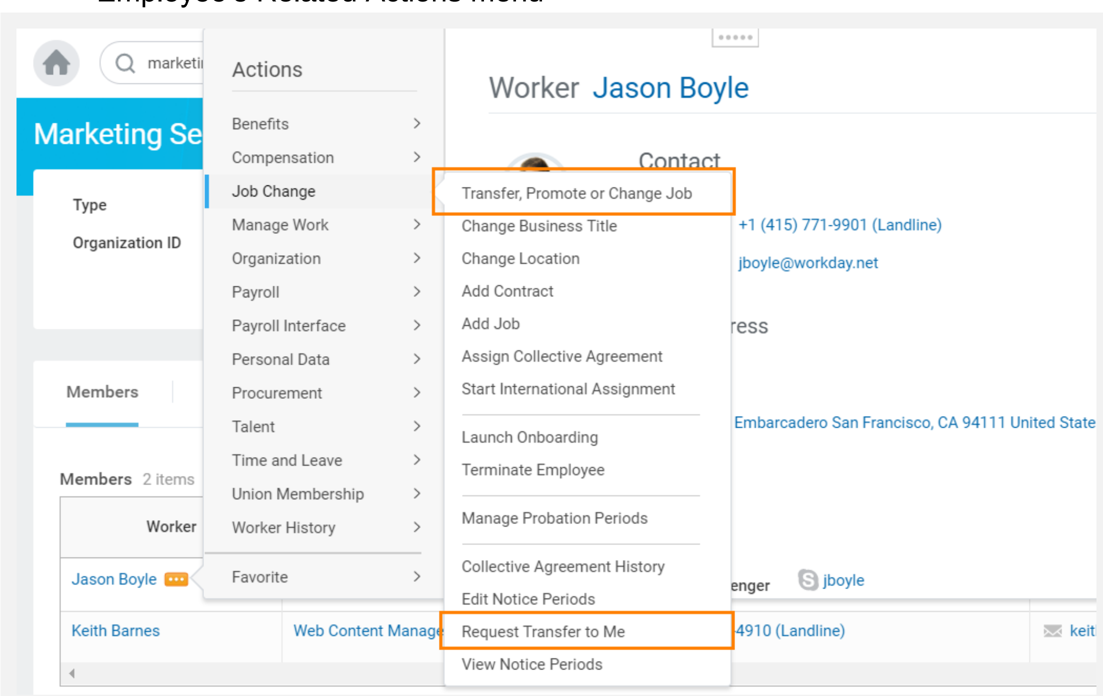
There are a few common variations of Change Job:

- Worker has a change in position, with no change to manager or supervisory organization.
- Worker has a change in manager and supervisory organization into a new position.
- Worker has a change in manager and supervisory organization, but no change to position.
- Worker is a manager, and has a change in manager and supervisory organization, but no change to position.
- Worker has a change in manager and supervisory organization, and the manager is new to the manager role (promoted).

In this section, we will look at these examples and examine the differences in how they process.

FINDING THE TASK

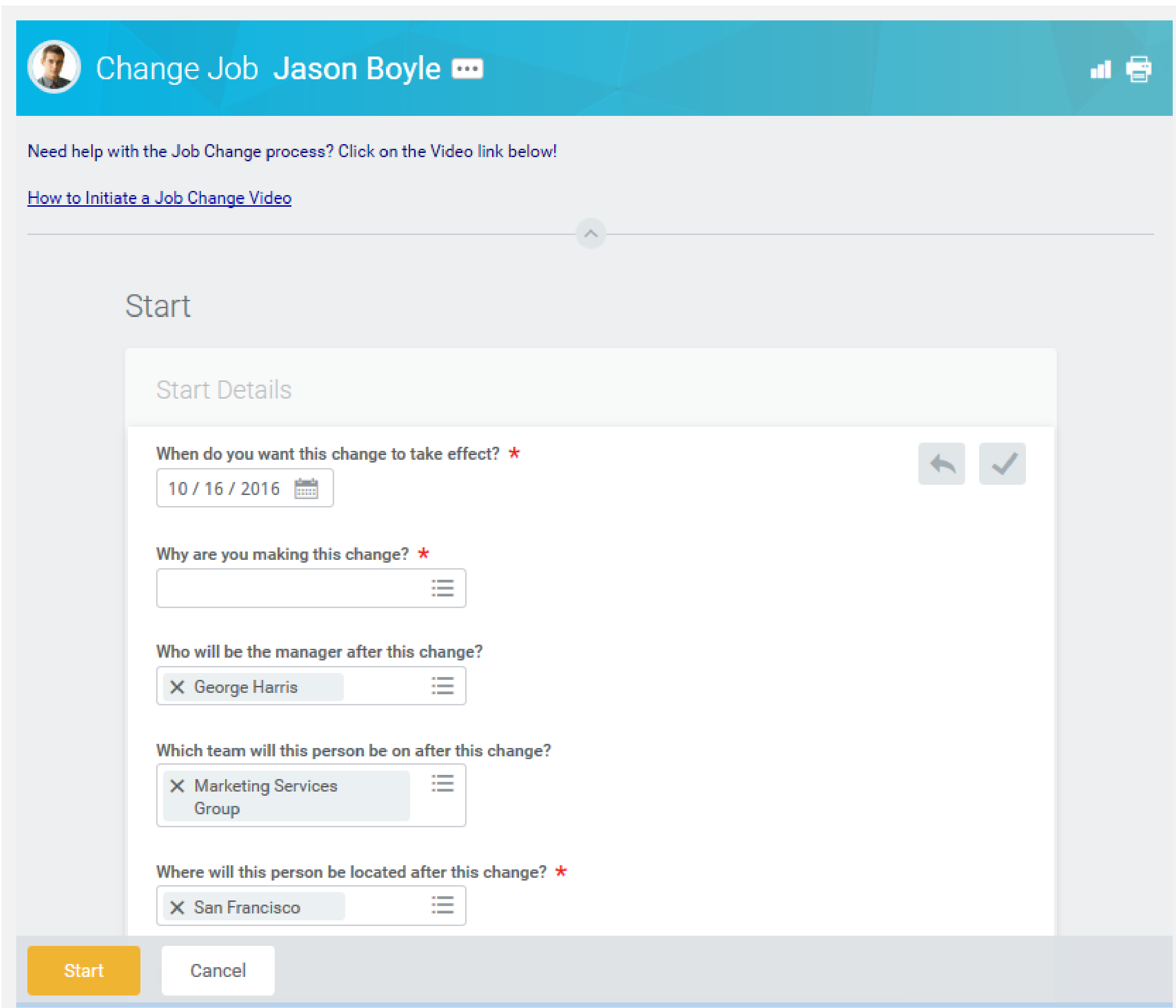
- Search bar
- Menu in the Navigate sliding tab
- Employee's Related Actions menu



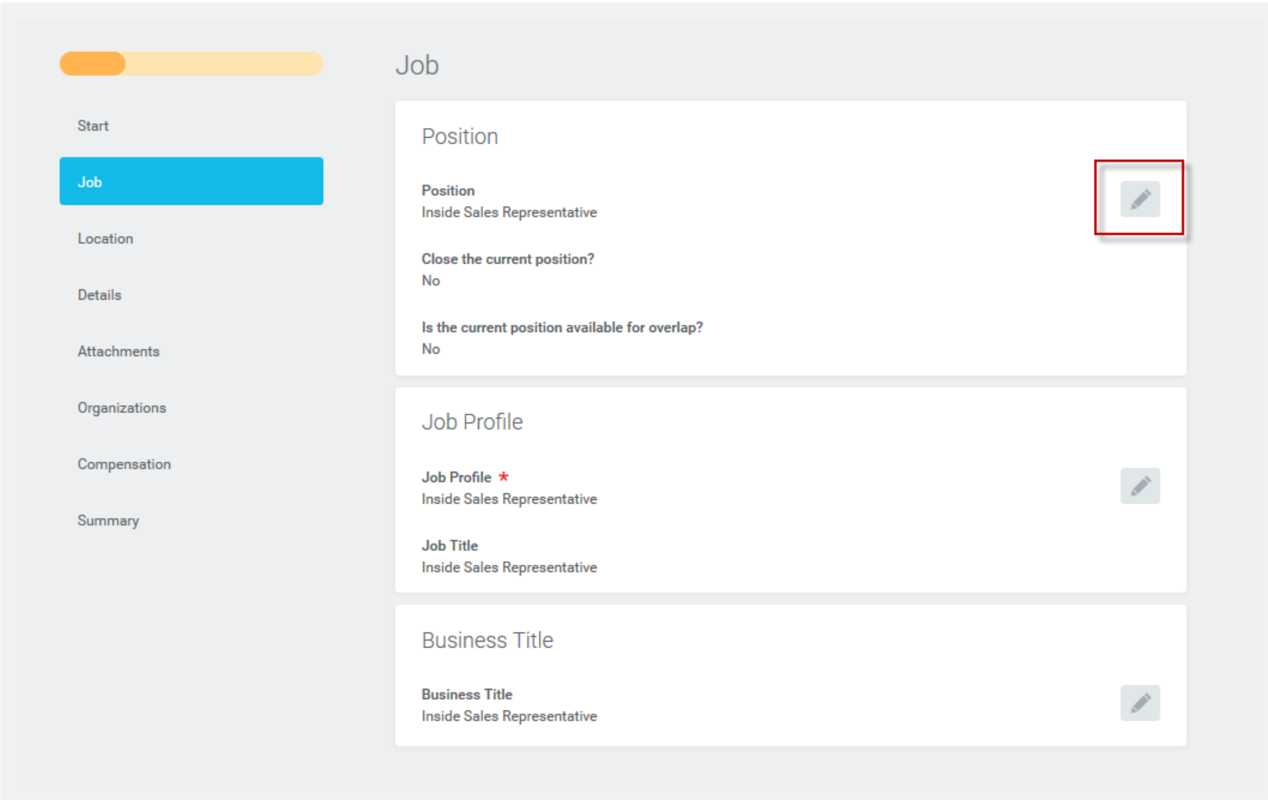
There are two tasks that can be used to initiate a job change. The first is Transfer, Promote or Change Job. The second is Request Transfer to Me, which is used when you want to initiate a job change for a worker that you want to have reporting to you. The Request Transfer to Me process assumes a change in manager, so only Move to New Manager Reasons are available to select.

CHANGE JOB SECTIONS

When initiating a Change Job business process, you will enter data using the Guided Editor framework, which takes you through multiple data entry pages; beginning with the Start page. On the Start page, Workday asks a series of questions regarding the worker's new manager, supervisory organization, and location. No other sections of the business process are displayed until the start page is completed.



After submitting the Start page, you will have the option of using the guided editor, which takes you through each section of the job change so that you can see all relevant fields and complete them in smaller doses. Click anywhere in a section to make the fields editable, or click the Edit icon to the right.



All of the sections listed in the above image are controlled by domain security so that you can tailor the process for different security groups in your organization.

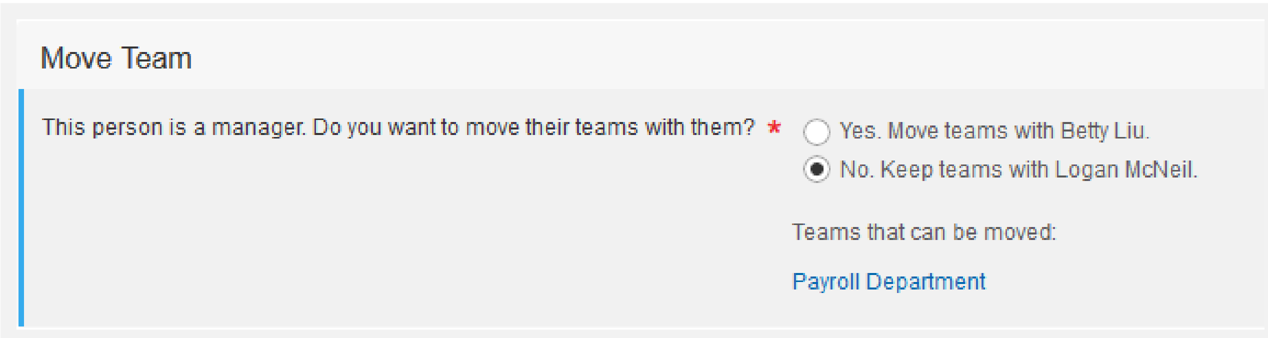
CHANGE JOB REASONS

Reasons and change types are a key component of the Change Job functionality. The Maintain Event Categories and Reasons task is used to create and map tenanted reasons to Workday-delivered job change types of Transfer, Promotion, Lateral Move, Demotion, and Data Change. You will specify which reasons apply to employees or contingent workers and which reasons to show to managers. Workday suggests that you keep the list of reasons short to reduce confusion as well as simplify selection. Each Workday-delivered job change type can result in moving a worker within or out of an organization.

MOVING A MANAGER'S TEAM

When you move a manager to a new organization using the Change Job business process, you can choose to also move the teams that report to that manager. The prompt displays:

- The teams which are eligible to move.
- Any teams which are ineligible due to a future-dated change.
- The person who will manage the teams if you do not move the team with their current manager.



You can move all eligible teams or leave all teams behind, but you cannot move some teams and not others.

After you complete the Change Job process, Workday initiates a separate Assign Superior subprocess for each eligible team with its own workflow and approvals. You can cancel, rescind, or correct the individual Assign Superior subprocesses as needed.

ACTIVITY 6.1 – CHANGE JOB

Business Case: As the manager of the Global Support – UK & Ireland supervisory organization, you will transfer Lucy Collins from your organization to the Marketing Collateral Coordinator position in the Marketing Communications Group.

TASK #1: INITIATE A JOB CHANGE

1. Sign in as the current Manager, Edward Huntington (*ehuntington*).
2. Navigate to Lucy Collins' profile, click her **Related Actions**, and select **Job Change** > **Transfer, Promote or Change Job**.
3. On the Start page, answer the following questions:

Field Name	***Entry Value***
When do you want this change to take effect?	Note the date has defaulted to the beginning of the next pay period, and that the date format is dd/mm/yy. Leave the default.
Why are you making this change?	Move to another Manager
Who will be the manager after this change?	Lisa Woolbright
Which team will this person be on after this change?	Marketing Communications Group
Location	Chicago

4. Click **Start**, and then click **Next** until you are on the Summary page.
5. Click **Submit**.
6. Sign out.

TASK #2: APPROVE JOB CHANGE

1. Sign in as the receiving Manager, Lisa Woolbright (*lwoolbright*).
2. Navigate to the **Transfer: Lucy Collins** task in Lisa's **Inbox**.

Note: This step is a review step that allows the receiving manager to edit the data as well as approve. If this was an approval step, the manager would only be able to view the data and approve, deny, or send it back to be edited.

3. Scroll down to the Job section enter the following information:

Field Name	***Entry Value***
Position	Senior Manager, Marketing Communication

4. Click **Approve**.

5. Sign out.

TASK #3: REVIEW AND APPROVE JOB CHANGE

1. Sign in as the HR Partner, Brian Sullivan (*bsullivan*).

2. Navigate to the **Transfer: Lucy Collins** task in Brian's **Inbox**.

3. Scroll down to review all the data (blue dots indicate a data change and red x indicates something was removed).

4. Find the **Compensation** section and note the changes. In the Salary and Hourly sections, the Hourly plan has been removed due to a change in compensation eligibility and the Salary plan entered.

5. Click in the Salary section to edit.

6. In the Amount field, change the pre-entered salary amount to *115,000*.

7. Click **Approve**.

8. Sign out.

TASK #4: APPROVE COMPENSATION CHANGE

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).

2. Navigate to the **Compensation Change: Lucy Collins – Senior Manager, Marketing Communication** task in Logan's **Inbox**.

3. Scroll down to review all the data

4. Click **Approve**.

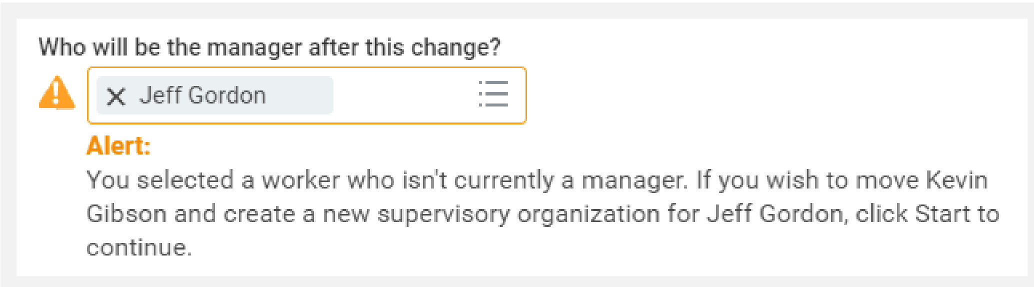
5. Sign out.

Activity Complete

MOVE TO NEW MANAGER

Change Job can be used to launch the Move to New Manager business process. Use this option to create a supervisory organization, and transfer a worker to a non-manager in another organization without changing the non-manager's current job or position.

When you select moving an employee to a non-manager, you will receive the following soft warning:



You can create an organization for someone who is not currently a manager, and move a worker into the new organization. You can move workers to new managers when:

- The worker's position is in a job management or position management organization.
- The non-manager's current organization uses the same staffing model as the worker's organization.
- The effective date of the move is after other staffing or organization changes that affect the worker's position.
- The worker's position has no in-progress events and is not in a job overlap.

The Change Job process asks questions that will guide managers through job change details in a familiar language, thus increasing their success rate, as well as reducing the need for HR support.

Note: If using the Move to New Manager functionality and the transaction is rescinded, the transferred employee will be returned to their original supervisory organization. Rescinding will not remove the new supervisory organization or the new manager assignment.

MICRO-TASKS

The business process policy for Change Job has options to allow security groups to initiate smaller micro-tasks. These smaller tasks provide a simplified page with only the fields needed and are also accessed through the Change Job menu.

- **Change Location**: Since a location change can have a wide impact on employee data, most fields will be available to edit.
- **Change Business Title**: The only field available to change is Business Title.

- **Change Contingent Worker Details**: This initiating action will only show the necessary fields for changing a contingent worker contract.
- **Request Transfer**: A manager-only initiation step. It allows a manager to initiate the Change Job transaction for an employee who reports to another manager, and pull the worker into their organization.
- **Request Transfer to Me**: Allows anyone to request the transfer of a worker and make them a direct report

STAFFING MOVEMENT REPORTS

We have many delivered staffing reports available within Workday. Below is a list a few of the reports:

Report	Description
Staffing Activity	View a summary of staffing activities by organization. Enables you to view events for either employees, contingent workers, or a combination. Events returned are based on the time period or date range entered. Whether the event is approved, pending, canceled, denied, or rescinded; you can select which status to include in the report results.
Positions and their FTE	View workers' scheduled weekly hours, FTE (full-time equivalent) percentage and time type for all the filled positions. You can optionally get these hours as of a specified date and/or include subordinate organizations. Enables you to monitor worker hours.
FTE Report	View the workers who have total FTE percent greater than the value specified in the report filter. The report includes columns for worker type, scheduled weekly hours, and time type, among others. This report can be copied and modified.
Turnover Analysis	Presents staffing turnover information in a chart format. This report can be copied and modified.

ACTIVITY 6.2 – CHANGE LOCATION USING THE MICROTASK

Business Case: You will initiate a location change for Matt Knox who is moving from his home office in Ohio to the Columbus location. Based on your extensive knowledge of your business you are confident this change will have a limited impact, so you decide to use the Location Change microtask.

TASK #1: INITIATE LOCATION CHANGE

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to Matt Knox' worker profile, click his **Related Actions**, and select **Job Change** > **Change Location.**
3. On the Start page, answer the following:

Field Name	***Entry Value***
When do you want this change to take effect?	Leave the default date
Why are you making this change?	Change Location
Where will this person be located after this change?	Columbus

4. Click **Start.**
5. We will not be making additional changes to location or details so click **Next** to navigate to the Summary page.
6. Review all the data and click **Submit.**
7. You can ignore the additional steps that are in your Inbox

Activity Complete

MANAGING FILLED AND UNFILLED POSITIONS AND JOBS

Your positions in position management organizations, and hiring restrictions for job management supervisory organizations, can be maintained using the Edit, Close, and Hiring Freeze tasks. The options available will change based on whether it is a position or job management model and whether the position or job is filled or unfilled.

Filled Position:

- Edit Position
- Edit Position Restrictions
- Manage Position Freeze
- View Job History (related actions off the position)

Unfilled Position:

- Edit Position Restrictions
- Close Position
- Manage Position Freeze

Filled Job:

- Edit Job

Unfilled Job:

- Edit Hiring Restrictions for the Supervisory Organization
- Manage Organization Freeze

EDIT POSTION RESTRICTIONS AND EDIT POSITION

Use the Edit Position Restrictions and Edit Position business processes for both filled and unfilled positions. The reason for making this type of change can vary:

- Edit Position Restrictions:
  - Use this task when you want to change, add, or delete the restrictions for a filled or unfilled position.
  - Using this task will change the restrictions, but not the worker's data.
- Edit Position or Edit Job:
  - Use to modify details of a worker's current job or position. For example, it can be used to change an employee from full to part time status.
  - Cannot be used to change supervisory organization or manager.
  - Allows you to make data changes regardless of position's hiring restrictions.
  - This task is primarily used as an administrative task for out of order events or to correct data.
- For changes such as promotions, demotions, transfers, lateral moves, or data changes, you should use the Change Job business process (e.g., to change an employee's location or part time or full time status).
- This task changes the employee data but not the position restrictions for future hires.

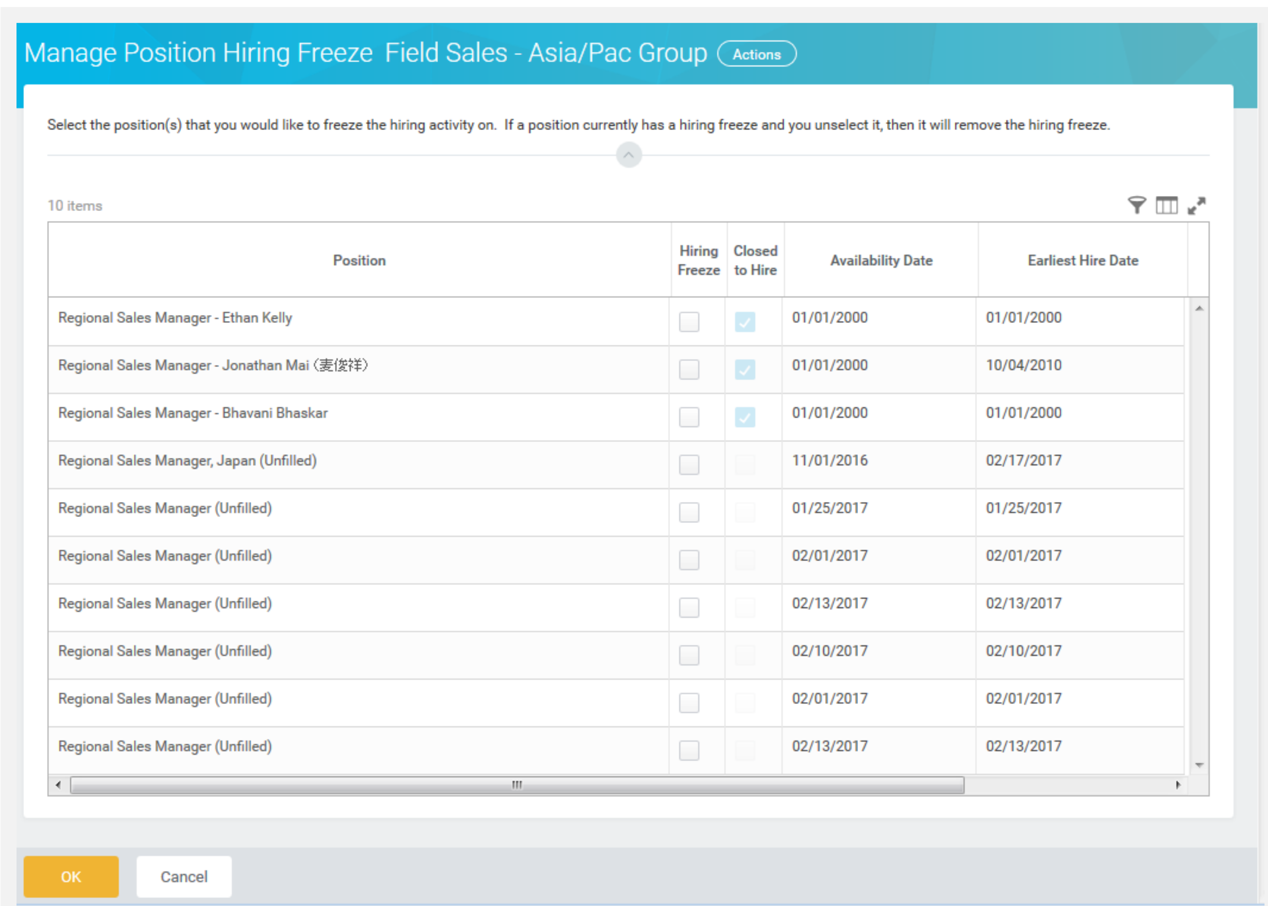
CLOSE POSITION VERSUS MANAGING HIRING FREEZE

When should you close a position versus freezing it? This question can be answered based on one condition: does the position need to go away permanently? If the answer is yes, then close it; it will no longer be available to hire into. The ability to close requires that the position is unfilled.

Although closing a position is considered a permanent status, like most business processes, it can be rescinded if the decision to close the position is reversed.

Touchpoint: Succession plans are tied to positions, so closing a position will impact the succession plan it is tied to.

Individual positions, entire supervisory organizations, or entire supervisory organization hierarchies can be frozen to stop any incoming staffing activity from occurring. Use the Manage Position Hiring Freeze or Manage Position Freeze task to freeze individual positions within a single supervisory organization.



Manage Position Hiring Freeze Field Sales - Asia/Pac Group Actions

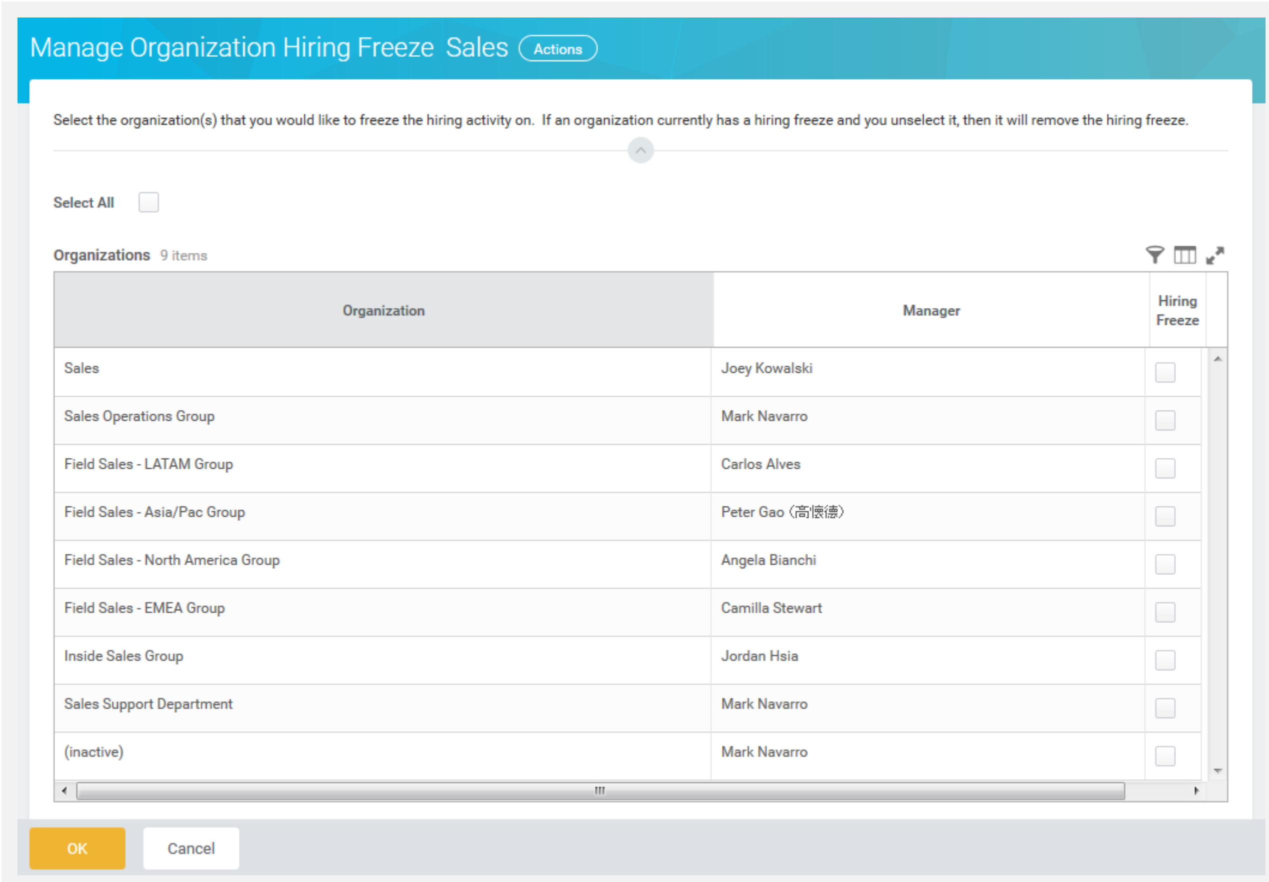
Select the position(s) that you would like to freeze the hiring activity on. If a position currently has a hiring freeze and you unselect it, then it will remove the hiring freeze.

10 items

Position	Hiring Freeze	Closed to Hire	Availability Date	Earliest Hire Date
Regional Sales Manager - Ethan Kelly	☐	☑	01/01/2000	01/01/2000
Regional Sales Manager - Jonathan Mai (麦俊祥)	☐	☑	01/01/2000	10/04/2010
Regional Sales Manager - Bhavani Bhaskar	☐	☑	01/01/2000	01/01/2000
Regional Sales Manager, Japan (Unfilled)	☐	☐	11/01/2016	02/17/2017
Regional Sales Manager (Unfilled)	☐	☐	01/25/2017	01/25/2017
Regional Sales Manager (Unfilled)	☐	☐	02/01/2017	02/01/2017
Regional Sales Manager (Unfilled)	☐	☐	02/13/2017	02/13/2017
Regional Sales Manager (Unfilled)	☐	☐	02/10/2017	02/10/2017
Regional Sales Manager (Unfilled)	☐	☐	02/01/2017	02/01/2017
Regional Sales Manager (Unfilled)	☐	☐	02/13/2017	02/13/2017

OK Cancel

Or use Manage Organization Hiring Freeze to freeze an organization and all selected subordinates.



When you freeze a position, you use a business process, Freeze Position, which can include approval steps. The ability to freeze an organization is done using the Manage Organization Hiring Freeze task. This is not a business process and will most likely be done by a user-based security group such as an HR administrator.

Unlike the process of closing a position, the concept behind a hiring freeze is that it is a temporary freeze, which at some point could be reversed by simply turning off the checkbox.

ACTIVITY 6.3 – ORGANIZATION FREEZE

Business Case: You just attended a meeting in which it was decided to stop hiring into the Marketing supervisory organization and all subordinates. The only exception to this is the Marketing Services Group, which instead of a complete freeze, will allow currently filled positions to be backfilled if anyone leaves their position.

TASK #1: FREEZE AN ORGANIZATION HIERARCHY

1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for and select the **Marketing** supervisory organization. Click Marketing's **Related Actions** icon.
3. Select **Staffing** > **Manage Organization Hiring Freeze**
4. Click on the **Select All** checkbox and then deselect the **Marketing Services Group**.
5. Click **OK**.

TASK #2: FREEZE AN ORGANIZATION

1. Search for and select the **Marketing Services Group** supervisory organization. Click Marketing Services Group's **Related Actions** icon.
2. Select **Staffing** > **Manage Position Hiring Freeze.**
3. Check the Hiring Freeze check boxes for the 2 unfilled positions; Marketing Coordinator and Web Content Manager**.**
4. Click **OK**.

TASK #3: QUESTIONS

1. List the organizations that are affected by this hiring freeze:
2. True or False: If Jason Boyle, a web content manager in the Marketing Services Group, leaves the organization, you will be able to hire someone to replace him?

Activity Complete

CHAPTER 6 KNOWLEDGE CHECK

1. True or False: The Change Job business process uses a guided editor, which helps you navigate through entering all the necessary data entry.
2. True or False: If you freeze a position it is permanent and cannot be undone.
3. True or False: When you edit a filled position, it will impact the employee who currently fills that position. If you edit the position restrictions associated with a filled position, it will not impact the employee's position data.

CHAPTER 7 – TERMINATION

OVERVIEW

There are many reasons a worker's employment ends; either voluntarily or involuntary. In Workday, we try to capture that information through a number of different configurable reasons, both country-specific, and local. Once the decision is made to end a worker's employment, there are multiple ways the termination process can be initiated, and many important dates of which to be aware.

OBJECTIVES

After reviewing this chapter, you should be able to:

- Initiate and complete the Termination business process.
- Explain the differences between the termination process, employee resignation, and termination with severance.
- Differentiate the dates associated with termination of an employee.
- Process a termination with Job Overlap.

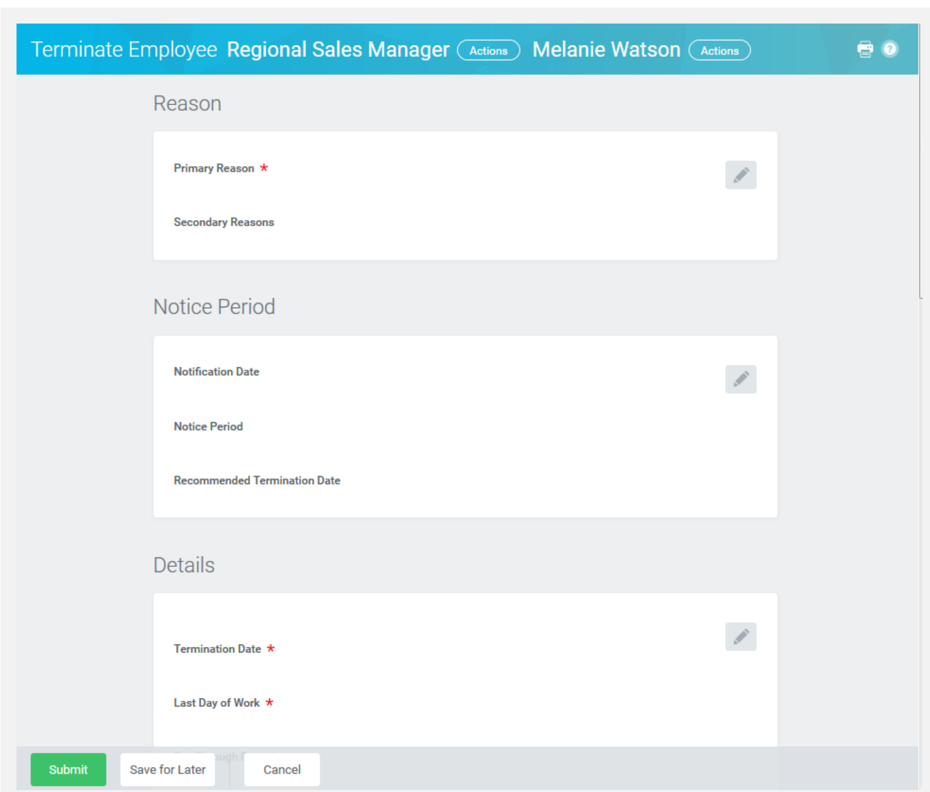
TERMINATION

Termination ends the active working relationship between the enterprise, and the employee and can be initiated several ways.

Some things to remember about terminations:

- Termination is a configurable event that uses.
- Termination is complete in the system at midnight on the day after the termination.
- Based on your security configuration, only certain roles will be able to indicate if the employee is eligible for rehire.
- You can indicate that the termination was regrettable.
- The exit interview can be documented either through a simple exit interview task or through an online questionnaire that is part of the business process.

Note: You can deny access to the Workday system for a worker. This step can be included in the business process or done separate from the Termination event. Click the worker's Related Actions, and select Security Profile > Edit Workday Account. You can either enter an Account Expiration Date and time, or enable the Account Disable checkbox.



When initiating a Termination business process, you will enter data using the Guided Editor framework, which displays sections of data, based on your security policy. For example, if you want the HR Partner or HR Administrator to control the decision as to whether a terminated employee is eligible for rehire, then secure the Eligible for Rehire section to those security groups and exclude others such as manager. The sections are listed below:

- Reasons
- Notice Period
- Details - dates
- Regrettable
- Eligibility for rehire
- Additional Details
    - Resignation Details
    - Severance Details
    - ROE Details (Record of Employment for Canada only)
- Position Details

INITIATING A TERMINATION

The Terminate Employee business process has many steps that can be included, so the business process we review in this class will most likely be different than the business process used by your organization. Below is a list of the steps and subprocesses that can be included; none of which are required.

Optional Subprocesses and Steps in Terminate Employee Business Process		
Add Retiree Status	Assign Costing Allocation for Terminated Employee	Assign Roles to Worker
Change Benefit Elections	Check Budget	Create Change Benefits Event
Create Job Requisition Sub Process	Edit Service Dates	End Academic Appointment Track
End Period Activity Pay	Generate Document	Maintain Employee Contract
Manage Business Processes for Worker	Manage Union Membership	Request Default Compensation for Position Event
Request One-Time Payment	Review~Worker-Initiated~Termination	Review COBRA Eligibility
Review Employee Termination	Review Payroll Interface Data Extract	

In Workday, there are a number of ways to initiate a termination:

1. Use the Terminate Employee business process by searching for the task, or click the worker's Related Actions, and select Job Change > Terminate Employee.

2. Enable the Submit Resignation business process to allow an employee to initiate their own termination event (Review Worker Initiated Termination step must be included in the Terminate Employee business process to link these processes together).

3. Use the Severance functionality in combination with the Termination business process.

Each of these methods of initiating a termination incorporates the Terminate Employee business process, and has a unique set of reasons.

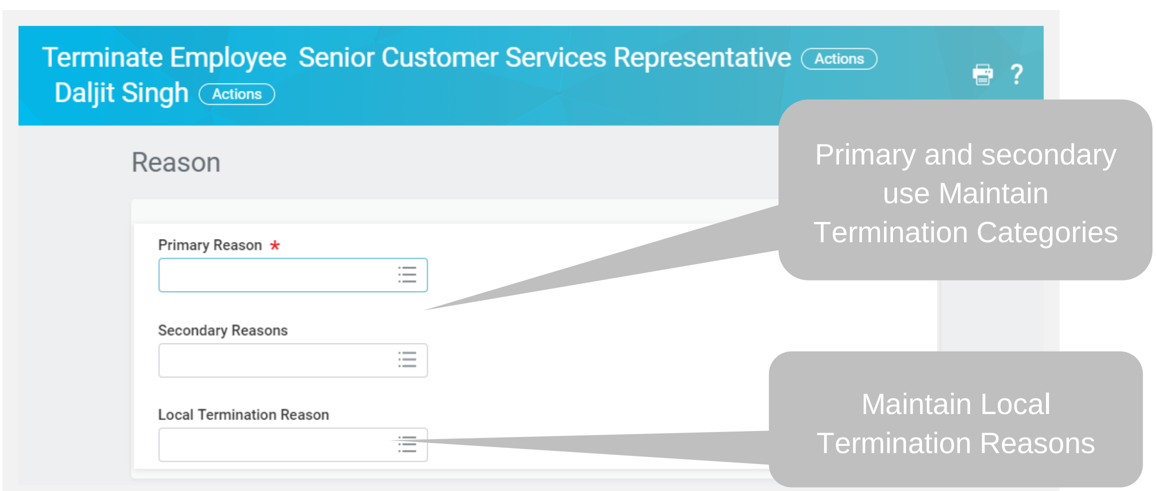
TERMINATION REASONS

The termination of an employee can occur for many reasons, and your ability to track and report based upon this information is critical to understand turnover rates. Depending on what method of termination is being used, and how termination reasons are configured, you may enter more than one termination reason for a single termination event.

There is a set of configured reasons for both the Terminate Employee and End Contingent Worker Contract business processes. Reasons can be organized within termination categories, and each reason can be set up as:

- **Involuntary**: Such as workforce reduction, poor job performance, or disciplinary.
- **Retirement**: Identify reasons that would be associated with a retirement status. Can be used in business process condition rules to set retiree status.
- **Manager Reason**: Controls which reasons a manager can select.

The reasons that your enterprise has configured are used across your organization. There may be a need to have reasons that are specific to a country or country region. Workday provides the option of creating termination reasons that can be selected to reflect local requirements.



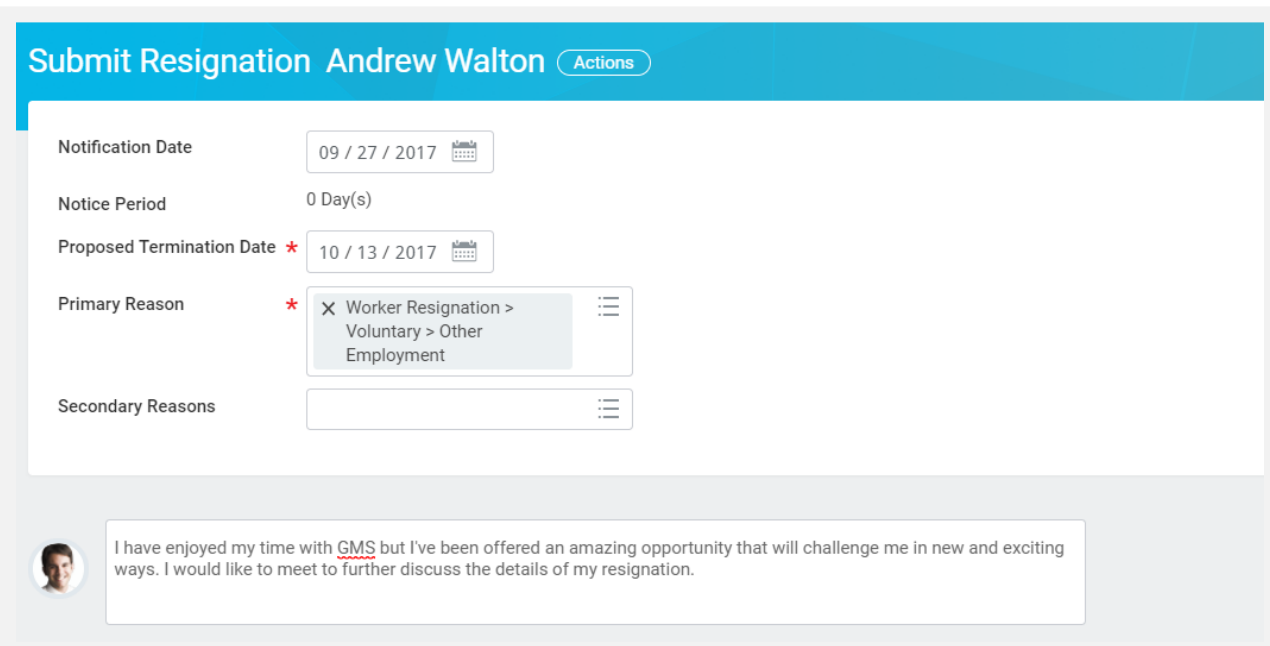
A set of reasons can be created for a country, or a region within the country, given a unique set of reasons. You can control which local termination reasons can be selected by managers.

If using the Severance or Worker Resignation options, then additional reasons were configured for these business processes.

RESIGNATION

The ability for an employee to resign, also known as providing an "I Quit" button, has several benefits. The most important benefit is timely reporting of a termination. If a manager has not properly reported or initiated the termination, the result can be overpayments and continued employee system access.

The resignation functionality allows an employee to formally report their intention to resign. Depending on your configuration the resignation can be approved by the manager, or possibly skip the manager and have an HR professional approve based on the reason for resignation. Employees can locate this task by using the Related Action off their name and selecting Job Change > Resign.



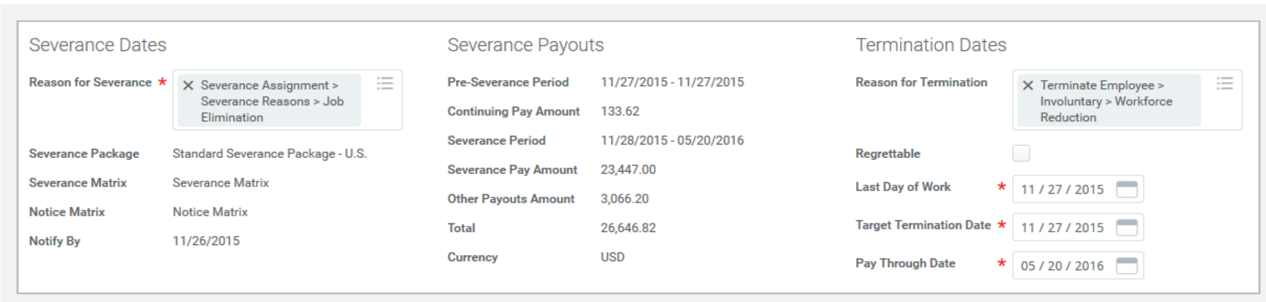
Depending on which method you use, certain termination-related dates may auto-populate or need to be carefully reviewed and possibly edited.

SEVERANCE

Workday provides a framework for managing the process of calculating a severance package as part of termination. Severance is generally defined as money provided to an employee who is ending employment due to reasons including layoff, job elimination, or possibly, mutual agreement. Severance enables you to calculate an employee's severance duration and amount based on the company's policy.

The Severance Matrix table is used to drive the initial default values on notices and ongoing severance payments. The Severance Package incorporates the severance matrix and four delivered sections to determine the specific pay components of the employee's severance. The stand-alone Severance Worksheet business process contains review, send back, and approval steps allowing for iterative adjustments to the default calculations. The severance information is then tied to the termination process through the Severance Worksheet and sent to either Workday Payroll or Workday Payroll Interface.

Note: The Severance Worksheet process must be completed before initiating the Terminate Employee business process.



When the Terminate Employee event is initiated, basic details of the severance package will be displayed along with the following information, which will populate from the Severance Worksheet:

- Reason for Termination
- Last Day of Work
- Pay Through Date
- Notify By Date

Depending on which method you use, certain termination-related dates may auto-populate or need to be carefully reviewed and possibly edited.

TERMINATION DATES

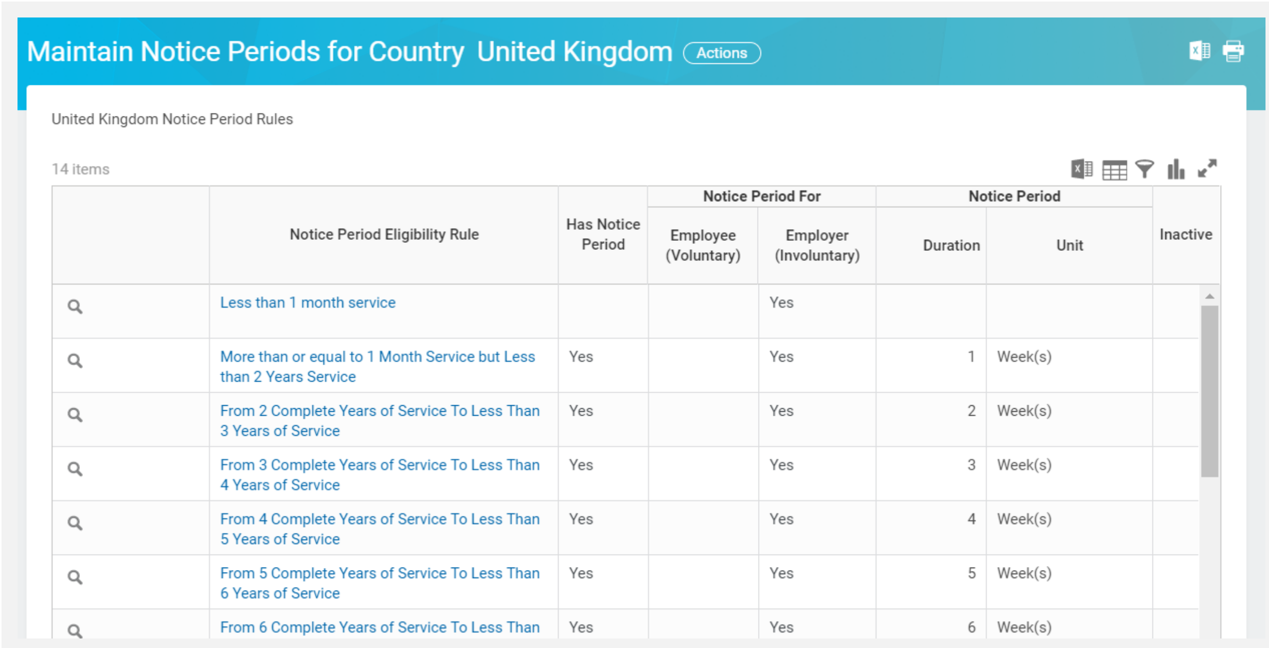
Date	Description
Termination Date	Effective date of the termination is equal to the employee's last day of employment. If already entered on a Severance Package, it cannot be changed when initiating a termination event.
Last Day of Work	Defaults to the termination date, but can be edited

Pay Through Date	Defaults to the termination date. Should be edited if any pay continues past the termination date, and should be paid through Workday Payroll or payroll integration.
Resignation Date	Will not auto-populate. If employee submits their resignation, the resignation date will display, but this field will need to be manually populated. Not available if Severance Worksheet is used.
Notify By	If a recommended minimum notice period is configured for the terminated employee's country, the date will automatically display the recommendation.
Last Date for Which Paid (Canada only)	Defaults from Pay Through Date (only available if terminating employee is located in Canada).
Expected Date of Return (Canada only)	Date must be equal to or greater than the Last Date of Work (only available if terminating employee is located in Canada).

The effective date of a termination should be considered the last day of employment. For example, if this coming Friday is the last day of employment, then enter Friday's date as the termination date. The termination will go into effect as of midnight. Time zone is a factor when viewing a termination. A terminated employee located in New York, will appear terminated five hours earlier for anyone located in a United Kingdom office.

NOTICE PERIOD FOR TERMINATION

Workday provides the ability to create notice periods that are country-specific and use eligibility rules to determine the duration of the notice period for the defined population. For example, in France you may have a notice period for a collective agreement that changes based on a worker's length of service. The notice period could also be different based on if the termination was voluntary or involuntary.



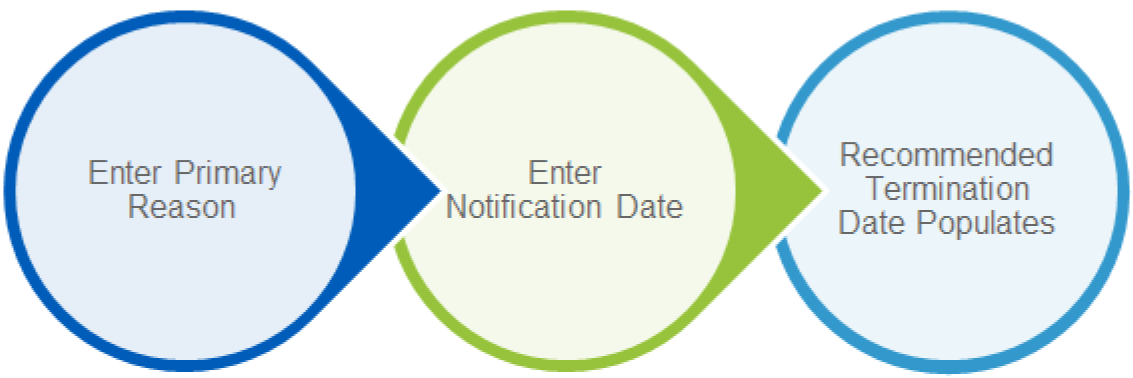
Maintain Notice Periods for Country United Kingdom Actions

United Kingdom Notice Period Rules

14 items

	Notice Period Eligibility Rule	Has Notice Period	Notice Period For		Notice Period		Inactive
			Employee (Voluntary)	Employer (Involuntary)	Duration	Unit	
	Less than 1 month service			Yes			
	More than or equal to 1 Month Service but Less than 2 Years Service	Yes		Yes	1	Week(s)	
	From 2 Complete Years of Service To Less Than 3 Years of Service	Yes		Yes	2	Week(s)	
	From 3 Complete Years of Service To Less Than 4 Years of Service	Yes		Yes	3	Week(s)	
	From 4 Complete Years of Service To Less Than 5 Years of Service	Yes		Yes	4	Week(s)	
	From 5 Complete Years of Service To Less Than 6 Years of Service	Yes		Yes	5	Week(s)	
	From 6 Complete Years of Service To Less Than	Yes		Yes	6	Week(s)	

Once a reason for termination is selected, enter a notification date. If there is a defined noticed period, the system will populate a recommended termination date.



ACTIVITY 7.1 – TERMINATION

Business Case: Brian Sullivan needs to initiate a termination for Adrian Martin, a worker in the Marketing Communications Group supervisory organization. Matt is leaving due to poor job performance.

TASK #1: INITIATE TERMINATION

1. Sign in as the HR Partner, Brian Sullivan (*bsullivan*).
2. Search for *Adrian Martin*, click his **Related Actions**, and select **Job Change** > **Terminate Employee.**
3. Enter the following:

Field Name	***Entry Value***
Primary Reason	Involuntary > Poor Job Performance
Notification Date	This Friday
Recommended Termination Date	What date auto-populated?
Last Day of Work	This Friday
Pay Through Date	Adrian is paid semi-monthly, so the pay period end date is the 15th and last day of month. Enter a pay through date based on the termination date and the end of the pay period containing the termination date.
Not Eligible for Rehire	Select checkbox

4. Click **Submit** and **Done**.

Activity Complete

JOB OVERLAP

If you would like to train a replacement for a worker who will soon be leaving their position, or backfill a position while a worker takes a leave of absence, it is possible to overlap workers in the same position.

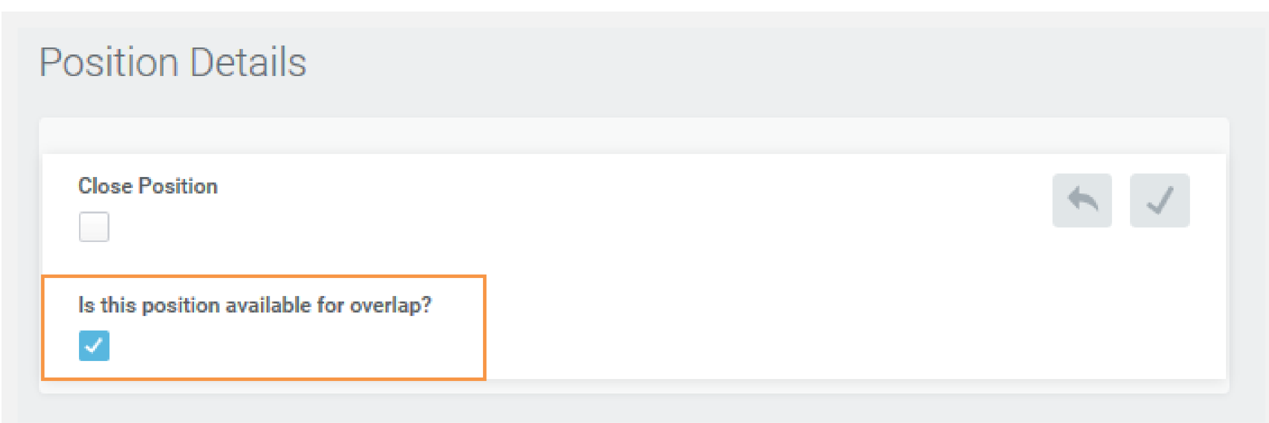
To take advantage of the job overlap functionality, this must first be enabled by selecting the Allow Job Overlap for Staffing checkbox in your tenant. This is found under the Staffing section of the Edit Tenant Setup-HCM task. Once this is enabled, you can hire, contract, add job, change job, or start international assignment for a worker into an already-filled position as long as:

- The position is in an organization using the position management staffing model.
- The principal worker (the original job holder) has a future-dated staffing event or a current or future-dated leave of absence that leaves the position vacant.
- You are not closing the position as part of the future-dated staffing event.
- You are not moving the position to a different organization using the Change Job business process.
- The position does not overlap another position.

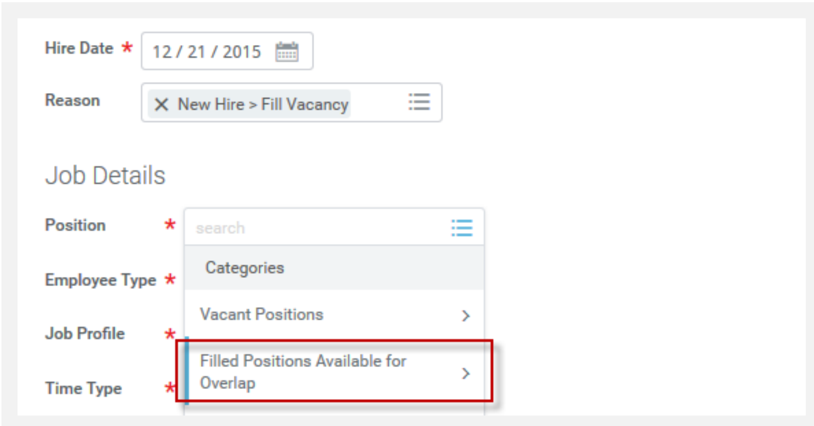
When dealing with overlap workers in Workday, the following terminology applies:

- Principal worker: original job holder
- Overlap worker: secondary job holder
- Overlapped position: original position
- Overlapping position: secondary position

Enabling job overlap in your tenant will allow you to select whether this position is available for overlap in the Change Job, End Additional Job, End Contingent Worker Contract, End International Assignment, and Termination business processes. You must indicate that the position is available for overlap during the staffing transaction to enable overlap functionality for that position.



You can fill overlap positions by selecting the Filled Positions Available for Overlap folder from the Position prompt.



SECURITY IMPLICATIONS

During the time of position overlap, the new worker should be training to take on the responsibilities of the position. With this in mind, the overlap and principal workers will share the same security access derived through the position they both currently fill. Any task routed to the Principal worker will also be received by the Overlap worker. When either the overlap or principal worker completes the task, it will be removed from the other worker's Inbox.

Domain and business process security access associated to the overlap position is also shared equally. Anything the Principal worker can see or do can be accessed by the overlap worker.

ORGANIZATION ASSIGNMENTS

With job overlap, Workday does not synchronize organization assignments across positions and position restrictions as it does with non-overlap positions. Organization changes only apply to the position or position restriction you take action on. You need to update the other position or the position restrictions separately. This behavior applies to both individual and mass organization changes.

REPORTING

There are two delivered reports that are available to track any positions have an overlap. These are Overlap Workers and Positions with Overlap.

Other delivered reports also take overlap into consideration, and whether a position with two people temporarily filling it should be counted as one headcount or two. Some reports that count workers, such as Directory by Organization or Headcount Report, count both the principal and overlap worker. There are a few reports that are focused on position count and will return one position when overlap exists. The FTE Report and Open Position Summary report are examples of position count reports.

ACTIVITY 7.2 – JOB OVERLAP – TERMINATE PRINCIPAL WORKER

Business Case: Jason Boyle will be leaving the Marketing Services Group in three weeks' time. In the interim, you would like to bring in his replacement to be trained. You need to terminate Jason with a future effective date, and be sure to indicate the position is available for overlap.

TASK #1: PROCESS TERMINATION FOR PRIMARY WORKER USING OVERLAP

1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for *Jason Boyle* and click his **Related Actions**.
3. Select **Job Change** > **Terminate Employee.**
4. In the Reason section enter the following information:

Field Name	***Entry Value***
Primary Reason	Voluntary > Commute Time

5. In the Details section enter the following information:

Field Name	***Entry Value***
Termination Date	Three weeks from today

6. In the Position Details section enter the following information:

Field Name	***Entry Value***
Is this position available for overlap?	Select the checkbox

7. Click **Submit**.
8. Sign out

TASK #2: ANSWER QUESTIONNAIRE

1. Sign in as the terminated employee, Jason Boyle (*jboyle*).

2. Open the Complete Exit Interview: Jason Boyle task in the Inbox.

3. Answer the questions, and click **Submit.**

4. Sign out.

Activity Complete

ACTIVITY 7.3 – JOB OVERLAP – HIRE OVERLAP WORKER

Business Case: Now that Jason Boyle has made the decision to leave, you will need to backfill his position. To start, you will initiate the hire for Jason's replacement, Kay Syrah.

TASK #1: HIRE OVERLAP WORKER

1. Sign in as Brian Sullivan (*bsullivan*).
2. From the Home page click on the **Favorites** worklet. Click on **Hire Employee** task.
3. Enter the supervisory organization of **Marketing Services Group**, and use existing pre-hire, **Kay Syrah.**
4. Click **OK.**
5. Enter the following information:

Field Name	***Entry Value***
Hire Date	Today's Date
Reason	New Hire > Fill Vacancy
Position	Web Content Manager (use Filled Positions Available for Overlap filter)
Employee Type	Regular
Time Type	Full Time
Location	San Francisco
Pay Rate Type	Salaried

6. Click **Submit.**
7. On the confirmation page, click the **Skip** link for the Start a Background Check task.
8. Click **OK**.
9. Sign out.

TASK #4: ENTER COMPENSATION FOR NEW HIRE

1. Sign in as the Compensation Partner, Logan McNeil (*lmcneil*).
2. Navigate to Logan’s **Inbox**.
3. Open the **Propose Compensation Hire: Kay Syrah – Web Content Manager** task.
4. Scroll down to the Salary section, and click anywhere in the section, or on the edit icon. Enter the salary amount of **110,000**.
5. Click **Submit**.

TASK #4: REVIEW THE SUPERVISORY ORGANIZATION

1. Search for and select the **Marketing Services Group.**
2. On the **Members** tab, confirm that Jason Boyle is vacating his position**,** Kay Syrah is in the same position with an overlap designation.
3. Sign out.

Activity Complete

CHAPTER 7 KNOWLEDGE CHECK

1. True or False: If you terminate a worker's employment on 4/30, the last day of their employment will be 5/1.
2. Which of the following is not a method to initiate a termination event?
   A. An employee uses self-service to resign.
   B. Use the Terminate Employee task.
   C. Run a background process to schedule a termination for a future date.
   D. Use the Severance Worksheet to create a severance package and then select the Terminate Employee task
3. True or False: Notice periods can be used to provide guidance for entering an employment termination date.
4. True or False: The ability to have two people in the same position for a limited period of time before a resigning employee leaves is called job overlap.

CHAPTER 8 – EVENT MANAGEMENT

OVERVIEW

As events such as hire, transfer, and termination occur; you may need to make changes, corrections, or remove the event entirely. Workday gives you multiple ways to manage events that are either in progress or successfully completed.

OBJECTIVES

After reviewing this chapter, you should be able to do the following:

- View worker history
- Cancel and rescind an event
- Correct event data
- Reassign a task
- Delegate a task

CANCEL, RESCIND, AND CORRECT EVENTS

The ability to manage transactions by either correcting the data that was entered, or by backing out an event through a cancel or rescind process is necessary since change is common in any business. In order to make changes to an event, such as rescinding the event or correcting a hire, first you need to locate the event.

Action	When Action is Available	Examples of Who's Responsible
Cancel	Task must be "In Progress"	Process initiator HR Administrator HR Partner Business Process Administrator
Rescind	Task must be "Successfully Completed"	Business Process Administrator
Correct	Task can be "Successfully Completed" or "In Progress"	Compensation Partner Compensation Administrator HR Administrator Business Process Administrator

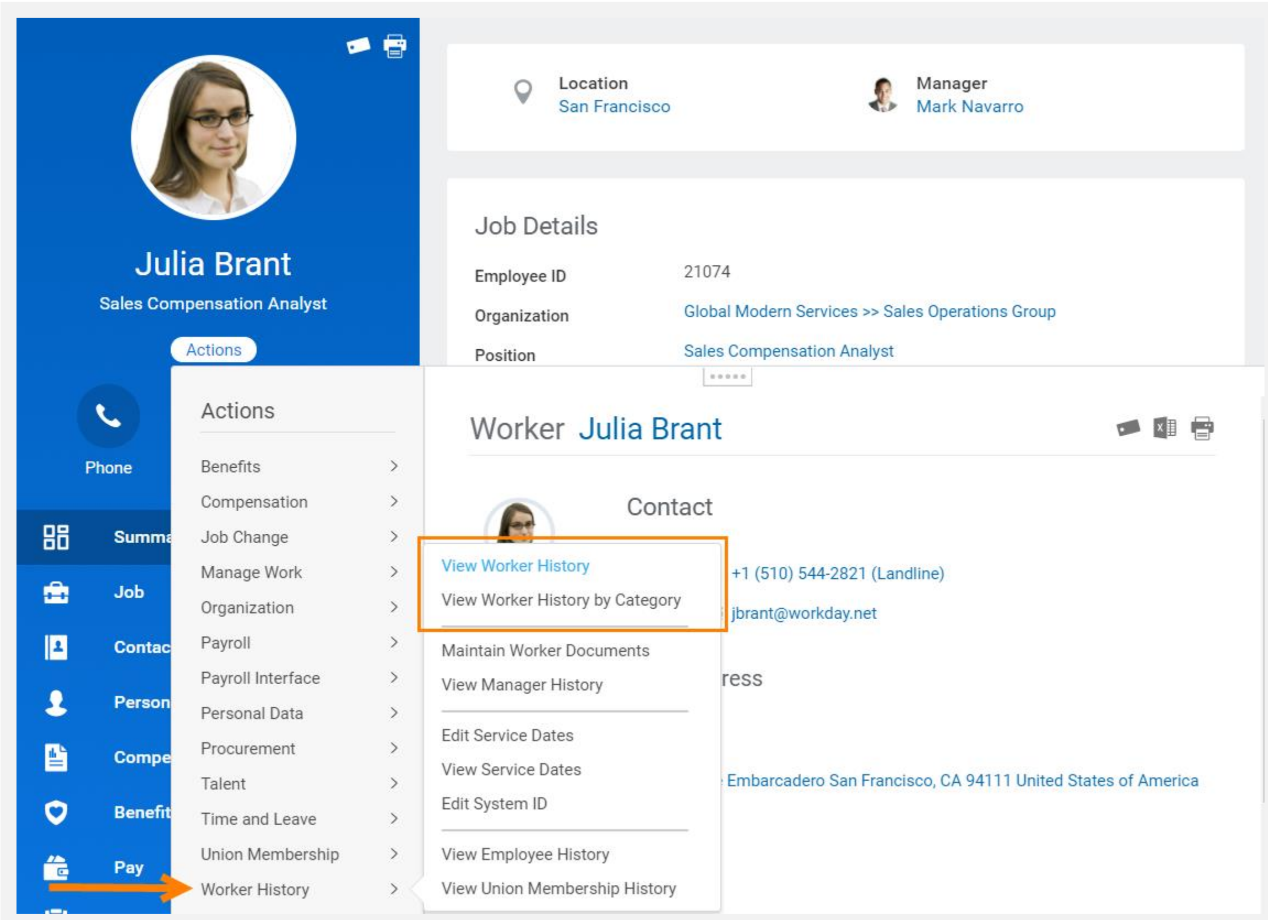
FINDING AN EVENT

The ability to view an event is dependent on your organization and administrative roles. For example, a manager can view the hire event of an employee in an organization they manage. If an employee transfers out of a manager's organization, any future events will not be visible.

There are multiple ways to find an event:

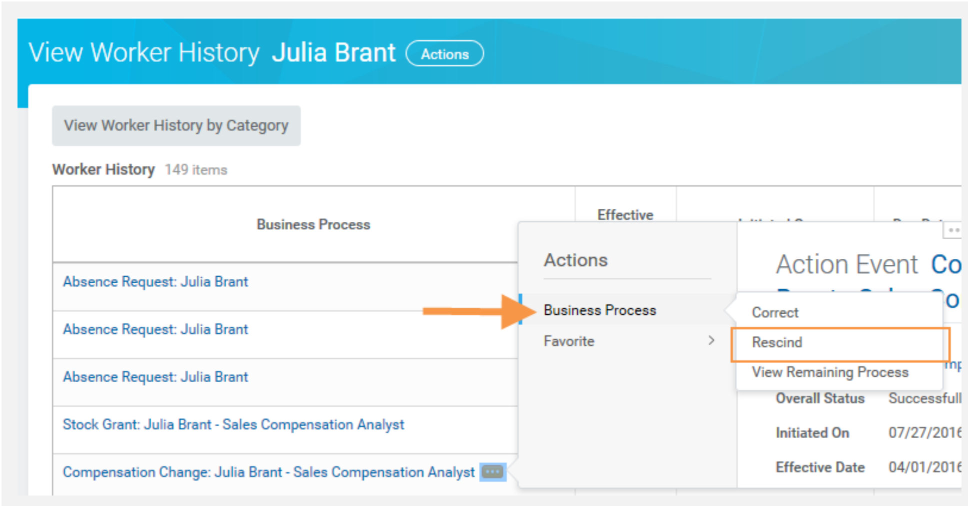
- Search
- Archive tab in your Inbox if you were part of a business process in the past 30 days
- View More Processes report to see historical events in the past 30 days or during a particular time period
- Worker History tab on a worker's profile, if configured
- Process Status worklet, if configured on a landing page

- View a worker's history by using the worker's Related Actions > Worker History > View Worker History
- Find Events – Standard Report which shows events by business process and allows for filtering with facets – one place to find all events without having to create custom reports every time



CANCEL AND RESCIND

Most business processes can be cancelled or rescinded. If a business process has not been completed, then it can be cancelled. Rescinding a business process means that a completed business process can be reversed as if it did not happen. Business Process Administrators can rescind a business process by accessing the business process' Related Actions, and selecting Rescind.



You can configure your business processes to automatically send notifications to specific roles when the business process is cancelled or rescinded.

There are two primary differences between rescind and cancel:

- Rescind
  - Use when process is in a status of Successfully Complete.
  - Can be done by security groups with appropriate permission.
- Cancel
  - Use when process is in a status of In Progress.
  - Can be done by security groups with appropriate permission as well as the worker who initiated the business process.

EFFECTIVE DATING

Many Workday business objects allow you to specify an effective, or "as of," date when you create or edit them. This allows you to define changes as taking effect on a date/time other than when the data entry actually takes place. This is useful when you need to hire a worker retroactively to the first day of the week, or to request a compensation change on the first day of the next year. You are never prompted for an entry date when editing, but an entry date is always stored in the system. The Effective Date and Entry Date are used in combination to allow various types of reporting.

ACTIVITY 8.1 – RESCIND AN EVENT

Business Case: Jake Bateman has decided not to take the Associate Marketing Analyst position, so you need to rescind his hire. This provides you with an opportunity to use one of the methods of finding an event in Workday.

TASK #1: VIEW WORKER HISTORY

1. Sign in as Brian Sullivan (*bsullivan*).
2. Search for Jake Bateman, click Jake's **Related Actions** icon, and select **Worker History** > **View Worker History by Category**.
    A. How many personal data business processes have been successfully completed? (Hint: Click the Personal Data tab.)
    B. Under the Compensation tab, are there any completed business processes and if so, which one(s)?

TASK #2: RESCIND THE TRANSFER

1. Navigate to the Staffing tab to find the Hire: Jake Bateman event in the report and click its **Related Actions**.
2. Select **Business Process** > **Rescind**.

   Note: If the business process is still in progress, you will see Cancel instead of Rescind. If this is the case, select Cancel to complete this step.
3. Enter a reason for rescinding in the comment box.
4. Click **Submit**.
5. Click the **Details and Process** arrow to expand the section and click on the **Process** tab to view Jake's process history.
    A. What is the Overall Status of Jake's hire event?
    B. Scroll down to see which process steps are now cancelled. Why are they cancelled?
6. Search for *Jake Bateman*, and note that he is no longer an employee.

Activity Complete

OUT OF ORDER CORRECTION AND EFFECTIVE DATING

Workday uses effective dates in staffing events that give you the flexibility to insert and correct staffing events out of order.

You can correct most staffing events out of order as long as the change does not affect a worker's organization or position. Some of the processes that allow out of order corrections include the following.

Hiring	Job Change
Add Additional Job	Change Job
Contract Contingent Worker	End Additional Job
Hire Employee	End International Assignment
Start International Assignment	Promote Employee
	Terminate Employee
	Transfer Employee

When you make a correction, Workday displays a supporting information section that lists later staffing events, moves, and reorganizations in a worker's history. Review this information to determine the impact of your correction so that you can fix the later events, if necessary.

If you correct the date of a staffing event, the new effective date cannot be earlier than the previous event or later than the next event in a worker's history. You must keep all staffing events, moves, and reorganizations in the same order.

The supporting information section includes Workday system-generated events. These events reflect changes that occurred when Workday converted and defaulted data during previous updates. You can drill into the event details and rescind these events, if necessary.

If you correct a completed event, Workday does not validate your changes against the hiring restrictions for the worker's job or position.

Note: Workday does not apply corrections to later events for you. Anyone who has security permission to correct a staffing event can make an out-of-order correction. Workday strongly recommends that you restrict corrections to administrators.

ACTIVITY 8.2 – CORRECT TRANSFER EVENT

Business Case: Lucy Collins was transferred into the Marketing Services Group. Once the transfer was completed, Brian was informed Lucy will be transferring one week later. Because Brian has the HR Partner role, which has security permission to initiate a correction, he is able to make the change.

TASK #1: CORRECT HIRE

1. Sign in as Brian Sullivan (*bsullivan*).

2. Enter *lucy collins* in the search field and click the **Search** icon.

3. In the search results locate the **Transfer: Lucy Collins** event. Use the Related Actions icon, and select **Business Process** > **Correct**.

4. Enter the following changes:

Field Name	***Entry Value***
Effective Date	One week from pre-populated date
First Day of Work (scroll down to locate)	One week from pre-populated date
Comment box	Enter a comment explaining the reason.

5. Click **Submit**.

6. Open the Details and Process section and click the **Process** tab, view the status and comment you entered as part of the Change Job process (near the bottom of the page).

Activity Complete

TASK REASSIGNMENT AND REQUEST REASSIGNMENT

Use Reassign Tasks to move a task from one worker's Inbox to another's. You might use this when a task in your Inbox is no longer your responsibility and needs to be moved to the correct person's Inbox. For example, as a manager I might have a number of tasks in my Inbox that I need to complete for my direct reports. If I am moved to a new position with new direct reports, the tasks can be reassigned to the person who will be filling my previous position.

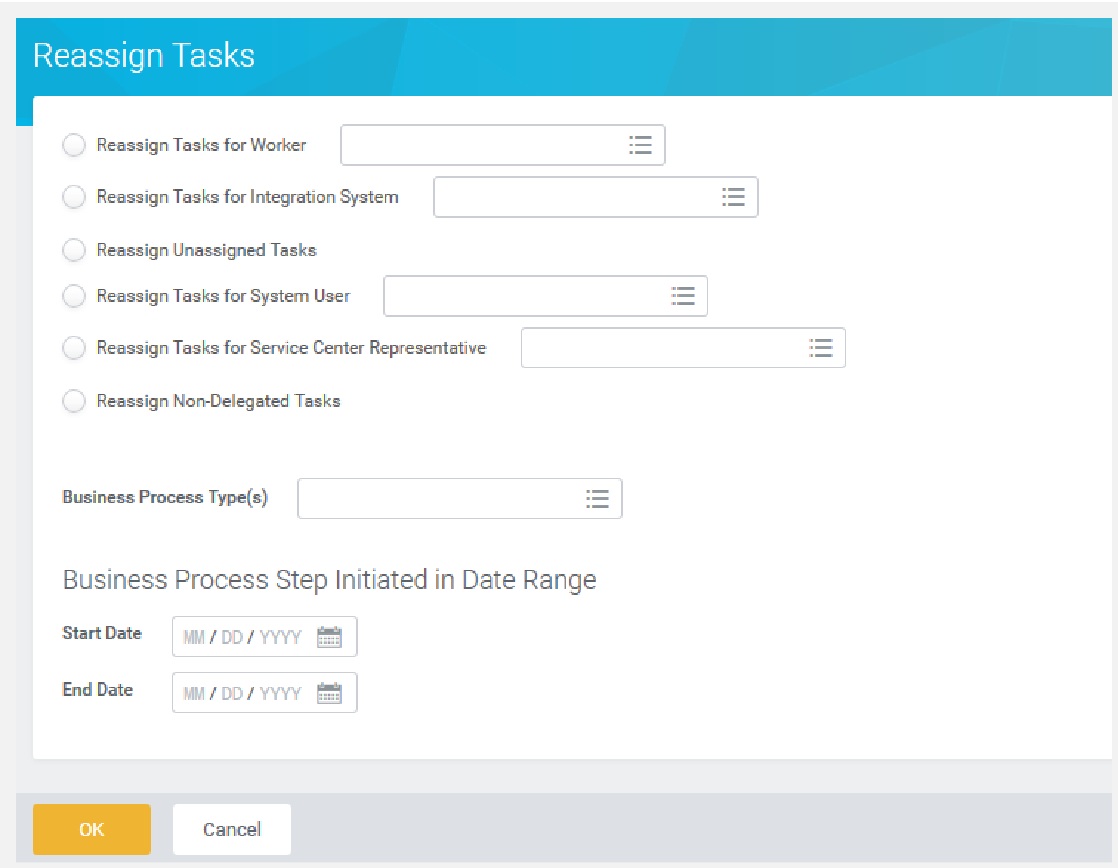
Action	When Action is Available	Examples of Who's Responsible
Reassign a Task	Task must be "In Progress"	Business Process Administrator
Request Reassignment	Task must be "In Progress"	Whoever is assigned a task can request reassignment
Request Delegation Change	Task must be "In Progress"	Anyone can request delegation of their Inbox, or just certain task in their Inbox. The initiation of a task can also be delegated.

Note: When you use the Reassign Task option, you are really requesting a reassignment. Your request will be routed for approval to the security groups listed in the business process security policy for that business process. The business process administrator will also be able to approve the reassignment. If the business process administrator requests reassignment, the request will be automatically completed (e.g., it will not route for approval).

This task is found using the settings icon on the task in your Inbox.

Tasks that have been assigned to someone's Inbox will remain there until they are completed, reassigned, or delegated.

Another option is for the business process administrator to reassign tasks from one person to another. They use Reassign Tasks to select a worker and review the tasks assigned to them. Optional filters can be added, such as a specific business process or a start or end date.

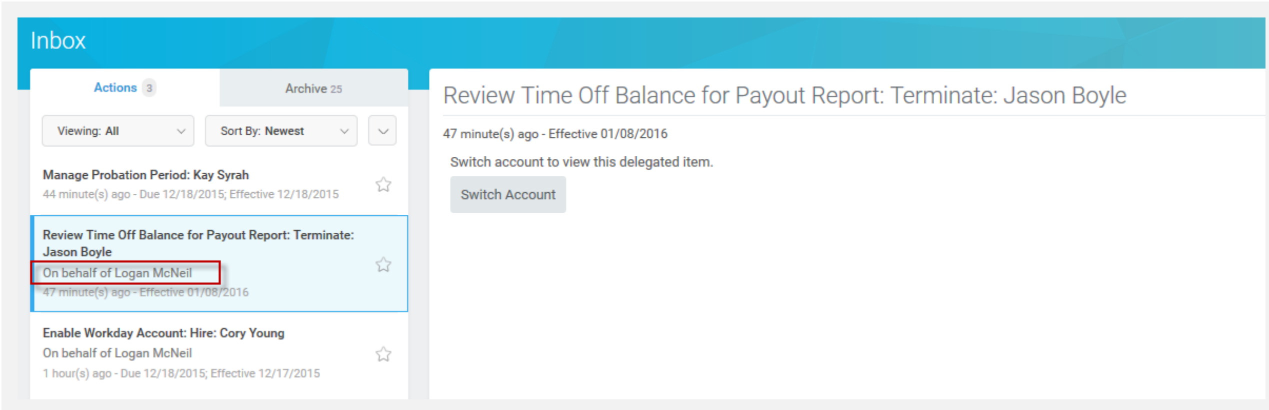


REQUEST DELEGATION CHANGE

Request Delegation Change allows you to request that either all or some business process tasks that are assigned to you be delegated to someone else for a designated period of time. The request could also be open-ended. As requesting a delegation change is a business process, you may configure it to require approvals.

Workday makes it easy for you to manage and perform delegated tasks with a Delegation Dashboard that enables you to perform tasks on behalf of other users.

If you are an active delegate, any delegated tasks will show "On behalf of" in your personal Inbox. You will need to switch accounts to take action on the task using the Switch Account button.

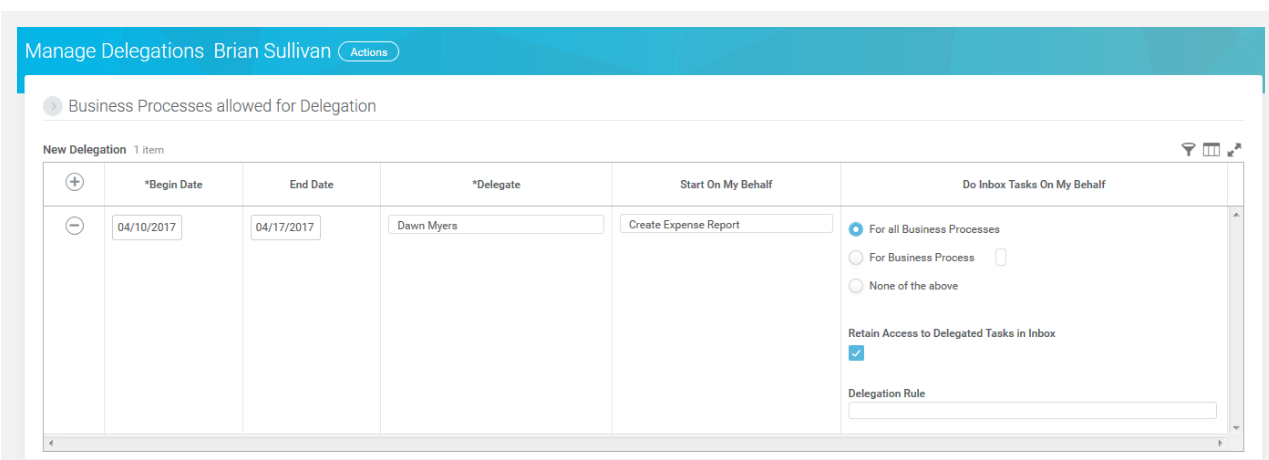


This will take you to a Delegation landing page, which will only display the items delegated to you as well as any Delegated Actions you can initiate on behalf of this user.

Delegation of one worker's tasks to another person can be done by anyone in the Workday system. This is a great reason to include a review or approval step in the Request Delegation Change business process. In addition, within Configurable Security, you have the option to specify which business processes can and cannot be delegated.

Use My Delegations in the settings menu of your Inbox to select the following:

- Begin Date
- End Date – optional, depending on tenant setup
- Delegate – who are you delegating to
- Start On My Behalf – select business processes someone can initiate for you
- Retain Access to Delegated Tasks – tasks will still show up in your Inbox and be removed as they are completed
- Select which business processes you would like to delegate



The Edit Tenant Setup – Business Processes and Notifications page has settings that determine to whom users can delegate a task, as well as if an end date is required for all delegations. The options are:

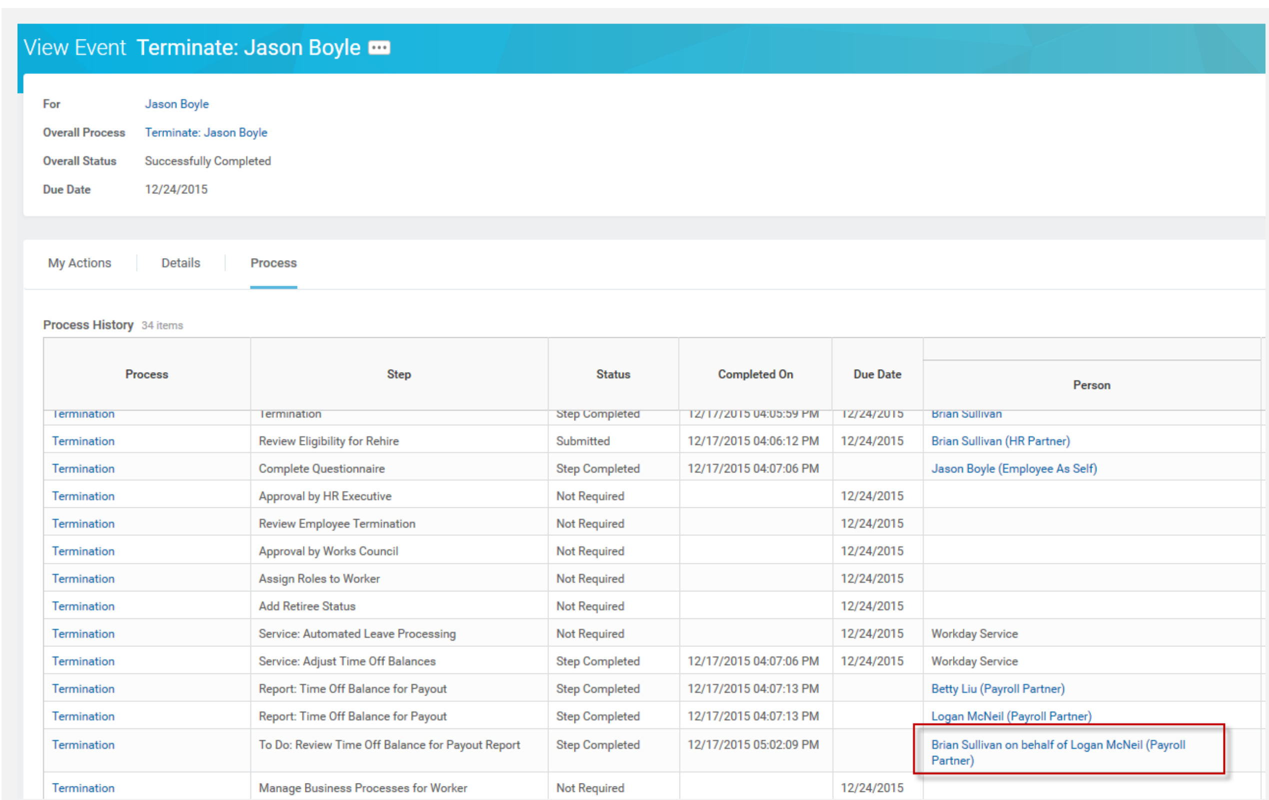
- Anyone
- Peers
- Subordinates
- Superiors

These options can be used together, such as selecting both peers and superiors.

In addition to a worker being able to delegate their tasks to another worker, a business process administrator can also delegate one or more business processes on someone else's behalf. Use the Manage Delegation Settings task to change existing or set up new delegations. A few examples of when this might be used include the need to manage an unexpected employee absence, or assist with a known delegation requirement for management, or the executive level of your organization.

Another option is to set up a delegation rule to be used by the business process administrator when creating a delegation for another worker. This allows you to create a delegation rule and then build it into the delegation request. When the condition is met, the delegation will occur.

When viewing the details of a business process, if a step in that process has been delegated, it will be clearly indicated.


View Event Terminate: Jason Boyle

For Jason Boyle
Overall Process Terminate: Jason Boyle
Overall Status Successfully Completed
Due Date 12/24/2015

My Actions | Details | Process

Process History 34 items

Process	Step	Status	Completed On	Due Date	Person
Termination	Termination	Step Completed	12/17/2015 04:05:59 PM	12/24/2015	Brian Sullivan
Termination	Review Eligibility for Rehire	Submitted	12/17/2015 04:06:12 PM	12/24/2015	Brian Sullivan (HR Partner)
Termination	Complete Questionnaire	Step Completed	12/17/2015 04:07:06 PM		Jason Boyle (Employee As Self)
Termination	Approval by HR Executive	Not Required		12/24/2015	
Termination	Review Employee Termination	Not Required		12/24/2015	
Termination	Approval by Works Council	Not Required		12/24/2015	
Termination	Assign Roles to Worker	Not Required		12/24/2015	
Termination	Add Retiree Status	Not Required		12/24/2015	
Termination	Service: Automated Leave Processing	Not Required		12/24/2015	Workday Service
Termination	Service: Adjust Time Off Balances	Step Completed	12/17/2015 04:07:06 PM	12/24/2015	Workday Service
Termination	Report: Time Off Balance for Payout	Step Completed	12/17/2015 04:07:13 PM		Betty Liu (Payroll Partner)
Termination	Report: Time Off Balance for Payout	Step Completed	12/17/2015 04:07:13 PM		Logan McNeil (Payroll Partner)
Termination	To Do: Review Time Off Balance for Payout Report	Step Completed	12/17/2015 05:02:09 PM		Brian Sullivan on behalf of Logan McNeil (Payroll Partner)
Termination	Manage Business Processes for Worker	Not Required		12/24/2015	

You also can delegate the initiation of certain business processes. The business processes where the initiation step can be delegated include:

- Change Organization Assignments for Worker
- Close Job Requisition
- Contract Contingent Worker
- Correct Time Off
- Create Expense Report
- Create Job Requisition
- Create Position
- Create Receipt
- Edit Job Requisition
- Edit Position
- End Contingent Worker Contract
- Enter My Time
- Hire Employee
- Promote Employee
- Request Time Off
- Start a Background Check
- Terminate Employee
- Transfer Contingent Worker
- Transfer Employee
- Expense Report Event
- Request Compensation Change
- Request One Time Payment
- Correct My Absence
- Request Absence

ACTIVITY 8.3 – REQUEST DELEGATION

Business Case: Congratulations, Brian! You have completed all the tasks on your "to do" list. It is time for a well-deserved holiday. Sign in and delegate your Inbox tasks to your peer, Dawn Myers, for a week starting right now.

TASK #1: MY DELEGATIONS

1. Sign in as Brian Sullivan (*bsullivan*).
2. Navigate to the **Inbox**.
3. Click the **More** icon (the pull-down menu in your activity feed), and select **My Delegations**.
4. Click the **Manage Delegations** button.
5. Enter the following information:

Field Name	***Entry Value***
Begin Date	Today's Date
End Date	1 week from today
Delegate	Dawn Myers
Do Inbox Tasks On My Behalf	For all Business Processes
Retain Access to Delegated Tasks in Inbox	Select the checkbox

6. Click **Submit**.
7. Sign out.

TASK #2: APPROVAL OF DELEGATION

1. Sign in as Brian's manager, Deborah Simpson (*dsimpson*).
2. Navigate to the **Inbox**.
3. Click **Approve** on the Delegation for Brian Sullivan task.
4. Sign out.

TASK #3: DELEGATION

1. Sign in as Dawn Myers (*dmyers*).
2. Click the **Profile** icon, and navigate to your Inbox.
3. The tasks in your Inbox should state they are On Behalf of Brian Sullivan. On the selected task click the **Switch Account** button and then click **OK**.
4. Navigate to Brian's Inbox and complete the ID Change: Kay Syrah task.
5. Click the **Add Row** icon, and then enter the following:

Field Name	***Entry Value***
Country	United States of America
National ID Type	Social Security Number (SSN)
Identification #	Enter nine random numbers

6. Click **Approve**.
7. On the confirmation page open the Details and Process section and click on the **Process** tab.
8. Confirm that the process history shows the task is completed by Dawn, on behalf of Brian Sullivan.
9. Click the **Profile** icon again and select **Switch Account** > **Dawn Myers (self)**.

CHAPTER 8 KNOWLEDGE CHECK

1. True or False: If a transaction is rescinded, the system will back out of a successfully completed business process.

2. True of False: All HR Partners can cancel, rescind, and correct all busienss processes.

3. If a task is reassigned to you:

    A. You are assisting someone else, and it is still that person's responsibility to make sure the task is completed.

    B. A task that was someone else's responsibility to complete is now your responsibility.

    C. You can end the reassignment at any time.

    D. You can deny the reassignment.

4. True or False: If you request your Inbox tasks be delegated to a peer, you can retain access, allowing both you and your peer to work through your Inbox tasks.

APPENDIX A – TRANSACTIONS REPORTS

COMMON TRANSACTIONS REPORTS

Report	Description
View Open Positions	View a summary of open positions in an organization. Enables you to audit the total number of available positions and hours, as well as the number of pre-hires for each position. Details include the organization, manager, position restrictions, etc.
Staffing Activity	View a summary of staffing activities by organization. Enables you to view events for either employees, contingent workers, or both. Events returned are based on the time period or date range entered. Whether the event is approved, pending, canceled, denied, or rescinded; you can select which status to include in the report results.
Positions and their FTE	View workers' scheduled weekly hours, FTE (full-time equivalent) percentage, and time type for all the filled positions. You can optionally get these hours as of a specified date, and/or include subordinate organizations. Enables you to monitor worker hours.
Business Process Status	By default, this report shows all business processes initiated in the last seven days.
Manage Business Processes for Worker	Including the Manage Business Processes for Worker step in your Terminate business process ensures that business processes do not become stalled while awaiting action from a worker who has been terminated. This step will allow you to reassign any existing business process steps currently in a worker's Inbox, assess any business processes currently in progress about the worker, or see if the worker is currently assigned as a delegate for another worker.
Reassign Tasks	Run this report to permanently remove responsibility for task(s) from the original worker, and reassign to the selected worker.

APPENDIX B – DAILY REVIEW QUESTIONS

DAY ONE REVIEW

1. True or False: Search allows you to use partial searches, abbreviations, and misspelled words.
2. If you want to perform an action on an object, what is the name of the icon you should select?
3. Where can you locate your next steps in a business process?
4. If you want to check on the overall status of a business process, where should you look?
5. If you would like to narrow your search results to just organizations, which search prefix would you use?
6. Where in the system can you store frequently used business objects, tasks, and reports for easy access?
7. What type of organization is the foundation of Workday HCM?
8. Where on a supervisory organization can you locate who fills the support roles that drive business processes for that organization?
9. Which of the staffing models requires you to create a position before you can hire into the organization?
10. Can you create a position in a job management-enabled organization? Why or why not?
11. What are the six possible hiring restrictions you can set on a position or a supervisory organization?
12. What can you create and attach to compensation components, such as a compensation package or salary plan, so the components default during a hire?
13. True or False: Your ability to view compensation data is controlled by security.

APPENDIX C – KNOWLEDGE CHECK AND DAY ONE REVIEW ANSWER KEYS

CHAPTER 1 KNOWLEDGE CHECK

1. **True** or False: If you are assigned a task to complete, you will find it in your Inbox.

2. **True** or False: To find a task, report, or object you can search using partial words, but it won't find a match if a word is misspelled.

3. What is the name and location of the icon you should select when you want to act on, or make changes to an object? **Related Actions icon**

CHAPTER 2 KNOWLEDGE CHECK

1. Where can you look to determine how many workers are in a supervisory organization? **The supervisory organization's Members tab**

2. Where can you look to determine who the HR Partner is for a supervisory organization? **The supervisory organization's Roles tab**

3. What are the two staffing models and where are the hiring restrictions set on each? **Position Management – hiring restrictions are set on each position and Job Management – hiring restrictions are set on the supervisory organization**

4. True or **False**: A job profile must have a one-to-one relationship to a position.

5. **True** or False: When hiring a person, there are required fields – one of which is the job profile.

6. Where on the supervisory organization can you check to see if the positions were successfully created? **Staffing tab**

CHAPTER 3 KNOWLEDGE CHECK

1. **True** or False: If compensation details automatically populate during a staffing event, such as a hire, this information can be edited. **Regardless of how compensation is populated during the staffing event (eligibility rules, job profile/position, requisition, or offer compensation), once populated, it can be edited.**

2. What two compensation components will always need to be entered, either by you or through defaulting?

    A. Salary and bonus plan

    B. Compensation package and bonus plan

    C. Compensation package and compensation grade

3. **True** or False: A change to a worker's compensation can be done anytime using the Request Compensation Change business process, and may include multiple approval steps.

CHAPTER 4 KNOWLEDGE CHECK

1. **True** or False: Within a transaction such as a hire or job change, business processes control which steps are included, the order in which the steps occur and who will complete the step.

2. Which is a true statement?

    A. If you are assigned an optional step it will be in your Inbox and will automatically be removed from your Inbox after 30 days.

    B. If you are assigned an optional step you can make the decision to select Skip This Task and not be required to complete the step.

    C. If you are assigned an optional step, you can reassign the task to another user who will be required to complete the step.

3. A worker is hired into which type of organization? **Supervisory Organization**

4. **True** or False: A pre-hire entered into Workday must have at least one piece of contact information, such as a phone number, email, or home address.

5. True or **False**: Every Workday customer will have to use the exact same Hire process. **Business processes can be configured and will differ from one implementation to another.**

CHAPTER 5 KNOWLEDGE CHECK

1. What are the two methods used to convert a contingent worker into an employee? **End Contingent Worker Contract and then initiate Hire or use Convert to Employee.**

2. How can you distinguish between an employee and a contingent worker? **[C] Notation by their name.**

3. True or **False**: When converting a contingent worker to an employee, their current compensation will automatically transfer to their employee compensation data. **False, since there is no contingent worker compensation data.**

CHAPTER 6 KNOWLEDGE CHECK

1. **True** or False: The Change Job business process uses a guided editor, which helps you navigate through entering all the necessary data entry.

2. True or **False**: If you freeze a position it is permanent and cannot be undone.

3. **True** or False: When you edit a filled position, it will impact the employee who currently fills that position. If you edit the position restrictions associated with a filled position, it will not impact the employee's position data.

CHAPTER 7 KNOWLEDGE CHECK

1. True or **False**: If you terminate a worker's employment on 4/30, the last day of their employment will be 5/1. **4/30 is the last day of their employment.**

2. Which of the following is NOT a method to initiate a termination event:

    A. An employee uses self-service to resign.

    B. Use the Terminate Employee task.

    C. Run a background process to schedule a termination for a future date.

    D. Use the Severance Worksheet to create a severance package and then select the Terminate Employee task.

3. **True** or False: Notice periods can be used to provide guidance for entering an employment termination date.

4. **True** or False: The ability to have two people in the same position for a limited period of time before a resigning employee leaves is called job overlap.

CHAPTER 8 KNOWLEDGE CHECK

1. **True** or False: If a transaction is rescinded, the system will back out a successfully completed business process.

2. True of **False**: All HR Partners can cancel, rescind, and correct all busienss processes. **Security settings control if an HR Partner can take these actions.**

3. If a task is reassigned to you:

    A. You are assisting someone else, and it is still that person's responsibility to make sure the task is completed.

    B. A task that was someone else's responsibility to complete is now your responsibility.

    C. You can end the reassignment at any time.

    D. You can deny the reassignment.

4. **True** or False: If you request your Inbox tasks be delegated to a peer, you can retain access, allowing both you and your peer to work through your Inbox tasks.

DAY ONE REVIEW

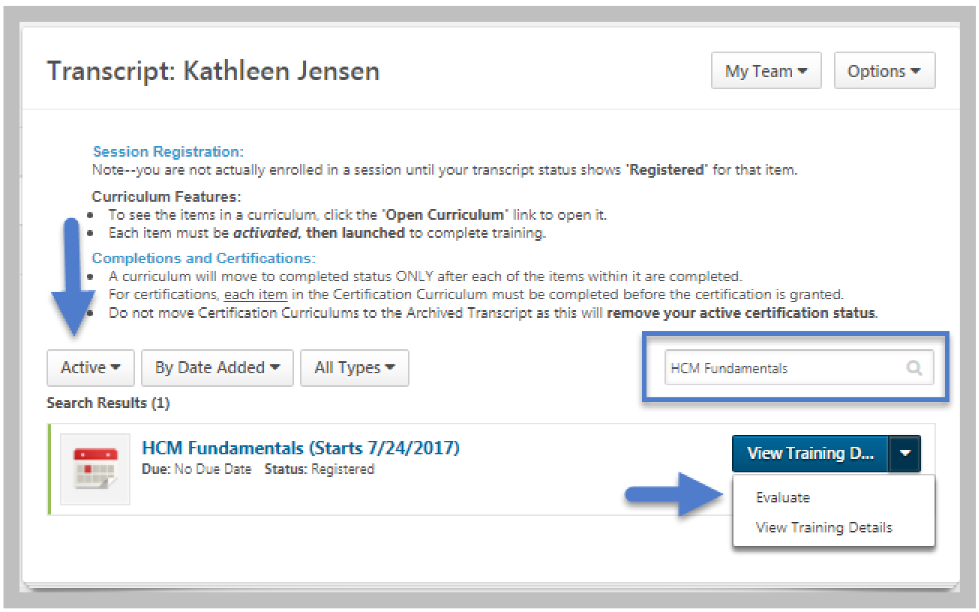
1. True or **False**: Search allows you to use partial searches, abbreviations, and misspelled words.
2. If you want to perform an action on an object, what is the name of the icon you should select? **Related Actions Icon**
3. Where can you locate your next steps in a business process? **Inbox**
4. If you want to check on the overall status of a business process, where should you look? **Navigate to the Inbox Archive tab, find the event, and click on the Process tab**
5. If you would like to narrow your search results to just organizations, which search prefix would you use? **org:**
6. Where in the system can you store frequently used business objects, tasks, and reports for easy access? **Favorites**
7. What type of organization is the foundation of Workday HCM? **Supervisory**
8. Where on a supervisory organization can you locate who fills the support roles that drive business processes for that organization? **Roles tab**
9. Which of the staffing models requires you to create a position before you can hire into the organization? **Position Management**
10. Can you create a position in a job management-enabled organization? Why or why not? **No, because positions created in position management-enabled organizations, not job management-enabled organizations.**
11. What are the six possible hiring restrictions you can set on a position or a supervisory organization? **Job Family, Job Profile, Location, Time Type, Worker Type, and Worker Sub-type**
12. What can you create and attach to compensation components, such as a compensation package or salary plan, so the components default during a hire? **Eligibility Rules**
13. **True** or False: Your ability to view compensation data is controlled by security.

APPENDIX D – CLASS EVALUATIONS

COURSE EVALUATIONS ON THE LAST DAY OF CLASS

Course evaluations are available at the start of the last day of class. Please follow the instructions below to submit feedback based on your experience in the course.

1. Log in to the Learning Center.
2. Select **View Transcript**.
3. Locate the training session in your **Active** tab. (Use the search field to quickly find your training session.)
4. Click the **View Training Details** pull-down menu and select **Evaluate**.



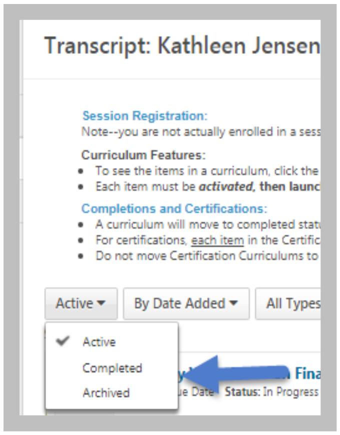
COURSE EVALUATIONS AFTER CLASS ENDS

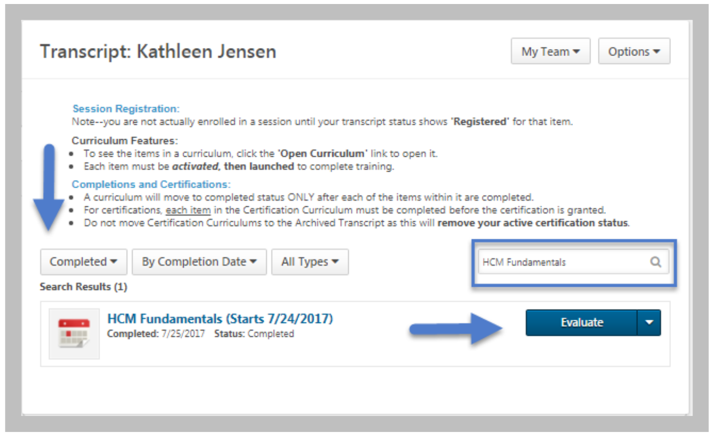
You can submit a course evaluation after the course has ended and the roster has been submitted. Please follow the instructions below to submit feedback based on your experience in the course.

1. Log in to the Learning Center.
2. Select **View Transcript**.
3. Select the **Active** tab to toggle to your **Completed** training.

4. Locate and select the completed training session. (Use the search field to quickly find your training session.)

5. Click **Evaluate**.





APPENDIX E – ADDITIONAL LEARNING

LEARN ON DEMAND HCM TRANSACTIONS CLASSES

- Navigation (Free)
- Segment-Based Security Groups (Subscription)
- Organizations and Security (Free)
- Business Process Overview (Free)
- Business Process Event: Understanding the Full Process Record (Free)
- Staffing Models Overview (Free)
- Staffing Positions: Job Profiles (Subscription)
- Staffing Positions: Managing Positions (Subscription)
- Reorganization (Subscription)
- Staffing Models Overview (Free)
- Staffing Positions: Job Profiles (Subscription)
- Staffing Positions: Creating Positions (Subscription)
- Preparing for Compensation Discovery (Free)
- Processing Hires and Contingent Workers (Subscription)
- Performing a Job Change (Subscription)
- Processing Terminations (Subscription)