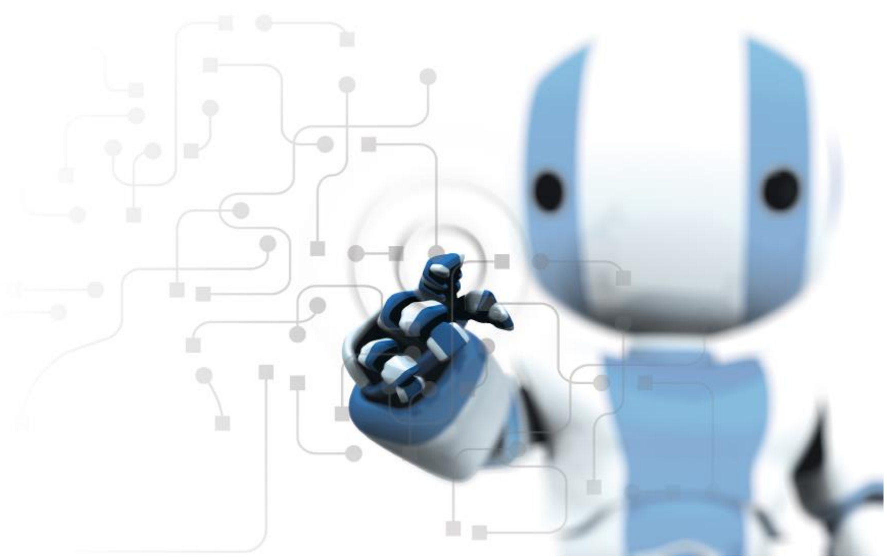
WORKDAY HCM TRAINING @ 040-65555757

COURSE MANUAL AND ACTIVITY GUIDE



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HCM FUNDAMENTALS FOR WORKDAY

This course will cover the Workday HCM fundamentals which will help you progress through your Workday HCM deployment. We will cover how to execute the major HCM business processes, perform administrative activities and setup of the core system functionality. In addition, we will cover business process configuration, configurable security and using Report Writer.

This class is designed for members of the deployment team prior to the Planning stage of deployment. While customers who are in production will also find this class useful for new workers, it is not designed to be an HCM transactional class. Various recorded training modules and HCM transactional virtual classes for in production customers will meet that training need more efficiently.

SECTION ONE: YOUR WORKDAY

We will cover basic navigation, present an overview of the deployment process, review core concepts of the Workday HCM system as well as introduce you to the business process framework and how to modify a business process. Below is a list of the areas we will address.

- Core Concept Overview
- Navigation
- Organization Structures
- Creating Supervisory Organizations
- Other Organization Types and Hierarchical Rollups
- Staffing Models
- Jobs and Positions
- Creating Jobs and Positions Using Our Delivered Staffing Models
- Compensation Components
- Compensation Overview
- Configuring Compensation
- Security
- Defining the Security Groups
- Modifying Security
- Business Process Framework
- Modifying Your Business Processes
- Reports for Understanding and Managing Business Processes

SECTION TWO: WORKING IN WORKDAY

Workday allows you to manage, administer and support your workforce. This includes tracking employee data as well as pre-hires and contingent workers. In this section we will be generating examples of basic transactions and discuss the steps involved. These activities will help you become more familiar with the Workday system and the methods of navigation. We will be performing the following tasks:

- Hiring Employees
- Contingent Workers
- Staffing Movement
- Job Changes Such as Promotions and Transfers
- Termination and Job Overlap
- Task Reassignment and Delegation
- Event Management and Security
- Self Service

SECTION THREE: WORKDAY TOOLS

Once your data is in the Workday system and your business processes have been configured to meet your business needs, it's time to start using the tools and resources available to you. Below is a list of the areas we will address.

- High Level Overview of Integration
- Understanding the Integration Flow
- Defining High Volume Events
- Workday Standard Reports: XpressO and Custom Report Creation
- Reporting Roles and Strategies
- Custom Fields
- Resources
- Workday Community
    - Updates and New Functionality
- Documentation Overview
- Workday Mobile
    - Workday on the iPad, iPhone, Android and other mobile devices

CHAPTER 1: CORE CONCEPTS AND NAVIGATION BASICS

In this chapter we will take a high level look at the core concepts within Workday HCM. This will provide you with an overall view of what is needed to perform transactions in Workday.

Navigating through Workday is made simple through the use of powerful search capabilities and multiple navigation tools. In this chapter we will review these tools as well as 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.

Keep in mind that all tasks and reports are secured and access requires you to be in the appropriate security group. If you cannot see a task, report or data 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 factory default security for our discussions.

OVERVIEW

After reviewing this chapter you should be familiar with 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

CORE CONCEPTS

Supervisory Organizations: The foundation of Workday HCM. This type of organization groups workers into a management hierarchy.

Staffing Models: Defines how jobs and positions are created and filled in a supervisory organization.

Job Profiles: Defines generic features and characteristics of a job and of a position that is built off that profile.

Compensation: The umbrella term for compensation packages, grades, grade profiles and plans.

Security: A security group is a collection of users or a collection of objects that are related to users. Allowing a security group access to a securable item in a security policy grants access to the users associated with the security group.

Business Processes: A sequence of one or more tasks that accomplishes a desired business objective.

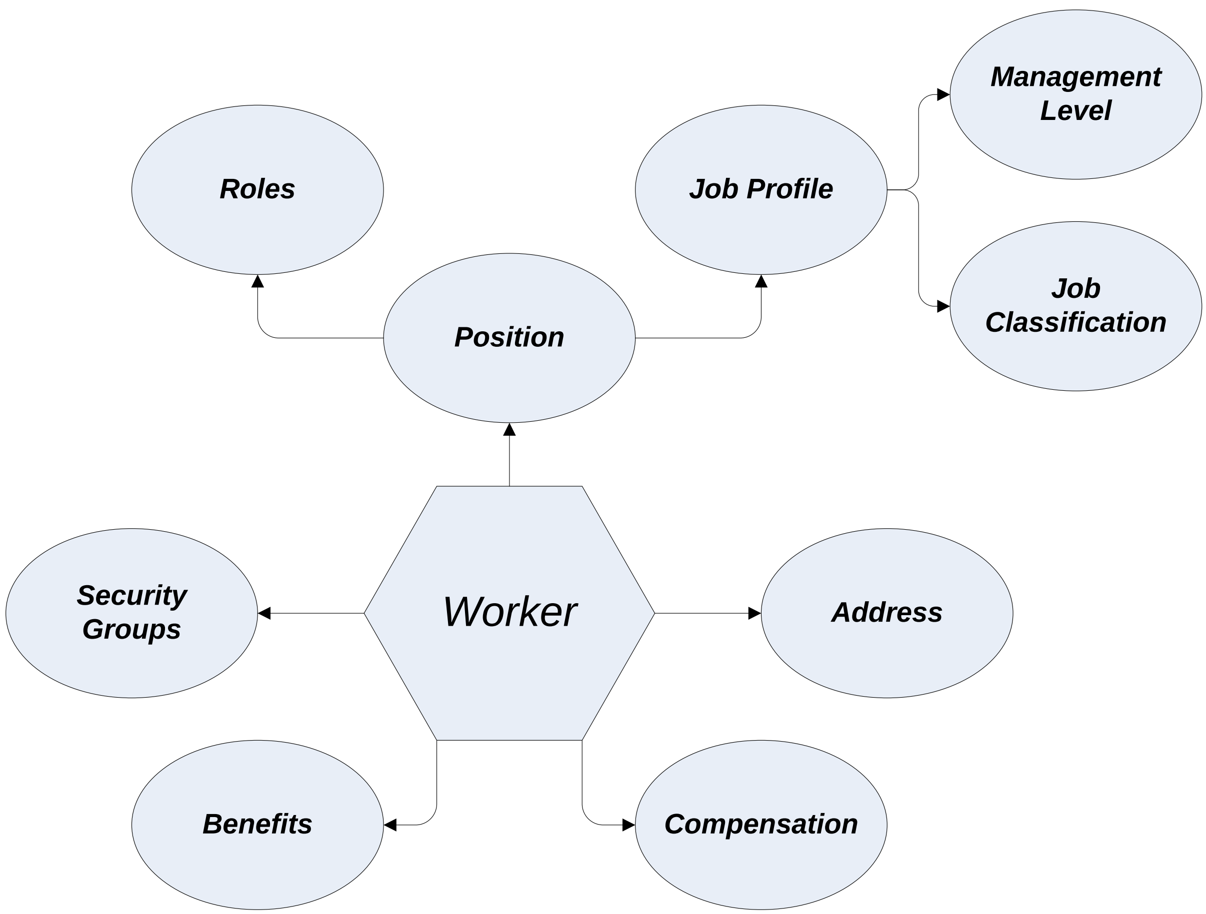
BUSINESS OBJECTS

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 links and many of those items have a *related actions icon* next to them. These features make Workday's reports and viewable pages actionable.

Workday stores data as business objects (e.g. organizations, workers, positions, etc.) 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: When you see something in Workday, you can perform an action on it.

In the diagram below, the "Worker" is the object and the attached bubbles are examples of related objects or groupings of objects related to the primary object.



CUSTOM LABELS

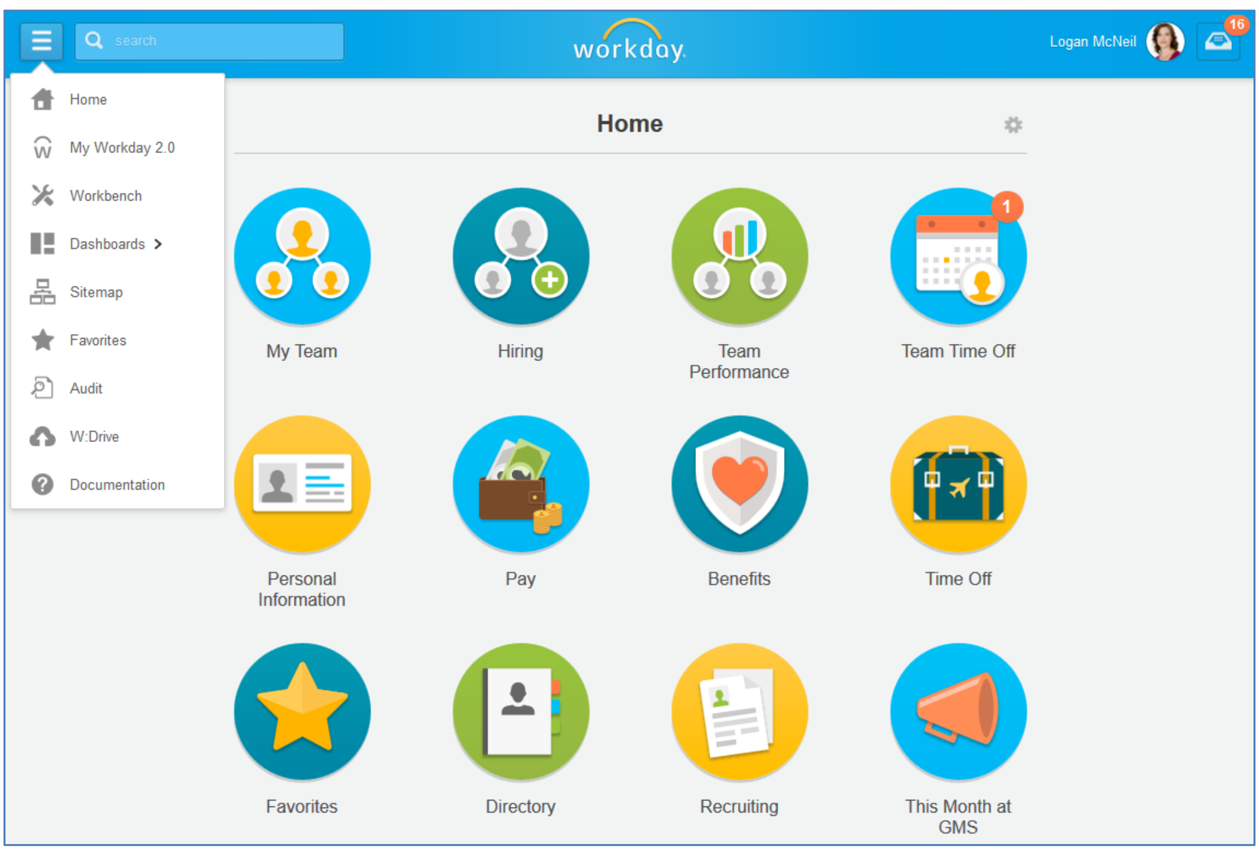
If certain terms used by Workday do not match up with the language used in your enterprise, you do have the ability to override some of these objects labels. The *Maintain Custom Labels* task enables you to create, edit, and delete custom labels which will override the original Workday terms in certain tasks and reports. You can define override values for different variations of the term when relevant, such as the singular, plural, and possessive forms of the terms. We also provide a Preserve Case option that always displays the custom label in the case you define.

You can only rename the following terms in specific areas: Contingent worker, contingent worker's, contingent worker(s), contingent workers, contingent workers', employee, employee's, employees, employees', worker, worker's, worker(s), workers, workers'.

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



The following chart describes elements of the Application Header and Workday Main Menu pictured on the previous page:

APPLICATION HEADER

Elements	Description
Main Menu	This icon on the upper left corner opens up the Workday Main Menu.
Search	You can search on tasks, objects (such as workers, pre-hires and organizations) and reports in the search bar. Type-ahead predictive suggestions return common matching results to which you have access based on your security configuration. Indicating a 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 preferred search category in your Preferences. That default category is used when you sign into Workday. If you manually select a different category, it applies for that search and returns to your default category for the remainder of your session. Search prefixes also allow you to narrow down your results to a specific type of search result. When using 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 on synonyms for Workday terms that you would like to find when searching, as well as suppress types of results that you don't want to see in search results.
Workday Icon	Click on the Workday icon to return to your configured default landing page.
Worker Profile	Click on your name or picture to view your worker profile, manage your user preferences or sign out of your Workday session.

MAIN MENU

Elements	Description
Home*	The Home landing page uses one consolidated view to display worklets giving employees, contingent workers and managers access to information and commonly used tasks for self-service and manager self-service.
My Workday 2.0*	The My Workday 2.0 page is an optional landing page that displays reports. It is available to anyone who has an assignable role (except manager) or an administrative role. You can have up to 5 report worklets on My Workday 2.0.

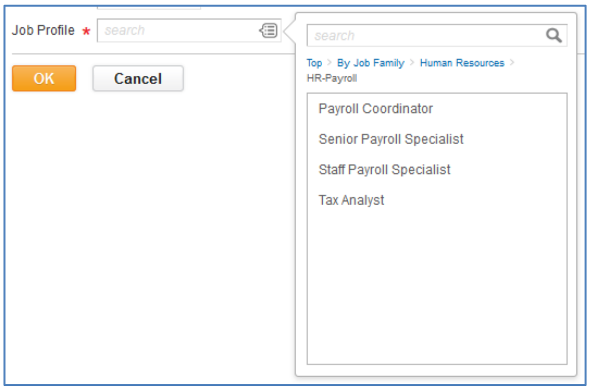
Elements	Description
Workbench	This landing page provides technical administrators and implementers quick and easy access to all the tools needed to create and manage custom reports, calculated fields, analytic indicators and other administrative tasks and reports.
Dashboards	Dashboards houses key management 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. These same dashboards also are used with the Workday for iPad application.
Sitemap	The Sitemap provides an alternate way to navigate the Workday system by displaying a menu with links to Available Reports and Tasks organized by categories such as Compensation, Benefits and Organizations.
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.
Audit	Audit provides a list of all the audit reports and tasks available to you, sorted by category.
W: Drive	The Workday drive is a virtual drive in which you can store generated reports. Users can find the same information through a Reports worklet on the Home landing page. When a new report is available in your W: Drive, a notification will display in the application header and in your Inbox. 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, system or procedures. This link will take users to the Documentation section of the Workday Community.

*Additional landing pages All About Me and My Team can be enabled to give users access to self-service and manager self-service on separate landing pages. These two landing pages, along with My Workday 2.0, will be retired in a future Workday release.

ADDITIONAL NAVIGATION TOPICS

PROMPTS

Workday utilizes prompts to help users navigate in search fields. Prompts display all content available to 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 default open.



ACTIONABLE REPORTS

Workday uses a very powerful object-action model that drives Workday's navigation and interactive reports. When you view a page in Workday, most of the items on the screen are links and many of those items have a related actions icon 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 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.

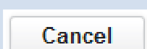
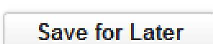
FAVORITES

As mentioned previously, your favorite business objects, tasks and reports can be found on the Favorites tab of the Main Menu. You have the ability to mark any item in Workday as a favorite by using the *Favorite -> Add* related action off an item in the system. This allows for easy access to those items which 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
	Opens the Workday Main Menu.
workday	Brings you back to your default landing page.
	Opens your Inbox to access current actions, notifications and historical processes.
	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 domain *Export to PDF and Excel*.
	Click to view this page as an Excel file. This can be restricted using the domain *Export to PDF and Excel*.
	Used to indicate that the report can be viewed as a chart.
	Talent Pool Tag: Click to put worker(s) into selected talent pool.
	Change prompt values and rerun either a report or a task with new values.
	Appears when you click on column headings in reports. Allows you to sort your column or remove the sort.
	Appears in the upper right side of worklets and landing pages and acts as a menu or settings option.
	Opens the associated instance, replacing the current view page (only available on select view pages).
Alerts: 1	Alert: Soft warning message that alerts you about system limitations based on configuration. You may continue your process or configuration.
Errors: 1	Error: Hard warning message that alerts you there is a critical error. An error must be corrected to move forward in a process or to enable your configuration.

TASK 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: Click on this prompt icon to see a list of available values sorted in folders (if applicable).
	Calendar: Opens a calendar to select your date.
	Delete Row: Click this icon to remove the current row from the grid.
	Add Row: Click this icon to add a row to the current grid.
	OK Button: When you click OK, the system accepts your changes.
	Submit Button: Submit accepts your changes and moves you to the next step in the business process.
	Done Button: Done closes a confirmation screen.
	Cancel Button: Click cancel to disregard all changes.
	Save for Later Button: Saves the item in your inbox until action is taken.

INBOX

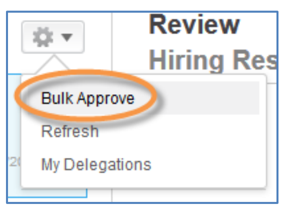
The Inbox is an activity stream that displays business process tasks, approvals, to dos and notifications. Clicking on the Inbox icon on the top right of your screen displays Actions and Notifications. When View Inbox is selected, your inbox opens in full-screen mode and the content is divided across three tabs called Actions, Notifications and Archive. The Actions tab displays tasks, approvals, and to dos, while the Notifications tab displays notifications regarding business processes and rules-driven alerts such as birthdays and time off. 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're viewing. The Actions tab also displays filter options based on items in your inbox, and you can choose to create your own filters using condition rules you configure. The standard filters are:

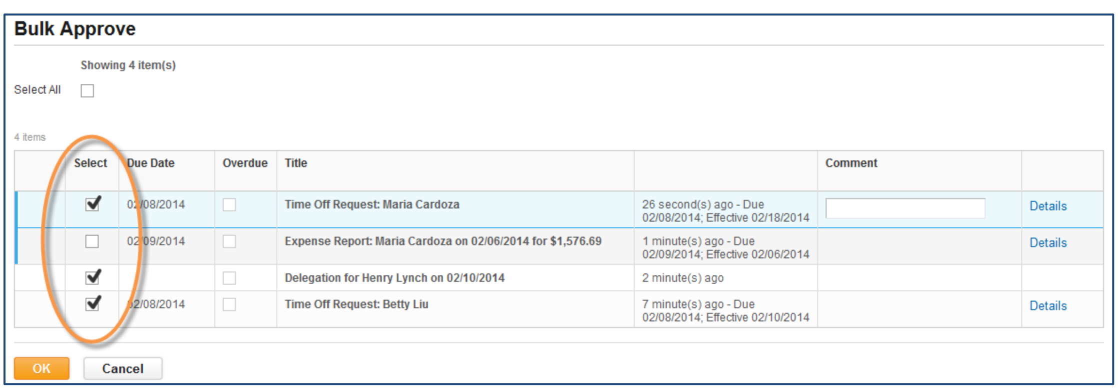
Filter	Description
All	All current business process tasks, approvals and to-dos awaiting your attention.
Favorites	Inbox items you starred as favorites.
Overdue	Business process items past their due date.

Bulk Approvals

In the Actions tab of your Inbox, the gear icon on the top right gives you the option to Bulk Approve items in your inbox. This selection is only available if you have Approval or Review steps pending action.

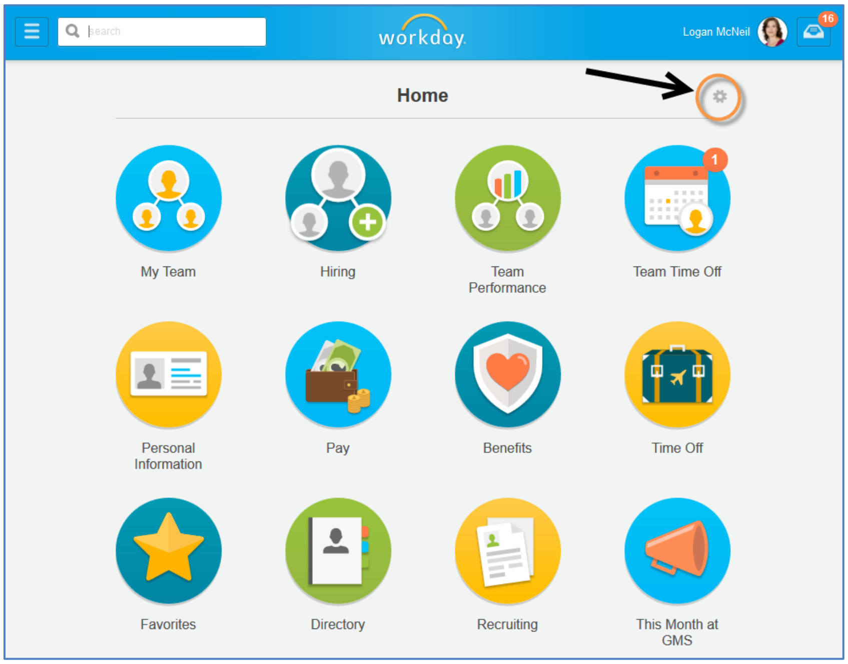


When you select this option, a Bulk Approve screen opens up with approval items from your Inbox. You can check the "Select All" box or you can select individual items to approve in bulk.



CONFIGURATION OPTIONS

At the top right of each landing page you will see a gear icon. By clicking this icon, you can personalize your landing page. You can add or remove any recommended or optional worklets to or from this page. You can also specify the order in which you would like these worklets to appear.



FIND WORKERS

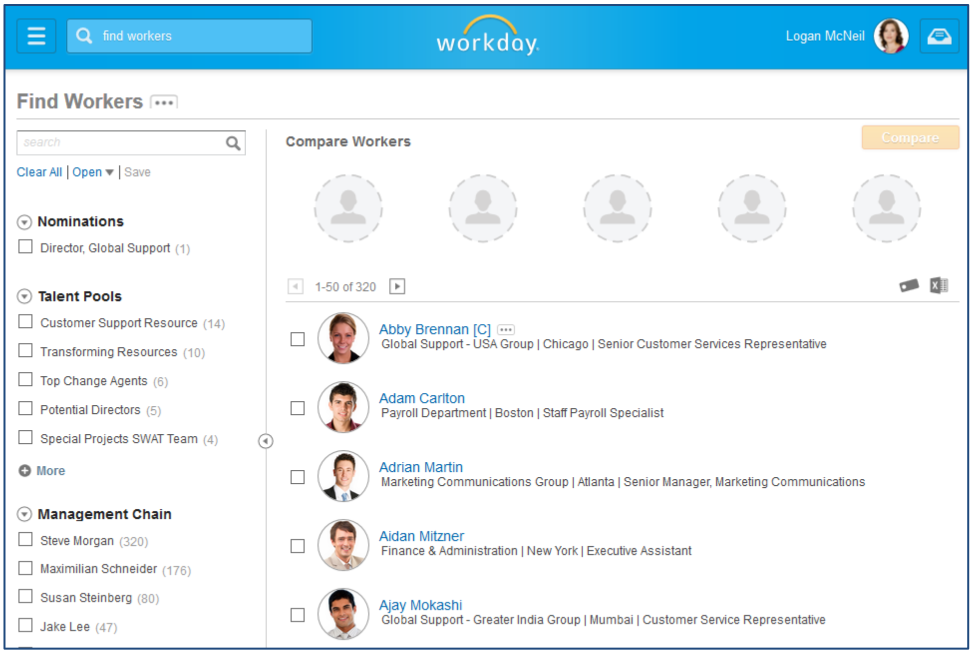
Use the Find Workers page to filter search results by various criteria, such as Location, Job Profile and Supervisory Organization. As you select a value for any filter category, or facet, the Find Workers page dynamically updates the resulting list of workers and facet value counts. The facet value counts help you understand the worker population that satisfies the current filter criteria and guide your exploration.

Workday displays search facets on the left side of the Find Workers page. Facets are non-tenanted; they correspond to generic categories such as location. Each facet contains one or more facet values. Facet values are tenanted; they correspond to specific values in your tenant. For example, the facet Location would display facet values for your specific locations.

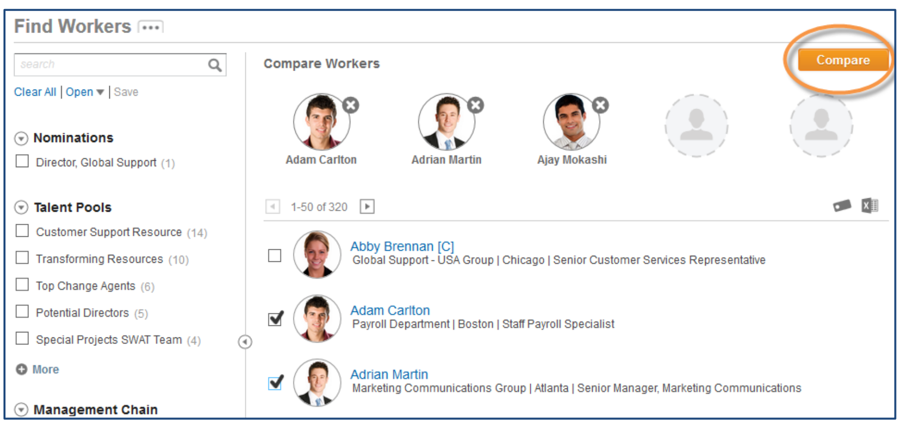
Each facet value is followed by a number indicating how many workers have that facet value. For example, if you have a *Chicago Sales Office* location with eight workers, the location facet would display a facet value of *Chicago Sales Office (8)*.

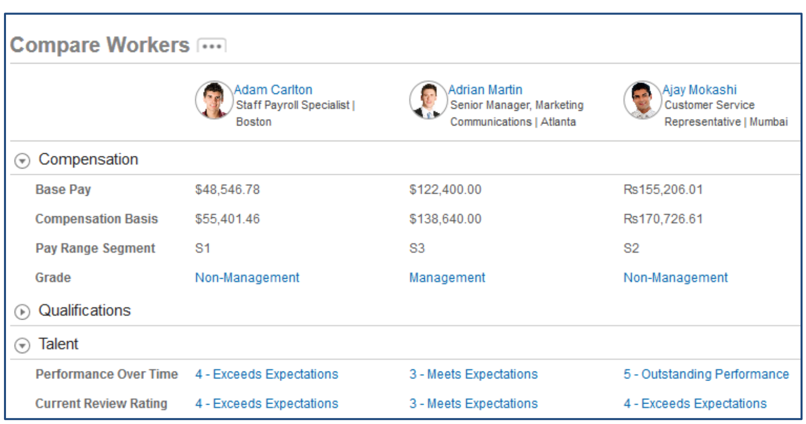
By default, no facet values are selected. As you select facet values to narrow your search, Workday dynamically updates the facet value count numbers for other facet values. For each facet, Workday displays the facet values with the most workers. If there are more facet values for that facet, click the More... link to display them. For facets with many possible facet values, Workday provides a prompt to select an additional facet value.

To create a custom Find Workers report, copy the standard version and then modify the report to suit your needs.



In the Find Workers report, you have the ability to Compare Workers by checking the box next to their name in your results and selecting the Compare button. You can compare up to five individuals at a time. Compare Workers opens up a window to view a side-by-side comparison of key worker attributes from the Talent, Compensation and general HCM areas:





ACTIVITY 1.1: SEARCH AND NAVIGATION

Business Case: You are a new Workday user. Sign on to your system and follow the instructions below.

URL

URL: https://XXXX-hostXX.workdayknowledge.com/gmsXX/login.flex

Your training system# ("X"s in the url above): ____________- host ______ gms ______

SIGN IN

User Name: lmcneil for Logan McNeil

System password: ________________________

SEARCH

Perform the following Search tasks, using Workday's smart search techniques:

1. Enter **Termination** in the Search box and click the magnifying glass or hit your enter key. How many search results do you receive? ____
2. Using a search prefix, type **bp: termination** and click the magnifying glass. How many search results do you receive? What are these search results? _____________________________________
3. Enter **Benefit Events Status Report** in the Search box and view the predictive search results. Then enter **ben even stat** in the Search box and note your results.

   Notice that searching on partial and abbreviated words will still return the results you seek.
4. Enter **betty liu** in the Search box and click the magnifying glass. View all of your search results with the default All of Workday category.
5. Change the Category on the left side of your results to **Expenses**. Now what are the only search results you receive? ____

NAVIGATION

Perform the following navigation tasks. You are not provided with additional steps in order to make the exercise more challenging for you:

1. Remove worklets from the Home page that you do not think you will be using in your initial deployment (perhaps Benefits).
2. Run the Address Change Report with no date criteria. Who had the most recent address change?

   ____
3. Find the supervisory organization that handles Payroll. How many workers are in that department?

   ____

CHAPTER REVIEW

When you see an object in Workday you can click on it to get more information or use the Related Actions Menu to initiate an action.

Landing pages are a collection of worklets that allow users to access information, tasks and reports:

- Home is a consolidated view of information and tasks for both self-service and manager self-service.
- My Workday 2.0 displays reports as worklets and can be enabled for anyone who has an assignable or administrative role (except managers).
- Workbench provides quick and easy access to existing tasks and reports for technical administrators and implementers.

All landing pages are configurable; Worklets can be added and removed at any time.

Worklets can be configured to be required or optional for specific security groups. Required worklets will be pre-loaded when a worker first signs into Workday and can't be removed. Optional worklets will be pre-loaded when a worker first signs into Workday and can be removed by the user at any time.

Most reports and Workday pages can be exported to either a PDF or Excel file.

Search can be used to find information in the Workday system because most data is indexed and searchable.

The Inbox is where you find tasks that you're responsible for completing. The Inbox is found on the top right of your screen and can be opened up to a full-screen view of your Inbox, which includes current action items, notifications and archive processes. The Inbox worklet can also be configured on landing pages.

CHECK YOUR KNOWLEDGE

1. What is the name of the icon that allows you to view information or perform tasks on a landing page?

   ____

2. True or False: Search allows you to use partial searches, abbreviations and misspelled words

   ____

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?

   ____

SAMPLE DECISION POINTS

1. Which worklets are required for your enterprise? Optional?
    a. What will be on the Home page?
    b. Will your admins have access to My Workday 2.0? What reports will you display?
2. Will you need Dashboards? Who should see them?

CHAPTER 2: ORGANIZATIONS IN WORKDAY

Workday supports several organization types but the primary organizational structure for HCM is the supervisory organization. In this chapter we will begin by focusing on the supervisory organization, which is the foundation of Workday HCM, and then look at other common organization types that can be created and maintained. This includes custom organizations which are optional and may be required to support your individual business and report requirements.

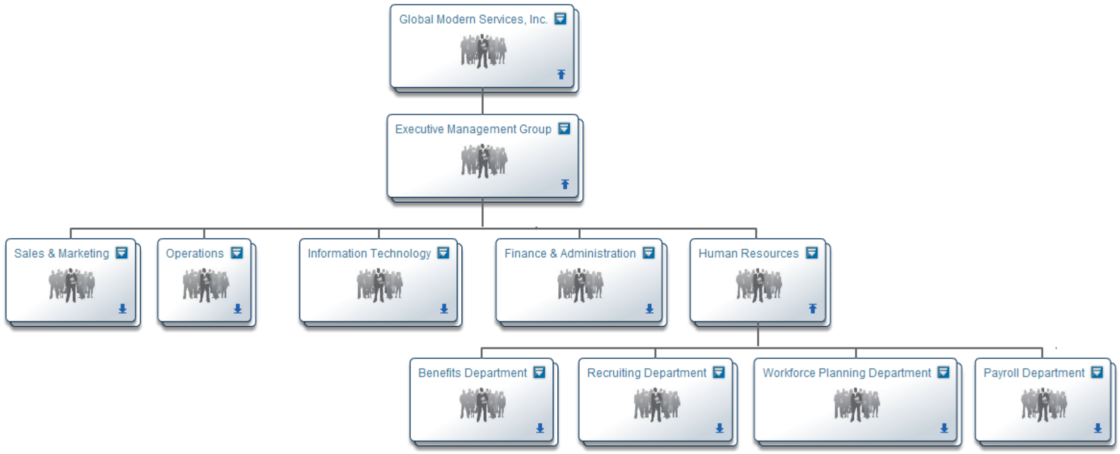
Workers are grouped and tracked within supervisory organizations. Other organizational structures can be put into the system to represent multiple organization views, but the primary structure is the supervisory organization, not cost center or department costing structure.

In addition, organization hierarchies will be defined and the purpose of these hierarchies explored. Once your organizations and organization hierarchies are created, these structures may change over time. The reorganization tasks will allow you to restructure as your business changes.

OVERVIEW

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

- Supervisory Organizations
- Setup of a Supervisory Organization Structure
- Reorganizations
- Managing a Supervisory Organization
- Additional Organization Types
- Organization Hierarchies
- Organizational Assignments
- Organizational Reports

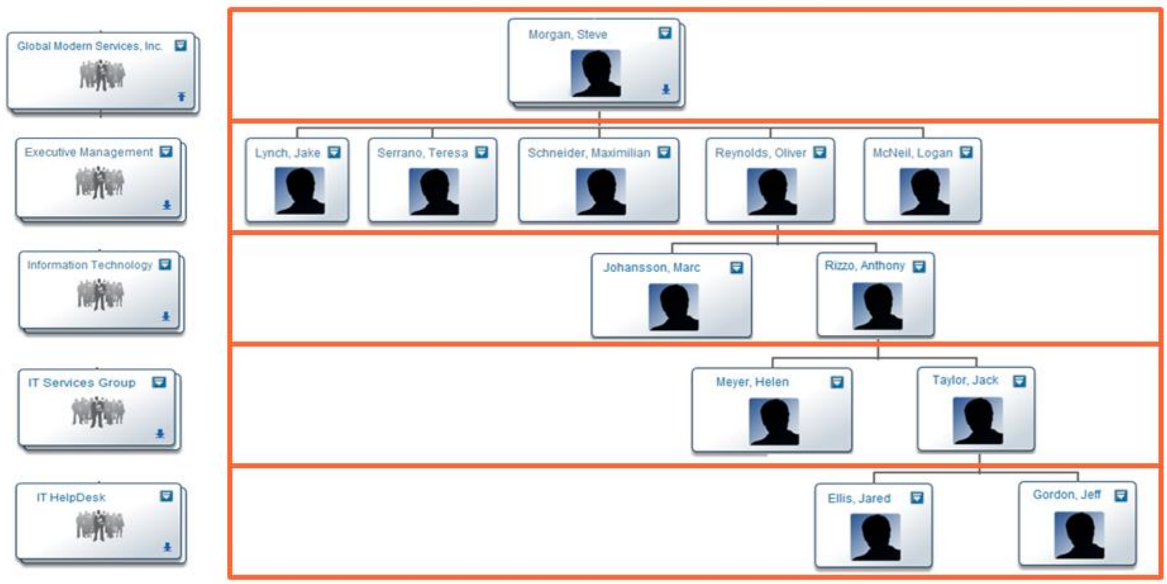


SUPERVISORY ORGANIZATIONS

Supervisory organizations are the foundation to HCM; they group workers into a management hierarchy. A supervisory organization can be a business unit, department, group or project. Jobs, positions and compensation structures are associated with supervisory organizations and workers are hired into jobs or positions associated with a supervisory organization.

Business processes can be assigned to a supervisory organization. All approvals and checklists are established for the supervisory organization hierarchy, with possible variations for particular organizations within that hierarchy.

As the primary organizational structure, supervisory organizations will be the focus of this section. The diagram* below illustrates the grouping of workers in supervisory organizations.



*This view is derived and not currently available in the system.

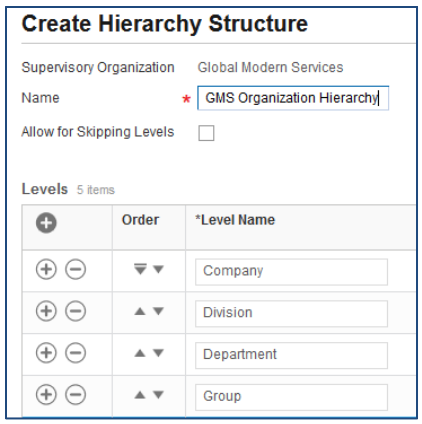
There are four key characteristics unique to a supervisory organization:

1. Positions are only created within a supervisory organization.
2. Employees must be hired into a supervisory organization.
3. Assignable roles have responsibilities within a supervisory organization.
4. Unique business processes can be assigned to a supervisory organization.

SUBTYPES

The supervisory organization can have organization subtypes like division and/or department. You define each organization subtype (managed with the *Maintain Organization Subtypes* task) for your specific needs. All organization subtypes are tenanted data.

If you have the business need to do so, you can also set up and enforce the hierarchy of your organization subtypes. For example, you might have three organization subtypes of department, division and team. In your organization, departments are always superior to divisions, which are always superior to teams. Therefore, you could create and enforce this structure using the *Create Hierarchy Structure* task and Enforce related action task off a hierarchy to ensure that no one in your organization creates a team that is superior to a department. You also have the option to allow levels to be skipped whereby an organization can report to any superior organization subtype, not just the organization subtype indicated as immediately superior. If the option to skip levels is not checked then once the hierarchy structure is enforced, the superior's level must be the level immediately above the subordinate's level.



VISIBILITY

An organization's visibility determines who can view the organization. Visibility options are:

Visibility	Definition
Everyone	Makes the organization public and visible by everyone.
Members Only	Makes the organization visible by the organization owner, supporting worker or workers assigned as organization members only.
Administrators Only	Makes the organization visible by the organization owner or worker with an assignable role for the organization (whether assigned directly, defaulted or inherited).
Administrators Only All Organizations	Makes the organization visible by the organization owner or worker with an assignable role for the organization (whether assigned directly, defaulted or inherited). For workers with assignable roles, access is treated as "Current Organization and All Subordinates", meaning that if a worker is assigned a role for an organization, she can view child organizations even if her inheritance of the role ends because another worker is assigned that role on child organizations.

LOCATION

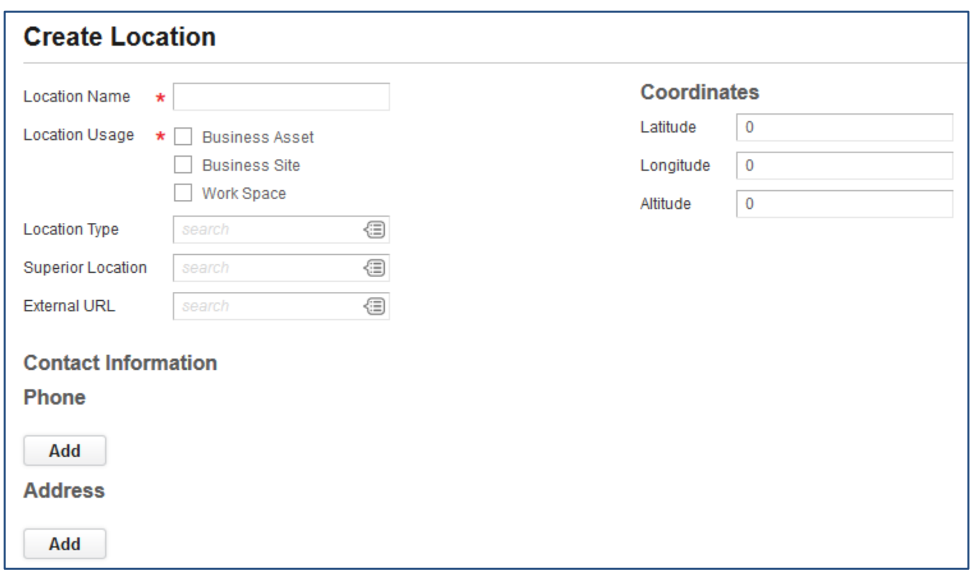
In the Workday system, a location can be created either as a business site, a business asset or a work space. The business site location is used to account for the physical location of workers and provides a page to enter time profile, time zone and locale information. This is the type of location that would be associated with a supervisory organization, while a business asset location is linked to finance.

A minimum of one location must be entered into the system prior to creating a supervisory organization because Primary Location is a required field when creating a supervisory organization.

A location represents:

- A work location that will include the physical address as well as additional details such as email and phone number(s).
- Time Profile defines the standard number of hours worked in that location each week. Usually this is 40 hours (8 hours per day), but in locations such as Paris the work week might be defined as 35 hours. The Time Profile is created prior to creating the Location.
- Locale controls the format for dates, times and currency. If you specify a locale for a location, users belonging to that site inherit that locale.

If locale is not set at the location level, users inherit the locale set in the tenant. Users can override any inherited locale by changing it in their preferences.



FUNDAMENTAL CHARACTERISTICS AND STRUCTURAL ASPECTS

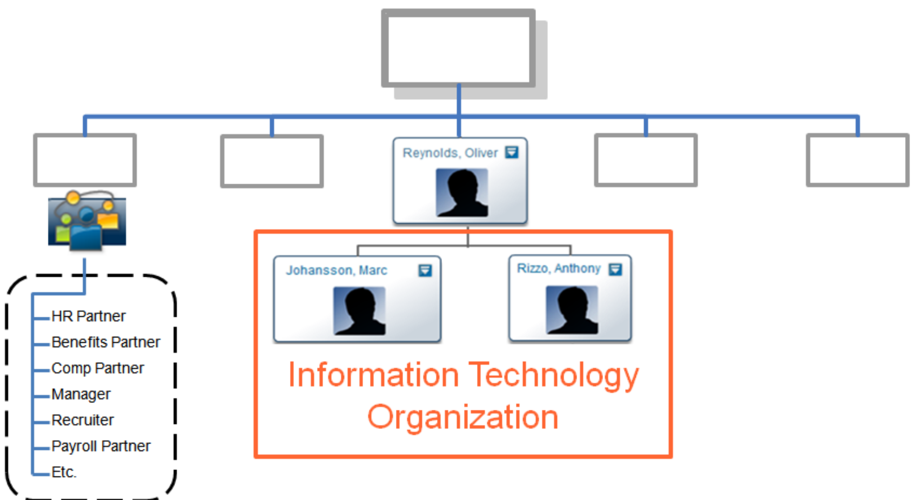
Information	Why It Is Important
Superior and Subordinate Organizations	Determine the organization hierarchy.
Availability Date*	Primarily used to control when the organization starts to appear in prompts and is fully viewable using the View Supervisory Organization task.
Organization Name	Name of the supervisory organization.
Organization Code	Optional field that can be used as an additional identification field.
Organization Subtype*	User defined field. Can create hierarchies and is reportable.
Organization Visibility*	• Administrators Only • Administrators Only – All Organizations • Everyone • Members Only
External URL	Allows you to identify a URL associated with the supervisory organization.
Primary Location*	Required data when creating a supervisory organization; inherited from the superior supervisory organization if not entered. Used for security routing and reporting purposes.
Staffing Model (Tab)**	Each of these staffing models provides a different level of control over staffing and supports different staffing goals
Assign Roles (Tab)	Denotes the manager and other support personnel. Drives business processes.
Identifiers (Tab)	Appears during the create/edit supervisory organization task to provide government identifiers.

* Required fields

** When creating the top level supervisory organization in a hierarchy, a staffing model is required. Subordinate organizations will inherit the staffing model of the superior supervisory organization and therefore a staffing model is not required for subordinate organizations. The inherited staffing model can be changed if needed.

ASSIGNABLE ROLES

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



REORGANIZATION

When creating organizations such as supervisory organizations, companies, cost centers and regions, a reorganization event needs to be created. A reorganization event enables you to group reorganization activities into an event that can be tracked in the Workday system. You can apply a common effective date to the reorganization activities and view and manage those activities in delivered reports and queries.

The reorganization event might include one change to the organization structure or it can group multiple reorganization activities for one or more organizations and track these activities in the reorganizations report.

Matrix organization creation and changes do not require a reorganization event.

ACTIVITY 2.1: CREATE A LOCATION AND A SUPERVISORY ORGANIZATION

Business Case: You are part of the team setting up the supervisory organization structure for Wealth of Knowledge, a professional training organization. You will use some existing values and create others during the process.

In this activity, you will create the superior supervisory organization. First, you will create a location and then create a supervisory organization. You will need to do these tasks as Logan McNeil because of the administrative access she has.

Sign in as Logan McNeil

CREATE LOCATION

1. Enter *Create Location* in the search box
2. Select the ***Create Location*** task
3. Enter the location information:

Field Name	Entry Value
Location Name	Reading – UK
Location Usage (check the box)	Business Site
Location Type	Headquarters

4. Click on the **Add Phone** button
5. Enter the following information:

Field Name	Entry Value
Country Phone Code	*Preferred Countries* > United Kingdom (+44)
Phone Number	01635 201 325
Phone Device	Landline
Primary	Turn on check box

6. Click on the **Add Address** button
7. Enter the following information:

Field Name	Entry Value
Effective On	Today's Date (which should default in)
Country	United Kingdom

Field Name	Entry Value
Address Line 1	204 Stephens Rd
City or Town	Reading
County	Berkshire
Postal Code	WC1V 7EN
Primary	Turn on check box

8. Click **OK**
9. Enter the Business Site information:

Field Name	Entry Value
Time Profile	Standard Hours - 40
Locale	English (United Kingdom) – en_GB
Time Zone	Western European Time (London)

10. Click **OK** and view the location you created

CREATE SUPERVISORY ORGANIZATION

1. Enter *Create Supervisory Org* into the search box
2. Click on the ***Create Supervisory Organization*** task hyperlink
3. Click on the **Reorganization** field prompt
4. Select the in-task **Create** > then the **Create Reorganization** task
5. Enter the following data:

Field Name	Entry Value
Reorganization Name	Workday Class Reorg
Reorganization Date	Today's date
Description	Create Wealth of Knowledge Organizations

6. Click **OK** to save and continue
7. Click **OK** to select your new Reorganization event
8. Enter the following information to create your supervisory organization:

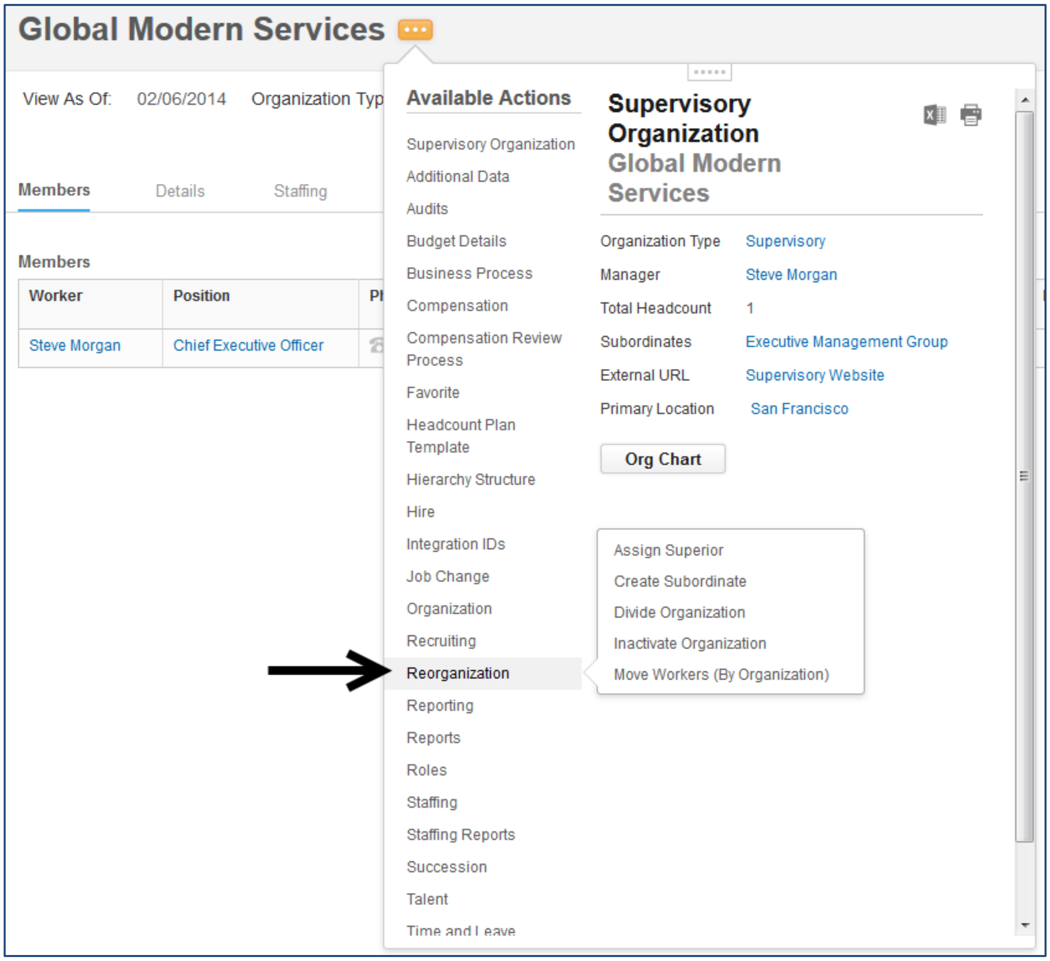
Field Name	Entry Value
Availability Date	Leave default of today's date
Organization Name	Wealth of Knowledge
Organization Code	WOK
Organization Subtype	Division
Organization Visibility	Everyone
Primary Location	*Active Locations* > Reading - UK

9. On the *Staffing Model* tab select **Position Management Enabled**.
10. On the *Assign Roles* tab click nine times to enter the following assignable roles (leave the two existing roles and the worker assigned to them):
    - Manager
    - Absence Partner
    - HR Partner
    - HR Analyst
    - Recruiter
    - Benefits Partner
    - Security Partner
    - Compensation Partner
    - Payroll Interface Partner
11. Assign the Chief Human Resources Officer - **Logan McNeil** to each of the assignable roles
12. Do not add *Organization Assignments* – we will discuss this later
13. Do not create *Identifiers*
14. Click **OK** and review your new Wealth of Knowledge supervisory organization

MANAGING SUPERVISORY ORGANIZATIONS

Managing changes to the supervisory organization is part of life. Workday easily facilitates any structural changes you may require.

Below is a screen shot displaying the reorganization options for existing supervisory organizations.



Recall that within the subordinate organizations you create, the allowed organization subtypes will depend on whether or not you have an enforced hierarchy structure.

Reorganization Options	Description
Assign Superior	Provides the ability to move the supervisory organization within the hierarchy.
Create Subordinate	Allows you to quickly create a new supervisory organization and include it in the hierarchy as a subordinate. The new supervisory organization will inherit the same staffing model, assignable roles and organizational assignments as the superior organization, if configured to do so.
Divide Organization	Allows you to create a new sibling organization and select which subordinate organizations move into it.
Inactivate Organization	To inactivate a Position Management or Job Management organization the individual positions and workers need to be moved out of the organization prior to inactivating. To inactivate an organization that uses Headcount Management you need to move all headcount groups out of the organization first.
Move Workers	This administrative task allows workers to be moved in or out of a supervisory organization (provided that they use the same staffing model). When Headcount Management is enabled, you must move the entire group, not individual employees.

These reorganizational activities utilize the **business process framework** which means you can route the organizational changes to relevant parties for approval before they take effect. You may also rescind or cancel a reorganizational activity, if needed.

ACTIVITY 2.2: CREATE SUBORDINATE SUPERVISORY ORGANIZATIONS

Business Case: In this activity, you will start building the Wealth of Knowledge supervisory organization structure. Wealth of Knowledge has a subordinate supervisory organization named Learning and Development, and Learning and Development has subordinate supervisory organization named Training. You will create these two organizations using the Create Subordinate reorganization task.

Sign in as Logan McNeil

CREATE SUBORDINATE ORGANIZATION

1. Click on the *Related Actions* icon next to **Wealth of Knowledge** (to navigate back to Wealth of knowledge, type *Wealth of Knowledge* or *WOK* in your search box)
2. Select the following action and task:

   Reorganization > Create Subordinate

3. Leave today's date as the effective date
4. Click **OK**
5. Enter the following data:

Field Name	Entry Value
Availability Date	Leave default of today's date
Organization Name	Learning and Development
Organization Code	LearnDev
Organization Subtype	Department
Primary Location	New York

6. Click **Submit** and **Done**
7. Navigate to Wealth of Knowledge to refresh your page and see that Learning and Development Department is now a Subordinate Organization of Wealth of Knowledge.
8. Click on the **Learning and Development Department** hyperlink on the page and view the *Roles* tab to see the assignable roles that inherited from Wealth of Knowledge.

CREATE A SECOND SUBORDINATE ORGANIZATION

1. Click on the *Related Actions* icon off of **Learning and Development Department**
2. Select the following action and task:

   Reorganization > Create Subordinate

3. Leave today's date as the effective date

4. Click **OK**
5. Enter the following data:

Field Name	Entry Value
Availability Date	Leave default of today’s date
Organization Name	Training
Organization Code	TRN
Organization Subtype	Department

We are not entering a Primary Location for Training because it will inherit the primary location of its superior, Learning and Development

6. Click **Submit** to save
7. Click **Done**

ACTIVITY 2.3: DIVIDING A SUPERVISORY ORGANIZATION

Business Case: Learning and Development has two subordinate supervisory organizations, Training and Course Development. In this activity, we will use the Divide Organization task to create the Course Development Department as a peer organization to Training.

Sign in as Logan McNeil

CREATE NEW SUPERVISORY ORGANIZATION THROUGH A DIVIDE

1. On the Learning and Development Department page, click on the hyperlink for its subordinate organization, **Training Department**
2. Click on the *Related Actions* icon off of the **Training Department** supervisory organization
3. Select the following action and task:

   Reorganization > Divide Organization

4. Leave today's date as the effective date
5. Click **OK**
6. Enter the following data:

Field Name	Entry Value
Availability Date	Leave default of today's date
Organization Name	Course Development
Organization Code	CoursDev
Organization Subtype	Department
Primary Location	Reading - UK

7. Click **Submit** to move to the next step of the business process
8. **Open** the *Assign Roles* task
9. View the Assignable Roles that were inherited or assigned and click **Submit**
10. Click **Done** to confirm
11. Enter *WOK* into the search box and select the Wealth of Knowledge supervisory organization
12. Click on the *Related Actions* icon next to Wealth of Knowledge, and then click Org Chart (another option: enter *Org Chart* into the search box and enter WOK into the prompt box)
13. Click the +2 on the Learning and Development supervisory organization to view the entire Wealth of Knowledge hierarchy
14. Click on the printer icon in the upper right hand corner of the screen and view your options for exporting an org chart to a PDF document to allow for printing

ADDITIONAL ORGANIZATION TYPES AND ORGANIZATION HIERARCHIES

An organization is used to group resources, workers and costs to support a particular business function. Organizations can be included in a hierarchy to represent a structure, such as a reporting hierarchy used to view reporting relationships. New organizations can be added and existing organizations can be divided or inactivated.

Different types of organizations track different information. Supervisory organizations track workers and enable business process approvals. Cost center organizations track costs. Company organizations provide a vehicle for statutory reporting.

You can create unlimited numbers of each type of organization and then use them for different types of reporting.

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. The following table lists some of the types of organizations provided:

Organizational Types	Hierarchical	Use
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.
Academic Unit	Yes	Academic units provide the basis to manage faculty appointments in education. Academic units such as departments can roll up to academic unit hierarchies that reflect the overall structure of the college or university.
Company	No	An organization that represents a legal entity.
Cost Center	No	An organization used for financial reporting, such as a financial department, to track revenue and expenses.
Region	No	Customer-specific regions reflect the area of responsibility for a worker instead of work location.
Matrix	No	Establish an indirect manager relationship.
Pay Group	No	Group workers with similar payroll processing parameters.
Retiree	Yes	An organization used to hold retirees; tracks and provides access for retiree administrators and partners.
Custom	Configurable	Allows you to define grouping attributes for reporting purposes. Also used to define company, cost center and regional hierarchies.

Organizational Types	Hierarchical	Use
Company Hierarchy	Yes	Allows for multiple relationships of companies for reporting purposes.
Cost Center Hierarchy	Yes	Allows for multiple relationships of cost centers for reporting purposes.
Regional Hierarchy	Yes	Allows for multiple relationships of regions for reporting purposes.
Location Hierarchy*	Yes	Location hierarchies are used to assign the locations and organizational roles that support them. Allows for multiple relationships of locations for reporting purposes. *Note: Locations are not organizations.

A complete list of all Workday-delivered organization types can be found on the Workday Community.

COMPANY

Companies are the primary organization type used by Workday Financials. A company in Workday equates to a single tax ID within your enterprise. Most of the delivered financial reports are run in the context of a company, such as balance sheets and income statements.

Applicable to the businesses located within United States, an **Employer Identification Number** or **EIN** (also known as Federal Employer Identification Number or FEIN) is the corporate equivalent of a Social Security Number, although it is issued to anyone, including individuals, who have to pay withholding taxes on employees.

You can specify a base currency for each company, which enables you to use multiple currencies across your Workday deployment. Even though different companies may use a different currency, a base currency can be defined so that all currencies are converted to the base for accounting purposes.

COST CENTERS

Cost centers are used to account for related revenues and expenses.

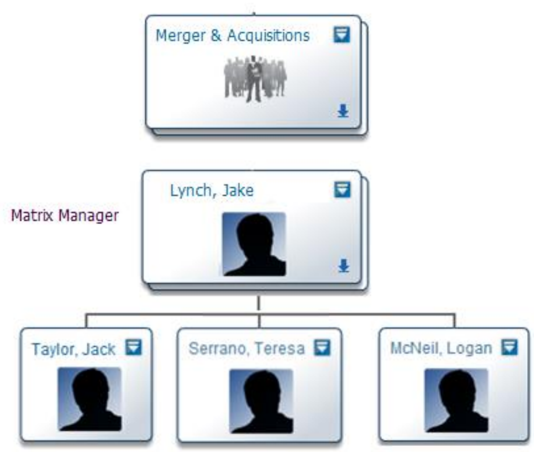
MATRIX ORGANIZATION

Matrix Organizations allow you to create and manage dotted-line relationships between workers and managers. You can assign workers who are working in more than one group to a matrix organization in addition to their supervisory organization. A matrix organization reflects a worker's dotted-line relationship to one or more managers. For example, a marketing worker and an engineer, reporting to the Marketing manager and Development manager, respectively, can be assigned to a group that reports to a product manager.

Reports	Description
Matrix Assignments	View all matrix assignments for workers based on selected organizations.
Matrix Organization	View the details of a matrix organization including visibility, members and supporting assignable roles.

Tasks	Description
Assign Matrix Member	Use to add members to an existing matrix organization by worker name or position as of an effective date.
Assign Matrix Organization	Assign worker to a matrix organization. This is a business process.
Assign Matrix Organizations	Assign worker to a matrix organization. This is a business process that can be added as a sub-process in business processes such as Hire Employee and Job Change.
Create Matrix Organization	Create a new matrix organization.
Remove From Matrix Organization	Remove worker from matrix organization of which they are currently a member.
Remove Matrix Member	Use to select a matrix organization and remove a member.

Matrix managers can be involved in approvals of HCM business processes, such as job changes, merit increases and performance reviews, for the workers in their matrix organizations. Business process definitions must be configured to include matrix managers in order for them to participate. This input supplements and informs the staffing decisions made by the worker's primary supervisory manager. You can configure the role so that the manager can or can't view workers' compensation information.



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.

Oliver Reynolds is a member of all of the following organizations:

Member of These Organizations 9 items

Organization	Organization Type	Organization Subtype
Global Modern Services, Inc. (USA)	Company	Company
GMS North America	Company Hierarchy	Company
60000 Office of CIO	Cost Center	Cost Center
Information Technology	Cost Center Hierarchy	Cost Center
USA - Western US	Location Hierarchy	Geographic Division
Executive (Monthly)	Pay Group	Pay Group
Global Modern Services Regions	Regional Hierarchy	Region
Headquarters - Corporate	Region	Region
Executive Management Group	Supervisory	Group

And he manages these organizations:

Manager of These Organizations 4 items

Organization	Organization Type	Organization Role
60000 Office of CIO	Cost Center	Cost Center Manager
Information Technology	Cost Center Hierarchy	Cost Center Manager
Information Technology	Supervisory	Manager
Workday SaaS Implementation Team	Team	Team Leader

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 the assignments can be edited for individual employees. These assignments are inherited by the supervisory organization's subordinates unless overridden.

There is an **Allowed Organizations** field in which 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 an 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 Staffing Roles Security Groups Organization Assignments Goals Additional Data

5 items

Organization Type	Allowed Organizations	Default Organizations
Company		Global Modern Services, Inc. (USA)
Cost Center		10000 Office of CEO
Region		Headquarters - Corporate
Division		
Growth/Share		

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

ORGANIZATION ASSIGNMENTS ON LOCATION

When creating or editing a location hierarchy, you also have the ability to restrict other types of organizations that can be assigned during staffing changes based on the location of a worker's position. You can designate these restrictions on the Organization Assignments tab on the location hierarchy.

When using the *Change Organization Assignments* task, the organization prompt list displays allowed values on the location hierarchy (or hierarchies) intersected with allowed values on the supervisory organization. If you don't specify values on the Organization Assignments tab, all values are assignable for that organization type.

ACTIVITY 2.4: CREATE A COMPANY ORGANIZATION

Business Case: In this activity Logan McNeil will be creating a new company organization called Knowledge Management, Ltd. to be used for reporting purposes by the Finance organization.

Sign In As Logan McNeil

1. Enter *Create Company* into the search box
2. Select the ***Create Company*** task
3. Click on the prompt to select the reorganization event
4. Select *Current and Future* > **Workday Class Reorg**
5. Click **OK** to select the reorganization event
6. Enter the following information:

Field Name	Entry Value
Organization Name	Knowledge Management, Ltd.
Organization Subtype	Company
Organization Visibility	Everyone
Company Currency	GBP

7. Click on the ⊕ five times to add additional rows
8. Assign the following assignable roles (leave the existing role):
    - Compensation Finance Partner (Sara Goldstein)
    - Company Costing Manager (Sara Goldstein)
    - Controller (Sara Goldstein)
    - Budget Manager (Sara Goldstein)
    - Grant Budget Specialist (Sara Goldstein)
9. Click **OK** to save and view your Company organization

ACTIVITY 2.5: ORGANIZATION ASSIGNMENTS

Business Case: In this activity, Logan McNeil will assign the organization assignments for the supervisory organizations. We will set up allowed and default organization assignments on Wealth of Knowledge and its subordinate supervisory organizations.

Sign in as Logan McNeil

1. Navigate to the **Wealth of Knowledge** supervisory organization
2. Select the *Related Actions* icon off of **Wealth of Knowledge**
3. Select the following action and task:

   Supervisory Organization > Edit Supervisory Organization

4. Enter the following Organization Assignments in the Assigned and Default Organizations fields:

Organization Type	Allowed Organizations	Default Organizations
Company		Knowledge Management, Ltd.
Cost Center	40000 Office of CHRO 41400 Workforce Planning	40000 Office of CHRO
Region	Headquarters – Corporate US – Northeast EU – Northern	Headquarters – Corporate

5. Click **OK** to save
6. Navigate to the **Learning and Development Department** supervisory organization (LearnDev)
7. Click on the *Related Actions* icon off of **Learning and Development Department**
8. Select the following action and task:

   Supervisory Organization > Edit Supervisory Organization

9. Using the prompts, select the following Organization Assignments in the **Default Organizations** column, leaving the defaulted Allowed Organization values:

Organization Type	Default Organizations
Company	Leave the default (Knowledge Management, Ltd.)
Cost Center	Leave the default (40000 Office of CHRO)
Region	US – Northeast

   Note that the only values available in the default Region prompt are the regions you assigned in the Allowed column

10. Click **OK** to save
11. Navigate to the **Training Department**
12. Click on the *Related Actions* icon off of **Training Department**
13. Select the following action and task:

    Supervisory Organization > Edit Supervisory Organization

14. Using the prompts, select the following Organization Assignments in the **Default Organizations** fields, leaving the defaulted Allowed Organizations values:

Organization Type	Default Organizations
Company	Leave the default (Knowledge Management, Ltd.)
Cost Center	41400 Workforce Planning
Region	Leave the default (US – Northeast)

15. Click **OK**
16. Search for and select the **Course Development Department** (CoursDev)
17. Click on the *Related Actions* icon off of **Course Development**
18. Select the following action and task:

    Supervisory Organization > Edit Supervisory Organization

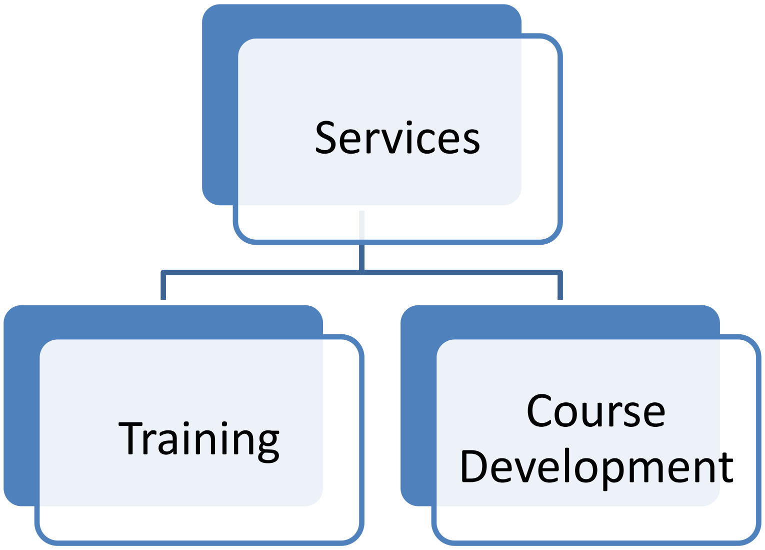
19. Using the prompts, select the following **Default Organizations**, leaving the Allowed Organization values:

Organization Type	Default Organizations
Company	Leave the default (Knowledge Management, Ltd.)
Cost Center	41400 Workforce Planning
Region	EU – Northern

20. Click **OK** to save

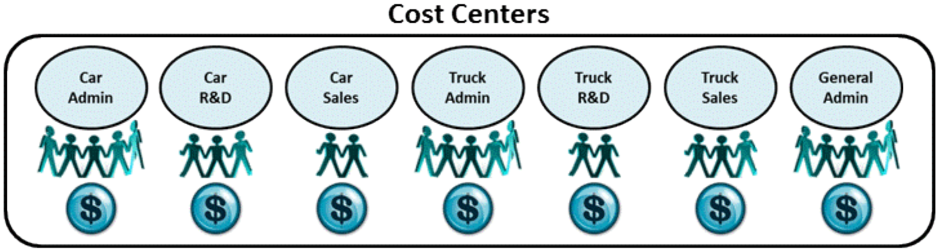
ORGANIZATION HIERARCHIES

Organization hierarchies are used for reporting to reflect different organizational roll ups. You can change how you roll up organizations at any point and can have multiple views (hierarchies) of your data, as long as the lowest level assignments are correct. Hierarchical organization types support inheritance of organizational roles down the hierarchy.

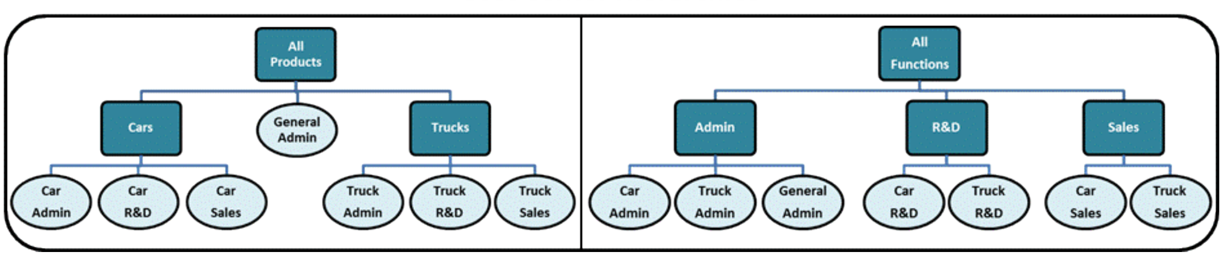


Organization hierarchies do not store positions, workers or transactions; only organizations of a relative type. Therefore, cost center hierarchies store cost centers, company hierarchies store companies and regional hierarchies store regions. Organizations group positions, workers and transactions. Positions and workers are created within/hired into supervisory organizations and locations. They are then assigned other organization types such as companies, cost centers, regions, matrix and any custom organizations.

Cost Centers



Cost Center Hierarchies



ACTIVITY 2.6: CREATE A COST CENTER HIERARCHY

Business Case: In this activity Logan McNeil will create a cost center hierarchy to allow reporting on all expenses incurred in the Wealth of Knowledge cost centers.

Sign In As Logan McNeil

CREATE A COST CENTER HIERARCHY

1. Enter *Cost Center Hierarchy* into the search box
2. Select the ***Create Cost Center Hierarchy*** task
3. Click on the prompt to select the reorganization event
4. Select the **Workday Class Reorg** you created (in the *Current and Future* folder) and click **OK**
5. Enter the following information:

Field Name	Entry Value
Organization Name	Wealth of Knowledge Cost Centers
Organization Subtype	Cost Center
Organization Visibility	Administrators Only

6. Click on the ⊕ two times to add two rows
7. Assign the following assignable roles (leave the existing roles):
   - Cost Center Financial Analyst (Patrick O'Brien)
   - Cost Center Manager (Patrick O'Brien)
8. Click **OK** to save

ADD EXISTING COST CENTERS TO YOUR COST CENTER HIERARCHY

1. Click on the *Related Actions* icon next to **Wealth of Knowledge Cost Centers**
2. Select the following action and task to include existing Cost Centers in your new hierarchy:

   Reorganization > Assign Included Organizations
3. Click on the prompt to select the reorganization event
4. Use the prompt folders to find the **Workday Class Reorg** you created
5. Click **OK**
6. Include the following cost center organizations in your hierarchy:
   - 40000 Office of CHRO
   - 41400 Workforce Planning

7. Click **OK**

   Note the members that are currently in these cost centers

8. Click on the *Related Actions* icon next to Wealth of Knowledge Cost Centers, and then click Org Chart to view the cost centers included in your hierarchy

ORGANIZATION REPORTS

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

Report	Description
Directory by Organization	View a directory listing of workers for one or more supervisory and/or matrix organizations. Details include worker, supervisory organization, phone number, email, title and location. Enables you to audit workers for organizations.
Organization Hierarchy	View an organization spreadsheet of the selected hierarchy and subordinates. Accesses the organization as its primary object. The organization object returns one row per organization.
Org Chart	View an organization chart of the selected organization to see the relationship between this organization and subordinate organizations. You can expand organizations to see a workers' reporting structure.
Organizations I Belong To	View the organizations you belong to with assignable roles, location, organization type, organization subtype and assignable roles you fulfill. Enables you to check your organization memberships and if you have security access, you may use the related actions menu for these organizations and roles.

CHAPTER REVIEW

The main organization type within Workday is supervisory organization. This is a critical component to the setup of HCM. Supervisory organizations are used to run business processes, collect data and designate workers to their management and support teams.

You must have a reorganization event when creating an organization. Reorganization activities such as inactivating, dividing, creating a superior or subordinate and move workers utilize the business process framework allowing you to require approvals and the ability to cancel or rescind the process.

In addition, other organization types drive different behaviors in Workday. We provide different types of organizations and even have the ability to create custom organizations to meet your unique business needs. Some types of organizations can be combined in a hierarchy to represent roll up structures for reporting and tracking. You can create an unlimited amount of organizations within Workday to reflect your company's requirements.

CHECK YOUR KNOWLEDGE

1. What is the primary organizational structure within Workday HCM?

   ____

2. Which of the following are changes that can be made to supervisory organizations?
   a. Create Subordinate
   b. Dividing Organization
   c. Assign Superior
   d. Inactivate Organization
   e. All of the above
3. How many organizations are allowed in Workday?

   ____

4. What are other types of organizations besides supervisory?

   ____

5. Where on the supervisory organization can you limit the (other) organization assignments?

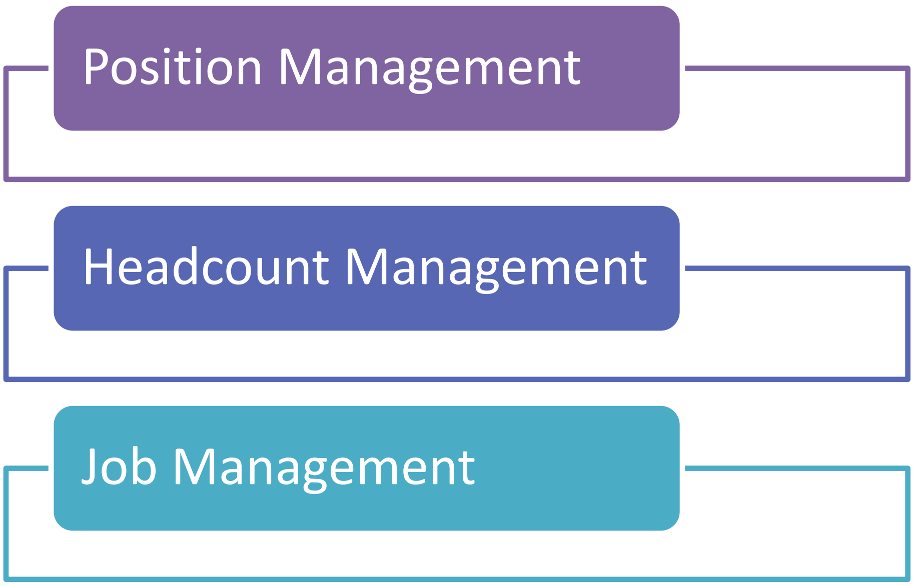
   ____

SAMPLE DECISION POINTS

1. What is your supervisory organization structure?
2. What organization subtypes represent your terminology? Do you need to implement a hierarchy structure?
3. Which locations represent your organizations? (E.g. headquarters is in San Francisco)
4. What are the standard weekly working hours (time profiles) for each of your locations?
5. What other organization types will you use?
6. When assigning other organization types to a supervisory organization, what is allowed and what is the default for each?

CHAPTER 3: STAFFING MODELS

When setting up your supervisory organizations, you need to consider your staffing strategy and budget needs. In this chapter, we will review staffing models, which at their simplest, are used to determine how jobs are defined and filled, provide different levels of control over staffing and support different staffing goals. Every supervisory organization must be associated with a staffing model. This chapter provides specific information about the difference between the three types of staffing models available within Workday.



OVERVIEW

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

- Staffing Model Definitions: Position Management, Headcount Management, Job Management
- Hiring Restrictions
- Differentiating Staffing Models
- Maintaining Staffing Models

STAFFING MODELS

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 level for positions.

The three types of staffing models are position management, headcount management and job management. Each of these staffing models provides a different level of control over staffing and supports different staffing goals.

POSITION MANAGEMENT

- A single position is created to be filled.
- 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 open after a job change.
- 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.

HEADCOUNT MANAGEMENT

- A headcount group is created.
- Defined number of allocated positions.
- To hire, promote, demote, contract or transfer a worker into a position, unfilled positions must exist in the headcount group.
- Position within the headcount is opened when a worker is transferred, demoted, promoted or terminated.
- Headcount allocation can be reduced or increased.
- Headcount group can be closed if they are 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.
- Position no longer exists after a worker is transferred, demoted, promoted or terminated unless moved with the employee.

HIRING RESTRICTIONS

Hiring restrictions define the rules and conditions in a position, headcount or job management organization and allow you to limit or restrict who is hired into your organization.

Restrictions for any staffing model may be established using the following:

- One or more job families
- One or more job profiles
- One or more locations
- Worker type (employee or contingent worker)
- Time type (full time or part time)

Optionally, you can relax your hiring restrictions by selecting the **Allow Override of Restrictions on Staffing Events** checkbox in the *Edit Tenant Setup - HCM* task. If this box is checked, 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.

Hiring restrictions apply to each staffing model in a different manner:

Staffing Model	Restrictions
Position Management	Restrictions apply to the single unfilled position.
Headcount Management	Restrictions apply to all of the unfilled positions in a headcount group.
Job Management	Restrictions apply to every job created within the supervisory organization during the hire process.

DIFFERENTIATING STAFFING MODELS

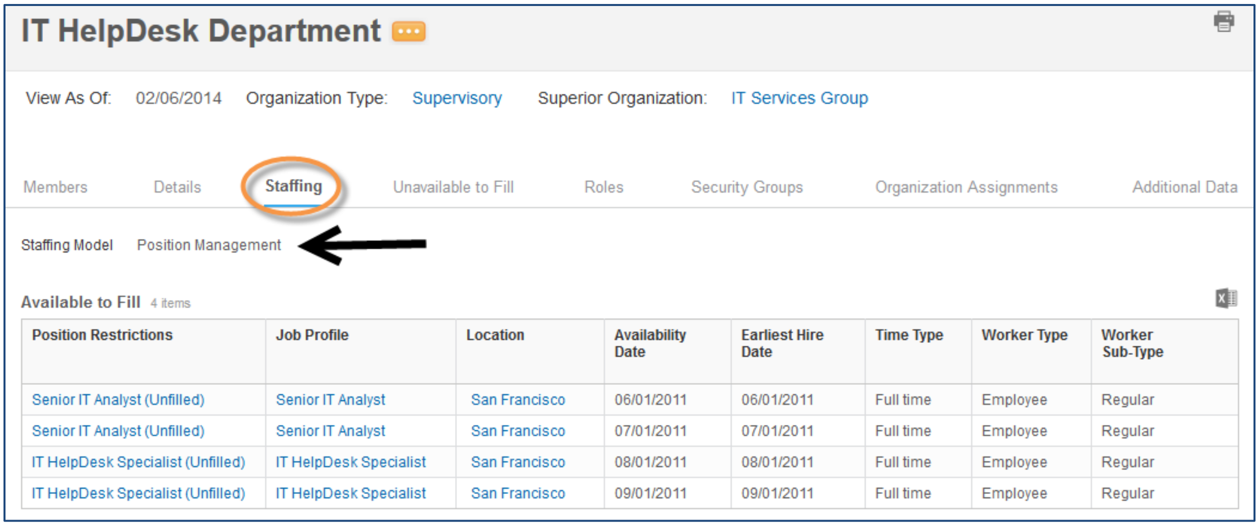
Below is a summary of the different Staffing Model features:

	Position Management	Headcount Management	Job Management
Capability to Report on Open and Filled Positions			
Assign Cost Center, Company and Region to an Unfilled Position			
Assign Default Compensation			
Position History Tracked			
Capability to Move Position With Transfer, Promotion, Demotion (For Headcount Must Move Entire Group)			
Individual Positions Can Be Moved as Part of a Reorganization			
Groups Positions Together That Have Similar/Same Job and Compensation Requirements			
No Hiring Limits (e.g. No Open Position or Headcount Required to Hire)			
Allows for the use of job requisition functionality			

Positions are always assigned to a specific supervisory organization regardless of whether they are assigned to specific workers. Each supervisory organization will have a designated staffing model that:

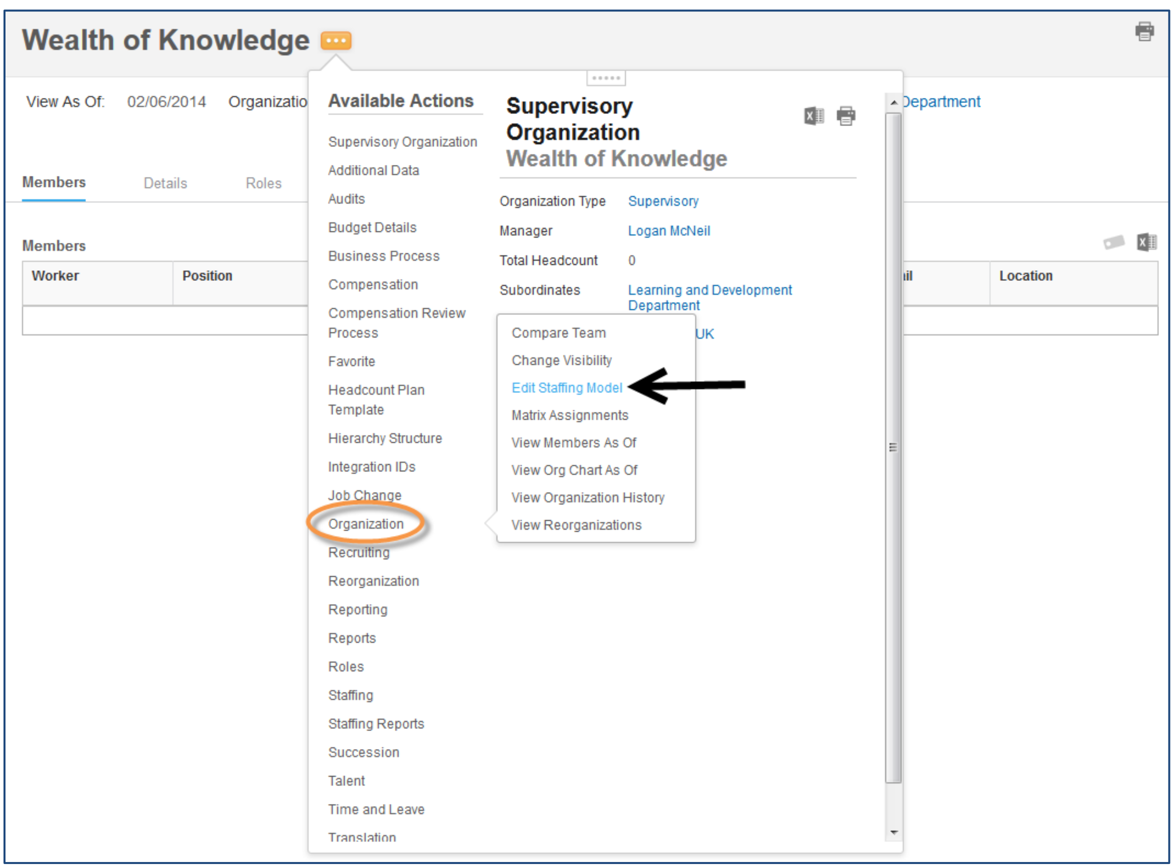
- Determines the process, approvals and restrictions for opening and closing positions.
- Defines what happens to a position when it is vacated.

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



The staffing model can be assigned while creating a supervisory organization or after it's been created as a separate task named *Edit Staffing Model*. Once a position or headcount group has been created or a hire has been initiated, the *Edit Staffing Model* task is no longer available, as the staffing model of an organization can no longer be changed. The navigation to find this task is as follows.

Click on the *Related Action* icon off of the organization and navigate to *Organization > Edit Staffing Model.* Once assigned, the staffing model can be edited using the same navigation.



ACTIVITY 3.1: SELECT A STAFFING MODEL

Business Case: Currently, all of the organizations within the Wealth of Knowledge supervisory organization structure inherited Wealth of Knowledge's position management staffing model. In this activity, you will select a different staffing model for some of the supervisory organizations you created within this structure - Training and Course Development.

Sign in as Logan McNeil

SELECT STAFFING MODEL FOR TRAINING DEPARTMENT

We are going to change the staffing model for the Training Department to Job Management

1. Enter *org:Training* into the search box and click on the magnifying glass or hit your enter key
2. Click on the ***Training Department*** hyperlink
3. Click on the *Related Actions* icon off of **Training Department**
4. Select the following action and task:

   Organization > Edit Staffing Model

5. Select **Job Management Enabled**
6. Click **OK** to save
7. Click **Done**

SELECT STAFFING MODEL FOR COURSE DEVELOPMENT

Now we are going to change the staffing model for the Course Development Department to Job Management

1. Enter *Course Development* into the search box and click on the supervisory organization
2. Click on the *Related Actions* icon off of **Course Development Department**
3. Select the following action and task:

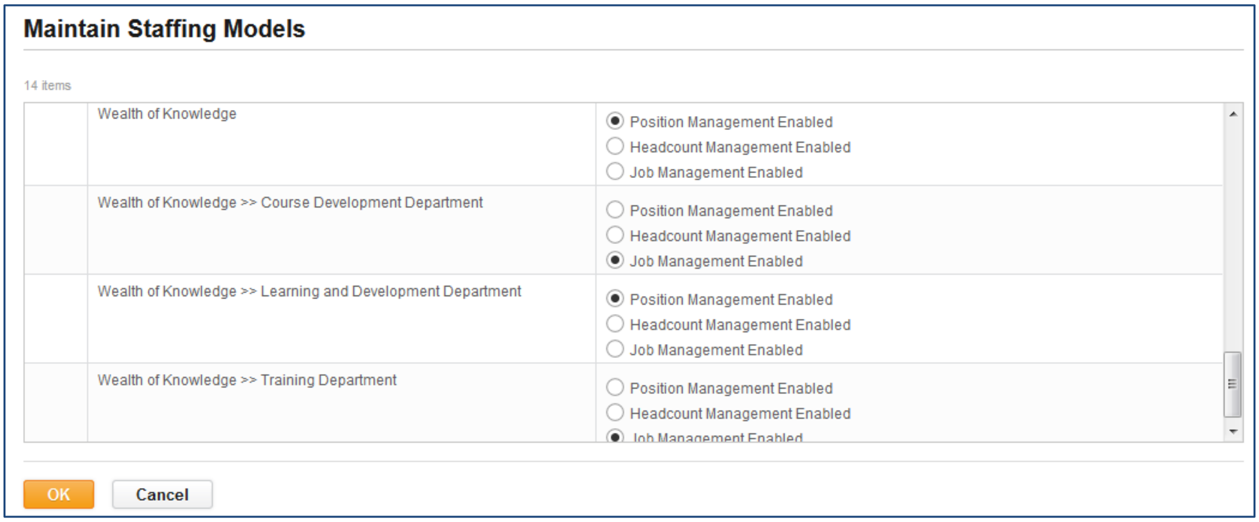
   Organization > Edit Staffing Model

4. Select **Job Management Enabled**
5. Click **OK** to save
6. Click **Done**

MAINTAIN STAFFING MODEL

The ***Maintain Staffing Models*** task allows you to view all supervisory organizations that have the staffing model selected but do not yet have any positions, headcount groups or jobs created.

A supervisory organization's staffing model can be edited until positions, headcount groups or jobs have been created. This report finds all the supervisory organizations that are still editable and allows you to select a different staffing model.



CHAPTER REVIEW

In Workday, you assign staffing models to supervisory organizations to establish how jobs are defined and filled.

Workday supports three types of staffing models: job management, position management and headcount management. Each of these staffing models provides a different level of control over staffing and supports different staffing goals.

CHECK YOUR KNOWLEDGE

1. What are the three staffing models?

   ____

2. Which staffing model has the most control?

   ____

3. Which staffing model is the most flexible?

   ____

4. True or False: Staffing models can easily be modified at any time following deployment.

   ____

SAMPLE DECISION POINTS

1. Which staffing model will be used for your organizations?

CHAPTER 4: JOBS AND POSITIONS

Depending on the staffing model you've selected, you will create either an unfilled position or an unfilled headcount group prior to initiating a hire. In comparison, when using the job management staffing model, a job is created during the hire process.

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

For all three staffing models, hiring restrictions can be established and used to control some of the data that can be selected during the hire business process. Other controls, such as the ability to close an opening that is no longer needed or temporarily freeze a filled or unfilled position or headcount group, are also available.

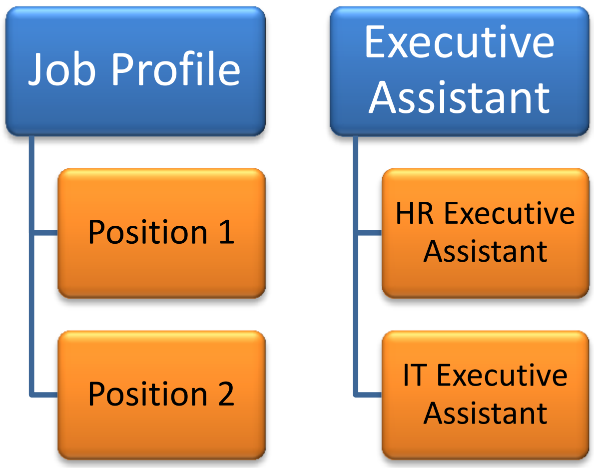
OVERVIEW

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

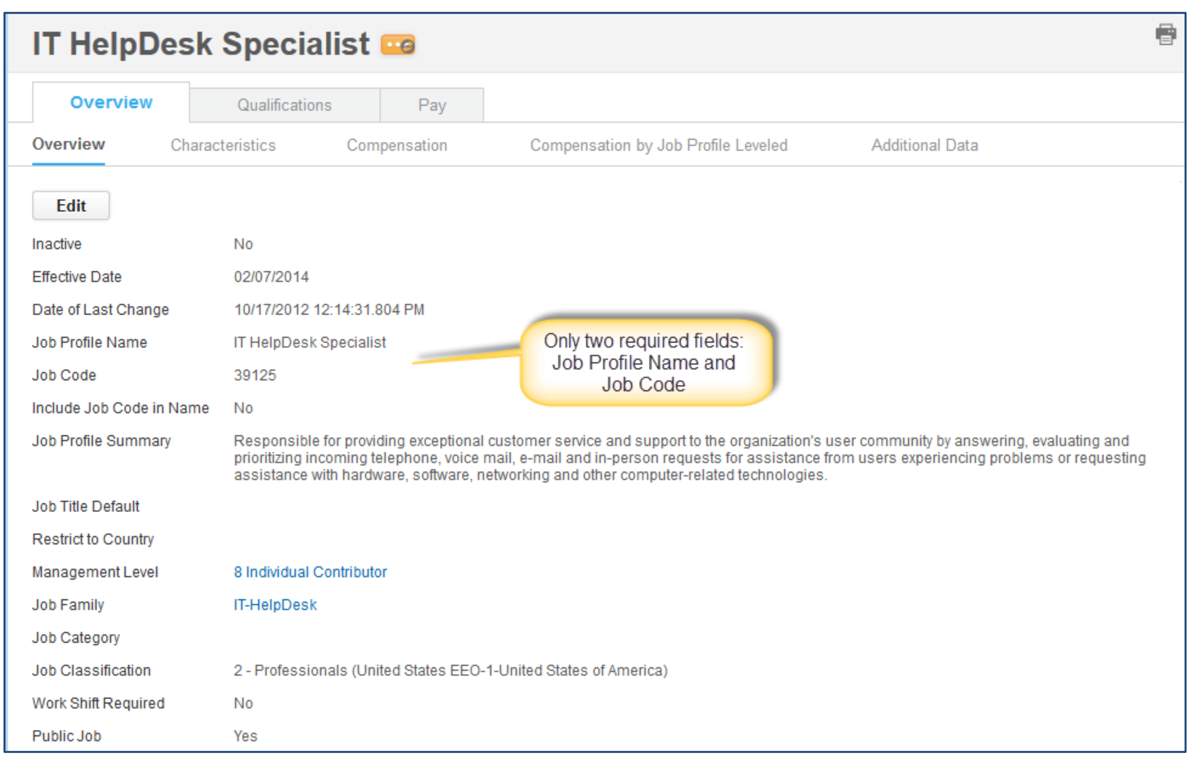
- Job Profiles
- Differentiating Job Profiles, Job Families and Job Family Groups
- Creating Positions and Headcount Groups
- Hiring Restrictions
- Managing Filled and Unfilled Positions and Headcount Groups

JOB PROFILES

In Workday, positions, headcount groups and jobs use job profiles as their foundation. Job profiles enable you to describe general characteristics of a position and identify special skills, training or other qualifications. A job profile can be used to create multiple positions.



Of all the fields available in a job profile there are only two required fields: job profile name and job code. All other fields track information that you, as a company, need 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)
- Include Job Code in Name (checkbox)
- Restrict to Country
- Management Level
- Job Classification, e.g. EEO Professional
- Job Family: categorization
- Company Insider Type
- Qualifications: Knowledge, Skills, Experience, Certifications, etc.
- Job Code (required)
- Job Title Default
- Job Exempt or Non-exempt
- Job Category (direct or indirect labor)
- Work Shift Required
- Pay Rate Type
- Compensation Grade and Rules
- Metrics (Difficult to fill or critical job)

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.

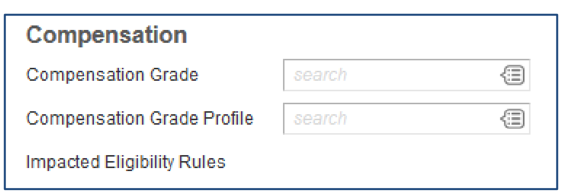
The fields that allow localization are as follows:

- Job Classification
- Pay Rate Type
- Certifications
- Workers Compensation Code
- 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 PROFILES AND COMPENSATION GRADES

You may have a one-to-one relationship between job profiles and compensation grades. When creating a job profile, the Compensation Grade and Compensation Grade Profile fields enable you to assign a compensation grade or grade profile directly to the job profile. The Impacted Eligibility Rules field lists eligibility rules that include the job profile. This enables you to look at those rules and see if any changes should be made to the rule.



MANAGEMENT LEVEL HIERARCHY

Many of the values that can be selected in the job profile are defined by you, the customer. For example, job category, job level, company insider type and management level are defined and then loaded into Workday as part of a deployment.

The management level hierarchy allows a customer to define the hierarchy of management levels such as manager, vice president and so forth. Management levels can be used for reporting or in the creation of condition rules and business process workflow, as well as eligibility rules. For example, you may want to create an eligibility rule in compensation stating that everyone who falls into management level 4 Vice President is eligible for a certain salary grade. In order for this to work in the system, you must define your management levels.

Management Level Hierarchy
Management Hierarchy

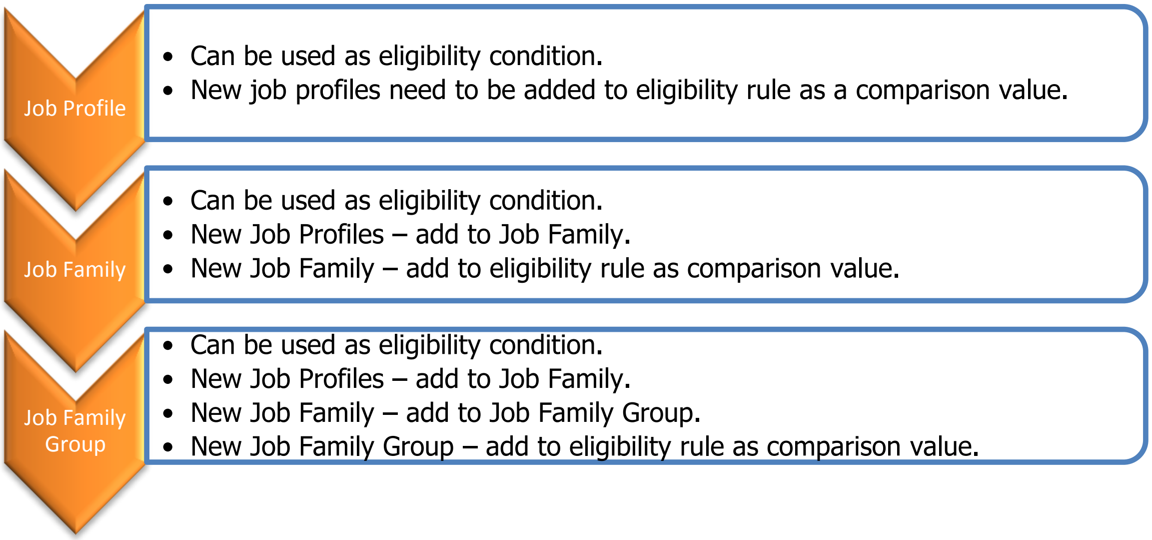
Change

8 items

Order	Management Level	Job Profile
1	1 Board of Directors	
2	2 Chief Executive Officer	Chief Executive Officer
3	3 Executive Vice President	Chief Financial Officer Chief Information Officer Chief Operating Officer Chief Risk Management Officer Executive VP, Sales & Marketing
4	4 Vice President	Chief Human Resources Officer Controller General Counsel Vice President, Consulting Services Vice President, Global Support Vice President, Marketing Vice President, Program Management Vice President, Real Estate & Facilities Vice President, Research & Development Vice President, Sales
5	5 Director	Associate General Counsel Director, Accounting Director, Consulting Services Director, Employee Benefits Director, Facilities Operations Director, Field Marketing Director, Field Sales Director, Financial Planning & Analysis Director, Global Support Director, HR Shared Services More (12)

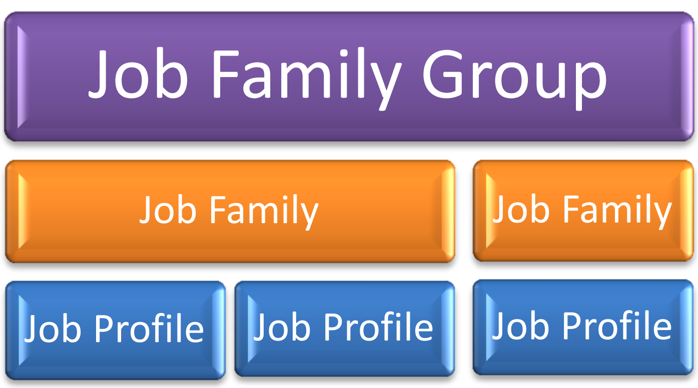
DIFFERENTIATING JOB PROFILES, JOB FAMILIES AND JOB FAMILY GROUPS

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 filters for locating a specific job profile in a prompt list, as well as when writing reports related to your job profiles.



If using job families or job family groups in an eligibility rule when a new job profile is created, it is important that it gets added to the appropriate job family. If job family is used as the criteria for a compensation eligibility rule and that rule is associated with a compensation package, if a new job profile is not added to the job family, no defaulting will occur when an employee is hired into the new job profile.

ACTIVITY 4.1: CREATING A JOB PROFILE

Business Case: As Logan McNeil, you will create a job profile that will later be used to create a position.

Sign in as Logan McNeil

1. Enter *Create Job Profile* into the search box
2. Select the ***Create Job Profile*** task
3. Use **today's date** as the Effective Date.
4. Click **OK** to continue
5. Enter the following information:

Field Name	Entry Value
Job Profile Name	Chief Training Officer
Job Code	100
Management Level	2 Chief Executive Officer
Job Family	KM-Training
Company Insider Type	United States - SEC Section 16 - Officer Insider
Pay Rate Types	Add rows for both the United Kingdom and the United States of America; set both to Salaried
Job Classification	• 1112 – Directors and chief executives of major organisations (British SOC – United Kingdom) • 1.1 – Executive/Senior Level Officials and Managers (United States EEO-1-United States of America)
Difficult to Fill	Difficult

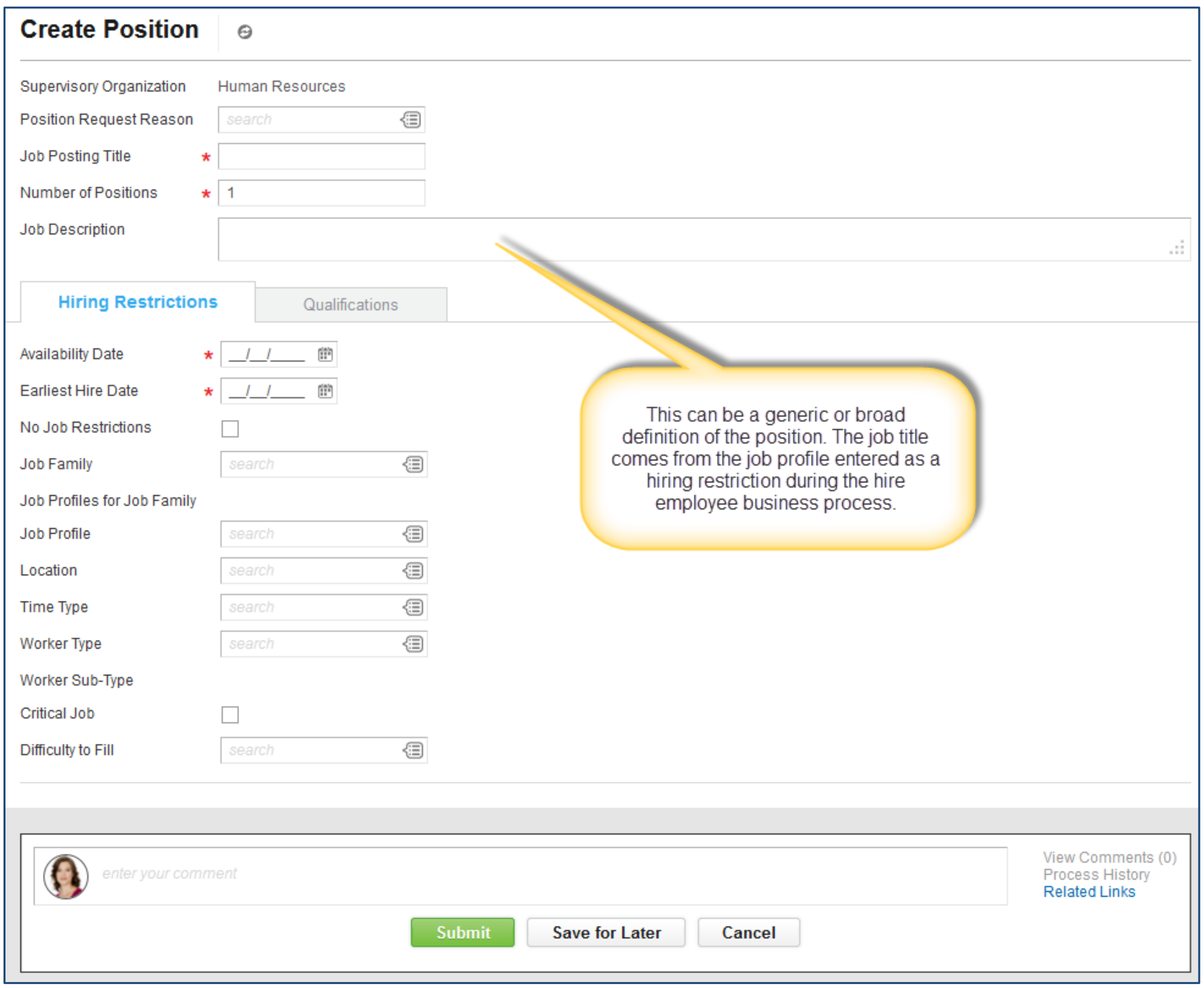
6. Click **OK** to save and view the Job Profile
7. Click **Done**

CREATING POSITIONS, HEADCOUNT GROUPS 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 Position or Headcount Management staffing models, before you can staff a supervisory organization, you must have an open position or available position in a headcount group.

The only required fields in the **Create Position** or **Create Headcount** tasks 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** check box must be turned on otherwise at least one restriction must be entered.

When a position is filled, if information such as 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.



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.

The fields that can be populated in the position (not including hiring restrictions) are as follows:

Fields	Description
Position Request Reason	Customer defined.
Job Posting Title	This is how you communicate the open position externally. It can be as specific or generic as needed.
Number of Positions	Can be used to create multiple unique positions with the same characteristics. A number is appended to the end of each title to identify it as a unique position.
Academic Tenure Eligible	Identifies positions that will allow tenured status for higher education. This must be turned on at the tenant level to be available (Edit Tenant Setup, on the Public Sector tab).
Availability Date	The date the position will be seen in the system and can be worked on by recruiting.
Earliest Hire Date	The position will not be available for hire prior to this date.
No Job Restrictions (Check Box)	If no restrictions, turn on this check box; otherwise at least one restriction must be entered.

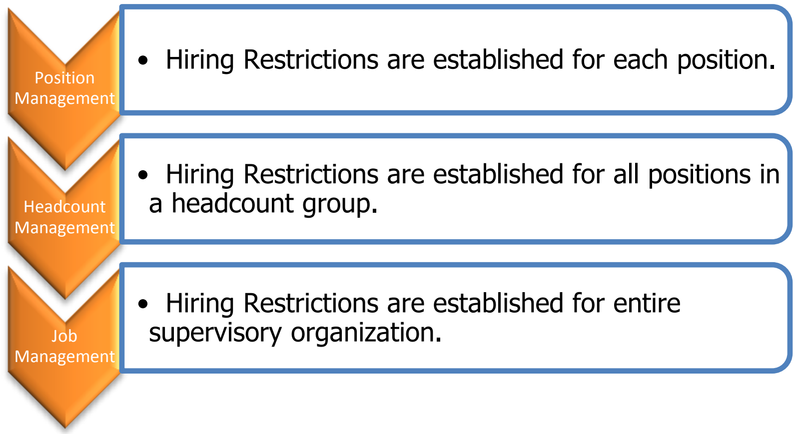
HIRING RESTRICTIONS

Hiring restrictions are used to set controls on how a position, headcount group or job management supervisory organization can be filled during hire. These hiring restrictions control who can fill an opening, the location and other conditions of employment. For example, if you set a hiring restriction on a position stating that location is San Francisco, then when you hire into that position the location of that worker must be San Francisco. It cannot be changed at the time of hire. Whether the hiring restriction controls a single position, a group of positions or the hiring into an entire supervisory organization depends on the staffing model selected for the supervisory organization.

It is a mandatory step to establish hiring restrictions for all positions, headcount groups and supervisory organizations that use the job management staffing model. If you choose not to identify a hiring restriction, beyond availability date and earliest hire date, you must turn on the **No Job Restrictions** check box.

Hiring restrictions are enforced during the hire and contract contingent worker events. The job profile restriction is also enforced during job changes such as transfers; however the other restrictions are not enforced during these events. No job restrictions are enforced during the edit position event.

Optionally, you can relax your hiring restrictions by selecting the **Allow Override of Restrictions on Staffing Events** checkbox in the *Edit Tenant Setup - HCM* task. If this box is checked, 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.



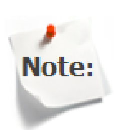
The following is a list of Hiring Restrictions you can select:

Fields	Description
Job Family	Job Families group job profiles. 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. If one value is selected it cannot be changed when hiring.
Location	Limits what location you can select. If one value is selected, no other location can be entered during hire.
Worker Type	Select from employee or contingent worker (e.g. if you select employee, the Contract Contingent Worker task will not be available).
Time Type	Limits what time type you can select; either full or part time.

DEFAULT COMPENSATION

After a position has been created, you can set up default compensation. This enables defaulting of compensation components when hiring into the position, and can be edited during the hire event. To find this task, use the related action off the position, select **Compensation** and the **Request Default Compensation Change** task. Alternatively, you could choose to include the Request Default Compensation step in the Create Position or Edit Position Restrictions business processes.

All compensation components can be used as a default regardless of eligibility. This includes the compensation package, grade, grade profile, step, salary, unit salary, allowance, unit allowance, bonus, merit, commission and stock.



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

JOB REQUISITIONS

You may require 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 *Termination* and *End Contingent Worker Contract*. If you choose to enable the job requisitions functionality then you must use either the position management or job management staffing models.

If you are using position management, you can choose if a job requisition is required during staffing events (e.g. hire or a job change into a different position) based on rules configured in 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.

Job requisitions are optional in the job management staffing model, but you can add rules on fill events to specify when the job requisition field is required.

Workday automatically populates qualifications, education, and competencies from the job profile when you create job requisitions for job management organizations.

For position management organizations, Workday uses job profile data when you create new positions

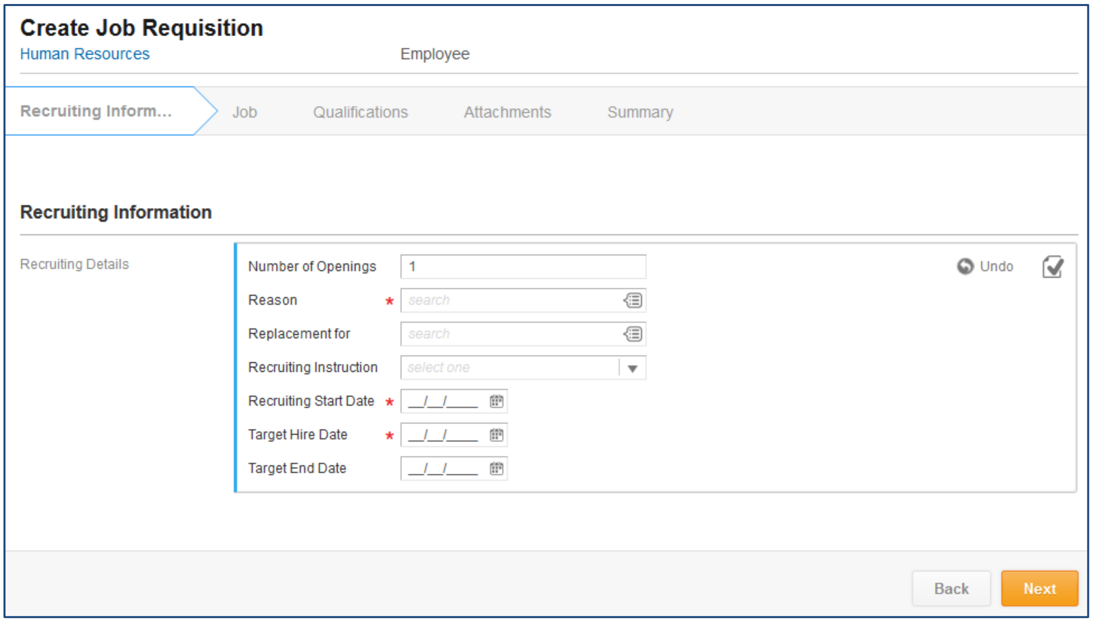
Note: Job requisitions are required if you are using the Workday Recruiting module.

When creating a job requisition, you can choose to create a new position or attach it 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.

When you create a job requisition for an existing position, Workday populates many fields based on the associated position, position restrictions or the job profile in job management organizations.

Options that are available to 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).



MANAGING FILLED AND UNFILLED POSITIONS, HEADCOUNT GROUPS, AND JOBS

Once your positions and headcount groups are created and your hiring restrictions are set for your supervisory organizations using the job management staffing model, you'll need to manage these objects using the *Edit, Close and Hiring Freeze* business processes. The options available will change based on whether it's a position, headcount, or job management model and whether the position, headcount group 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 Headcount Group:

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

Unfilled Headcount Group:

- Edit Headcount Restrictions
- Close Headcount
- Manage Headcount Freeze

Filled Job:

- Edit Job

Unfilled Job:

- Edit Hiring Restrictions
- Manage Organization Freeze

EDIT POSITION RESTRICTIONS AND EDIT POSITION

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

Edit Position Restrictions or Edit Headcount 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

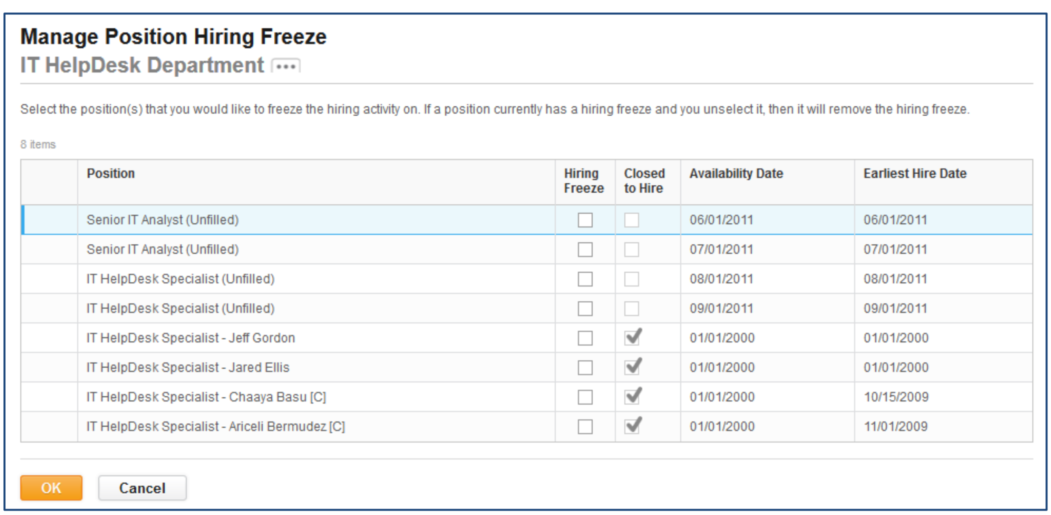
- This task should be used as an administrative task for out of order events only.
- For changes such as promotions, demotions, transfers, lateral moves or data changes, you should use the Change Job business process (e.g. to change an employee's location or part time or full time status).
- If you use the Edit Position task, the system will let you change anything, regardless of the original position restrictions.
- This task changes the employee data but not the position restrictions.

CLOSE POSITION VERSUS MANAGE HIRING FREEZE

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

Individual positions, headcount groups, 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
IT HelpDesk Department

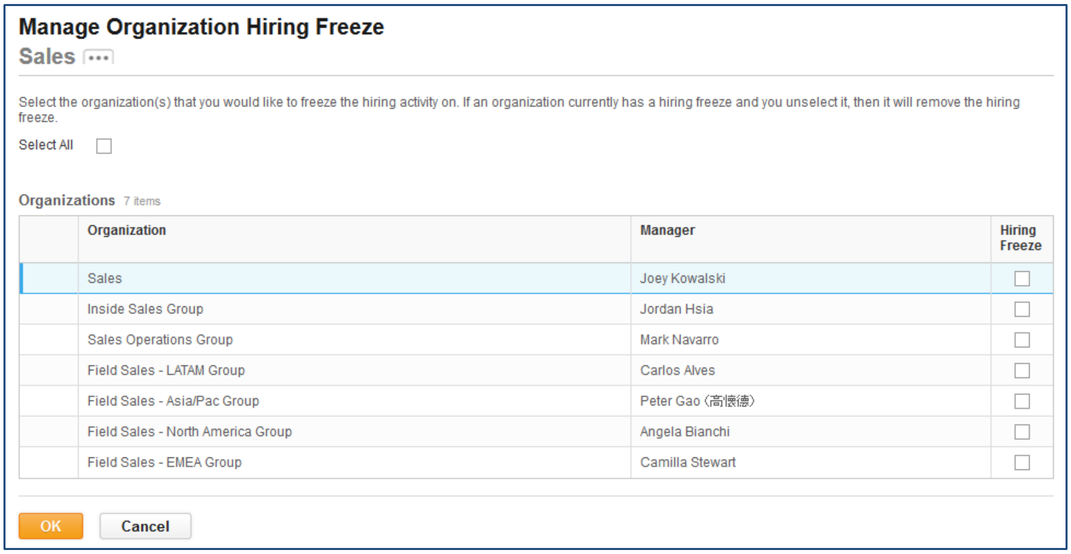
Select the position(s) that you would like to freeze the hiring activity on. If a position currently has a hiring freeze and you unselect it, then it will remove the hiring freeze.

8 items

Position	Hiring Freeze	Closed to Hire	Availability Date	Earliest Hire Date
Senior IT Analyst (Unfilled)	☐	☐	06/01/2011	06/01/2011
Senior IT Analyst (Unfilled)	☐	☐	07/01/2011	07/01/2011
IT HelpDesk Specialist (Unfilled)	☐	☐	08/01/2011	08/01/2011
IT HelpDesk Specialist (Unfilled)	☐	☐	09/01/2011	09/01/2011
IT HelpDesk Specialist - Jeff Gordon	☐	✓	01/01/2000	01/01/2000
IT HelpDesk Specialist - Jared Ellis	☐	✓	01/01/2000	01/01/2000
IT HelpDesk Specialist - Chaaya Basu [C]	☐	✓	01/01/2000	10/15/2009
IT HelpDesk Specialist - Ariceli Bermudez [C]	☐	✓	01/01/2000	11/01/2009

OK Cancel

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



When you freeze a position or headcount group you are using the same business process, *Freeze Position or Headcount Group* and 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.

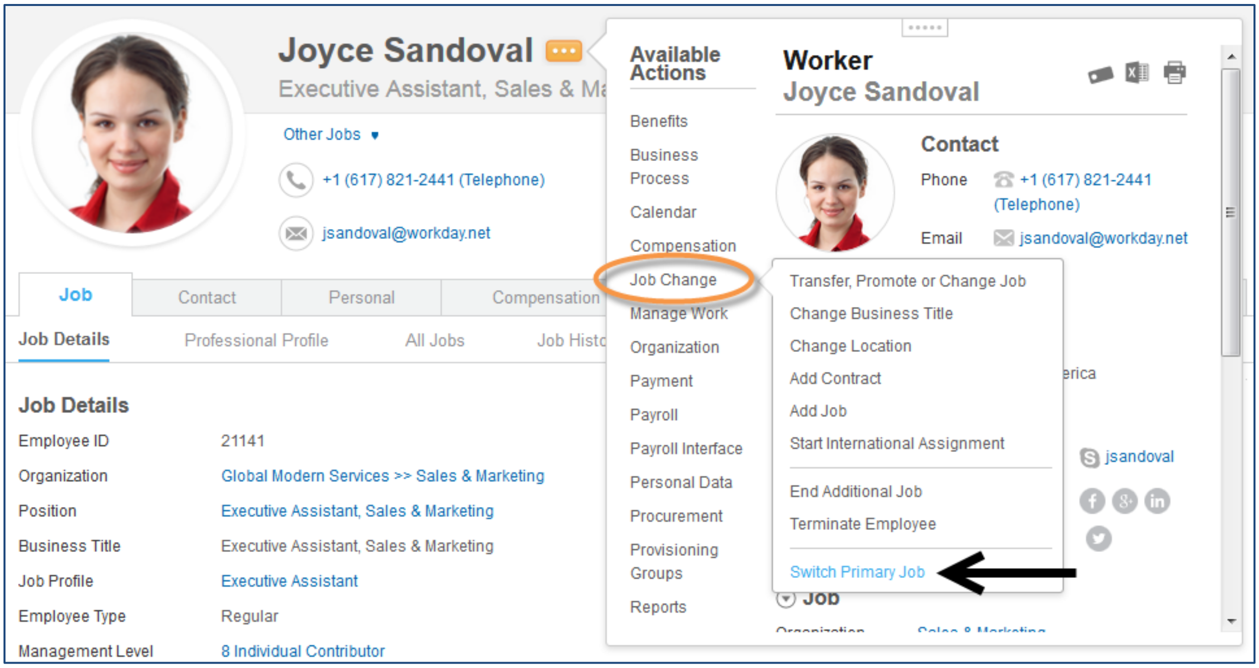
Unlike the process of closing a position, the concept behind a hiring freeze is that it's a temporary freeze which at some point could be reversed by simply turning off the check box.

SWITCH PRIMARY JOB

For those customers who utilize multiple jobs, the Switch Primary Job business process allows you to change the primary job designation for workers with multiple jobs. Indicating a worker's primary job is necessary to identify the main manager and report accurately.

The Switch Primary Job business process gives you the flexibility to change a worker's primary job due to a job change, a new additional job, or the end of the current primary job.

You can access the Switch Primary Job task through search or by selecting Job Change > Switch Primary Job as a related action on a worker. After you specify the job switch reason and effective date, Workday displays the worker's primary job on that date and provides additional information. If the worker has more than one additional job, you then specify which job to designate as the new primary job.



Your ability to change a worker's primary job designation depends on the following worker, job, and pay group conditions:

Worker: The worker can't have another in-progress Switch Primary Job event, an in-progress Termination event, or a completed Termination event that is effective after the switch date.

Job: The proposed primary job must be an active additional job as of the proposed switch date, can't be an international assignment, and can't have an in-progress End Additional Job event or a completed End Additional Job event that is effective after the proposed switch date.

Pay Group: Both jobs must belong to Workday pay groups, belong to the **same** external pay group, or have no pay group assigned. They can't belong to a mix of a Workday pay group and an external pay group or belong to a first-generation Workday Payroll Interface pay group. Neither job can have an in-progress Assign Pay Group event or a completed Assign Pay Group event that is effective after the proposed switch date.

As a note, Workday also allows you to have a benefits primary job, which establishes an employee’s eligibility for benefits. If no benefits primary job is identified, then the HR primary job is used.

ACTIVITY 4.2: CREATE POSITIONS AND SET HIRING RESTRICTIONS

Business Case: As Logan McNeil, you will be creating three new positions and setting hiring restrictions in your Wealth of Knowledge organizations. After the positions and restrictions are created and approved, assign the position of Chief Training Officer to a list of assignable roles.

Sign in as Logan McNeil

CREATE A NEW POSITION IN WEALTH OF KNOWLEDGE

1. Enter *WOK* into the search box and click on the link for **Wealth of Knowledge**
2. Select the *Related Actions* icon off of **Wealth of Knowledge**
3. Select the following action and task:

   Staffing > Create Position

4. Enter the following information on the create position page using **today's date** as the availability date and the earliest hire date:

Field Name	Entry Value
Job Posting Title	Chief Training Officer
Job Profile	Chief Training Officer
Worker Type	Employee
Worker Sub-Type	Regular

5. Click **Submit** to continue to the next step of the business process
6. Click the **Skip** link to skip the task *Request Default Compensation for Position Event*

   Hint: From Logan's Inbox, you can also find Skip This Task by clicking on the action

7. Click **OK**
8. Click **Open** for the *Change Organization Assignments* task
9. Review the proposed organizations that defaulted and click **Submit** to save

   Note that the next step is going to Steve Morgan for approval – we will approve as Steve later

10. Click **Done**

CREATE A SECOND POSITION IN LEARNING AND DEVELOPMENT

1. Navigate to the Learning and Development Department
2. Select the *Related Actions* icon off of **Learning and Development Department**
3. Select the following action and task:

   Staffing > Create Position

4. Enter the following information on the create position page using **today's date** as the earliest hire date and the availability date:

Field Name	Entry Value
Job Posting Title	Training Director
Job Profile	Training Director
Location	London New York Paris San Francisco
Worker Type	Employee

5. Click **Submit**
6. On the next screen, click **Skip** to skip the task *Request Default Compensation for Position*
7. Click **OK**
8. **Open** the *Change Organization Assignments* task
9. Review the proposed organizations that defaulted and click **Submit** to save
10. Click **Done**

CREATE A THIRD POSITION IN LEARNING AND DEVELOPMENT

1. Select the *Related Actions* icon off of **Learning and Development Department**
2. Select the following action and task:

   Staffing > Create Position

3. Enter the following information on the create position page using **today's date** as the availability date and the earliest hire date:

Field Name	Entry Value
Job Posting Title	Learning Program Manager
Job Profile	Learning Program Manager
Time Type	Full Time
Worker Type	Employee

4. Click **Submit** to save
5. **Skip** the task *Request Default Compensation for Position*
6. Click **OK**
7. **Open** the *Change Organization Assignments* task
8. Review the proposed organizations that defaulted and click **Submit** to save
9. Click **Done**

SET HIRING RESTRICTIONS ON THE TRAINING DEPARTMENT

1. Navigate to the **Training Department**
2. Select the *Related Actions* icon off of the **Training Department** supervisory organization
3. Select the following action and task:

    Organization > Set Hiring Restrictions

4. Enter the following information on the Set Hiring Restrictions page using **today's date** for the availability date and earliest hire date:

Field Name	Entry Value
Job Profile	Instructor

5. Click **Submit** to save
6. Click **Done**

SET HIRING RESTRICTIONS ON THE COURSE DEVELOPMENT DEPARTMENT

1. Search for *Course Development* and select the **Course Development Department**
2. Select the *Related Actions* icon off of **Course Development Department**
3. Select the following action and task:

    Organization > Set Hiring Restrictions

4. Enter the following data using **today's date** as the availability and earliest hire date:

Field Name	Entry Value
Job Profile	Course Developer

5. Click **Submit** to save
6. Click **Done** and sign out

    Note that all positions and hiring restrictions went to Steve Morgan for final approval

APPROVE NEW POSITIONS AND HIRING RESTRICTIONS

Sign in as Steve Morgan (smorgan)

1. Click on the **Inbox** icon on the top right of your screen in the application header
2. Click **View Inbox** at the bottom of the inbox preview window
3. Approve all five staffing tasks (Create Position and Hiring Restrictions) by utilizing the **Bulk Approve** feature from the gear icon in the activity feed, or by individually approving each task (click the **Select All** checkbox to select all items when using bulk approval)
4. Click **Done** and confirm that Steve's inbox is now empty

ASSIGN POSITION TO ASSIGNABLE ROLES

Sign in as Logan McNeil (lmcneil)

1. Navigate to the *Staffing* tab on the navigation ribbon of Wealth of Knowledge, Learning and Development, Training, and Course Development supervisory organizations. Verify that all of the following positions and hiring restrictions were created and available to fill:

Supervisory Organization	Positions or Hiring Restrictions
Wealth of Knowledge	Chief Training Officer
Learning and Development	Learning Program Manager
	Training Director
Training Department	Instructor job profile
Course Development Department	Course Developer job profile

2. Select the *Related Actions* icon off of the Wealth of Knowledge supervisory organization
3. Select the following action and task:

   Roles > Assign Roles

4. Click **OK**
5. In addition to the Chief Human Resources Officer, add the **Chief Training Officer** position to the Assigned To field for the following assignable roles:
   a. Compensation Partner
   b. Security Partner
6. Click **OK** to save
7. Confirm that both Logan McNeil and the unfilled Chief Training Officer position are filling the Compensation Partner and Security Partner assignable roles in Wealth of Knowledge
8. Click **Done**

CHAPTER REVIEW

Job profiles allow you to define the attributes of a position such as job classification, exempt or non-exempt status and management level.

Job families are used to organize and group job profiles and job family groups are used to organize and group job families. All three of these components can be used as eligibility in a compensation eligibility rule.

When creating an unfilled position or headcount group, the job posting title is used to communicate the opening externally. The actual job title and business title default from the name of the job profile.

Setting at least one hiring restriction or selecting no job restrictions is mandatory for all three staffing models: position, headcount and job management.

The values associated with a job profile, such as job classifications, management level and job level, are defined by you and loaded into Workday as part of deployment.

Use the Edit Position task as an administrative task for out of order events; use the Change Job task for promotions, demotions and transfers and when a worker's position data needs to be changed such as a location or full time to part time status.

If you're interested in using commitment accounting then you must use job requisitions.

Use the Hiring Freeze task to temporarily freeze hiring for a position or headcount group, one or more supervisory organizations or an entire supervisory organization hierarchy.

CHECK YOUR KNOWLEDGE

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

   ____

2. True or False: If you turn on the no job restrictions check box, a hiring restriction is not required.

   ____

SAMPLE DECISION POINTS

1. Which job profiles need to be built and how much detail is necessary (EEO, Pay Rate Type, Skills, Experience, etc)?
2. Are you using job families? Job family groups?
3. What is your management level hierarchy?
4. Will you leverage job requisitions for your positions and/or organizations?
5. What will your Create Position business process look like?

CHAPTER 5: COMPENSATION

Compensation in Workday tracks compensation at both the enterprise-wide and the individual worker level. The compensation structure is comprised of grades and plans which are grouped together into a package. Compensation grades provide guidance with reference pay ranges, compensation grade profiles allow for localization and compensation plans provide various types of pay components.

By using compensation eligibility rules, these compensation components can default into an employee’s compensation during a staffing event, such as hire or transfer. Rules can also be used to identify populations eligible for a merit or bonus target that is different from the default target.

Compensation can be changed for an individual employee or as part of a mass event such as a merit or bonus event. When a merit event is launched, for example, any employee with the merit plan in their compensation will be included in the event. This could be a population as small as one, or for thousands of employees. This data can either be entered directly into Workday by managers or compensation professionals or it can be loaded.

Each employee will have multiple components included in determining their total compensation. In Workday, you have the opportunity to define different sections of compensation and use those sections in one or more templates that can be designed to calculate and report an employee’s total compensation, based on your definition.

OVERVIEW

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

- Compensation Components
- Compensation Rules
- Compensation Reports
- Compensation Packages
- Initiating Compensation Events
- Total Compensation and Setting Up Total Compensation Templates and Reports

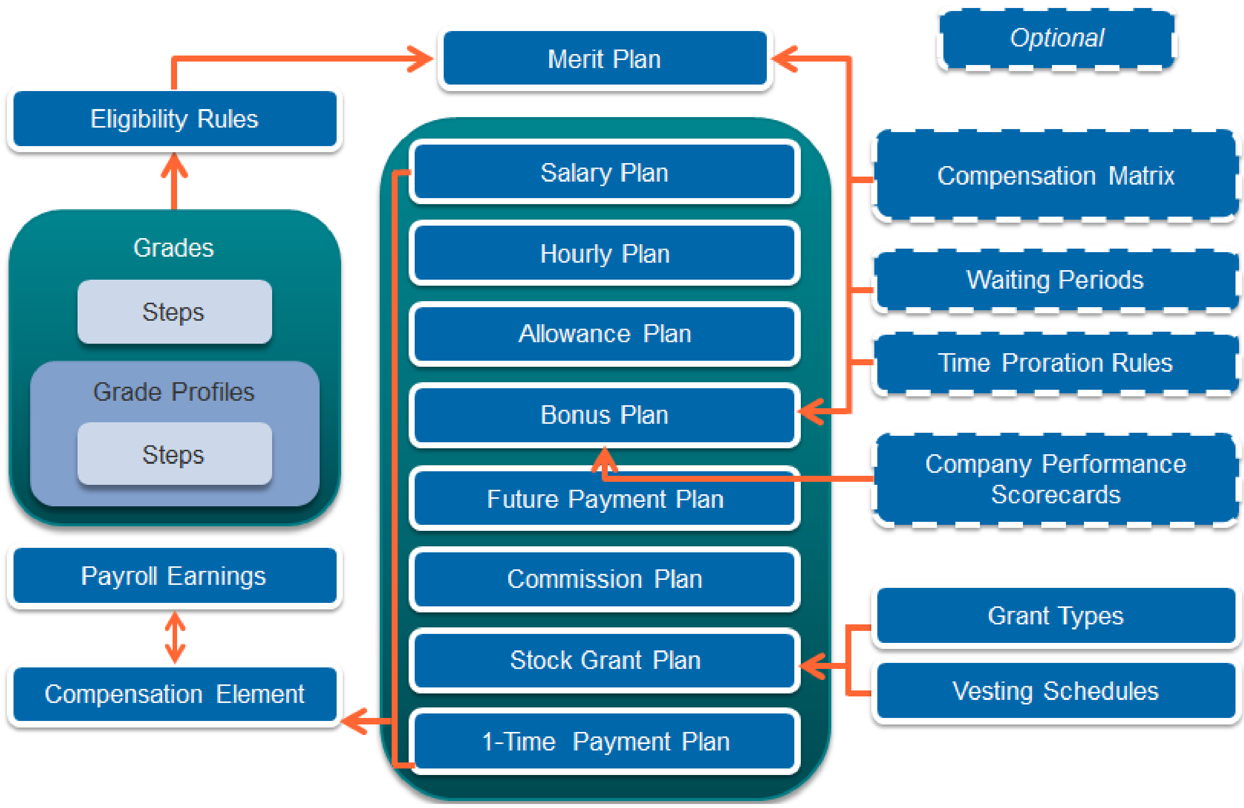
COMPENSATION COMPONENTS

If you are a compensation administrator, you create the Workday compensation structure for your company. To establish eligibility for components of compensation or to automate the assignment of these components to worker compensation, you create compensation eligibility rules indicating which workers are eligible for which compensation components.

The compensation structure is comprised of grades and compensation plans which are grouped together into a compensation package. Compensation grades provide guidance with reference pay ranges, compensation grade profiles allow for localization and compensation plans provide various types of pay components.

SETUP STRUCTURE OF WORKDAY COMPENSATION

This diagram illustrates the prerequisites for the various Workday compensation plans:



To establish a compensation structure for your company in Workday you should:

- Define compensation elements to make the link between compensation and payroll earnings.
- Define guidelines (grades, grade profiles and steps) associated with compensation elements.
- Define compensation plans and grades.
- Add the plans and grades that you want to bundle together into compensation packages.
- Create compensation eligibility rules to determine the groups of employees who are eligible for the different compensation plans.
- Assign those rules to compensation components (packages, grades, grade profiles and plans) to control which employees are eligible for them.

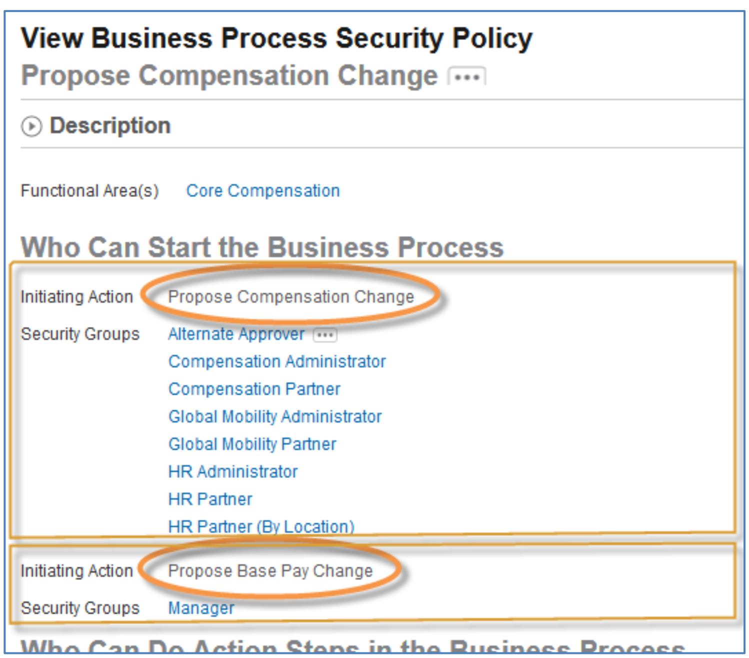
After you have the compensation components in place, administrators, partners and managers can use the plans and rules as a reference point to assign and update worker compensation (the employee's components of pay).

INITIATING COMPENSATION EVENTS

Compensation events can be initiated either as a single event for an individual employee or as part of another HR change such as a hire or transfer event. When included in a staffing business process the compensation change task will automatically be sent to the appropriate Inbox to be completed.

As part of Staffing Events:

- Propose Compensation: allows you to edit any compensation components.
- Propose Compensation Change: as a sub-process you can select either the Propose Compensation Change or Propose Base Pay Change initiation steps.



In addition to building a compensation change into a business process you can also initiate a change at any time by using one of the following compensation tasks manually from a *Related Action* off the employee's name:

- Request Compensation Change: any compensation plan can be edited.
- Request Grade Change: only the compensation grade or grade profile can be changed.

Both the tasks listed above use the Request Compensation Change business process with a unique initiation step that limits the changes that can be made and provides a user-friendly page.

Let's look at an example of an employee's compensation:

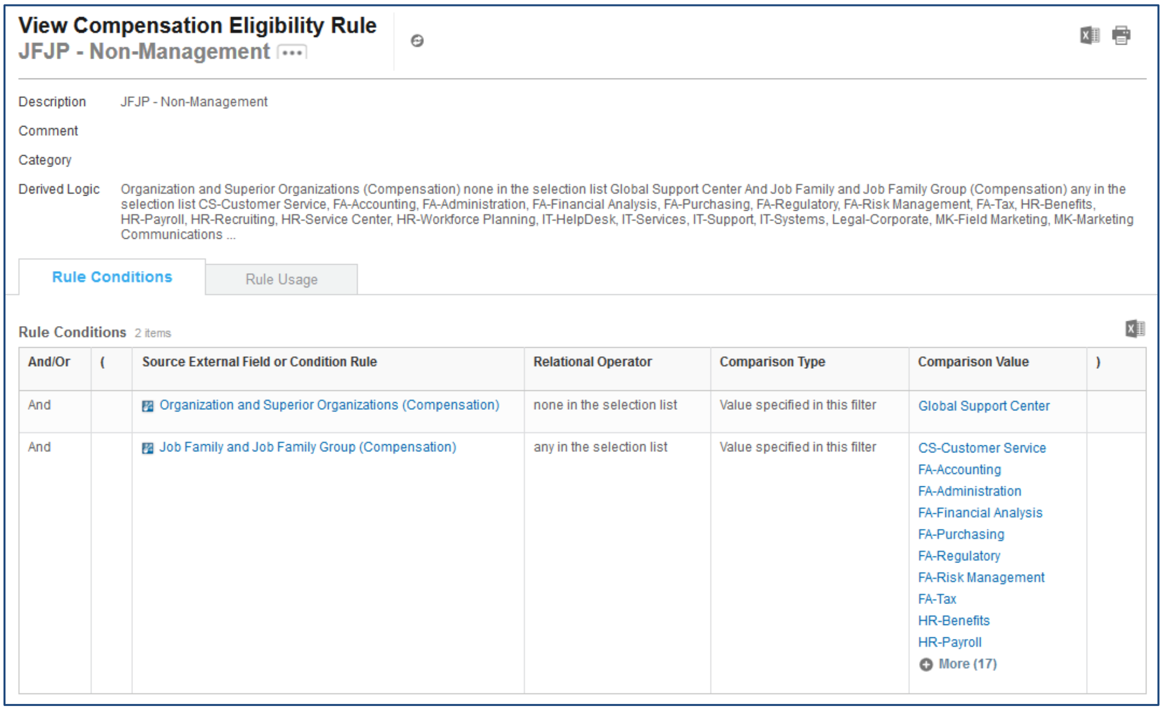
Worker: Logan McNeil

Position: Chief Human Resources Officer in San Francisco

Available components in the Executive Compensation Package	Offered to Logan	Comments
Salary Range **($145,000 – $200,000 Annually)**	$197,491.24 annually	Compensation grade provides guidance. A salary should fall within the range but the system allows you to go below or above it. Additional approval can be triggered on this condition.
Car Allowance **($500 / Month)**	$500 / month	An allowance can default with one amount, such as $500, but can be edited for an individual employee at time of hire.
Housing Allowance **($5000 / Month)**	None	Just because an employee is eligible for a compensation component, such as an allowance, doesn't mean it will be offered.
Phone Allowance **($150 / Month)**	$150 / month	An allowance can default with one amount and if the No Override checkbox is turned on it can't be edited at the employee level. The defaulted allowance could be removed but not edited.
Merit **(Annual Merit Review)**	Annual Merit Review	Potential money entered as a percentage calculation. If a merit plan is part of an employee's compensation when the merit event is launched it will be included in the process.
Bonus **(40% of Salary)**	20% of salary	Potential money entered as an amount or percentage calculation. If a bonus plan is part of an employee's compensation when the bonus event is launched it will be included in the process.

COMPENSATION RULES

Compensation rules determine an employee's eligibility for each compensation component during staffing and compensation business processes. Eligibility is based on any combination of organization, job profile, location, position or any other available class report field.



To control the compensation components for which employees are eligible, assign eligibility rules to the compensation components either through the Assign Compensation Components to Rule task or directly through each of the compensation component definitions.

To have compensation components populate by default for eligible employees during staffing transactions (hire, job change), you must further assign the eligibility rule to a compensation package *and* associate the default grade, grade profile, and one or more plans with that package. The rule for plans can be different than the rule for the package they are in.

You can also use compensation eligibility rules to:

Assign compensation targets uniquely to different employee populations for bonus, merit and stock plans, as well as grade profiles.

Roll out or remove compensation plans (allowance, bonus, commission, merit, stock and period salary plans) for a target population.

If you are using compensation eligibility rules and defaulting compensation from a position, the default compensation will override the eligibility rules.

Report	Description
Compensation Rule Assignment	Identifies the compensation components associated with the eligibility rule and which filled and unfilled positions would be eligible based on the rule. This report cannot be copied.
Employee Compensation Audit	Identifies workers in a specific organization(s) who are incorrectly associated with any compensation plans or components. Also identifies eligible workers who do not have a specific plan in their compensation. This report cannot be copied.
Compensation Spreadsheet	For any organization and its subordinates you can run this report to view workers and all their compensation components, in addition to hire date, compa-ratio and quartile. This report may be copied and modified to meet your requirements.
Compensation Changes Report	View all compensation changes within a time period. The compensation changes can be filtered by business process status. For example, you can report on all compensation changes that are in progress or all changes that were terminated or rescinded. The results can then be sorted by type of compensation change, reason or organization. This report may be copied and modified to meet your requirements.

ACTIVITY 5.1: CREATE COMPENSATION RULES

Business Case: As Logan McNeil, you will create compensation eligibility rules. You will also edit an existing compensation rule. These rules will later be used when creating compensation components to allow for defaulting during staffing events.

Sign in as Logan McNeil

CREATE COMPENSATION RULES

1. Enter *Create Compensation Eligibility* into the search box
2. Select the ***Create Compensation Eligibility Rule*** task
3. Enter the following information:

Field Name	Entry Value
Description	WOK – All
Source External Field or Condition Rule	Job Family and Job Family Group (Compensation)
Relational Operator	*Frequently Used* > Any in the selection list
Comparison Type	Leave default (Value specified in this filter)
Comparison Value	KM-Training

4. Click **OK** and view your compensation rule
5. Navigate to the ***Create Compensation Eligibility Rule*** task
6. Enter the following information:

Field Name	Entry Value
Description	WOK – Execs and Training
Source External Field or Condition Rule	Job Profile (Compensation)
Relational Operator	Any in the selection list
Comparison Type	Leave default (Value specified in this filter)
Comparison Value	• Chief Training Officer • Instructor • Learning Program Manager • Senior Instructor • Training Director

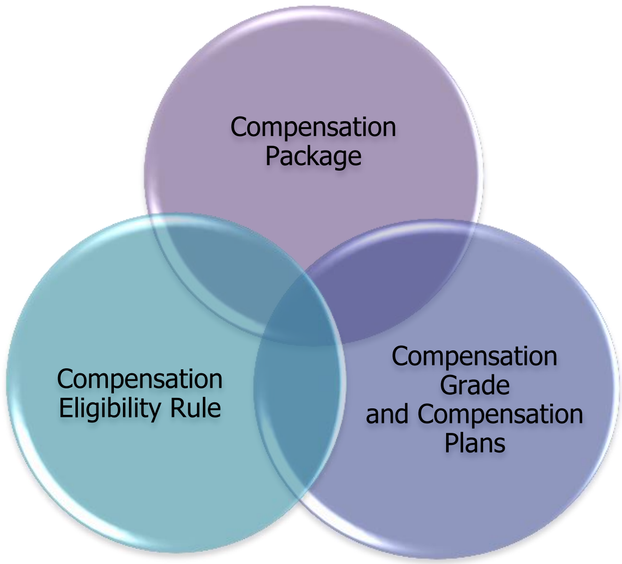
7. Click **OK** to save and view your rule

EDIT AN EXISTING COMPENSATION RULE

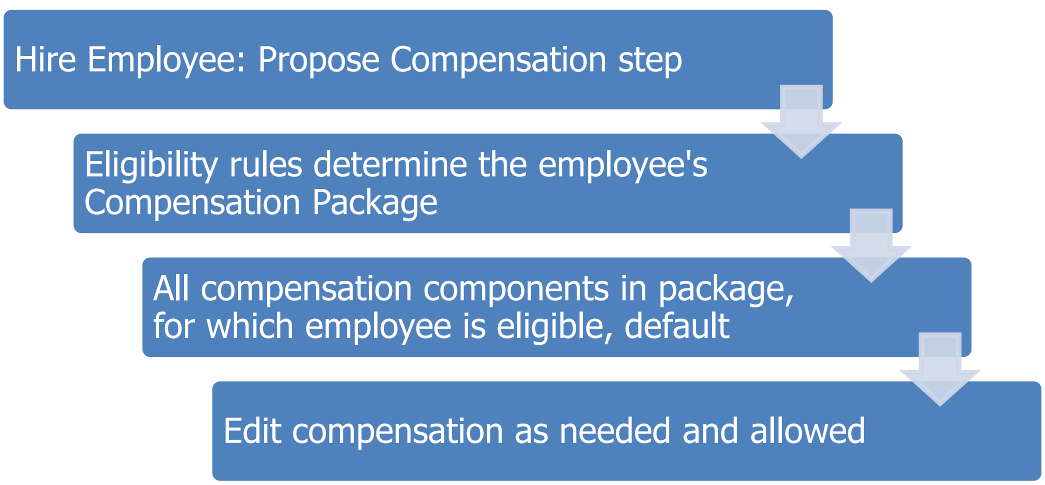
1. Enter *Edit Compensation Eligibility* into the search box
2. Select the ***Edit Compensation Eligibility Rule*** task
3. Select the **Location – London** rule
4. Click **OK** to continue
5. Change the Description to **Location - UK**
6. Add the Comparison Value of **Reading – UK** (Leave the London location)
7. Click **OK** to save

COMPENSATION PACKAGE

A package is a grouping of compensation grades and compensation plans. The combination of including compensation components in a package and using compensation eligibility rules enables the system to default those components into an employee's compensation during staffing activities.



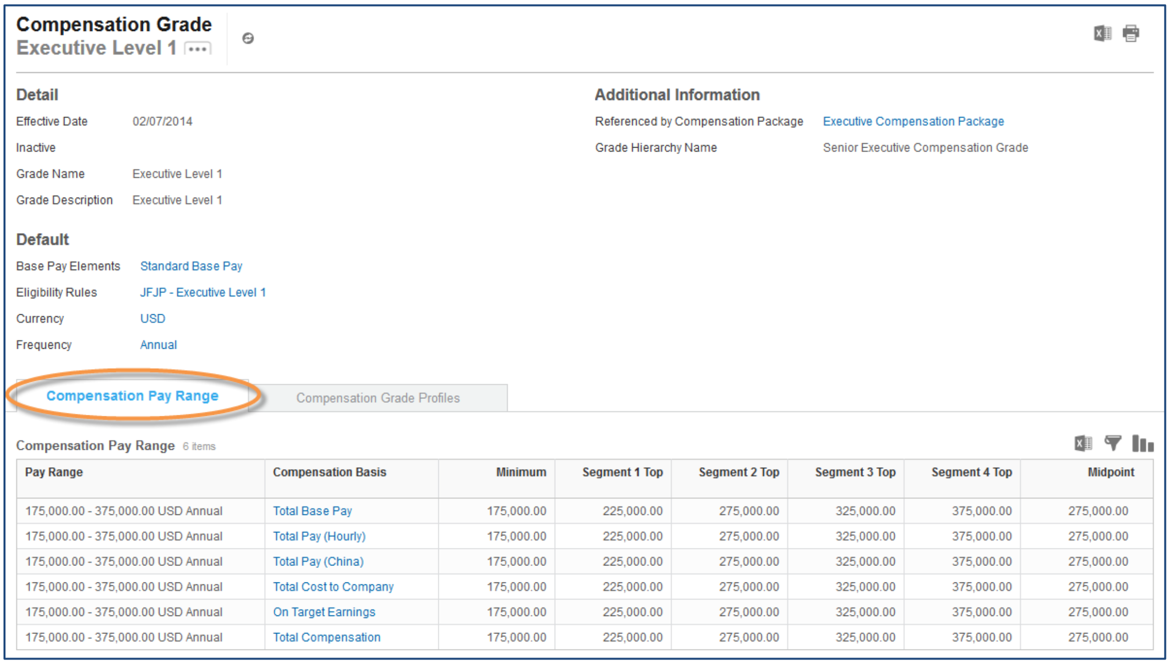
For example, if an eligibility rule makes an employee eligible for two different bonus plans, and both bonus plans are included in the compensation package for which they are eligible, then both bonus plans will default into the employee's compensation. If the two bonus plans are not included in the compensation package, then neither will default into the employee's compensation but will be selectable when completing the Propose Compensation task.



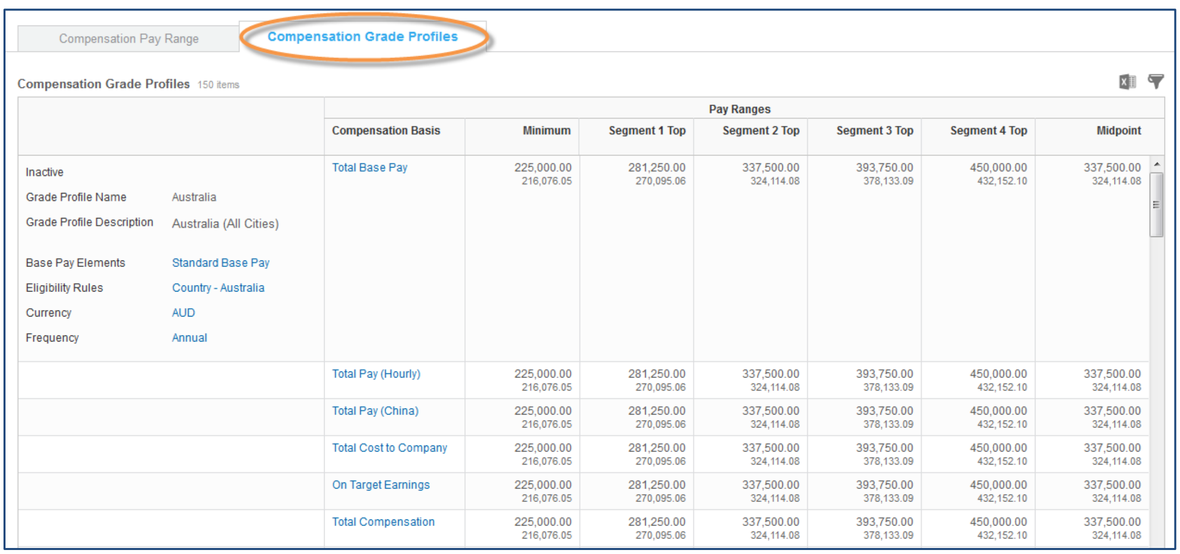
COMPENSATION GRADES

The compensation grade provides pay ranges as references. Your grades can include a pay range defined for each compensation basis. Within compensation grades are the options to create grade profiles and compensation steps.

Grade profiles allow you to assign a worker to a different compensation range than the default. For example, a unique compensation eligibility rule can default an employee into a grade profile based on their position, location or other criteria. Steps are defined on compensation grades and grade profiles, representing a single monetary amount within the grade or profile. A worker's compensation package can contain both plans and a step.



Pay Range	Compensation Basis	Minimum	Segment 1 Top	Segment 2 Top	Segment 3 Top	Segment 4 Top	Midpoint
175,000.00 - 375,000.00 USD Annual	Total Base Pay	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00
175,000.00 - 375,000.00 USD Annual	Total Pay (Hourly)	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00
175,000.00 - 375,000.00 USD Annual	Total Pay (China)	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00
175,000.00 - 375,000.00 USD Annual	Total Cost to Company	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00
175,000.00 - 375,000.00 USD Annual	On Target Earnings	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00
175,000.00 - 375,000.00 USD Annual	Total Compensation	175,000.00	225,000.00	275,000.00	325,000.00	375,000.00	275,000.00



	Pay Ranges						
	Compensation Basis	Minimum	Segment 1 Top	Segment 2 Top	Segment 3 Top	Segment 4 Top	Midpoint
Inactive Grade Profile Name: Australia Grade Profile Description: Australia (All Cities) Base Pay Elements: Standard Base Pay Eligibility Rules: Country - Australia Currency: AUD Frequency: Annual	Total Base Pay	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08
	Total Pay (Hourly)	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08
	Total Pay (China)	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08
	Total Cost to Company	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08
	On Target Earnings	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08
	Total Compensation	225,000.00 216,076.05	281,250.00 270,095.06	337,500.00 324,114.08	393,750.00 378,133.09	450,000.00 432,152.10	337,500.00 324,114.08

The employee's compensation components could include multiple currencies but when viewing total compensation the total will be calculated using the compensation grade currency.

The fields in the compensation grade are as follows:

Field	Description
Base Pay Elements	Identifies whether the total base pay is defined as either a single compensation element or as a compensation element group. The element group can define salary pay or hourly pay as salary plus another compensation component, such as a housing allowance.
Eligibility Rules	By associating this compensation grade with an eligibility rule, the correct grade will default every time an employee's compensation is entered, giving accurate guidance to the person entering the salary. Note: The compensation grade can also be directly linked to a job profile instead of using a compensation eligibility rule. If the compensation grade is attached to a job profile and an eligibility rule, the rule would be ignored in favor of the relationship to the job profile.
Referenced by Compensation Package	Reference only: Displays the compensation package(s) attached to this grade.
Compensation Pay Range Fields	Minimum, Midpoint, Segments 1-5: this information is displayed as a reference and the system will issue a warning if an amount is entered outside the range. The number of segments is configurable to allow for a range that is divided into quartiles, tertiles or quintiles. When creating the compensation grade you will need to enter the number of segments: 3, 4 or 5.
Currency and Frequency	Enter the currency and frequency that describe the range. This currency will be used when entering salary or hourly rates, as well as when reporting on total compensation. All compensation components, regardless of currency, will be converted to this currency and frequency.
Compensation Basis	Allows you to select which compensation plans are used to determine the employee's estimate earnings. Use the **Create Compensation Basis** task to define additional compensation bases. On the compensation grade you can enter one or all of your compensation basis' to create multiple pay range definitions. The range you define should reflect the multiple components of pay that are included in the compensation basis. The Total Base Pay and the employee's primary compensation basis will be displayed during business processes such as Request Compensation Change and Change Job, and provides analytics for making compensation change decisions.

COMPENSATION PLANS

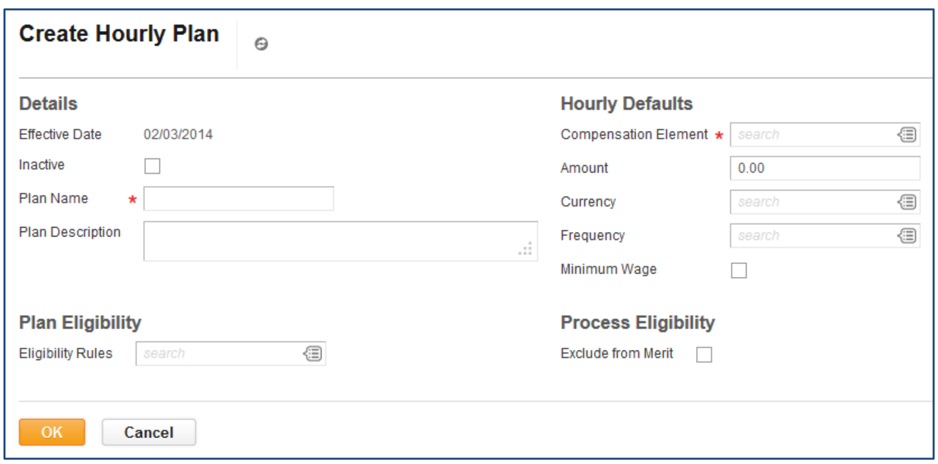
Salary Plans and Hourly Plans

When setting up a salary plan there are only a few fields that need to be considered since the amount of salary will be determined during the hire or compensation change, or through default compensation associated with the position.

Field	Description
Apply FTE%	Turn on this check box to prorate compensation for employees assigned to this plan based on their full time equivalent percentage.
Exclude from Merit	Turn on this check box if you don't want this salary plan included as part of total base pay when you initiate the merit process.

Because information such as the currency and frequency is populated based on an employee's compensation grade, and not the salary plan, only one salary plan should be required in most system configurations.

In comparison to the simple set up of a salary plan, when setting up an hourly plan you can enter the compensation element as well as an amount, currency, frequency and specify if the amount is equivalent to minimum wage.



If an amount is not entered on an hourly plan, an hourly amount will not default during hire and should be entered for each employee when proposing compensation.

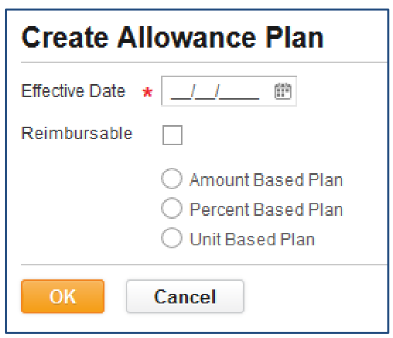
Allowance Plans

Payments included as part of an employee's pay could include something as common as car or cell phone allowances to vouchers for movie tickets. The allowance plan can be created to use one of the following:

Type	Description
Amount Based	Enter an exact amount, currency and frequency and indicate if it can be overridden at the employee level.
Percent Based	Enter a percent and frequency and indicate if it can be overridden at the employee level.
Unit Based	Enter a number of units, frequency, value per unit, and currency. Unit based allowances can be overridden at the employee level if the no override check box is not turned on.

The reimbursable check box is used when an allowance is not being paid through payroll but through an expense report. When the check box is turned on the compensation element field will not be required when creating the allowance.

By creating it as an allowance you're able to track the value of the allowance through compensation for use in reports and in the total compensation statement.



ACTIVITY 5.2: CREATE COMPENSATION

Business Case: As Logan McNeil, you will create a compensation structure using the eligibility rules you created. You will use this compensation structure later when hiring into Wealth of Knowledge.

Sign in as Logan McNeil

CREATE COMPENSATION PLANS

1. Enter *Create Salary Plan* into the search box
2. Select the ***Create Salary Plan*** task
3. Enter **today's date** as the Effective Date and click **OK**

Field Name	Entry Value
Plan Name	WOK Salary Plan
Eligibility Rules	WOK - All
Apply FTE%	Turn on check box
Compensation Element	Base Pay

4. Click **OK** to save and **Done**
5. Enter *Create Allowance* into the search box
6. Select the ***Create Allowance Plan*** task
7. Enter **today's date** as the Effective Date
8. Select **Amount Based Plan**
9. Click **OK** to continue

Field Name	Entry Value
Plan Name	WOK Internet Allowance
Eligibility Rules	WOK – Execs and Training
Compensation Element	Allowance
Amount	55.00
Currency	USD
Frequency	Monthly
No Override	Turn on check box

10. In the ***Allowance Plan Profiles*** area click on the ⊕ to add a row:

Field Name	Entry Value
Amount	40.00
Currency	GBP
Eligibility Rules	Location - UK

11. Click **OK** and review the allowance plan you created
12. Click **Done**

CREATE A COMPENSATION GRADE

1. Enter *Create Grade* into the search box
2. Select the ***Create Compensation Grade*** task
3. Enter **today's date** as the Effective Date
4. Leave **4** as the Pay Range Segments
5. Click the **Use Grade Profiles** checkbox
6. Click **OK** to continue
7. Enter the following:

Field Name	Entry Value
Grade Name	01
Base Pay Elements	Standard Base Pay
Eligibility Rules	WOK - All
Currency	USD
Frequency	Annual

8. In the Compensation Pay Range tab, enter the following information, using the Total Base Pay compensation basis:

Field Name	Entry Value
Minimum	35,000
Segment 4 Top	85,000 *(hit Tab or Enter key)*
Calculate Segments	Turn on check box

9. Select the **Compensation Grade Profiles** tab and enter the following information, using the Total Base Pay compensation basis:

Field Name	Entry Value
Grade Profile Name	United Kingdom
Base Pay Elements	Standard Base Pay
Eligibility Rules	Location - UK
Currency	GBP
Frequency	Annual
Minimum	25,000
Segment 4 Top	70,000 *(hit Tab or Enter key)*
Calculate Segments	Turn on checkbox

10. Click **OK** and review your compensation grade and grade profile
11. Click **Done**

CREATE A COMPENSATION PACKAGE

Group your grade and plans together in a compensation package.

1. Enter *Create Compensation Package* into the search box
2. Select the ***Create Compensation Package*** task
3. Use **today's date** as the Effective Date
4. Enter the following information to group your compensation grade and plans into a compensation structure:

Field Name	Entry Value
Package Name	WOK Package
Eligibility Rule	WOK - All
Compensation Grade	01
Compensation Plans	• WOK Salary Plan • WOK Internet Allowance *(hit Enter key)*

5. Click **OK** and review the components in your compensation package
6. Click **Done**

BONUS AND MERIT PLANS

There are many similarities between setting up a bonus plan and merit plan. This next section will review how these plans are created and the functionality that's available.

When setting up a bonus or merit plan there are a number of optional configurations that can be included:

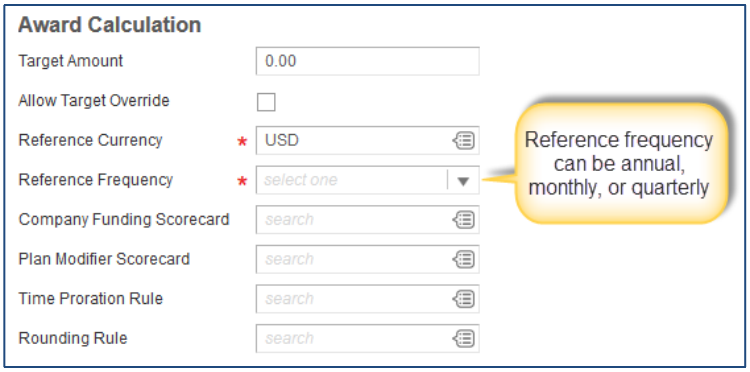
Configuration Options	Description
Compensation Basis (Bonus % Target Only)	When calculating a percent award you can select one of the following choices: Eligible Earning Override Total Base Pay Compensation Basis: Allows you to define which compensation elements will be included in the calculation.
Allow Target Overrides	Permits the entry of a target number or percent for an individual employee assigned to this plan. Makes the Individual Target field available for entry on the Request Compensation Change task and in compensation assignments for staffing events when you use this plan.
Compensation Matrix	Allows you to base bonuses and merit increases on results of completed performance reviews and the individual employee's evaluation rating. In a bonus plan, two compensation matrices can be used: one that impacts the overall pool and one that is weighted with a company scorecard to impact an individual employee's target amount for discretionary and non-discretionary amounts.
Use as Reference Only	Select this check box to have the bonus process calculate and display a bonus pool based on the plan's target amount and not the compensation matrix. The matrix becomes a reference tool for managers when entering bonus or merit increases, but isn't used to calculate the pool.
Compensation Scorecard/Company Funding Scorecard (Bonus Only)	In addition to using employee performance as a factor when determining the bonus or merit targets, you can also include a compensation scorecard to assist in adjusting the overall bonus or merit pool based on company performance. This includes: Defining the company goals Entering the scorecard results against goals Linking the scorecard to the bonus plan

Configuration Options	Description
Time Proration Rule	Bonus and merit awards can be prorated based on: Base Pay Changes in Period Leave of Absence Target Changes in Period Time in Plan Time in Position Time since Company Service Date Time since Continuous Service Date Time Since Hire Time since last Base Pay Increase Time since last Merit Increase
Waiting Period	When an employee is hired or becomes eligible for a bonus or merit plan they may not be immediately eligible to receive a bonus until completing a waiting period. The waiting period unit can be in days, weeks, months or years and is calculated based on: Company Service Date Continuous Service Date Date of Last Base Pay Increase Date of Last Merit Increase Hire Date Plan Assignment Date Position Assignment Date You may choose to exclude certain criteria from the waiting period so that an employee is not penalized for receiving a raise due to a promotion if 'date of last base pay increase' is what your waiting period is based upon.
Include Active Employees Assigned Plan During Process Period	Turn on this check box to pull employees into the merit or bonus process if they aren't currently participating, but participated during the process period.
Include Active Employees in Waiting Period	Turn on this check box if you want to include employees who aren't eligible to participate due to a waiting period.

BONUS PLANS

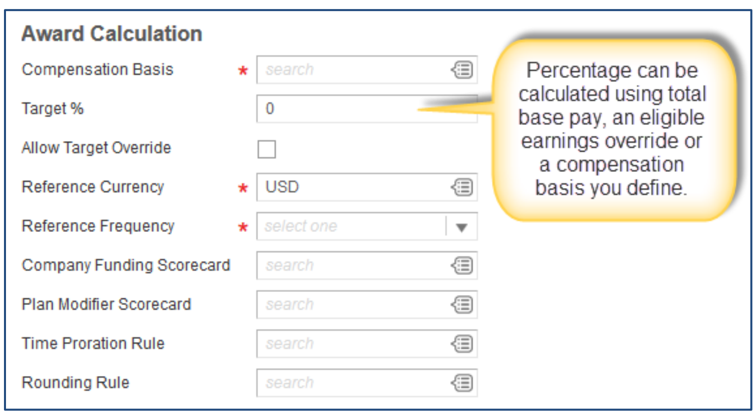
Bonus plan can be defined as either a flat amount or a percent. Workday allows you to customize targets for each worker to which the plan is assigned. Bonus plans have a reference currency, so managers can work in one currency even if bonuses are given in multiple currencies. In addition, bonus plans provide the options of a bonus plan profile, the addition of performance factors and tranches.

Amount Based Bonus Plan



Percent Based Bonus

If you create a bonus plan that uses a percent based calculation, you will need to define which pay components will be included in the calculation. The compensation basis allows you to configure unique calculations or use eligible earnings override or total base pay.



Eligible Earnings Override: Define eligible earnings for your employees and use these earnings as the basis for calculating their bonuses in percent-based bonus plans. If using eligible earnings, populating this value for all employees assigned to the bonus plan is required. The Employees without Eligible Earnings report should be run prior to initiating the bonus event.

Total Base Pay: The sum of all salary and allowance plans as defined as base pay in the worker's compensation grade or grade profile.

Compensation Basis: Uses the sum compensation of an employee's plans that are enabled as the basis to calculated target amounts for that employee. You select which compensation plans are used to determine the compensation basis using the Create Compensation Basis task and name the compensation basis whatever you want to name it. For example, you could calculate compensation basis using all salary plans and merit plans or all salary and allowances.

Calculate Using Eligible Earnings: For customers who want to base bonuses on actual earnings you can load a salary figure and have the system use that figure in the bonus calculation. Uses an employee's eligible earnings, which is determined by the customer, for a defined period of time as the basis to calculated target amounts for that employee.

Eligible Earnings Override

In order to use the Eligible Earnings options you will need to complete the following steps:

1. Use the Create Eligible Earnings Override Period task to define the time period (from and to date) that the eligible earnings include.
2. Use the Create Eligible Earnings Override task to enter an earnings amount for each employee participating in the bonus plan. This can be done either manually or through the EIB load process. If the earnings period is quarterly, then you would load the employee's earnings for that quarter. This must be done prior to running the bonus process.
3. Run the Employees without Eligible Earnings Override report. You can identify employees participating in the bonus plan who do not have an eligible earnings override for the specified period. You can create eligible earnings for employees directly from this report.
4. When initiating a bonus process you'll need to select the eligible earnings period for that bonus run.

Bonus Plan Profiles

Bonus plan profiles allow changes in bonus default amounts and currency based on an additional compensation target rule.

Target Amount	Currency	Eligibility Rule
5000	EUR	Current Bus Site - Paris
8000	USD	Current Bus Site - Dallas
10000	USD	Current JFJP - Management

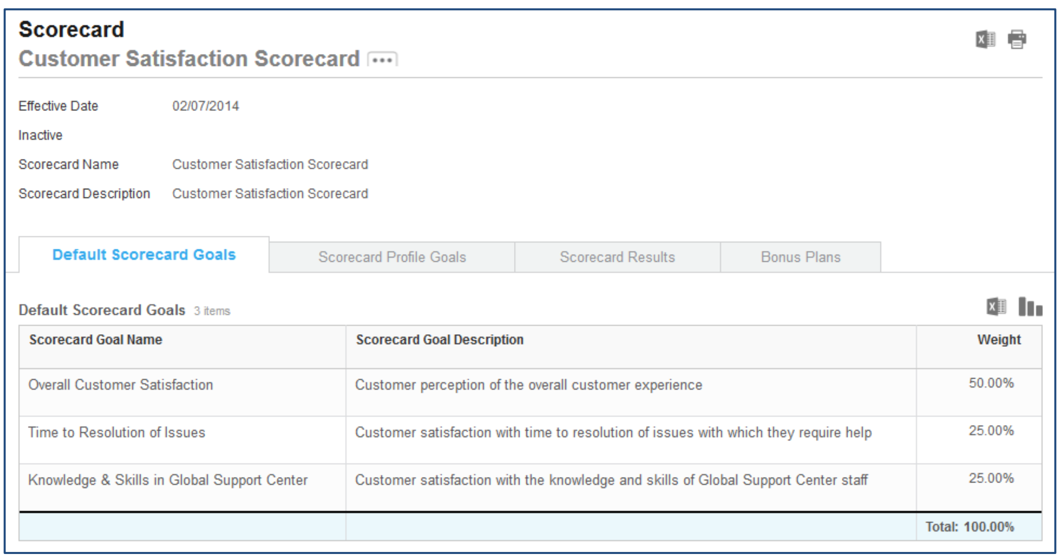
Tranches

Tranches are pre-defined portions or installment amounts that can be applied to the bonus. This allows you to create a bonus plan or multiple bonus plans with a total bonus amount that will be paid by the end of the year.

Tranche	Tranche Percent
1	25%
2	25%
3	15%
4	35%
Total	**100%**

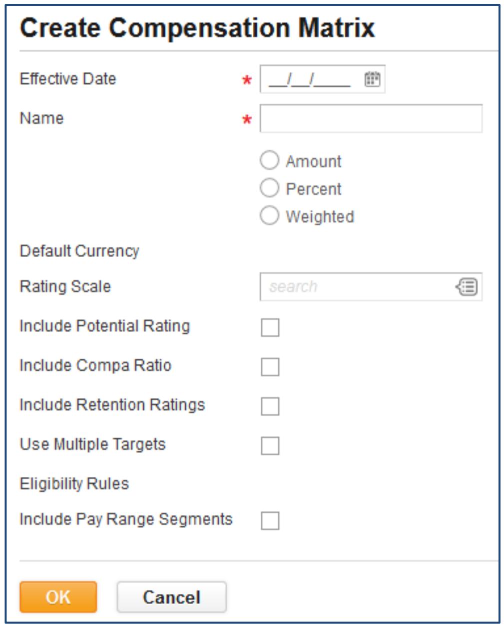
Compensation Scorecard

The compensation scorecard is another option available to help determine bonus pools and provides a list of weighted criteria used to evaluate company performance. The results, or percentage of the goal achieved for each criterion, can then be used to determine the available bonus pool.



Compensation Matrix

A compensation matrix can be used to reward your employees' performance more accurately. Merit plans can include options such as the use of a compensation matrix which allows you to tie an employee's overall performance for a selected type of performance review to their merit or bonus increase. The compensation matrix provides the person responsible for entering the increases with guidance based on the employee's performance and their compensation grade quartile.



A compensation matrix can be used for the merit and percent, amount and weighted bonus plans. In addition, you can create the matrix to include single or multiple targets, as well as choose to include retention ratings or pay range quartiles.

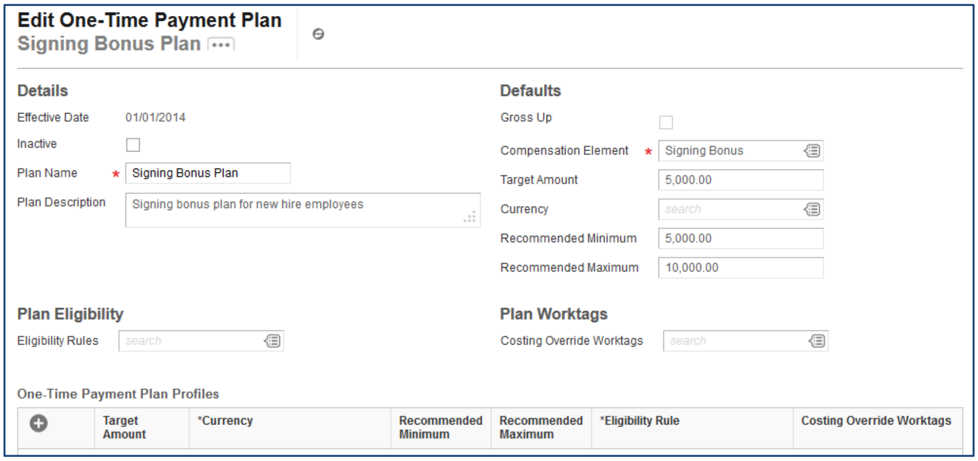
- For Percent Bonus Plan
- For Amount Bonus Plan
- For Weighted Bonus (percent range applied to the target)

Review Rating	Pay Range Quartile	Minimum	Maximum
5 - Outstanding Performance	Q1	4.50%	5.50%
5 - Outstanding Performance	Q2	4.00%	5.00%
5 - Outstanding Performance	Q3	3.50%	4.50%
5 - Outstanding Performance	Q4	3.00%	4.00%
4 - Exceeds Expectations	Q1	3.50%	4.50%
4 - Exceeds Expectations	Q2	3.00%	4.00%
4 - Exceeds Expectations	Q3	2.50%	3.50%
4 - Exceeds Expectations	Q4	2.00%	3.00%
3 - Meets Expectations	Q1	2.50%	3.50%
3 - Meets Expectations	Q2	2.00%	3.00%

Alternatively, turn on the Use as Reference Only check box to use the matrix as only a reference in the merit process. If the matrix is used for reference only, Workday will calculate and display a merit pool based on the plan target, not the compensation matrix. When a manager proposes bonuses, he or she will see the recommendations provided by the compensation matrix, but the pool amount is calculated off of the bonus plan target.

ONE-TIME PAYMENT PLANS

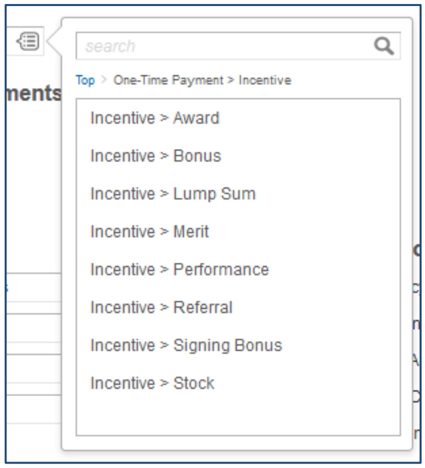
A one-time payment plan provides the ability to award an ad-hoc payment to an individual employee. This type of plan could be used for a wide variety of payments such as employee referrals, retention bonuses and severance payments.



The fields in this plan reflect the set up as a percent based or an amount based plan:

Field	Description
Gross Up	When selected, the one-time payment automatically adjusts the target amount so that the employee receives the full amount and not an adjusted amount due to taxes. The payroll earnings linked to this plan needs to be set up on the calculation tab as a gross up, with a gross up net amount, which will turn on this check box. (for amount based plans only)
Compensation Element	Compensation elements tie the compensation plan to payroll earnings.
Target Amount/Target Percentage	Enter the amount to pay the employee or the percentage to be used to calculate the payment.
Currency	Enter the currency in which the one-time payment is to be paid. (for amount based plans only)
Recommended Minimum and Maximum Amount/Percent	These values serve as the minimum and maximum guidelines for the manager requesting the one-time payment. A value can be entered that is outside of the range.
Reference Frequency	Enter the frequency that should be used to calculate the payment amount. If the percentage is 5% then the payment would be 5% of Total Base Pay for the period of time defined by the reference frequency. (for percent based plans only)
Costing Override Worktags	You can now select one or more Costing Override Worktags in the Request a One-Time Payment task to override the worker's organization assignments.

The reasons that can be entered when initiating a one-time payment can be set up through the **Maintain Event Categories and Reasons**. After creating a new plan make sure there is an appropriate reason available. Although this is not a required field it can be helpful when reporting on what types of payments are awarded.



In order to initiate a one-time payment:

- Use the related action off the employee's name and select a one-time payment plan
- Search for the Request One-Time Payment task and select both the one-time payment plan and the employee receiving the award

ELEMENTS AND ELEMENT GROUPS: PAY COMPONENTS

The compensation element field refers to the maintain compensation element which is used to:

Map compensation plans to payroll earnings.

Define base pay on compensation grades and grade profiles.

Compensation elements are the integral link between compensation and payroll. When a compensation element is attached to a plan and the plan assigned to an employee, Workday knows which earnings to use to pay the employee for his or her compensation.

Compensation Elements

16 items

Compensation Element	Element Name	Element Description	Included in Compensation Element Groups	Usage Count	Payroll Earning	External Payroll Earnings	
						Payroll Entity	Payroll Earning
	Base Pay	Standard base pay element, required to issue paychecks	Standard Base Pay	8	Base Pay Base Pay (PI) Base Pay by Project Call Out Pay - Minimum [USA] Compensatory Time Paid [CAN] Double Time [CAN] Double Time Pay - Straight Rate [USA] Exception Hourly Pay Floating Holiday Paid Holiday Pay More (21)	Global Modern Services, Inc. - GMS	REG - Regular Base Pay
	Car Allowance	Car Allowance		1	Car Allowance [USA]	Global Modern Services, Inc. - GMS	ALC - Allowance - Car
	Cell / Mobile Phone Allowance	Cell / Mobile Phone Allowance		3	Cell / Mobile Allowance	Global Modern Services, Inc. - GMS	ALP - Allowance - Cell Phone

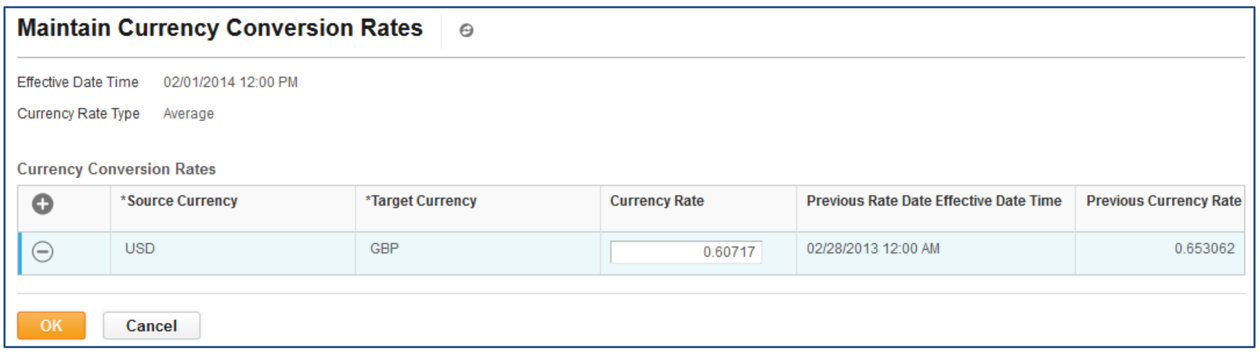
Compensation elements are the payment types that are included in compensation plans and compensation element groups. Base pay, car allowance and commissions are all examples of compensation elements.

Compensation element groups are used when an amount is a combination of elements. For example, salary could be a combination of base pay and a housing allowance. Even though an element group is usually more than two elements, it may contain only a single element.

CURRENCY EXCHANGE RATES

The need to support multiple currencies in a single system is common in the global environment in which you work. Whether you're tracking four or 40 different currencies, this information can be entered and updated in Workday.

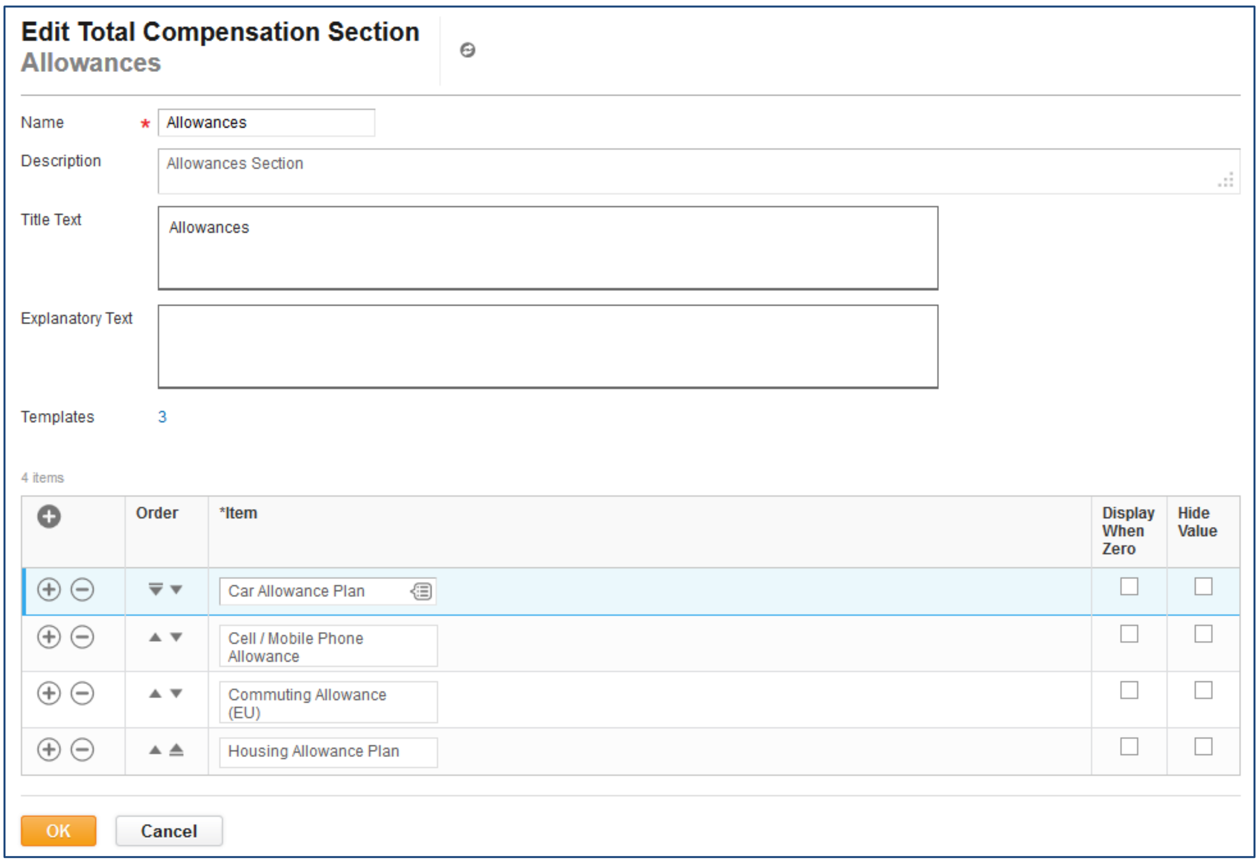
- New currencies can be easily added using the Maintain Currency Conversion Rates task
- Exchange rates are effective dated
- Multiple currencies can be used in an employee's compensation package
- Total compensation is expressed in the employee's compensation grade profile currency
- Inbound integrations can be configured to automatically import conversion rates



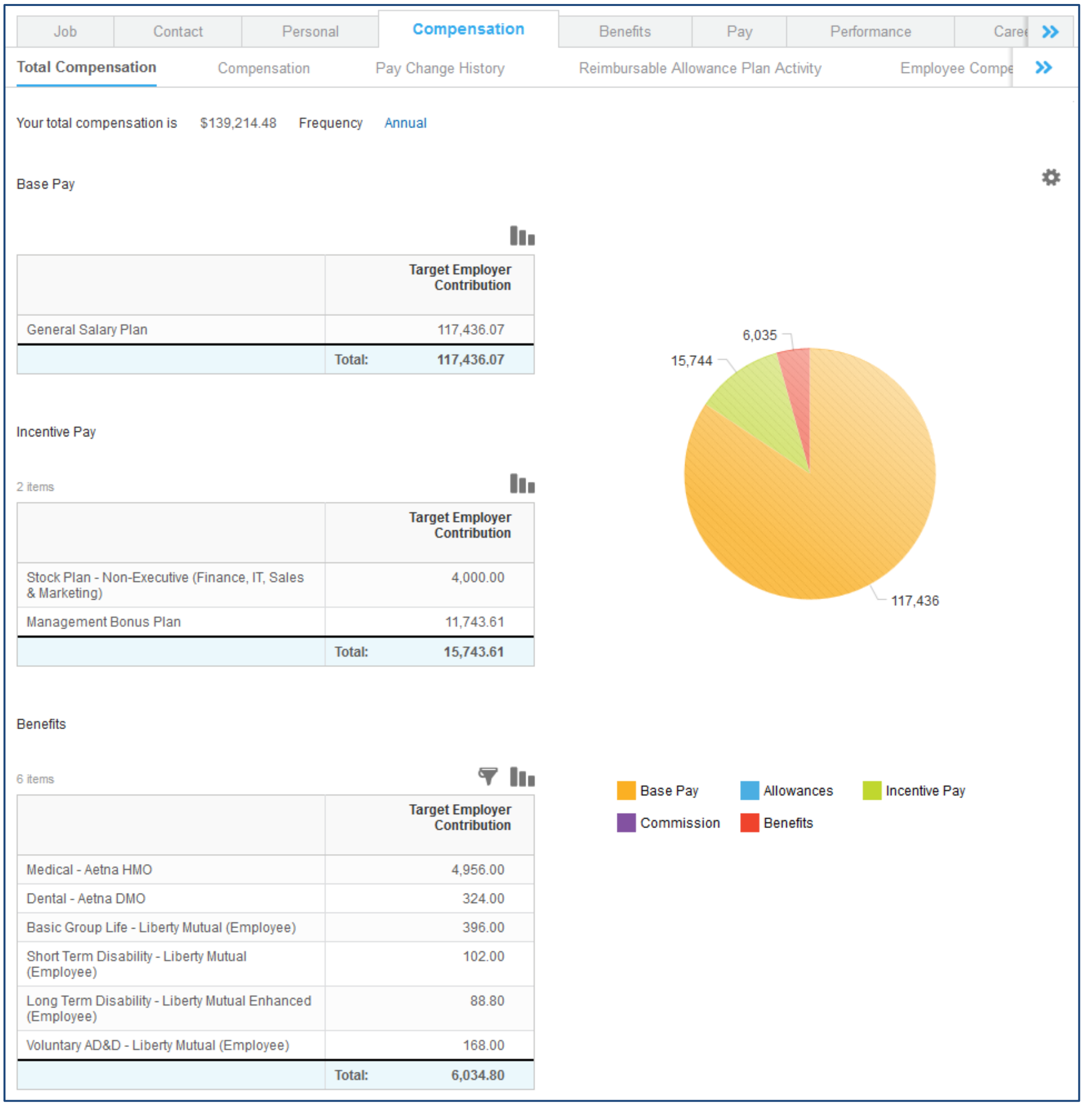
TOTAL COMPENSATION

There is one total compensation report, but there can be different templates to control what data appears. A total compensation template includes a total compensation rule that identifies the workers and the total compensation sections that will appear when running the total compensation report.

The total compensation section requires all plans that should be part of the total compensation calculation to be entered. For example, if you create a section named "Allowances" you would enter all allowance plans that will be part of the calculation. If new allowance plans are created, the allowance section will need to be edited to include the new compensation plan.



The values for all components will be annualized and show the annual compensation amount that would result from a year of compensation at the current rate. The workers compensation grade currency will be used to normalize any compensation elements that are in other currencies.



This report is designed for individual employees to view and understand the value of their total compensation package. In addition, there are other reports, such as the View Bonus and One-Time Payment History report, which list all awarded bonuses, their effective date, amounts and currency.

Report	Description
Total Compensation	Users can display the total compensation report on their home page to see the breakdown of all the components that make up their compensation. These components can include base pay, bonuses, health and other benefits, stock, commissions, etc.
Total Compensation Template Audit	Identifies workers included in more than one total compensation template.

ACTIVITY 5.3: COMPENSATION RULE ASSIGNMENT

Business Case: As Logan McNeil you will audit your WOK – All compensation rule to check which components of compensation it is assigned to and which positions and organizations are included in the population defined by the rule.

Sign in as Logan McNeil

1. Enter *comp rule assign* into the search box
2. Select the ***Compensation Rule Assignment*** report
3. View the report as of **today's date**

Field Name	Entry Value
Compensation Rule Assignments	WOK – All (*select from the prompt*)

Questions:

1. Which components of compensation have been linked to the WOK – All eligibility rule?

   ____

2. Why is the United Kingdom grade profile not included here?

   ____

3. Under Positions, why are the entire Course Development and Training Departments listed?

   ____

COMPENSATION REPORTS

Workday delivers a number of compensation audit reports. The following is just a partial list; to view all delivered reports use the Sitemap and select the compensation category. Reports are listed on the left of the results.

Report	Description
Compensation Summary	Uses organization and option of including all subordinates to display salary totals by organization (supervisory, cost center, etc.).
Employee Compensation Details by Job Profile	Provides a side-by-side comparison of all workers in the same job profile as of a certain date.
Compensation Changes Report	By organization, view all compensation changes for a specified period. Can be filtered by status of business process: in-progress, successfully completed, rescinded, etc.
In Progress Compensation Changes	View all compensation events that are in progress, including which worker is responsible for the awaiting action.
Out of Order Compensation Changes	Reports all employees with compensation events that did not occur in order, based on effective date. Identifies data that may need to be corrected or changed.

CHAPTER REVIEW

A compensation structure includes compensation grades and plans which are grouped into compensation packages.

Allowances can be percentage, amount or unit based and can be configured to allow override at time of hire.

Compensation eligibility rules can control the compensation components for which employees are eligible.

Compensation can be populated during staffing activities using defaults from position or through eligibility rules.

Based on compensation eligibility rules, employees must be eligible for only one compensation package and compensation grade or defaulting will not occur.

An employee's total compensation is viewed based on the currency on their compensation grade profile.

CHECK YOUR KNOWLEDGE

1. True or False: The compensation eligibility rules use a framework that is completely unique to compensation and is unlike anything else in the Workday system.

   ____

2. True or False: The system will allow you to enter a base pay amount that is less than or greater than the grade range the employee was eligible for.

   ____

3. What will happen if an employee is eligible for three allowance plans but the plans are not in the compensation package for which they are eligible?

   ____

SAMPLE DECISION POINTS

1. How many packages are necessary?
2. How many versions of the various plans do you need (salary, hourly, bonus and merit)?
3. What criteria drive who gets what type of compensation?
4. Which grades and grade profiles are necessary? What allowances are necessary and will you allow changes (no override?)
5. What components make up total compensation and how do you want that to display for different populations of workers?

CHAPTER 6: SECURITY GROUPS

Workday application data is accessible only through the configurable security structure that is enforced by the Workday Object Management System (OMS). As such, no Workday user can view data that is not granted with his or her security group. For example, a person in the Security Administrator security group can grant passwords to gain access to the Workday system, but the Security Administrator cannot see compensation data unless he or she also has the role of Compensation Partner.

Roles are also used to drive business process management. With Workday, you can configure which security groups and roles participate in a business process and which security groups can grant access to tasks and reports.

Configurable security enables customers to modify or accept as delivered default security groups and security policies that control view and modify access to Workday.

A Security group represents one or more workers with similar access and modification needs, such as HR Partner. A security policy details the report fields, tasks and views that the group can access and/or modify. A domain or a business process policy is a collection of securable items (domain) or a specific business process. Business processes are separately secured from domains and sub-domains.

Security acts as a bridge between Workday-owned metadata and customer-owned tenanted data to access to functionality. Security groups and security policies are in the customer/tenanted realm, with little developer involvement. Domains reside in the metadata realm and are not configurable by customers.

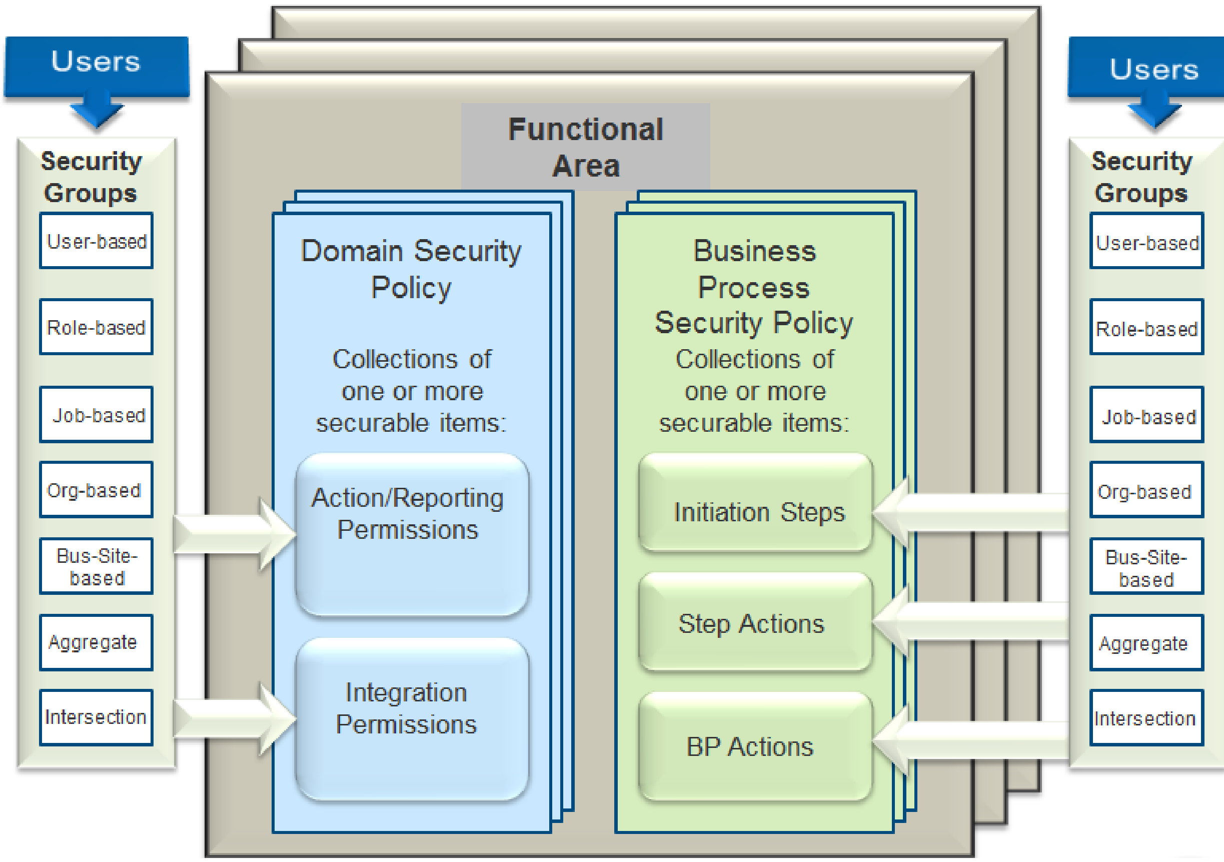
OVERVIEW

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

- Configurable Security
- Functional Areas, Securable Items and Security Policies
- Security Groups
- Security Group Types

CONFIGURABLE SECURITY

Workday application data is accessible only through group-based security that is enforced by the Workday Object Management System (OMS). As such, no Workday user can view data that is not granted with his or her security group.



COMPONENTS OF CONFIGURABLE SECURITY

Security Groups: groups of users who need to perform actions or access data.

Domains: defined tasks and reports that are functionally similar.

Domain Security Policies: dictate which security group can view or modify data within the domains.

Business Process: delivered by Workday; though you cannot create new business processes you can configure them to meet your workflow requirements.

Business Process Policies: dictate which security groups can participate in the business process and in what ways they can participate.

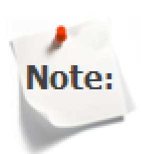
FUNCTIONAL AREAS, SECURABLE ITEMS AND SECURITY POLICIES

A functional area is a collection of domain or business process security policies that are related to the same set of product features (for example, Benefits or Compensation). The Functional Areas report will display all functional areas and included domains and business processes.

Domains are collections of related securable items (actions, reports, report data source or class report fields). Each domain is secured by a domain security policy and Workday has preset the securable items within each domain. The items are grouped into collections for which it makes sense that users have the same permissions.

Domain security policies define what security groups have access to securable items and whether they have view or view and modify access. You determine which security groups have access to each domain security policy.

Business process security policies contain such securable items as initiation steps, step actions and actions on the process as a whole: view, approve, rescind, cancel and correct.



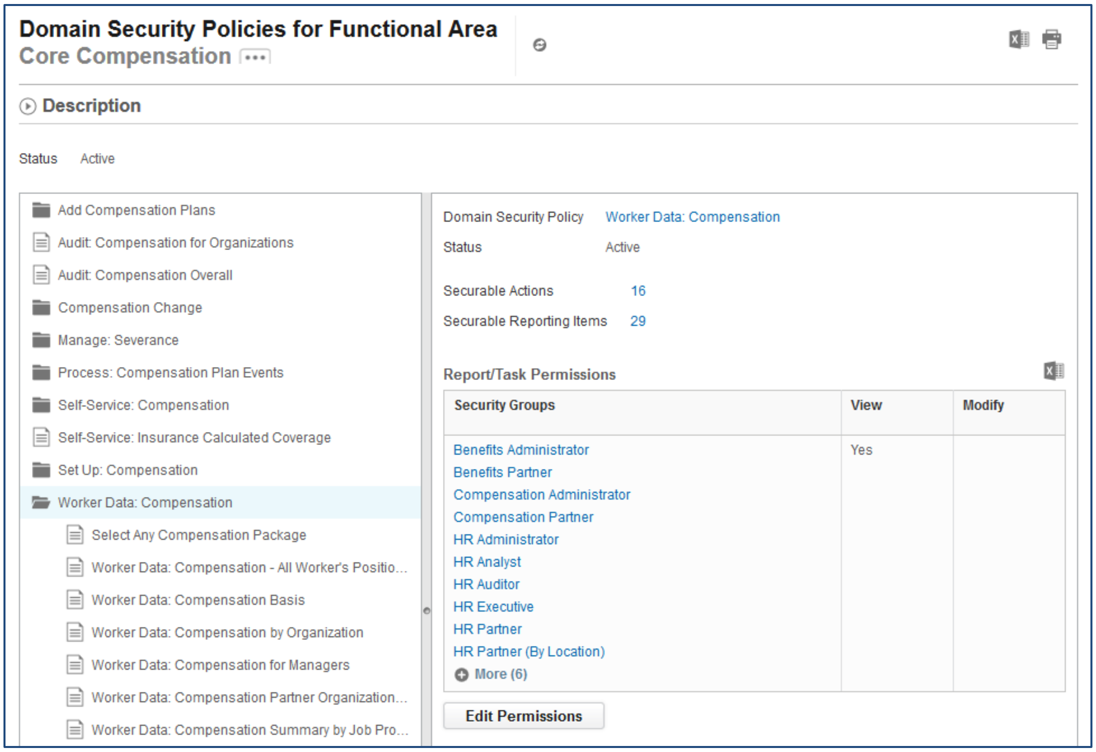
Entire functional areas can be enabled or disabled. For example, if Benefits is not part of Phase 1 of the deployment, the benefits functional area can be disabled. Edit the functional area to find the check box.

DEFINING SECURITY POLICIES

Defining security policies means granting permissions to system users by associating security groups with domain and business process policies. These policies are associated to securable items.

With domain security policies, you designate permissions for security groups to view or view and modify tasks within the policy. For integrations, you designate permission to get or get and put data. Some secured items may be included in more than one domain security policy. Workers who are granted different levels of access permission in different domains get the most access granted.

There are numerous ways to view and edit the associations between workers and securable items. Each domain can be secured by one or more security groups. You can assign which security group(s) should set up compensation or access a workers total compensation data, for example. This is accomplished by editing the security policy for the domains.



SECURITY POLICIES FOR BUSINESS PROCESSES

The areas of the business processes which can be secured are:

- Who can start the process
- Who can do action steps on the process
- Who can do actions on the entire process
- View
- Approve
- Cancel
- Rescind
- Correct
- Who can be added as an ad-hoc approver
- Whether the process can be delegated
- Whether comments are hidden from the worker

This configuration would be defined for all processes that can be accessed through the overall process.

INHERITANCE IN DOMAIN SECURITY POLICIES

Some domain security policies have a hierarchical relationship with child policies which can inherit the security policy settings of the parent. There is no inheritance for business process security policies.

The parent security policy is actually a master control that allows you to set which security groups have access permissions in all the children. If you add or remove a security group in the parent policy, the change appears in all the children.

You can turn off inheritance in any child security policy by editing it. After that, changes made in the parent no longer have any effect in that child policy. Editing a child security policy does not affect inheritance in any of the others. You can restore inheritance in a child policy by clicking the Use Parent Permissions button.

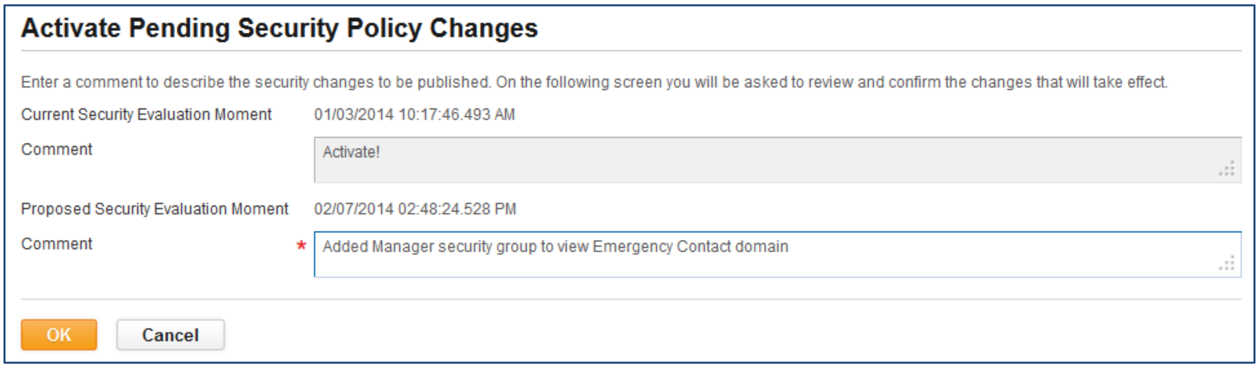
A parent domain may or may not have any securable items of its own. The list of secured items in the parent is a list of those in the children. No item appears in more than one child.

Whether a child security policy is currently inheriting permissions from its parent is shown in the Status field, under the security policy title. If it is inheriting, the status says "Active – Inheriting parent permissions."

SECURITY POLICY CHANGE CONTROL

As you modify your security policies to add or remove security groups or enable or disable policies and functional areas, Workday keeps track of the date and time of each change. Workday security evaluates the security configuration as of a timestamp, ignoring any security changes made after that date and time. As you make changes, Workday saves them as inactive, pending changes until you activate them.

To activate your security changes, use the task *Activate Pending Security Policy Changes*. When you activate them, Workday records the timestamp of that moment. If you later discover a problem with your security configuration that you cannot quickly fix, you can use the task *Activate Previous Security Timestamp* to activate a previous timestamp while you make the changes needed to fix the configuration. *Business Process Security Policies with Pending Changes* and *Domain Security Policies with Pending Changes* will allow you to view security policies with pending changes.



USER PROXY

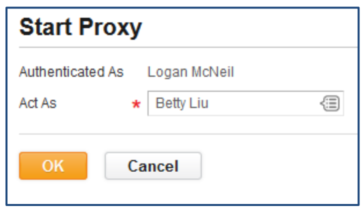
Workday enables you to configure proxy access in non-Production environments such as Sandbox to allow privileged groups to act on behalf of another user. This functionality allows users to test business process and security configurations, for example, before moving them into production. Security Administrators can create proxy access policies specifying:

The security groups that have proxy access to Workday

On whose behalf users can act once they sign in

The security groups that users can't proxy into

You can perform any action in Workday that the user on whose behalf you're acting can access. Use the tasks *Start Proxy* and *Stop Proxy* to sign into and terminate proxy sessions.



SECURITY GROUPS

SECURITY GROUPS AND WORKERS

A security group is a collection of system users. Users can either be grouped explicitly (user-based security group) or by deriving group membership from other relevant information about the user. The types of security groups are:

- User-based
- Job-based (unconstrained)
- Job-based (constrained)
- Role-based (unconstrained)
- Role-based (constrained)
- Organization Membership
- Location Membership
- Level-based
- Manager Level-based
- Aggregation
- Intersection
- Service Center (constrained)
- Service Center (unconstrained)
- Segment-based
- Integration System (constrained)
- Integration System (unconstrained)

Except for the user-based security group, you include workers in security groups based on role, organization, location and/or job.

RULES OF SECURITY GROUPS

Assigned two ways:

- By the system based on a process
- Manually

Security Groups enforce security by:

- Controlling what you can *do*
- Controlling what you can *access*

Security Groups are used in business processes

Role Based	User Based	Job Based
Manually assigned	Assigned to users based on administrative responsibility	Assigned automatically based on criteria selected
Inherited from the superior supervisory organization if not assigned	Assigned to a person	Optional and customer defined
Assigned to a position		

ASSIGNABLE ROLES AND ROLE-BASED SECURITY GROUPS

- Equal to responsibility in an organization.
- Each assignment is organization specific.
- Manually assigned.
- Assigned to a position.
- Workday defaults assignable roles from the superior organization if not filled (if the roles are configured to inherit).
- An assignable role is linked to a role-based security group.
- Found by selecting Roles on the navigation ribbon within a supervisory organization.
- Role-based security group (constrained): access to securable items through this type of role-based group is limited to workers in those organizations.
- Role-based security group (unconstrained): unlike the role-based security group-constrained, this group is not context sensitive; it makes no attempt to match the context of the workers in the group (organization or ownership) with the context of the secured item. For example, if given access to the Emergency Contact domain, managers in the unconstrained role-based security group of Any Manager can view all workers' emergency contacts, whereas managers in a similar constrained role-based security group would see workers only in the supervisory organization(s) that they are assigned the manager role for.

Examples of role-based security groups include:

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

USER-BASED SECURITY GROUP

- Grants administrative access (setup and maintenance).
- Multiple people can be members of the same user-based security group.
- Grants access across the system.
- Manually assigned.
- Assigned to a person.
- Found as a related action off of the worker’s name:

  Security Profile > Assign User-Based Groups

Examples of user-based security groups include:

- Benefits Administrator
- Compensation Administrator
- HR Administrator
- Organization Administrator
- Payroll Administrator
- Employee Review Administrator
- Setup Administrator
- Security Administrator
- Job and Position Administrator
- Report Writer

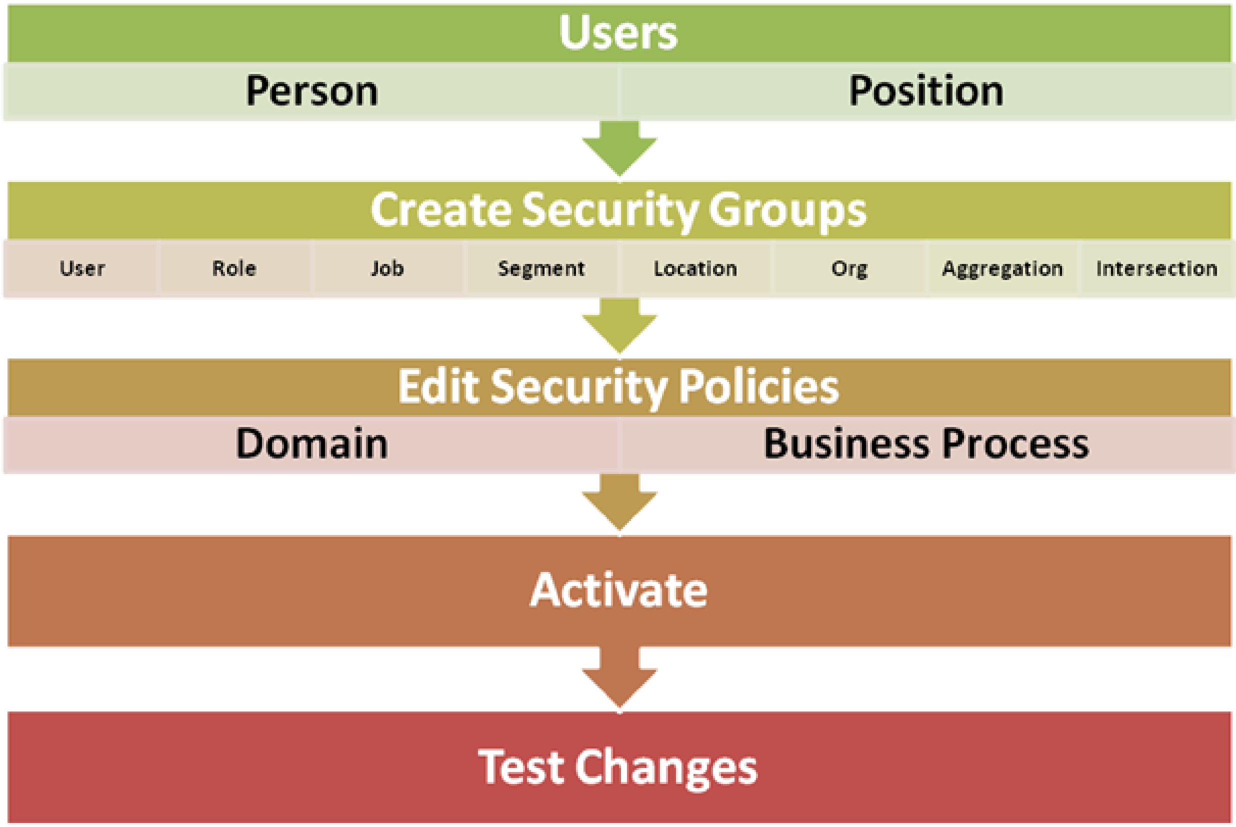
JOB-BASED SECURITY GROUPS

Workday provides additional flexibility by delivering customer-defined job and custom assignable roles. You can use both job and custom assignable roles as part of a business process and approvals can be assigned to these roles.

Job Roles

Job roles are automatically assigned to a worker based on a specific job profile or management level. Example job roles include Chief Financial Officer, Senior Vice President or Manager's Manager. Job roles are used in business process management tasks; they do not determine task or report access. They are optional and customer-defined.

STEPS FOR CONFIGURING SECURITY



Take a moment to explain in your own words what the above graphic is saying:

DAY TO DAY SECURITY REPORTS

Report	Description
Action Summary for Security Group	View all domain security policies and business process security policies that use the specified security group. Enables you to see all the policies that grant access to the security group, their functional areas and the details for the securable items to which access is granted.
Security Analysis for Action	View the permissions the specified user has on an action, if any, and which security policies and groups grant that access. Enables you to see how a specific user can access a specific action and helps you troubleshoot security issues.
View Security Group	View all details about security group membership, the security policies in which the group is used, the permissions it has and the functional area. Enables you to audit the permissions granted to workers or other security groups through a security group.
Domain Security Policy Summary	View every domain with its current security configuration. Enables you to check security policies and perform related actions.
View Security for Securable Item	View which domain a securable item is associated with. View what security groups grant access to the specified securable item. Enables you to troubleshoot incorrect security access.

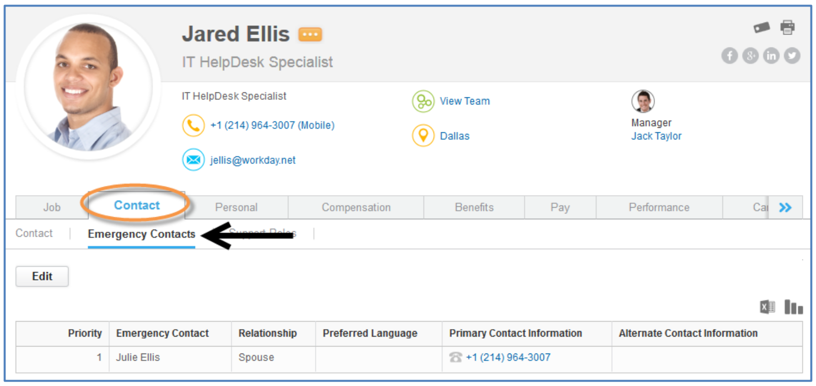
ACTIVITY 6.1: MODIFY DOMAIN SECURITY POLICY

Business Case: You will login as Logan McNeil, the Security Administrator, to determine which security groups can currently view an employee's emergency contact. You will modify security so that managers can view their own workers' emergency contact information.

VIEW SECURITY

Sign in as super user Logan McNeil (lmcneil)

1. As Logan McNeil, navigate to **Jared Ellis** and verify you can view his emergency contact. You can find Emergency Contacts in the **Contact** section of Jared's worker record.



Sign in as manager Jack Taylor (jtaylor)

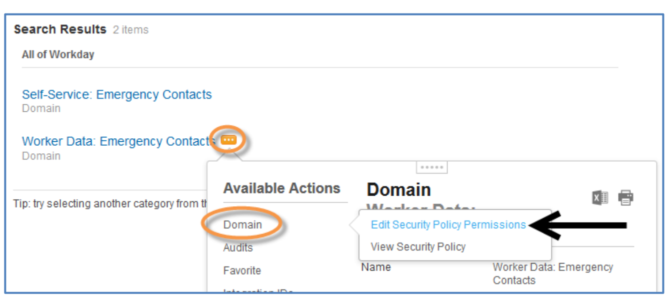
1. Signed in as Jack Taylor (Jared Ellis' manager), navigate to Jared's worker record and verify that you **cannot** view his emergency contact information.

EDIT DOMAIN SECURITY POLICY

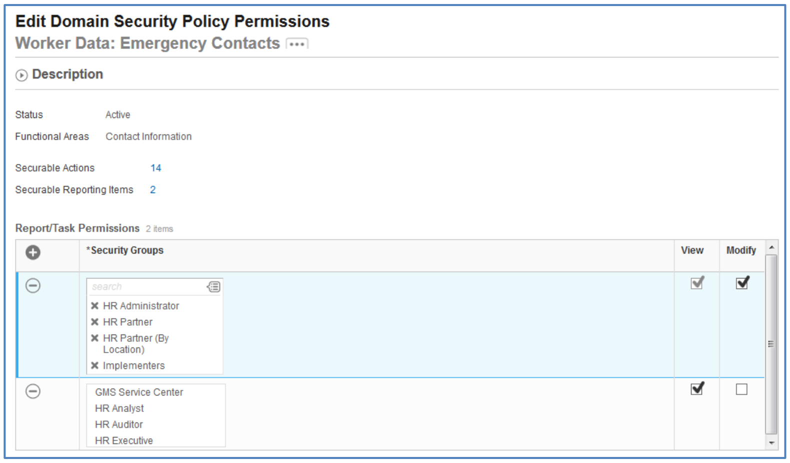
Sign in as Logan McNeil (lmcneil)

1. Search for ***domain: emergency contacts***
2. In your search results, hover over **Worker Data: Emergency Contacts** and click on the *Related Actions* icon (see below)
3. Select the following action and task:

   Domain > Edit Security Policy Permissions



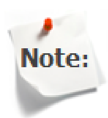
4. View the permitted security groups that can access the domain. Is the Manager security group amongst those?



5. What is the functional area for this domain?

____

6. Add **Manager** to the security groups that can only **View** contact information under *Report/Task Permissions*.



Any change to a security policy will not take effect until you Activate Pending Security Policy Changes.

7. Click **OK** and **Done**
8. Navigate to the ***Activate Pending Security Policy Changes*** task
9. Write an appropriate comment
10. Click **OK** to save
11. Check the **Confirm** checkbox to enable Managers to see their worker's secured ID information
12. Click **OK** and sign out

CONFIRM SECURITY POLICY CHANGES

Sign in as Jack Taylor (jtaylor)

1. Navigate to Jared Ellis and verify that you can now view your worker's emergency contact information
2. Sign out

ACTIVITY 6.2: MODIFY BUSINESS PROCESS SECURITY POLICY

Business Case: You will login as Logan McNeil, the Security Administrator, to modify the Hire business process security policy so that the job based security group Chief Financial Officer can review an employee hire. You will also edit ad hoc approval permissions.

Sign in as Logan McNeil (lmcneil)

VIEW SECURITY POLICY

1. Search for *bp: Hire*
2. Hover over **Hire for Global Modern Services** in your search results and click on *Related Actions*

   Business Process Policy > View

3. Look at the security groups that can do the action step of **Review Employee Hire** (hint: this is under the category of *Who Can Do Action Steps in the Business Process*).
4. Is Chief Financial Officer amongst those?

   ____

5. Have any security groups been granted Ad Hoc Approve abilities? (hint: this is under the category of *Who Can Do Actions on Entire Business Process)*

   ____

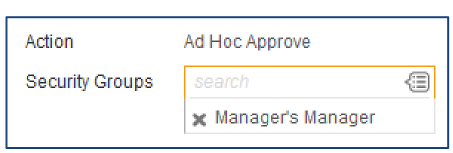
EDIT BUSINESS PROCESS SECURITY POLICY

1. Use the *Related Action* off of the **Hire** policy at the top of the page:

   Business Process Policy > Edit

2. Scroll down to the ***Review Employee Hire*** action step (in *Who Can Do Action Steps in the Business Process*) and add the **Chief Financial Officer**:

3. Scroll down to the section titled *Ad Hoc Approve*
4. Enter the security group **Manager's Manager** in the ***Ad Hoc Approve*** section



5. Click **OK** and **Done**
6. Navigate to the ***Activate Pending Security Policy Changes*** task
7. Write an appropriate comment
8. Click **OK**
9. Check the **Confirm** checkbox
10. Click **OK**

CHAPTER REVIEW

Security is separately maintained and configurable for business processes and for domains.

Reports/Views/Tasks are all securable items within domains and sub or child domains.

Entire functional areas can be disabled.

Once security is modified, the pending changes must be activated.

Workday allows for the assignment of security roles based on job, organization, etc.

Workday allows for the assignment of user based security to an individual.

Security can be assigned manually or by the system.

CHECK YOUR KNOWLEDGE

1. Name the different types of security groups.

   ____
   ____
   ____

2. A position is linked to a _______________, which is linked to a role-based security group.
3. True or False: Editing a security policy takes effect immediately.

   ____

4. Match the security terms with their definitions:

A. Security Groups	___ Groups of users who need to perform actions or access data
B. Business Process Policies	___ Defined tasks and reports which are functionally similar
C. Domain Security Policies	___ Dictate which security group can view/modify data w/in the domains
D. Domains	___ Dictate which security groups can participate in the business process

SAMPLE DECISION POINTS

1. Which security groups will be necessary to provide the appropriate access and what domains and business processes will these security groups have access to?
2. Which roles will you be using to run your business processes?

CHAPTER 7: DEFINING BUSINESS PROCESSES

Workday's business process framework lets you define and implement business processes to suit the way your company works. You choose the tasks that compose a business process and in what order they must be completed. You can create variations of behavior within a business process using business intelligence as well as different configurations of the same business process for different organizations.

You can define custom business processes for any supervisory organization. The business process logic is inherited, so subordinate organizations automatically use a business process defined for a superior organization, unless the subordinate organization has its own version of the process.

OVERVIEW

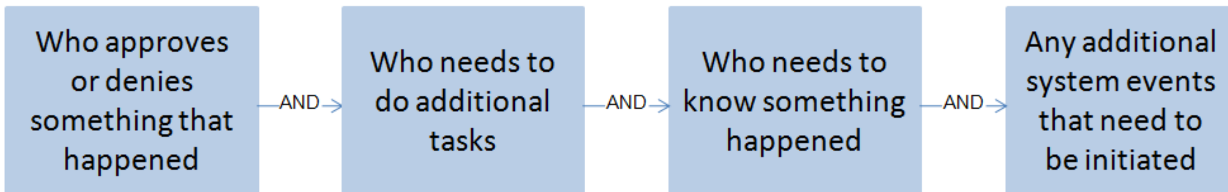
After reviewing this chapter you should be familiar with the following:

- Business Process Framework
- Business Process Configuration Options
- Business Process Functionality
- Business Processes and Sub-Processes
- Deploying Your Business Processes
- Resources and Reports

BUSINESS PROCESS FRAMEWORK

The business process framework uses security groups to control who performs the activities that make up a business process. Because all activities are associated with specific security groups, and not with specific people, workers can move into and out of those security groups and positions without disrupting the business process logic.

Business process definitions determine:



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 it can be a sub-process which is also a combination of actions, to dos, and/or checklists. Within the process, conditions can be defined which will determine whether a step will be initiated. Notifications can also be defined to notify a Workday user or email address that a step has begun, been completed or that a particular review response was selected (e.g. approved, denied, cancelled, etc.).

The difference between actions, approvals and to dos:

- Action: Tasks or events within Workday.
- Approvals: Approval of a task or event within Workday.
- To Do: Reminder to do a task either within Workday or outside the system.

BUSINESS PROCESS COLUMNS

Action	Definition
Step	The related actions icon appears in the left column and contains the available actions for a specific step of the business process.
Order	This determines the order of execution for the steps within a business process. Workday uses letters to sequence steps as numbers are sorted alphabetically, not numerically, so 10 sorts before 2. The initiation step is always step "a". Subsequent steps will use the characters b through z. For example: if three steps are d, they run parallel and all must be completed to kick off the next step. You can also skip letters. For example: a, b, c, d, f is okay, even though e is missing. In addition, if you add an item with two letters, such as ca, it runs after step c and before step d.
If	A condition is part of a business process step and consists of one or more rules. A condition rule is considered an "if" statement. If the condition is not satisfied the step will not occur.
Type	This is where you identify the type of step. For example: an action, service or to do.
Specify	This is where you indicate the specifics based on the type of step. For example, if the step type is an action, you will be required to specify the type of action (either a review or a sub-process).
Optional	An optional step does not have to be completed. The notification message contains a link that the recipient can click to skip the step. The next step does not begin until the recipient either chooses to skip it or completes it.
Group	Specify one or more security groups responsible for this step. The available security groups are limited to those allowed by the security policy. If the step is an action step that runs another business process, the available security group is controlled by the security policy for that business process. This step appears in everyone's Inbox automatically and is removed when someone completes the step.
All	If the all column is not checked, as soon as one person in the role approves the request, the notification disappears from everyone else's Inbox and the business process continues. Checking this column requires all persons in the security group to approve the request.
Run As User	Used to identify the user for a batch or integration step type.
Due Date	This is the elapsed time from when the process is initiated until the process should be completed. Due dates have no meaning unless you run a task alert or business process report that can indicate which business processes steps or entire processes are past due or approaching their due date.

Action	Definition
Due Date is Based On Effective Date	Due date is based on effective date refers to the effective date that the initiator specifies when starting an instance of the business process. If effective date is not used, the due date references the date the business process is initiated.
Routing Restrictions	Routing restrictions enable you to configure individual workflow steps so that selected individuals are excluded from the workflow routing based on your selections. Alternate routings enable you to identify alternate security groups for routing the transaction or to identify alternate security groups for those users specifically excluded from the transaction.
Complete	When a completion step finishes, the business process is listed as complete, even if there are more steps in the process. For example, a person can be listed as "hired," even if the steps for the employee to enter personal information and a W-4 form are not yet done. Completion makes the data for this business process available to other systems like payroll or general ledger. Make sure all approval steps and review action steps come before the completion step. If there is no completion step, the business process is considered complete when the last step finishes.

BUSINESS PROCESS STEP TYPES

Type	Definition
INITIATION	The initiation step is always the first step in a business process.
ACTION	An action or event that occurs within Workday. For example: An Action step of Review Employee Hire within the Hire Default Definition.
APPROVAL	An Approval step gives the designated approver the opportunity to approve or deny the entire business process.
APPROVAL CHAIN	An Approval Chain also approves the entire business process. An Approval Chain is a sequence of approvals that starts with an individual, then goes to that person's manager, and on up the management chain until it gets to the top or until some exit condition is met. Use the Group column to set the security group that starts the chain.
BATCH/JOB	You can specify that a batch process be run as a business process step. To do so, when creating or editing a business process, simply add a step for the batch process (set the step Type to Batch and specify the batch process to use).
CHECKLIST	A Checklist is a collection of To Dos. Select one of the checklists available to this organization.

CONSOLIDATED APPROVAL	A Consolidated Approval enables you to combine multiple approvals for the same person into a single approval task notification. When the approvers link to the approval page, they see simplified information for each step, but with a link to more information, if they need more detail. As with a single approval, if the approver denies the approval the entire business process is denied and terminated.
CONSOLIDATED APPROVAL CHAIN	This step combines the properties of an Approval Chain with the properties of a Consolidated Approval.
EDIT ADDITIONAL DATA	The Edit Additional Data business process step type can be used to edit custom fields within the context of a business process. Note BP validation rules do not apply to this step.
INTEGRATION	An integration step is a Workday system operation that transfers data to or from an external application. An integration step would also kick off a separate processing thread.
REPORT	It is also possible to run a report as a step in a business process. When a report is run as a business process step, its output is sent automatically to the W: drive, rather than being displayed immediately. You can optionally create a To Do step within the business process that consolidates the link(s) to one or more reports within a single To Do step.
REPORT GROUP	Same as Report step, but for a report group, which allow multiple financial reports to run as a single unit.
REVIEW DOCUMENTS	This enables you to use a business process to distribute documents to workers
SERVICE	A service step kicks off a separate processing thread (example: creation of a Workday user account).
TO DO	A To Do is an activity that the responsible person must do either within or outside the Workday system, such as a new hire filling in and submitting a W-4 form.
MASS APPROVAL	Provides a dashboard for multiple approvals from a single process. Is only available for processes that deal with multiple organizations, like bonus, merit and salary actions.

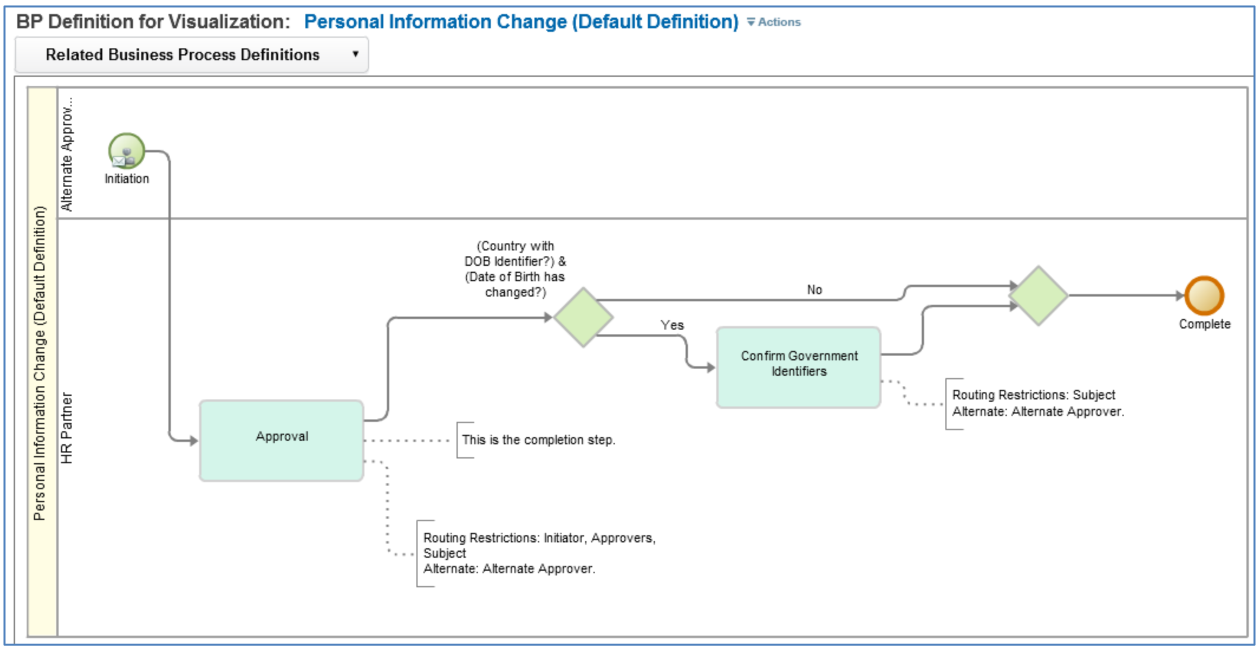
ACTIVITY 7.1: VIEW BUSINESS PROCESS DIAGRAM

Business Case: You can view a diagram of all your business process definitions. As Logan McNeil you will login and view a BP diagram for the business process of Change Primary Address.

Sign in as Logan McNeil

VIEW BUSINESS PROCESS DIAGRAM

1. Enter *bp: personal information* into the search box
2. Click on **Personal Information Change (Default Definition)**
3. Click on **View Diagram**



QUESTIONS

1. In which step is this process considered completed?

   ____

2. Are there any condition rules in this business process?

   ____

3. Are there any routing restrictions?

   ____

BUSINESS PROCESS CONFIGURATION OPTIONS

You cannot create your own business process. Some tasks are not associated with a business process. If there are tasks that you feel should be associated with a business process, you may submit a Brainstorm in the Workday Community and see whether other customers feel the same way. Many changes in business process functionality are a result of suggestions and feedback from our customers.

Business processes are also controlled by configurable security. Business processes have their own security configurations, as previously noted in the chapter on security. There are restrictions as to what security group(s) can initiate and perform functions in a business process, such as an approval.

The **Business Process Configurations Options** report can be run for any business process or for any sub-process where it will return all business processes in which the sub-processes can be used. This report details all available actions for a business process, which approval options are allowable, which sub-processes can be used in the business process, as well as options for saving after an available action, restrictions, prerequisite actions and more.

Business Process Configuration Options

Filter by Business Process Type: Hire

Return Business Processes for which the selected are allowed Subprocesses: No

30 items

Allows Mass Approval Steps	Allows Help Text	Allows Related Worklets	Allows Specific Group Routing	Initiating Task allows Condition Rules	Allowed Actions							Allowed Services	
					Task	Options on Save	Initiates Subprocess	Required	Restrictions	Prerequisite Actions	Mutex Group	Event Service	Restrictions
					Add Period Activity Pay	Save for Later Submit	Period Activity Pay			Assign Pay Group		Provision Accounts	After Completion Only
					Assign Costing Allocation for Hire Employee	Save for Later Submit	Assign Costing Allocation					Reset Workday Account	After Completion Only
					Assign Matrix Organizations	Save for Later Submit	Assign Matrix Organizations						
					Assign Pay Group	Save for Later Submit	Assign Pay Group			Change Organization Assignments			
					Change Benefit Elections	Go Back Save for Later Submit	Change Benefits for Life Event		After Completion Only	Remove Retiree Status			
					Change Benefit Jobs	Save for Later Submit	Change Benefit Jobs		After Completion Only				

This sample of the Business Process Configurations Options report shows some of the available actions in the Hire business process, options for saving those actions, sub-processes that can be initiated, prerequisite actions that occur before the actions (such as requiring Change Organization Assignments before Assign Pay Group), restrictions (note that you cannot have a Change Benefits for Life Event sub-process prior to the completion step), etc.

Here are a few examples of Configurable Business Processes:

Staffing

- Create Position
- Create Headcount
- Contract Contingent Worker
- End Contingent Worker Contract
- Transfer Contingent Worker
- Edit Hiring Restrictions
- Edit Position
- Change Job
- Terminate
- Hire

Compensation

- Request One-Time Payment
- Request Stock Grant
- Propose Employee Bonus Award
- Request Employee Merit Adjustment
- Request Compensation Change (ad hoc)
- Propose Compensation Change (within a staffing event)
- Propose Compensation (within a hire event)

Benefit Events

- Change Benefits
- Change Benefits for Life Event
- Change Benefits for Open Enrollment
- Change Retirement Savings

Time Off/Leave Events

- Request Time Off
- Request Leave of Absence
- Correct Time Off
- Request Return from Leave of Absence

Talent Management Events

- Start Performance Review
- Start Development Plan
- Start Performance Improvement Plan
- Start Disciplinary Action

Personal Data Events

- Date of Birth Correction
- Personal Information Change
- Edit ID Information
- Marital Status Change

Contact Information Events

- Legal Name Change
- Create Primary Address
- Preferred Name Change
- Change Primary Address

EDIT, COPY OR LINK

As part of each Workday deployment, business processes are loaded into the tenant and you may want to then edit those business processes. You will not often copy, link, or create definitions. In most situations there will be a default definition of each business process and condition rules will allow that one business process to meet many organizational requirements.

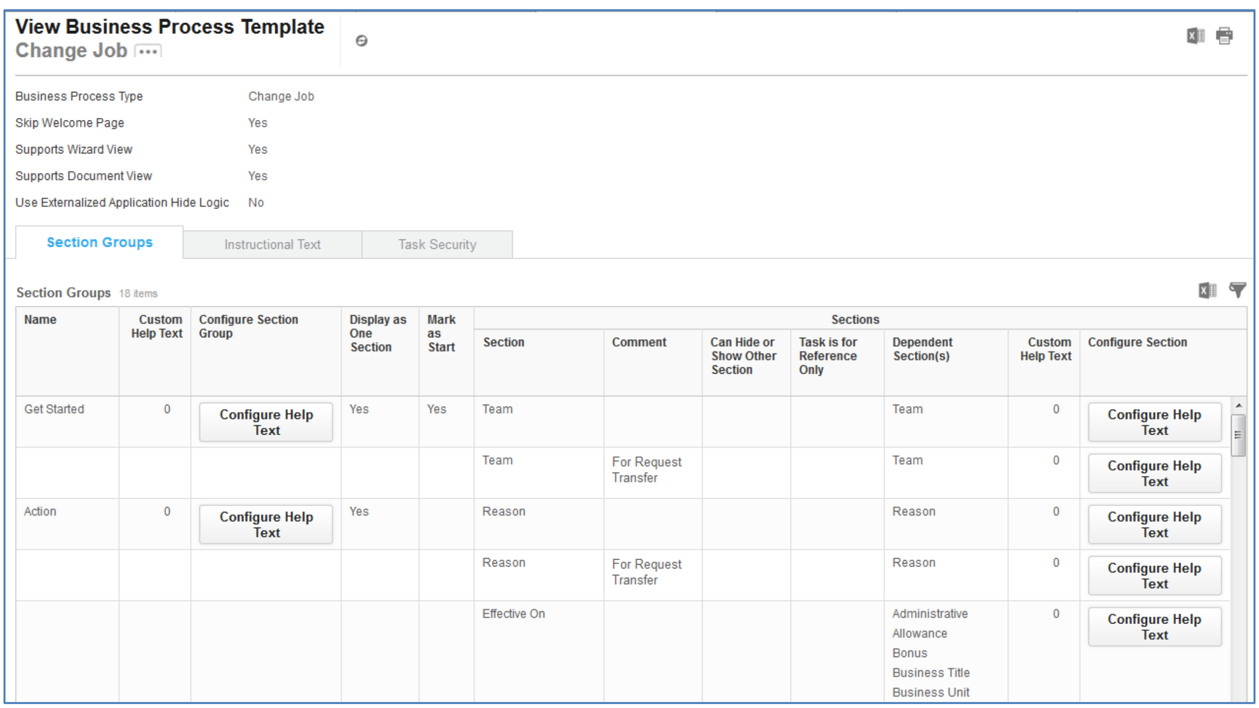
For example, the hire process might require that contract information be entered in Europe but not in the United States. By including a condition of location to the Maintain Employee Contract step, this step will only occur if the condition is met.

In addition to editing, you have the option to create a new (copy) version of that business process for a specific supervisory organization and its subordinates or link to an existing (usually modified) business process.

TEMPLATE DRIVEN USER INTERFACE (UI)

In many areas of Workday you will see a template driven user interface. This template driven UI is used for inline edits, filtered prompts and expandable sections that streamline data entry. This user experience is available within several business processes such as Onboarding, Contact Change, Change Job and Performance Reviews.

Use the Business Process Template report to view the predefined field order, add instructional text and analyze task security.



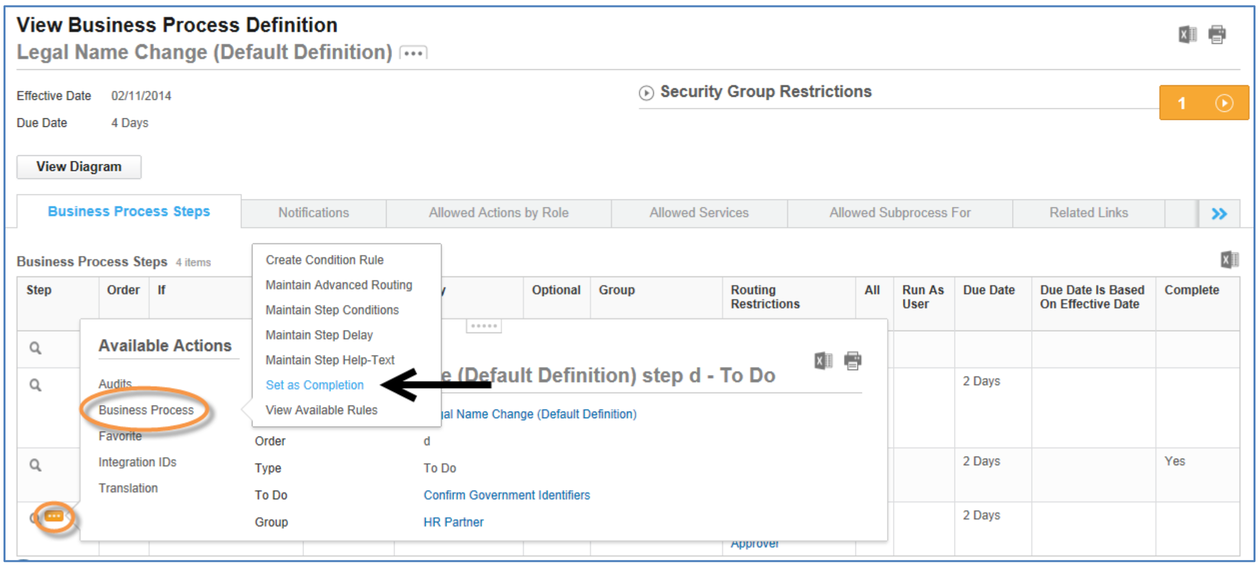
BUSINESS PROCESS FUNCTIONALITY

COMPLETION STEP

There can be multiple steps within a business process and one of the steps may be identified as completing the process. Following the completion step there can be tasks or to do steps that need to be done, but these steps will not impact the successful completion of the process. For example, the Hire process may be completed once the compensation is proposed even though a Workday account needs to be created or a laptop ordered. The completion step being met in a Hire business process means that there will be a worker record in addition to the pre-hire record and the worker will display as a direct report for the manager.

To designate a completion step use the related actions icon off of the step and select:

Business Process > Set as Completion

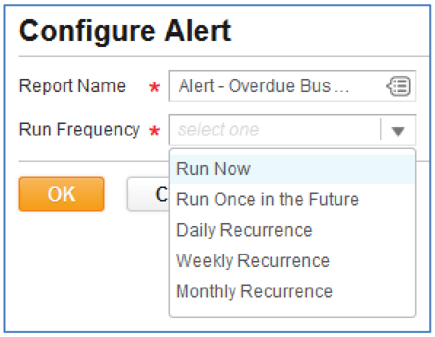


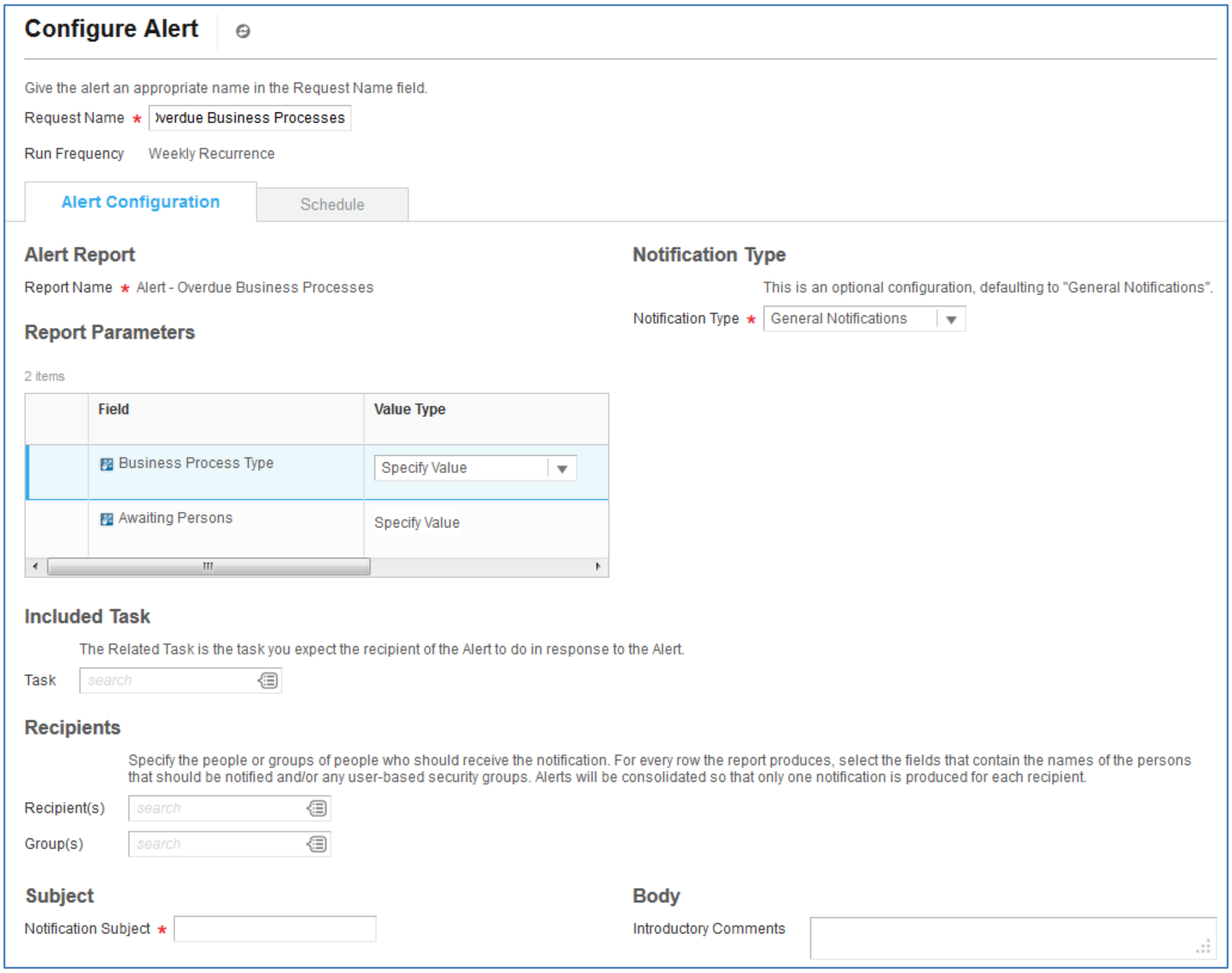
DUE DATES AND ALERTS

Each business process, as well as individual business process steps, can have a due date. This is the elapsed time from when the process is initiated until the process should be complete. A due date assigned to a step is calculated from when this step is assigned to a worker in the specified role. Due dates can be from the effective date of the event step or the transaction/event or from the initiation date.

Due dates do not impact the flow and functionality of the business process. For example, once a step reaches and passes its due date, the step remains in the appropriate user's Inbox (e.g. the business process does not cancel or terminate on its own as a result of the due date.) However, due dates can be helpful for reporting purpose and for setting up notifications around overdue tasks. Administrators and users (if enabled by administrators) can configure their settings with regard to the delivery frequency of notifications via email and opt for immediate delivery or daily digest delivery.

Workday also enables you to generate configurable alerts based on a custom report. You can configure alerts to send relevant business information to users based on any condition for which you can create a report in Workday. Use the **Configure Alert** task to tie an alert and a custom report together. (The filter criteria in the custom report should define the conditions on which you want to alert.) The alert can be set to run immediately, once at a specified date/time in the future, daily, weekly, or monthly. At the specified time, it is then sent to a Workday Inbox, an email address, or the Inbox.



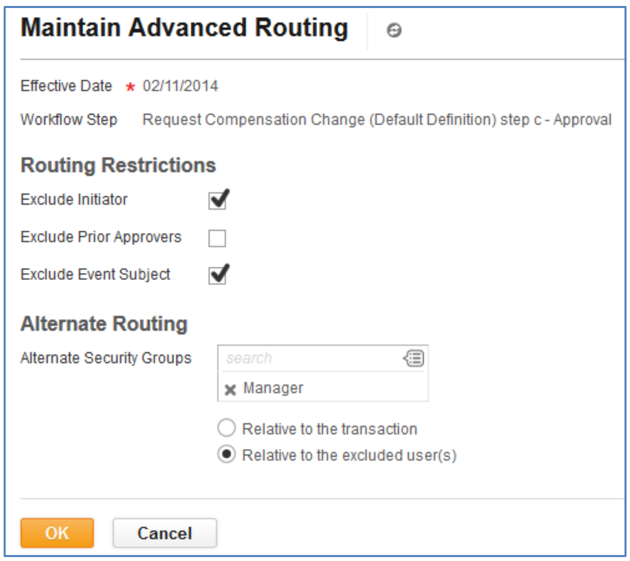


DELAYS AND ROUTING RESTRICTIONS

Adding a step delay effectively puts the business process into a "background" mode until the specified delay is complete. This is useful for certain steps that frequently require a lengthy period (perhaps weeks) to complete or you do not want a step to fire until the business process has reached the completion step. During the specified delay, the remaining steps disappear from the inboxes of the responsible groups. The steps then reappear upon completion of the specified delay.

The delay can be based on the prior step completion date, the process initiation date or an external field (that is, a class report field) of dates from the Workday system. During the step delay period, the process is associated with the user specified on the Business Process tab of the Tenant Setup: Business Process and Notifications. When configuring the step delay you can opt to select the Recalculate Upon Correct checkbox. Because step delay is calculated when the business process transaction reaches the step with the delay, subsequent changes to the business process, such as correcting the business process event's effective date, do not cause the delayed step to recalculate the delay. When you select this option, Workday recalculates the step delay when you correct the business process.

A routing restriction is used to prevent approval on one's own behalf. By selecting either to exclude the initiator, exclude prior approvers, or to exclude the event subject, you have the ability to require that an approval occurs but someone who previously approved or is the subject of the event will not have the task appear in his Inbox.



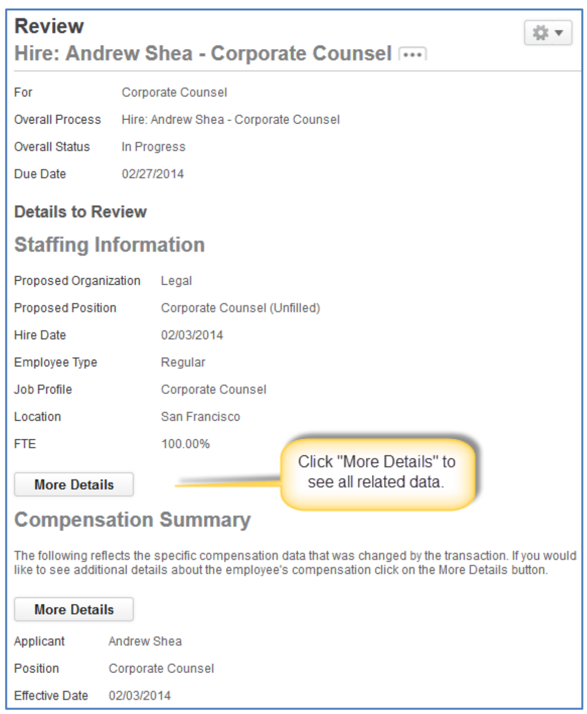
If all potential assignees that might get this step are skipped as a result of the restrictions, the step is marked as "not required". To prevent this from happening, choose a setting in the alternate routing section.

CONSOLIDATED APPROVAL

In addition to the approval and approval chain step types, Workday provides a consolidated approval step type. This step type concatenates data from previous individual steps in a business process and then presents that data in a dynamically-generated custom approval page. The user can then approve or deny several previous steps as a single action. In addition, you can configure the consolidated approval step to display data in the custom approval page from only selected previous steps, to display custom field labels and to display custom instruction text.

A consolidated approval may be placed at any point in the business process except the initiation step. However, a consolidated approval may only display previous steps, not subsequent steps. For example, you have a business process with steps a, b, c, d, e and f. If step d is a consolidated approval step, you can configure it to display any combination of a, b, and c. Since e and f come after the consolidated approval step, they cannot be included in the consolidated approval.

When you include the content of a step in a consolidated approval, all data in the step are included. You cannot choose to include some fields but not others. However, some steps (mostly in the Hire processes) display only some fields by default and provide an expander that displays the rest of the fields. This display filtering is preconfigured by Workday; you cannot add or remove these expanders from any step displayed in a consolidated approval page.

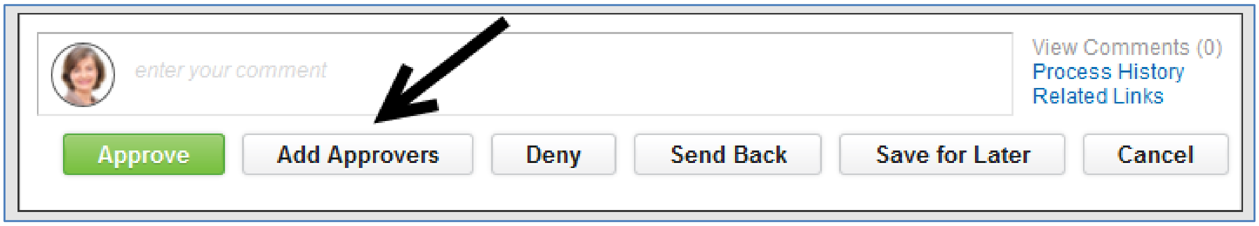


AD HOC APPROVAL

You have the ability to add additional approvers to an event while the business process is in progress, or "in flight", 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.

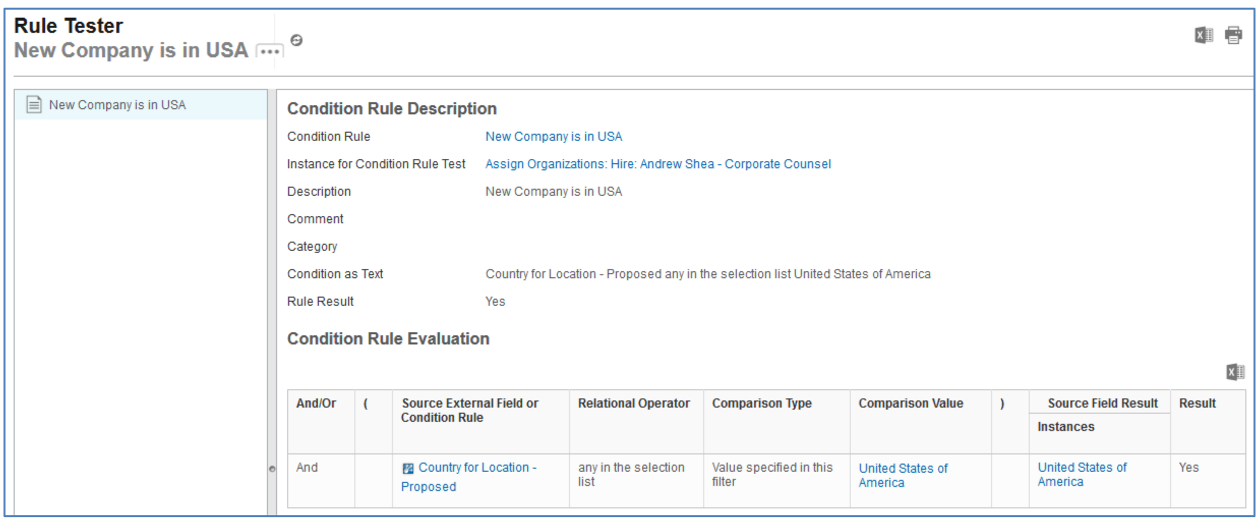
In addition to approving a business process, added approvers can also send back, deny, delegate and reassign a business process. However, an additional approver can be added only one time per approval step, so an additional approver cannot then add more additional approvers to the business process.

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.



CONDITION RULE TESTER

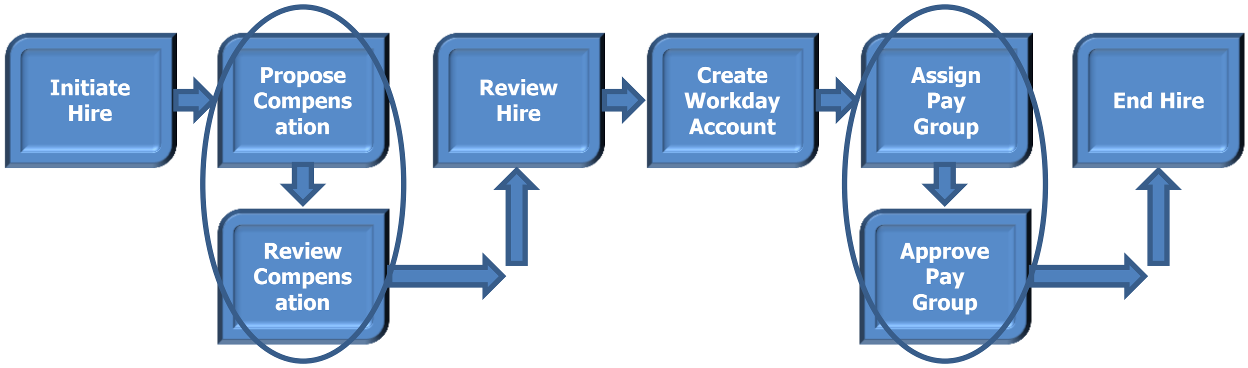
The Test Rule task provides the Business Process Administrator the ability to troubleshoot a condition rule in a business process event when the actual result does not match the expected result. To access the Test Rule task, take the related action of a business process event that contains at least one condition rule and select Business Process –> Test Rule. Then select which condition rule you would like to test (if there is more than one in the business process).



This will show whether the condition was met, as well as a full execution flow so that you can see what about the business process subject did and did not meet the condition rule.

BUSINESS PROCESSES AND SUBPROCESSES

One example of a configurable business process is Hire. The following is a sample business process depicting how sub-processes are handled within the workflow.

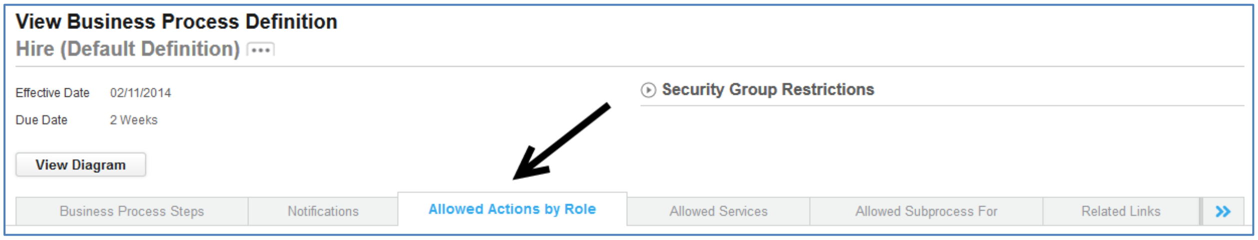


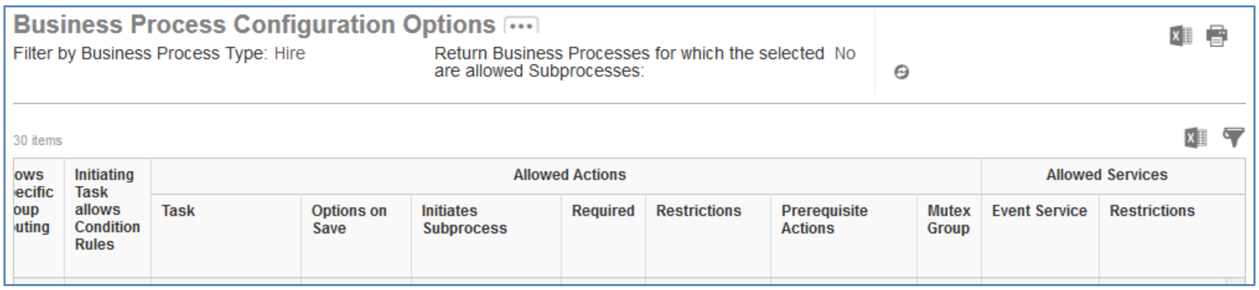
When including sub-processes within your main business process, the system will complete the steps in the sub-process before moving to the next step in the main business process. Within a business process there may be sub-processes such as Propose Compensation or Assign Pay Group. These types of sub-processes can be included when they are needed to support your business requirements. Workday delivers the allowed sub-process for each business process. For example, the following sub-processes are available within the Hire business process:

- Add Academic Appointment
- Assign Costing Allocation for Hire Employee
- Assign Matrix Organizations
- Assign Pay Group
- Change Background Check Status
- Change Benefit Elections
- Change Benefit Jobs
- Change Organization Assignments
- Change Personal Information
- Check Position Budget
- Create Change Benefits Event
- Create Provisioning Event
- Create Workday Account
- Edit Government IDs
- Edit ID
- Edit Licenses
- Edit Other IDs
- Edit Passport and Visas
- Edit Service Dates
- Maintain Employee Contract
- Onboarding
- Propose Base Pay
- Propose Compensation
- Remove Retiree Status
- Request Budget Approval
- Request One-Time Payment
- Request Stock Grant for New Hire
- Review Payroll Interface Data

There are two sources to find the allowed sub-processes for each business process. They are:

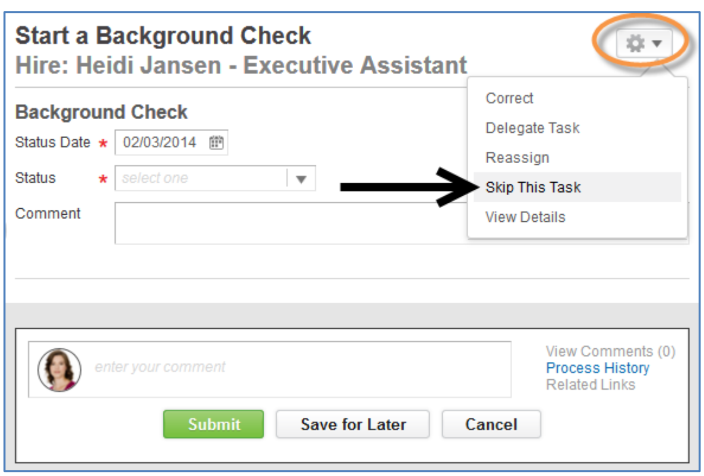
- From the business process, click on the Allowed Actions by Role tab.
- Run the Business Process Configuration Options report.





Optional Steps

Optional steps can be added to a business process and allow the task to be skipped. Workday lists the step 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.



ACTIVITY 7.2: ASSIGN SUPERIOR ORGANIZATION

Business Case: It has been decided to merge WOK into the GMS organization. As Logan McNeil, you will assign the superior organization of WOK so it reports to the Human Resources supervisory organization. This allows WOK to inherit business process definitions from Global Modern Services.

Sign in as Logan McNeil

ASSIGN SUPERIOR ORGANIZATION

1. Enter *WOK* into the search box
2. Click on the **Wealth of Knowledge** supervisory organization
3. Click on the *Related Actions* icon off of **Wealth of Knowledge**
4. Select the following action and task:

   Reorganization > Assign Superior

5. Leave today's date as the effective date
6. Click **OK**
7. Enter the following data:

Field Name	Entry Value
Superior	Human Resources

8. Click **Submit**
9. Click **Done**

QUESTIONS

1. Look at the *Roles* tab for Wealth of Knowledge; what do you notice?

   ____

2. Why do you have additional roles?

   ____

ACTIVITY 7.3: EDIT BUSINESS PROCESS FOR HIRE EMPLOYEES

Business Case: You are Logan McNeil, the Business Process Administrator for Wealth of Knowledge. Since Wealth of Knowledge now reports up to Global Modern Services, it will follow the Global Modern Services business process of Hire. New requirements have been given to you and you will need to make some adjustments to the Hire business process. You will add steps and configure the business process to meet the new requirements.

Sign in as Logan McNeil (lmcneil)

EDIT BUSINESS PROCESS STEPS

We will start editing our business process by deleting a step and adding additional steps to the Hire definition for Global Modern Services.

1. Enter *bp: hire* into the search box and click the magnifying glass
2. Select ***Hire for Global Modern Services***
3. Use the *Related Action* off the definition (top of the page) and select the following action and task:

   Business Process > Edit Definition

4. Use **today's date** for the Effective Date
5. Click **OK** to edit the definition

Remove and Add Business Process Steps

1. Remove the **Onboarding step – d** (hint: it is the last step d)
2. Click on the ⊕ to add a new step
3. Enter the following information:

Field Name	Entry Value
Order	ba
Type	Action
Specify	Review Employee Hire
Group	HR Partner
Due Date	1 day

4. Click on the ⊕ to add a new step
5. Enter the following information:

Field Name	Entry Value
Order	bb
Type	Action
Specify	Review Employee Hire
Group	Chief Financial Officer
Due Date	1 day

Hint: if you cannot find Chief Financial Officer, check your security policy configuration

6. Click **OK** and review the two new steps you just added

CONFIGURE BUSINESS PROCESS STEPS

Now we will configure the business process and the steps we just created.

Add Routing Restrictions

We will add a routing restriction to the ba step of Review Employee Hire so the HR Partner (Logan) will only receive this step if she is not the initiator of the Hire event.

1. From the *Related Action* off step **ba** (hover over the magnifying glass), select:

    Business Process -> Maintain Advanced Routing

2. Use **today's date** for the Effective Date and click **OK**
3. Check the **Exclude Initiator** box. This will ensure that if an HR Partner initiates the hire then they will not have to complete this step.
4. Click **OK** and **Done**

Create Condition Rule

Now we want to add a condition rule to step bb so the Chief Financial Officer security group will only Review Employee Hires if the proposed management level is Vice President or above.

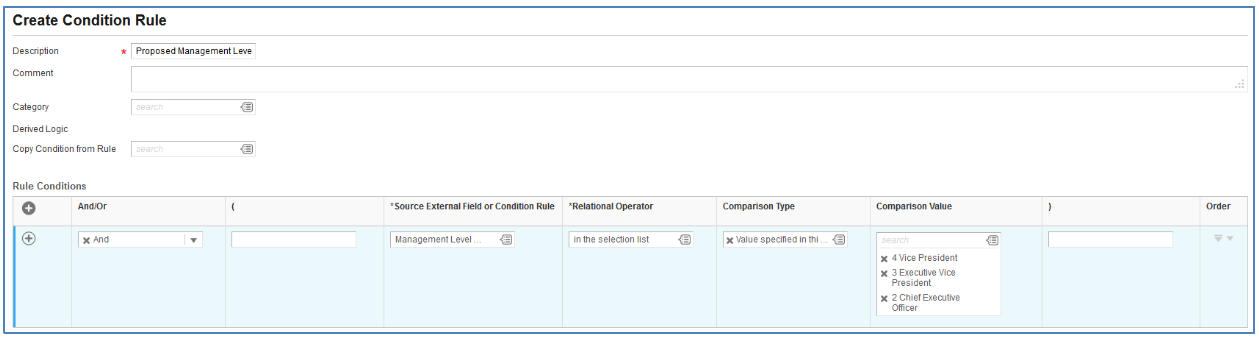
1. From the *Related Action* off step **bb**, select:

    Business Process > Maintain Step Conditions

2. Click **OK**
3. Click on the ⊕ to add an Entry Condition for this step
4. Click on the Rule field prompt
5. Select the in-task **Create** > then the **Create Condition Rule** task
6. Click **OK**
7. Enter the following information:

Field Name	Entry Value
Description	Proposed Management Level
Source External Field or Condition Rule	Management Level – Proposed
Relational Operator	In the selection list
Comparison Type	Leave the default (Value specified in this filter)
Comparison Value	2 Chief Executive Officer 3 Executive Vice President 4 Vice President

Below is a picture of what the rule should look like:



8. Click **OK**
9. Click **OK** again to attach the rule as an entry condition for step bb
10. Review your business process and view the Routing Restriction on step ba and the If (condition rule) on step bb

Create Label Override

Next we will rename the Propose Compensation step to Remuneration, which is a term that makes more sense to our users.

1. Click the *Related Actions* for the **Propose Compensation** step (second step b):

   Business Process > Maintain Step Label Override

2. Use **today's date** for the Effective Date
3. Click the **OK** button
4. In the *Step Label Override* field enter **Remuneration** (in some countries compensation is called remuneration)
5. Click **OK** and **Done** to save

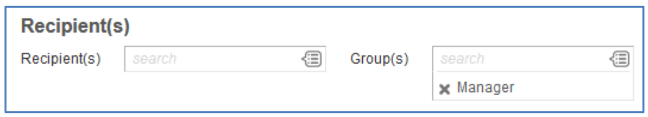
Create Notification

Since a manager can initiate a hire but does not approve it, we will add a notification that will let the manager know when certain steps are complete.

1. From the *Related Actions* icon off of the Business Process itself (top of the page) navigate to:

   Business Process > Add Notification

2. Use **today's date** for the Effective Date
3. In the Trigger(s) section, choose the radio button **On Exit** and select the step **d-Edit Government IDs** – you are making the notification trigger after the Edit Government IDs step is complete
4. In the Recipient(s) section input **Manager** under **Group(s)** – you are selecting the role based security group of Manager to receive this notification



5. In the Message Content area insert a row under the **Subject** section, choose the **External Field** radio button and select the **Full Legal Name** field – you are making the new hire's legal name the subject of the notification
6. Under the **Body** section insert a row, choose the **Text** radio button and type the following text: *Your direct report now has their IDs in the system*
7. Click **OK** and **Done**

   You can view all system and custom notifications in the Notifications tab of your business process

BUSINESS CASE OR CONTEXT

Looking back at the previous exercise in which you were given specific detailed instruction on business process changes to make, list all of the changes you made in laymen's terms as if you were explaining them from a business case scenario to someone else. For example:

"One of the last things we did was change the label shown for the **Propose Compensation** sub-process so that it would display as **Remuneration**. That term makes more sense for our Australian operations when they receive that step in their Inbox."

ACTIVITY 7.4: COPY BUSINESS PROCESS OF HIRE EMPLOYEE FOR TRAINING

Business Case: We have decided that the Training organization will need its own Hire business process definition. Instead of editing the default definition, we will copy and modify an existing business process that has previously been customized for the IT Helpdesk organization. This newly copied business process will be used only for the supervisory organization of Training and any subordinates.

Sign in as Logan McNeil (lmcneil)

COPY BUSINESS PROCESS: HIRE FOR TRAINING

1. Search for *bp: hire*
2. Select ***Hire for IT HelpDesk Department***
3. Use the related action off the definition itself and select the following action and task:

   Business Process > Copy or Link Business Process Definition

Field Name	Entry Value
Effective Date	Today's Date
Select: Copy Workflow Definition to Business Object	Training Department

4. Click **OK**
5. Add a row to add a new step in this process

Field Name	Entry Value
Order	c
Type	Service
Specify	Create Workday Account

6. Add a row to create another new step in this process

Field Name	Entry Value
Order	d
Type	Action
Specify	Onboarding

7. Click **OK** and review your new Hire business process for the Training Department

ACTIVITY 7.5: EDIT BUSINESS PROCESS FOR TERMINATE EMPLOYEE

Business Case: Logan McNeil will edit the business process for Terminate; she will add a To Do to this business process.

Sign in as Logan McNeil (lmcneil)

EDIT BUSINESS PROCESS: TERMINATION FOR GLOBAL MODERN SERVICES

1. Navigate to the bp: Termination for Global Modern Services.
2. Click on the *Related Actions* icon off of the definition and select:

   Business Process > Edit Definition

3. Leave today's date and click **OK**
4. Add a new step to the business process:

Field Name	Entry Value
Order	ca
Type	To Do
Specify	Exit Interview
Group	HR Partner

5. Click **OK**
6. Click **Done**

QUESTIONS

1. Who is getting the To Do of Create Exit Interview? Is this whom you would have complete this to do in your organization?

   ____

DEPLOYING YOUR BUSINESS PROCESSES

An essential step in planning your deployment will be configuring your business processes. Workday will provide a set of pre-built 'factory defaults' business process definitions from which to work. Testing and analysis of those business processes can go a long way towards ensuring that your Workday deployment is a smooth one. Properly configured business processes can also aid in adoption of Workday by employees, power users and managers!

Business process scope and design sessions can take several days depending on the size of the deployment, the number of products and features you are initially deploying and the complexity of your current business practices or work flow.

RESOURCES AND REPORTS

BUSINESS PROCESS REPORTS

Use the Business Process Configuration Options report to help you determine what kind of actions and sub-processes are possible in a business process. The Business Process Security Configuration report will detail for you the security groups that can initiate a business process, perform actions within a business process, approve steps in a business process, cancel, rescind, etc.

Remember that security is configurable so you may add security groups to the business process security policies if, for example, you wish to send a conditional approval to the Executive Vice President (a custom job based security group that is not delivered with the delivered factory defaults) to approve.

BUSINESS PROCESS ANALYSIS

You will be asked to work with a number of delivered business processes as the starting point for configuring them for your own organization. Many business processes can be used with little reconfiguration at all, others may require more involved modifications.

DESIGNING YOUR BUSINESS PROCESS

You will be asked to configure delivered business processes for such common HCM transactions as Hire, Terminate, Change Job, etc. As an exercise, please consider the Hire process. Ignore any consideration for requisitions, budgets, positions and any approvals or notifications related to the same. Assume that you have an open position, approved headcount or whatever is necessary for the Hire process to be initiated.

Using the following template configure a rough draft of what your company's Hire process looks like now:

1. Who can initiate the Hire? (e.g. What security groups – Managers, Recruiters, etc.)

   ____

2. What is the first step after initiation of the Hire? (e.g. compensation)

   ____

3. Who can perform this step?

   ____

4. Is there any notification associated with this step?

   ____

5. Does this step always occur or are there conditions that must be met for this step to occur?

   ____

6. Is there instructional help you'd like the initiator of this process to receive?

   ____

7. If so, what is it?

   ____

8. If the same person initiated this Hire as is being presented with this first task, should this task be skipped?

   ____

9. If so, should it be routed to another person instead?

   ____

10. What is the next step in this Hire process?

    ____

Continue this business process, making note of any conditional steps, routing restrictions, notifications, etc. that may be a part of the business process.

Keep in mind that in your deployment you will be working with delivered default/standard business processes in your business process scope and design phase, which have already been optimized for your use. Feel free to look at delivered business processes in the GMS tenant for ideas as you go through this activity.

CHAPTER REVIEW

Business processes link actions, to dos, checklists, approvals, approval chains, notifications, services, batch processes and reports together in order to perform a specific business process.

Business process steps occur in alphabetical order with the initiation step of "a" launching the process. A completion step indicates when the process is complete and can occur before all the steps are completed.

Business process due dates work with alerts and/or business process transaction reports so you can alert workers to overdue business processes for which they are responsible.

Business process steps are assigned to security groups.

Configurable security controls which security groups can initiate or perform steps within a business process.

Step conditions can be used for business intelligence within a business process, allowing steps to occur or not occur based on whether the associated condition is true.

Specialized business process steps can be used to create mass or consolidated approvals in order to make business processes more efficient.

CHECK YOUR KNOWLEDGE

1. Identify at least 5 business processes you will use in Workday HCM:

   ____

   ____

   ____

   ____

   ____

2. True or False: A business process may have steps that need to be completed after the "completion step".

   ____

3. True or False: Business Process steps are sent to particular workers in order to complete them.

   ____

4. What task can be selected to configure notifications that will inform workers or their managers about pending, due, or overdue business process tasks?

   ____

SAMPLE DECISION POINTS

1. Which business processes will you be using?
2. What steps are needed for each process and who is assigned to these steps?
3. What conditional steps are needed to handle certain scenarios?
4. Do you need any routing restrictions to streamline the process?

CHAPTER 8: TRANSACTIONS IN WORKDAY

Once the structure of your Workday deployment has been loaded, including your supervisory organizations, job profiles, compensation structures, business processes and more, you're 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.

OVERVIEW

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

- Process Overview
- Hire Process
- Assigning User Based Security Groups
- Hiring into Headcount and Job Management
- Contracting Contingent Workers
- Converting Contingent Workers
- Staffing Movement
- Termination
- Event Management
- Change and the Supervisory Organization

HIRING AND SUPERVISORY ORGANIZATIONS

The primary HCM organizational structure within Workday is the supervisory organization, or who reports to whom. 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 structure is the supervisory organization, not cost center or department costing structure.

PROCESS OVERVIEW

The Workday system gives users multiple ways to initiate the same task or view the same information. For example, there are several ways to create a pre-hire as well as hire an employee. The different options allow users to find a preferred method to accomplish a task.

The Workday Recruiting module seamlessly guides pre-hires though the recruiting lifecycle. If you are not using Recruiting in your organization, Workday allows you to track pre-hires through the hire process including evaluations, interviews and possibly hire.

Process steps	Workday tasks
Enter a Pre-Hire	• Create Pre-Hire • Name • Source of pre-hire • Contact information
Screen Pre-Hire for Positions	• Edit Pre-Hire Profile • Attach resume • Identify interviewers • Enter status
Make Interview Recommendations	Enter Interview Results for pre-hire
Hire the Pre-Hire into a Position	Hire Employee
Create a Compensation Package	Propose Compensation

CREATE A PRE-HIRE

To begin the hire process, we will first enter information for a new pre-hire. You can enter contact information such as name, address, phone and email address plus nationality and sourcing information for pre-hires. If you aren't using Workday Recruiting, this information can be entered manually or flow over from an integration with a third party applicant tracking system. Once they are identified as a candidate for a position you can track them through the evaluation process.

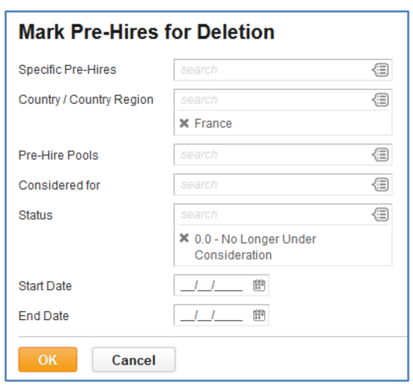
What you need to know when entering a pre-hire:

- A pre-hire must have at least one piece of contact information: a phone number, email address or a 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 for this requirement, Workday has created a deletion process. Use the Mark Pre-Hires for Deletion task to identify specific pre-hires or pre-hires by location, pools, position considered for and interview status and then run the Delete Pre-Hire process.

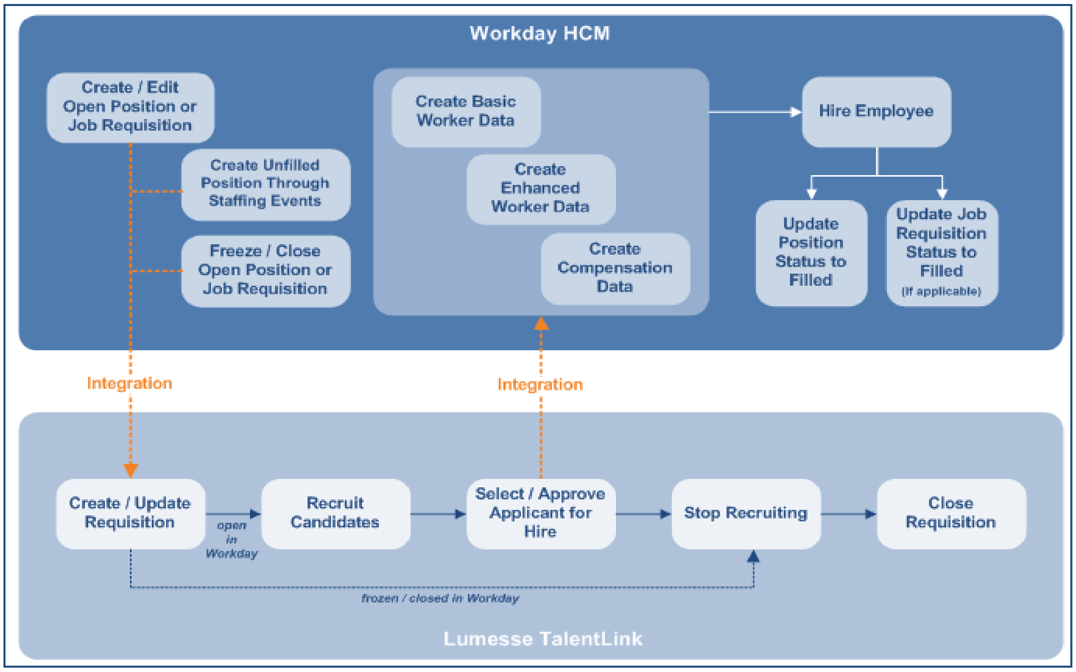


PRE-HIRES AND INTEGRATIONS

As an alternate to using Workday Recruiting or manually entering pre-hires, you may choose to have Workday integrate with other recruiting/applicant sourcing applications such as Taleo or Lumesse TalentLink. How these integrations are built can vary from one recruiting application to another.

The following is an example of how the integration might work if using TalentLink.

Open positions are sent to TalentLink to automatically create requisitions, recruit and select candidates in TalentLink and then send pre-hire data back to Workday to create a worker profile and launch the Hire business process. The following diagram illustrates the recruitment workflow and possible integration points between Workday and TalentLink:



Workday is the system of record for all position data, including changes to position restrictions and status. Separate integration systems manage the flow of data from Workday to TalentLink and from TalentLink back to Workday, based on the field mappings between systems. Both the outbound and inbound integration systems are delivered and hosted by Workday.

After you approve pre-hires for hire in TalentLink, launch integrations to upload pre-hire data and hire employees in Workday.

The integration from TalentLink to Workday:

- Sends pre-hire personal data, including demographic and contact information
- Specifies hire details such as start date, employee type and location
- Launches from Workday based on a scheduled process

Workday creates a basic pre-hire profile from the TalentLink requisition and then imports enriched pre-hire data, such as qualifications, job history and base compensation. Workday launches the Hire business process for the pre-hire based on the organization to which the position belongs. The position is no longer available for hire in Workday and the position status changes to "filled" after the hire process completes. 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 time or part time)
- Location
- Scheduled Weekly Hours

Components which can be used when creating a compensation package for an employee:

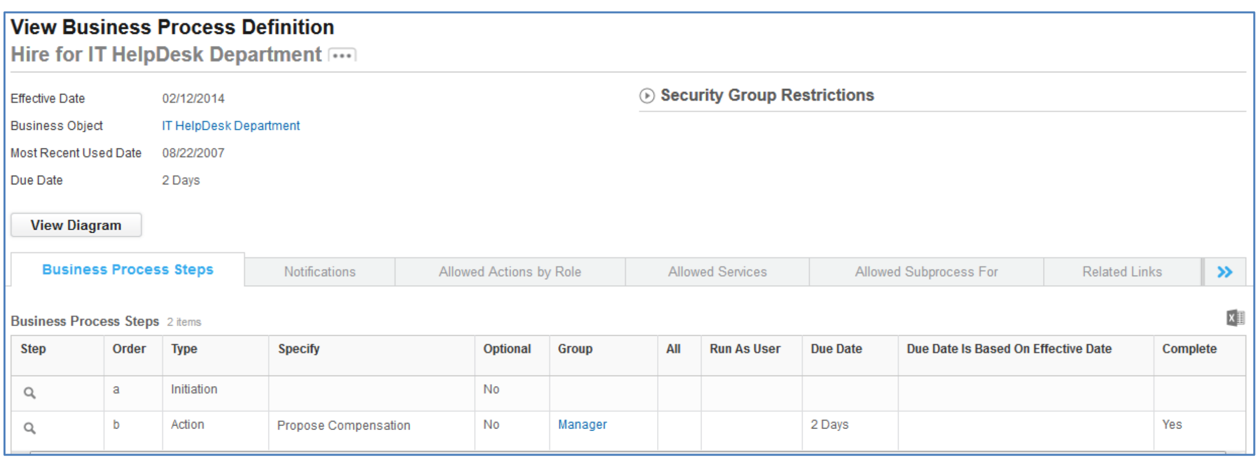
- Salary plans
- Unit Salary plans
- Allowances plans
- Commission plans
- Unit Allowance plans
- Bonus plans
- Merit plans
- Stock plans

REVIEW OF THE BUSINESS PROCESS FRAMEWORK

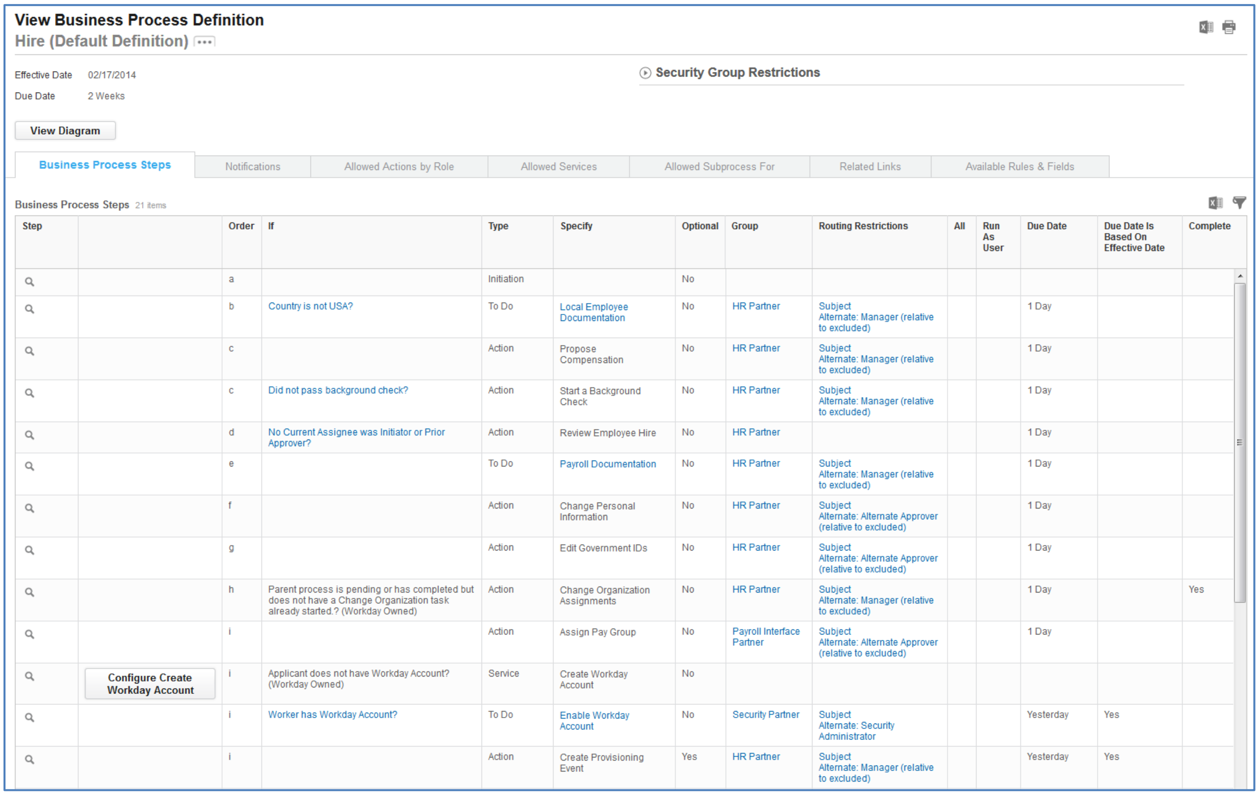
The business process framework allows you to create a multi-step business process that begins with initiating the process and can include additional steps that complete the business objective.

For example, if your objective is to hire an employee, what other steps need to be completed besides the initial data entry? The business process framework allows you to create a process that is very simple or incredibly complex, depending on your requirements.

The screen shot below is a simple hire business process; the HR data is entered during the initiation step and then a manager enters the compensation data.



In contrast, a hire business process can include many steps such as approvals, reviews, entering additional data, to do/reminders and conditional rules. The idea is to include all activities and involve all the right people to complete the process and it can be configured to be as simple or complex as you need it to be.


View Business Process Definition
Hire (Default Definition)

Effective Date 02/17/2014
Due Date 2 Weeks

Security Group Restrictions

View Diagram

Business Process Steps | Notifications | Allowed Actions by Role | Allowed Services | Allowed Subprocess For | Related Links | Available Rules & Fields

Business Process Steps 21 items

Step		Order	If	Type	Specify	Optional	Group	Routing Restrictions	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete
		a		Initiation		No							
		b	Country is not USA?	To Do	Local Employee Documentation	No	HR Partner	Subject Alternate: Manager (relative to excluded)			1 Day		
		c		Action	Propose Compensation	No	HR Partner	Subject Alternate: Manager (relative to excluded)			1 Day		
		c	Did not pass background check?	Action	Start a Background Check	No	HR Partner	Subject Alternate: Manager (relative to excluded)			1 Day		
		d	No Current Assignee was Initiator or Prior Approver?	Action	Review Employee Hire	No	HR Partner				1 Day		
		e		To Do	Payroll Documentation	No	HR Partner	Subject Alternate: Manager (relative to excluded)			1 Day		
		f		Action	Change Personal Information	No	HR Partner	Subject Alternate: Alternate Approver (relative to excluded)			1 Day		
		g		Action	Edit Government IDs	No	HR Partner	Subject Alternate: Alternate Approver (relative to excluded)			1 Day		
		h	Parent process is pending or has completed but does not have a Change Organization task already started.? (Workday Owned)	Action	Change Organization Assignments	No	HR Partner	Subject Alternate: Manager (relative to excluded)			1 Day		Yes
		i		Action	Assign Pay Group	No	Payroll Interface Partner	Subject Alternate: Alternate Approver (relative to excluded)			1 Day		
	Configure Create Workday Account	i	Applicant does not have Workday Account? (Workday Owned)	Service	Create Workday Account	No							
		i	Worker has Workday Account?	To Do	Enable Workday Account	No	Security Partner	Subject Alternate: Security Administrator			Yesterday	Yes	
		i		Action	Create Provisioning Event	Yes	HR Partner	Subject Alternate: Manager (relative to excluded)			Yesterday	Yes	

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 sub-process for the Hire and Contract Contingent Worker business processes. You can include the following actions in the Onboarding process:

- Change Legal Name
- Change Preferred Name
- Change Contact Information
- Complete I-9 Form
- Change Benefit Elections
- Review Documents
- Complete Federal Withholding Forms
- Change Personal Information

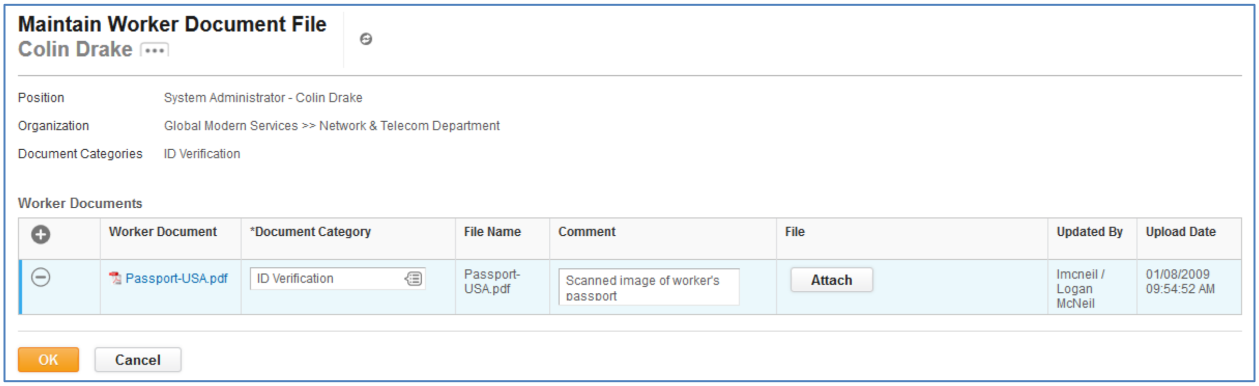
Workday delivers two step types for business processes to simplify the onboarding experience for both new hires and HR Partners:

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. 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.

WORKER DOCUMENTATION

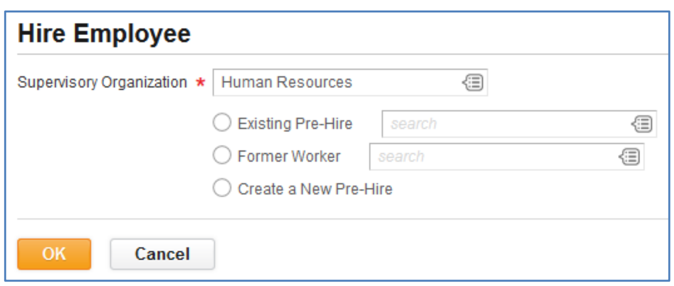
When initiating a hire, as well as other business processes, you can insert worker documentation that is pertinent to the hire process such as I-9 verification, a resume, employment application or offer letter. Documents can be reviewed and managed later using the *Maintain Worker Document File* task.



FORMER WORKERS

Workday allows you to store data for workers terminated prior to your Workday implementation. You can then use these former workers to identify rehires and populate personal and contact information.

The *Contract Contingent Worker* and *Hire Employee* tasks both allow you to rehire former workers. Users with the appropriate security permissions will be able to select a former worker during the contract or hire processes, which creates a pre-hire record and populates the Original Hire Date field with data from the former worker record.



There are several ways to load and manage former workers in the system. You may choose to use an integration to bulk load former worker data from a spreadsheet. To upload former workers manually, access the *Create Former Worker* or *Edit Former Worker* tasks. You can also attach historical documents to your former worker records using the Former Worker Documents report.

ACTIVITY 8.1: HIRE INTO WEALTH OF KNOWLEDGE

Business Case: As Logan McNeil, you will hire a new employee into the Wealth of Knowledge organization, complete all reviews and approvals as well as assign assignable roles. There will be additional steps included in this business process that should be reviewed.

Sign in as Logan McNeil

HIRE EMPLOYEE INTO WEALTH OF KNOWLEDGE

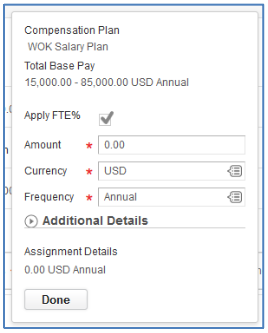
1. Navigate to the **Wealth of Knowledge** supervisory organization
2. Select *Roles* on the navigation ribbon and verify that Logan McNeil and the Chief Training Officer (Unfilled) position are assigned to the Compensation Partner and Security Partner assignable roles
3. Select *Staffing* on the navigation ribbon and locate the position **Chief Training Officer (Unfilled)**
4. Use the *Related Actions* icon off of the position (hover over the position)
5. Select the following action and task:

   Hire > Hire Employee
6. Search for existing pre-hire ***Barry Sikes***
7. Complete the hire process using **today's date** as the hire date and the **New York** location
8. Enter any additional required or missing information (leave the defaults)
9. Click **Submit** to move to the next step in the business process
10. **Skip** the *Start a Background Check* task in your Inbox

PROPOSE COMPENSATION FOR NEW HIRE

1. **Open** the *Remuneration* task presented to you after the hire, or find it in your Inbox
2. Look at the Propose Compensation template. Did the compensation components (package, grade, salary plan and allowance plan) default in the proposed Guidelines, Salary and Allowance sections?

   Note: if compensation did not default, check the eligibility rules on your compensation components
3. Find the Proposed column for **Salary**
4. Click on the icon in the Proposed Salary section. This will open assignment details:



5. Enter an amount of *78,000*
6. Click Done
7. Click **Submit** and note the next step in the business process
8. Click **Done** and sign out

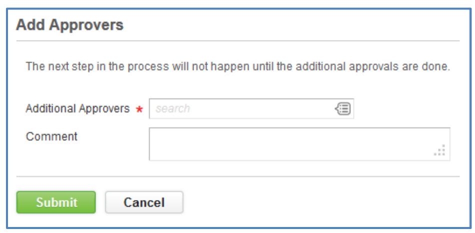
What is the next step in the business process? Why is that step going to Teresa Serrano?

____

Sign in as Teresa Serrano (tserrano)

REVIEW EMPLOYEE HIRE AND AD HOC APPROVAL

1. Click on Teresa's Inbox icon and select the *Hire: Barry Sikes* task
2. Select **Add Approvers** to initiate Ad Hoc approval
3. In the Additional Approvers prompt select **Manager's Manager -> Steve Morgan**



4. Click **Submit**

Sign in as Steve Morgan (smorgan)

1. Click on the *Hire: Barry Sikes* task in Steve's Inbox
2. Click **Approve** and sign out

Sign in as Logan McNeil

ID CHANGE

1. Click on the *ID Change: Barry Sikes* task in your Inbox
2. Click on to add a row within the National IDs field
3. Enter the following information in the corresponding field:

Field Name	Entry Value
Country	United States of America
National ID Type	Social Security Number (SSN)
Identification #	999-99-9999

4. Click **Approve** to save
5. **Review** the task *Review Pay Group Assignment* in your inbox
6. **Approve** the proposed pay group that populates

EDIT WORKDAY ACCOUNT

Before Barry Sikes can access Workday he will need a Workday system user account. This has been generated automatically, but the password will need to be changed so you can log in as Barry.

1. Navigate to the **WOK** supervisory organization and see that Barry Sikes is now listed as a member of the organization
2. Use the *Related Actions* icon off of **Barry Sikes** (hover over his name)
3. Select the following action and task:

   Security Profile > Edit Workday Account

4. Enter the following information:

Field Name	Entry Value
Password	Use class password
Require New Password at Next Sign In	Uncheck this box

5. Click **OK**
6. Click **Done**

ASSIGN ASSIGNABLE ROLE

Now that Barry Sikes is hired into the CTO position and has a Workday User Account, assign him to the assignable role of Manager for the Learning and Development department:

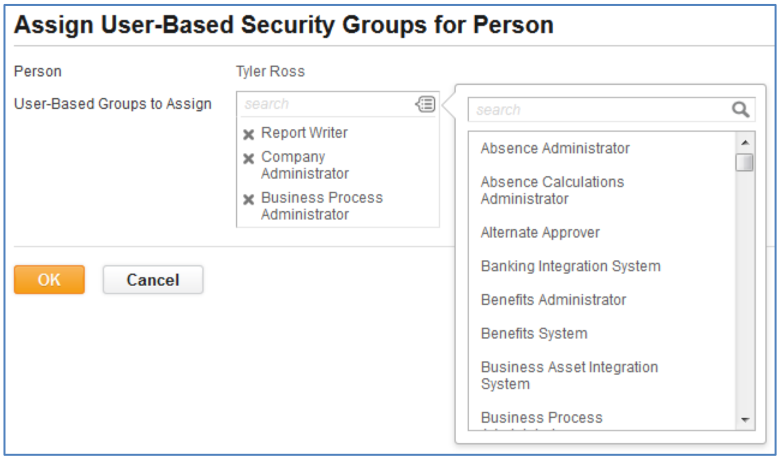
1. Navigate to the **Learning and Development Department** and click on the *Roles* tab. Confirm that Barry Sikes is now assigned the role of Compensation Partner and Security Partner for the organization, along with Logan.
2. Use the *Related Actions* icon off of **Learning and Development Department** to assign the role of Manager
3. Select the following action and task:

   Roles > Assign Roles

4. Click **OK**
5. Click on the to assign the role of **Manager** to the Chief Training Officer – **Barry Sikes**
6. Click **OK** and confirm that Barry Sikes replaced Logan as the Manager for Learning and Development
7. Click **Done**

ASSIGNING USER BASED SECURITY GROUPS

User based security groups are predefined groups that provide specific access to administrator functions. These security groups are not organization specific; typically a security administrator must assign user based security groups to a system user.



ACTIVITY 8.2: ASSIGNING USER BASED SECURITY GROUPS

Business Case: As Logan McNeil, you will assign a number of user based security groups to Barry Sikes.

Sign in as Logan McNeil

ASSIGN USER-BASED SECURITY GROUPS

1. Search for *Barry Sikes'* employee record or navigate to his organization, Wealth of Knowledge
2. Use the *Related Actions* icon off of **Barry Sikes**

    Security Profile > Assign User Based Groups

3. Enter the following security groups:

    - Benefits Administrator
    - Business Process Administrator
    - Compensation Administrator
    - Job and Position Administrator
    - Organization Administrator
    - Report Writer
    - Security Administrator
    - Talent Administrator

4. Click **OK** to save
5. Click **Done** and sign out

ACTIVITY 8.3: HIRE INTO POSITION MANAGEMENT

Business Case: As Barry Sikes, you will hire a new employee into the Learning and Development organization. Because Barry Sikes fills the assignable role of Manager for Learning and Development, he can initiate this task. Complete all review and approvals.

Sign in as Barry Sikes (bsikes) and enter answers for the password reset questions

CONFIGURE HOME LANDING PAGE

1. Click the icon on the right side of your screen to configure Barry's Home landing page
2. Under Optional Worklets, click on the to add a row
3. Add the following worklet:
   - Open Positions
4. Optional: Reorder worklets using the up and down arrows or leave them in the current order
5. Click **OK** and **Done**

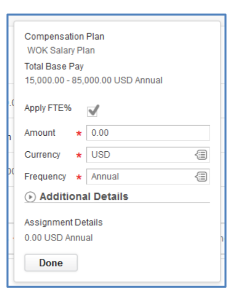
HIRE EMPLOYEE INTO LEARNING AND DEVELOPMENT

1. In the Open Positions worklet, use the *Related Actions* icon off of the **Training Director (Unfilled)** position (this position is in the Learning and Development organization)

   Hire > Hire Employee
2. Search for pre-hire, *Alejandro Rojas*
3. Complete the hire process using **today's date** as the hire date
4. Enter **New York** location
5. Enter any additional required or missing information (leave the defaults)
6. Click **Submit**

CREATE COMPENSATION FOR NEW HIRE

1. **Open** the *Remuneration* task presented to you after the hire process
2. On the Propose Compensation template, find the Proposed column for **Salary**
3. Click on the icon in the Proposed Salary section. This will open assignment details:



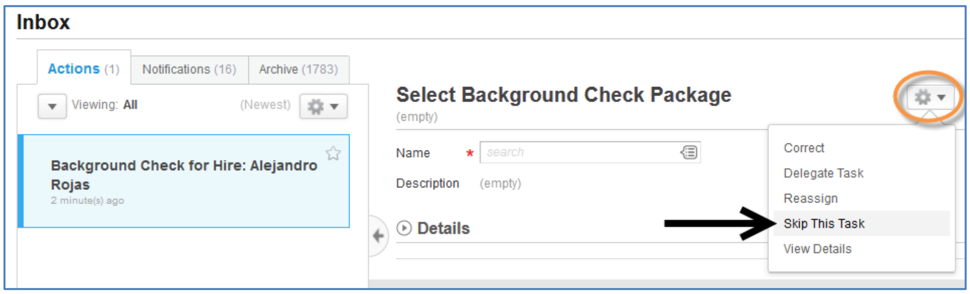
4. Enter the amount of **60,000**

5. Click Done
6. Click **Submit** to go to the next step in the business process
7. Click **Done** and sign out

Sign in as Logan McNeil (lmcneil)

REVIEW EMPLOYEE HIRE

1. Navigate to view your Inbox and **Skip** the *Background Check* task (hint: click the gear icon on the task in your Inbox)



2. Enter a skip reason and click **OK**
3. Click **Review** on the *Review Employee Hire* task that is presented to you
4. Click **Approve**
5. **Skip** the *Assign Pay Group* task

Why did Logan receive the Review Employee Hire step when we hired Alejandro, but not Barry?

____

ID CHANGE

1. **Open** the *Edit Government IDs* task
2. Click on ⊕ within the National IDs field
3. Enter the following information in the corresponding field:

Field Name	Entry Value
Country	United States of America
National ID Type	Social Security Number (SSN)
Identification #	999-99-9998

4. Select **Approve** and click **Done**

EDIT WORKDAY ACCOUNT

1. Navigate to **Learning and Development** and confirm that Alejandro Rojas is now a member of the supervisory organization.
2. Click on the *Related Actions* off of **Alejandro Rojas** and select the following action and task:

   Security Profile > Edit Workday Account

3. Enter the following information:

Field Name	Entry Value
Password	Use class password
Require New Password at Next Sign In	Uncheck this box

4. Click **OK** and **Done**

ASSIGN ROLES

Now that Alejandro Rojas is hired into the Training Director position and has a Workday User Account, assign him to the assignable role of Manager for the Course Development organization:

1. Use the *Related Actions* icon off of the **Course Development Department** to assign the role of Manager
2. Select the following action and task:

   Roles > Assign Roles

3. Click **OK**
4. Click on to assign the role of **Manager** to **Alejandro Rojas**
5. Click **OK** and confirm that Alejandro Rojas is now the Manager of Course Development
6. Click **Done** and sign out

HIRING INTO HEADCOUNT AND JOB MANAGEMENT

HEADCOUNT MANAGEMENT

Because all of the positions in a headcount group share the same set of hiring restrictions, headcount management is particularly useful for organizations that hire large numbers of workers into the same or similar jobs with the same or similar requirements and restrictions. For example, an IT organization may have a constant need for ten network engineers with the same skills to perform similar work.

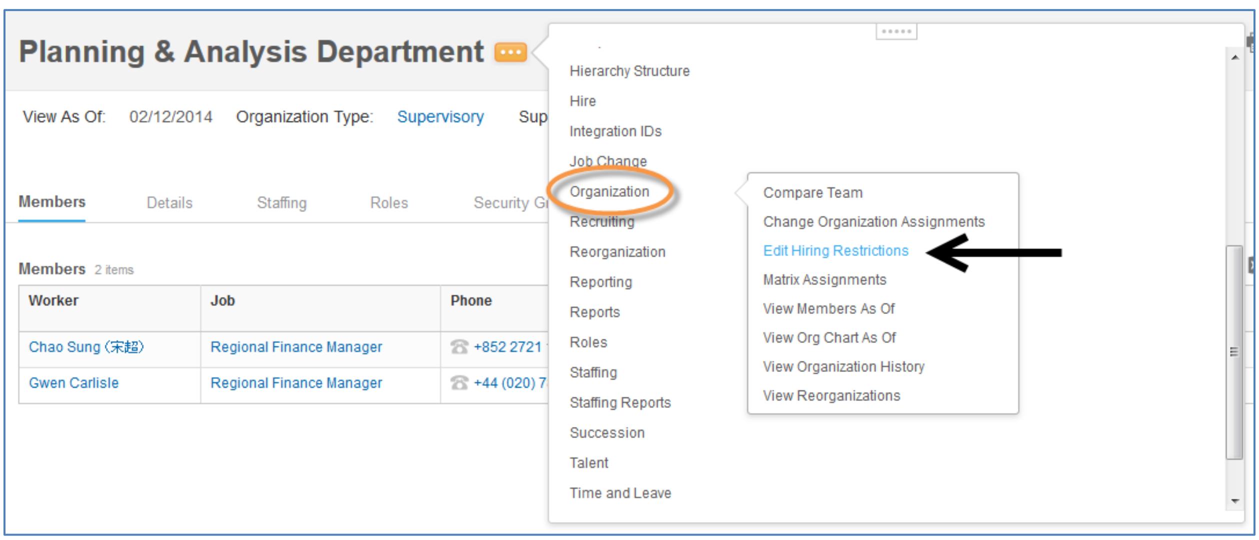
Headcount management is also appropriate for organizations that prefer to define broad categories of jobs rather than creating narrowly defined requirements for each position. For example, a food service establishment might create two headcount groups: one for front-line staff like table service staff, who work directly with customers and another for kitchen workers involved in food preparation.

Before you can hire into a supervisory organization with the staffing model of headcount management you need to do the following:

1. Create headcount group
2. Complete all approvals

JOB MANAGEMENT

With job management, you staff organizations by defining one set of hiring restrictions for the entire organization. You can restrict hiring to particular job families, job profiles, worker types or locations and specify whether workers must be full or part-time.



Because the same set of hiring restrictions apply to all of the jobs in a job management organization, and because there can be only one set of restrictions per organization, this staffing model is particularly useful for organizations that prefer to define broad job requirements.

For example, the manager of a growing team of software application specialists in a startup company needs the flexibility to hire workers with a wide range of skills, backgrounds, qualifications and work preferences and doesn't want to restrict his ability to fill jobs as the right people become available. He meets with his manager to outline his requirements and receives a verbal agreement to hire nine additional headcount, to be allocated as he sees fit.

Before you can hire into a supervisory organization with the staffing model of Job Management you need to do the following:

1. Set Hiring Restrictions
2. Complete all approvals

ACTIVITY 8.4: HIRE INTO JOB MANAGEMENT ORGANIZATIONS

Business Case: As Barry Sikes, you will hire a new employee into the Training Department and as Alejandro Rojas, you will hire a new employee into the Course Development Department. The pre-hires have already been screened and are ready to hire.

Sign in as Barry Sikes

HIRE EMPLOYEE INTO THE TRAINING ORGANIZATION

1. Navigate to the *Training* supervisory organization (TRN)
2. Use the *Related Actions* icon off of **Training Department** to hire the employee
3. Select the following action and task:

    Hire > Hire Employee

4. Use pre-hire, **Keith Leonard**
5. Click **OK**
6. Complete the hire process using **today's date** as the hire date and the **San Francisco** Location
7. Enter any additional required or missing information (leave the defaults)
8. Click **Submit**

PROPOSE COMPENSATION FOR HIRE

1. **Open** the task for *Propose Compensation* presented to you after the hire process
2. On the Propose Compensation template, find the Proposed column for **Salary**
3. Click on the icon in the Proposed Salary section. This will open assignment details.
4. Enter the amount of **42,000**
5. Click Done
6. Click **Submit** to save and **Done**

QUESTIONS

1. Why was the second step in the BP labeled Propose Compensation instead of Remuneration?

    ____

2. What step is awaiting action in this business process?

    ____

EDIT WORKDAY ACCOUNT

1. View the **Training Department** and confirm Keith Leonard is now a member of the organization
2. Use the *Related Actions* icon off of **Keith Leonard**

   Security Profile > Edit Workday Account

3. Enter the following information:

Field Name	Entry Value
Password	Use class password
Require New Password at Next Sign In	Uncheck this box

4. Click **OK**
5. Click **Done** and sign out

Sign in as Alejandro Rojas (arojas) and enter answers for the password reset questions

HIRE EMPLOYEE INTO THE COURSE DEVELOPMENT ORGANIZATION

1. Navigate to the task ***Hire Employee*** to initiate a hire into the organization Alejandro manages, Course Development
2. Use the existing pre-hire - **Brady McCormick**
3. Click **OK**
4. Complete the hire process using **today's date** as the hire date and **Reading - UK** location
5. Enter any additional required or missing information (leave the defaults)
6. Click **Submit** and **Done**

Sign in as Logan McNeil (lmcneil)

PROPOSE COMPENSATION FOR NEW HIRE

1. Click on the ***Remuneration*** task in your Inbox
2. Click on Launch to open the inbox item
3. In the Propose Compensation template, find the Proposed column for **Salary**
4. Click on the icon in the Proposed Salary section. This will open assignment details.
5. Enter the amount of **52,000** and note the currency that defaulted for his salary
6. Click Done and **Submit**
7. **Skip** the *Start a Background Check* task

REVIEW HIRE

1. Click the **Review** button for the *Review Employee Hire* task
2. Click **Approve**
3. **Skip** the *Assign Pay Group* task in your Inbox

ID CHANGE AND MAINTAIN EMPLOYEE CONTRACTS

1. **Open** the *Edit Government IDs* task (labeled *ID Change* in the Inbox)
2. Click on ⊕ within the National IDs field
3. Enter the following information in the corresponding fields:

Field Name	Entry Value
Country	United Kingdom
National ID Type	National Insurance (NI) Number
Identification #	AB 12 34 56 A

4. Click **Approve**
5. **Open** the *Maintain Employee Contract* task (labeled *Contract* in the Inbox)
6. Indicate the Status of Brady's contract is **Open**
7. Click **Submit** to save
8. **Review** the task *Review Pay Group Assignment* in your Inbox
9. **Approve** the proposed pay group that populates
10. Click **Done** and sign out

QUESTIONS

1. Did Brady McCormick receive the WOK Internet Allowance? If not, why?

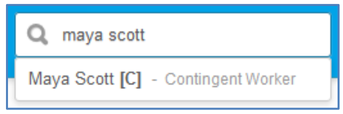
   ____

2. We saw a new step in the Hire business process to Maintain Employee Contracts. Why did we see this step with Brady and not the other hires?

   ____

CONTRACTING CONTINGENT WORKERS

Temporary workers are referred to as Contractors or Contingent Workers in Workday. The [C] notation is displayed next to the contractor's name.

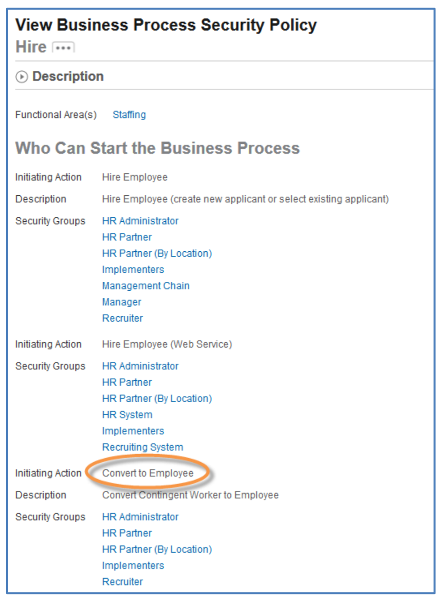


Rate and frequency of payment information can be stored as a reference only. Payment for a contractor is not sent to payroll through the payroll interface.

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 includes fields such as location, primary home address and primary work address.

CONVERT TO EMPLOYEE

The Convert to Employee task uses the Hire Employee business process; it just uses a different step to initiate the process.



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 Convert to Employee task is a streamlined way to change a contingent worker to an employee. This cuts down the number of individual steps and quickly completes a hire.

In order to use this feature, the position the contingent worker will fill needs to be created and available on the hire date, just like any other hire. If the worker is being hired in to a headcount group, then there must be an available headcount within the group.

ACTIVITY 8.5: CONTRACT A CONTINGENT WORKER

Business Case: Barry Sikes will contract a contingent worker to work for a month.

Sign in as Barry Sikes (bsikes)

INITIATE CONTRACT

1. Navigate to the *Training* supervisory organization
2. Click the *Related Actions* icon off of the **Training Department**

   Hire > Contract Contingent Worker

3. Select the existing pre-hire **Brad Archer**
4. Click **OK**

Field Name	Entry Value
Contract Start Date	Today's date
Reason	Select any reason you would like
Contingent Worker Type	Contractor
Job Profile	Leave the defaulted value
Time Type	Full Time
Location	San Francisco
Contract End Date	One month from today
Contract Pay Rate	75.00
Currency	USD
Frequency	Hourly
Assignment Details	Enter any information you would like

5. Click **Submit** and sign out

Sign in as Logan McNeil (lmcneil)

1. Select the *Contract: Brad Archer* task in your Inbox
2. Review the information
3. Click **Approve**

ACTIVITY 8.6: CONVERT A CONTINGENT WORKER

Business Case: Logan McNeil will convert a contingent worker to an employee

Sign in as Logan McNeil (lmcneil)

CONVERT A CONTINGENT WORKER

1. Navigate to contingent worker *Abby Brennan*
2. Find the *Related Actions* icon off of **Abby Brennan [C]**:

   Job Change > Convert to Employee
3. Select **Training Department** for the Supervisory Organization
4. Click **OK**
5. Use **today's date** as the hire date (we will change her contract end date in the next step to ensure Abby has only one worker record in the system) and enter the following information:

Field Name	Entry Value
• **Contract End Date**	Yesterday
• **Reason**	Voluntary > Contract Ended
Job Details	
• **Employee Type**	Regular
• **Job Profile**	Instructor
• **Time Type**	Full Time
• **Location**	Reading - UK

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

Sign in as Barry Sikes (bsikes)

1. Click on the *Hire Compensation: Abby Brennan* task in your Inbox
2. Click on Launch to open the task
3. In the Propose Compensation template, find the Proposed column for **Salary**
4. Click on the icon in the Proposed Salary section. This will open assignment details.
5. Enter the amount of **52,000**
6. Click Done
7. Click **Submit** and sign out

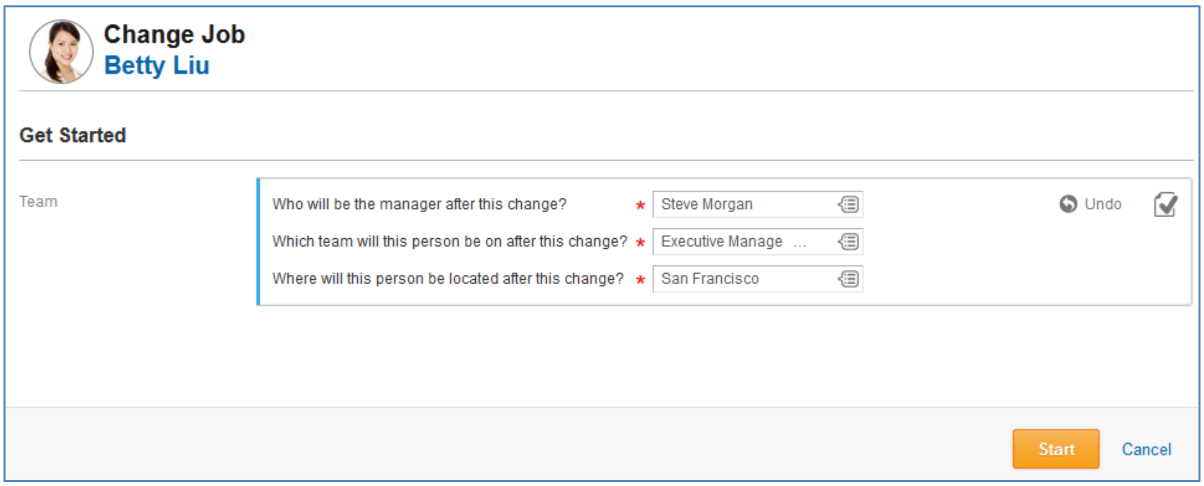
STAFFING MOVEMENT

The Change Job process supports promotions, demotions, transfers, lateral moves as well as changes to position data and location. 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.

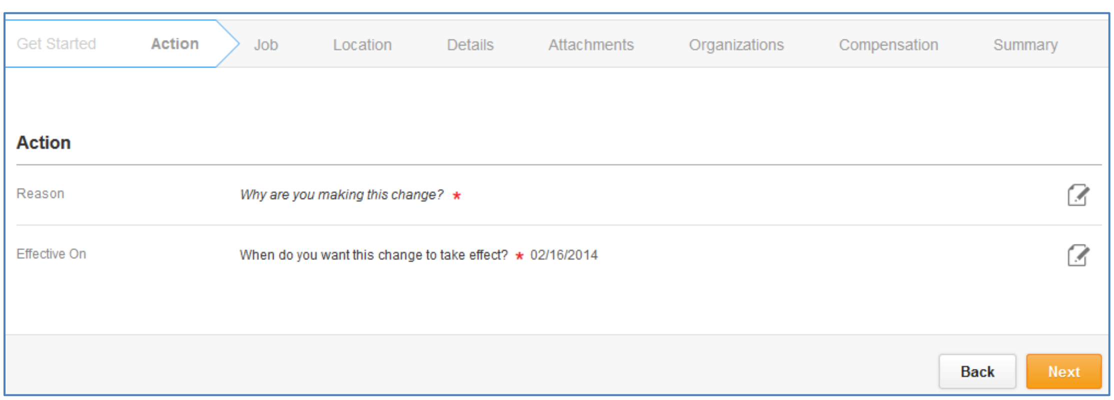
The Change Job process asks questions that will guide managers through job change details in a familiar language thus increasing their success rate as well as reducing the need for HR support.

CHANGE JOB SECTIONS

When initiating a Change Job business process, you will first be taken to a 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 Get Started page, you will use the guided editor, which takes you through each section of the job change one at a time so that you can see all relevant fields and complete them in smaller chunks.



All of the sections listed in the above screenshot (Job through Compensation) are controlled by domain security so that you can tailor the process for different roles in your organization.

At the tenant level, you can determine how you would like Workday to handle the position that a worker is in during a staffing movement when using headcount or job management. The Change Job Use Default Orgs for Job and Headcount Management in Edit Tenant Setup – HCM is a check box that keeps positions in their current organizations when workers move to a new organization with the same staffing model. Organization assignments default from the worker's new supervisory organization, but you need to reassign roles to the worker's new position. If you clear this check box, positions always move with workers to their new organization and workers keep their current role assignments.

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.

CHANGE JOB SECURITY

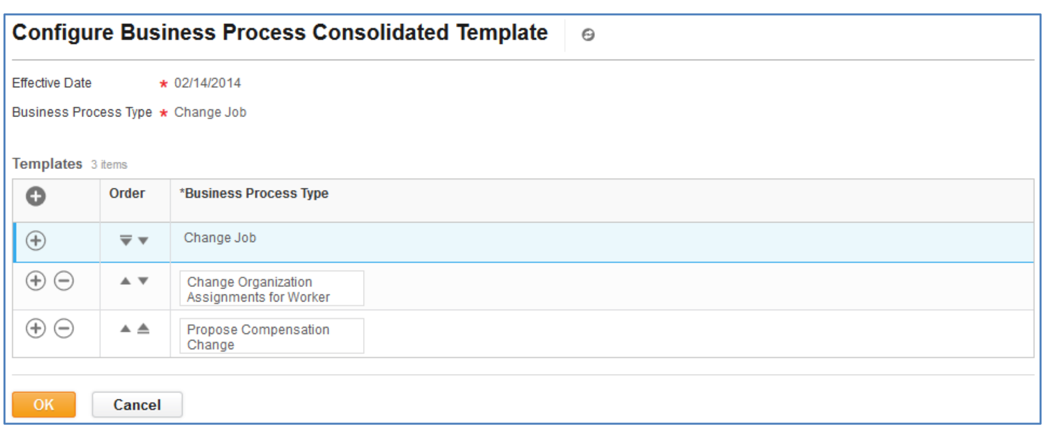
The Change Job process has multiple content areas with separate security domains, giving you field-level control over what managers and administrators can view or modify. Additional security domains provide access to fields in the Change Organization Assignments and Propose Compensation Change processes on consolidated templates.

Coordinate your business process and domain security policies to ensure that security groups who can access business process actions also can access the data.

CONSOLIDATED TEMPLATE

You can optionally consolidate the change job process with the change organization assignments and propose compensation change sub-processes within the guided editor to streamline workflow from initiation to approval. The consolidated processes start at the same time, so that managers can complete all changes on one page and administrators can review and approve the process details together.

Change Job must be first in the process order on the consolidated template, followed by one or both sub-processes. If you have compensation eligibility rules based on organizations, the required process order is Change Job, Change Organization Assignments and then Propose Compensation Change.



If you limit the fields that a manager may enter on the Change Job consolidated page, then you must include a Review Change Job step in your business process so that an administrator can complete fields that managers cannot access.

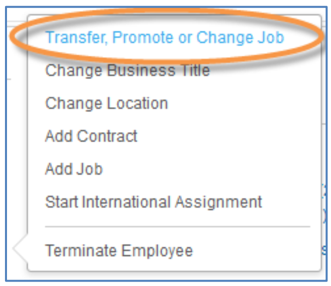
With certain initiating actions such as Change Location, you may not want to include Compensation details in your consolidated template. The task *Configure Consolidated Template Override* enables you to override the default consolidated template for the Change Job business process by removing Propose Compensation Change business process step.

FINDING THE TASK

Search bar

Sitemap in the Main Menu

Related Action list off the employee's name



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: this initiating action will only show the necessary fields for changing a location

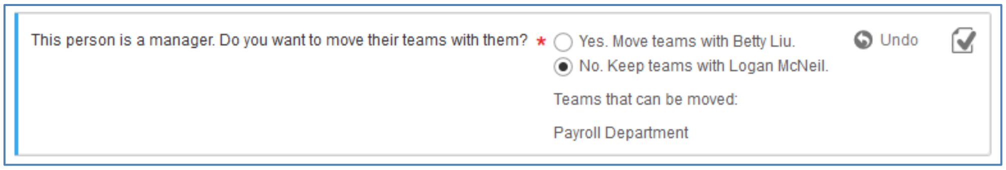
Change Contractor Details: this initiating action will only show the necessary fields for changing a contingent worker contract

Request Transfer: Managers need to be able to "pull" an employee into their organization and this initiating action will be allowed when the security group initiating the action does not have direct access to the worker (if they have direct access they should be using the Change Job business process).

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 that are eligible to move.
- Any teams that are ineligible due to a future-dated change.
- The person who will manage the teams if you don't 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 sub-process for each eligible team with its own workflow and approvals. You can cancel, rescind or correct the individual Assign Superior sub-processes as needed.

STAFFING REPORTS

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

Report	Description
Open Positions Summary	View a staffing summary for a specific supervisory organization that uses position management as the staffing model. Summary includes the number of current workers, pending offers, future hires and Q1 to Q4 totals for a specific organization and the next level down in the organization hierarchy, which is an accumulation of all the organizations below it. You can drill down to see the details for each number.
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 Audit 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 and this report can be copy and modified.
Turnover Analysis	Presents staffing turnover information in chart format. This report can be copied and modified.

ACTIVITY 8.7: CHANGE JOB

Business Case: You will transfer an employee to a different manager and position.

Sign in as Max Schneider (mschneider), the current manager

JOB CHANGE

1. Select your **My Team** worklet
2. Click on the *Related Actions* icon next to **Kelly Brown's** name (hover over her name)
3. Select the following action and task:

   Job Change > Transfer, Promote or Change Job

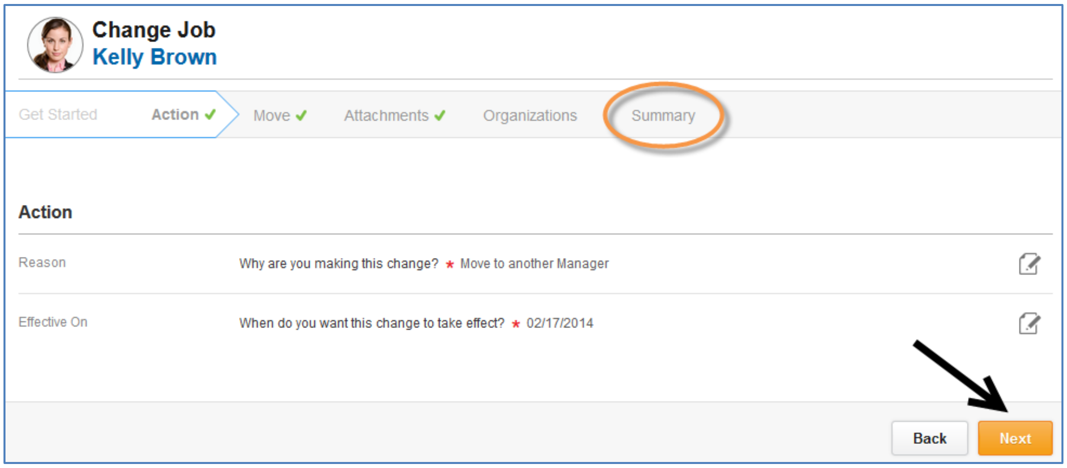
4. On the Get Started page, answer the following questions (you can close the window that pops up with the Job Change Video Guide):

Field Name	Entry Value
Who will be the manager after this change?	Barry Sikes
Which team will this person be on after this change?	Learning and Development
Where will this person be located after this change?	New York

5. Click **Start** to take you to the Change Job guided editor
6. On the Action tab, answer the following questions:

Field Name	Entry Value
Why are you making this change?	Move to another manager
When do you want this change to take effect?	(Note the date that have defaulted in, but do not change it. We will discuss this later.)

7. To advance through the guided editor, you can use the Next button. However, since you will not be changing any further information about Kelly Brown, you can click on the **Summary** tab at the end of the guided editor. This will take you directly to a page which summarizes all the information entered regarding the staffing movement.

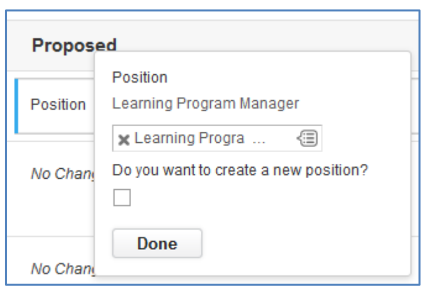


8. Click **Submit** and sign out

Sign in as Barry Sikes (bsikes), the receiving manager

REVIEW TRANSFER (RECEIVING MANAGER)

1. Look for a task in your Inbox
2. Select the *Transfer: Kelly Brown* task
3. Click on Launch to view the task
4. In the proposed column for Job select the new **Position** for Kelly Brown, **Learning Program Manager**



5. Click **Done** and click ***out*** of the Position field to allow the entire page to update according to the new position information you included
6. Scroll down to enter compensation information
7. In the **Compensation** section find the Proposed column for **Salary**
8. Click on the icon in the Proposed Salary section for the WOK Salary Plan assignment details
9. Enter the amount of **$83,000**
10. Click Done
11. Click **Approve** and sign out

Sign in as Logan McNeil (lmcneil)

REVIEW TRANSFER (HR PARTNER)

1. Look for a task in your Inbox
2. Select the *Transfer: Kelly Brown* task
3. Click on Launch to view the task
4. Click **Approve** and sign out

Sign in as Barry Sikes

REVIEW COMPENSATION CHANGE (COMPENSATION PARTNER)

1. Look for a task in your Inbox
2. Select the *Compensation Change: Kelly Brown* task
3. Click **Approve** and sign out (you can ignore any other steps in the business process)

QUESTIONS

1. What is the overall status of the process?

   ____

2. What date defaulted in for this job change and why?

   ____

3. What is Kelly Brown's position and supervisory organization today and what will it be as of the next pay period?

   ____

4. Why did the Review Compensation step go to Barry Sikes?

   ____

5. Other than Approve or Deny what could you do when you receive a Review task?

   ____

ACTIVITY 8.8: TRANSFER A MANAGER

Business Case: You will transfer a manager and move the manager's team along with him.

Sign in as Logan McNeil (lmcneil)

JOB CHANGE

1. Search for *Alejandro Rojas* and click on his worker record
2. Click on the *Related Actions* icon next to **Alejandro Rojas**' name
3. Select the following action and task:

   Job Change > Transfer, Promote or Change Job

4. On the Get Started page, answer the following questions (you can close the window that pops up with the Job Change Video Guide):

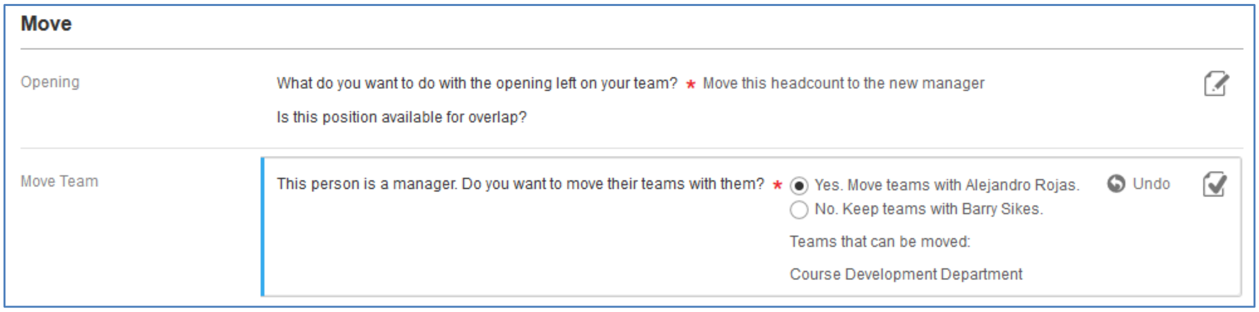
Field Name	Entry Value
Who will be the manager after this change?	Logan McNeil
Which team will this person be on after this change?	Wealth of Knowledge
Where will this person be located after this change?	New York

5. Click **Start**
6. On the **Action** tab, answer the following questions:

Field Name	Entry Value
Why are you making this change?	Move to another manager
When do you want this change to take effect?	Tomorrow's date

7. Click the **Next** button to advance to the **Move** section and enter the following information:

Field Name	Entry Value
What do you want to do with the opening left on your team?	Move this headcount to the new manager
This person is a manager. Do you want to move their teams with them?	Yes. Move teams with Alejandro Rojas



8. Click on the **Summary** page within the guided editor to review the information you inputted
9. Click **Submit** and sign out

Sign in as Barry Sikes (bsikes)

1. Navigate to the *Compensation Change* task in Barry's Inbox
2. Because there were no proposed compensation changes for Alejandro, click **Approve**
3. Sign out

Sign in as Logan McNeil (lmcneil)

1. Click on the *Assign Organization Roles for Alejandro Rojas* task in Logan's Inbox
2. Click **Submit** to keep Alejandro as the role of Manager for Course Development
3. Navigate to **Wealth of Knowledge** and select the following action and task:

   Organization > View Org Chart As Of

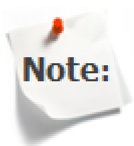
4. Select **tomorrow's** date to view your new Wealth of Knowledge organization with the Course Development department reporting directly to Wealth of Knowledge
5. Sign out

TERMINATION

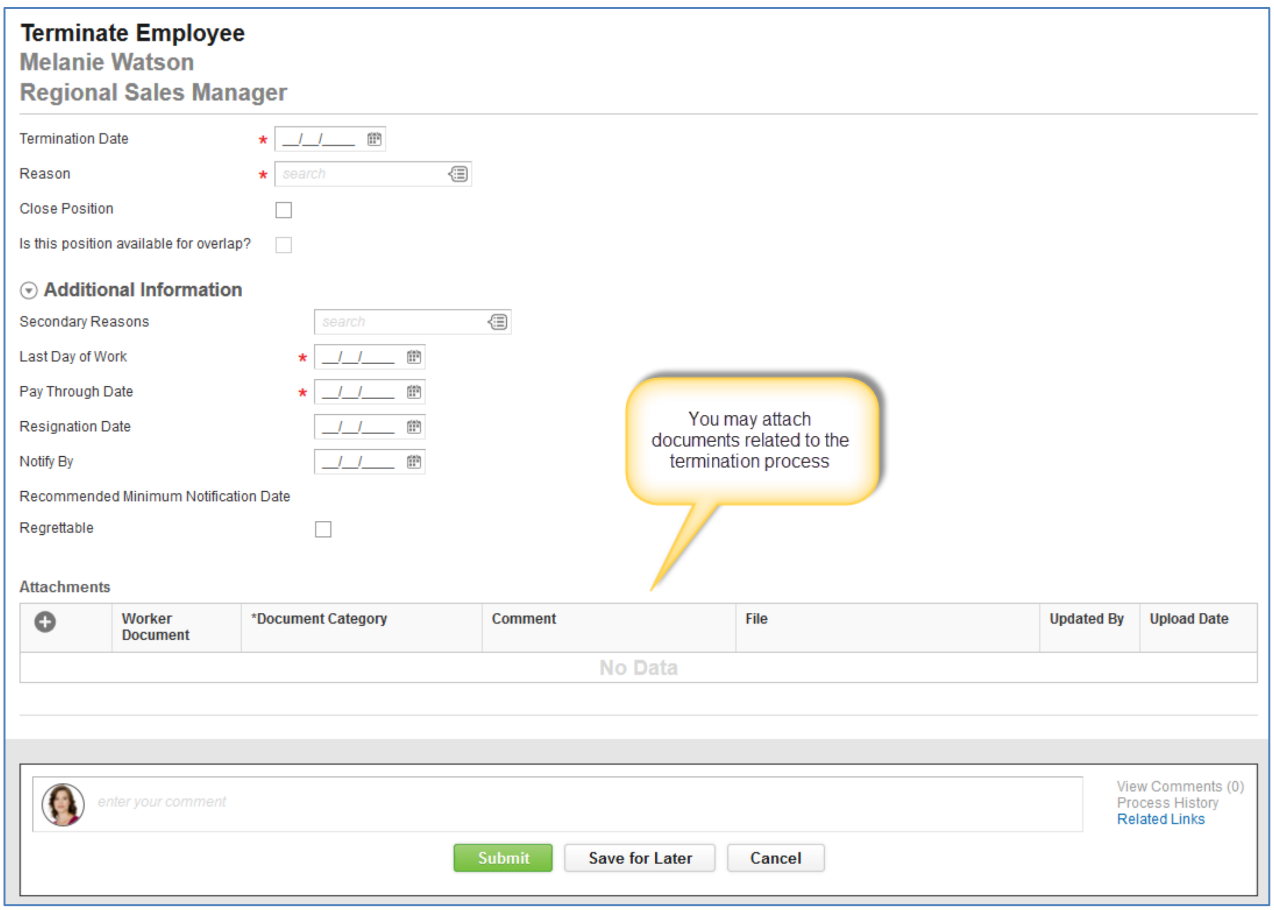
Termination ends the active working relationship between the enterprise and the employee and can be initiated by using the related actions icon off of the employee's name.

Some things to remember about terminations:

- Termination is a configurable event.
- Termination is complete in the system at midnight on the day after the termination.
- You can indicate if the employee is not eligible for rehire.
- You can indicate that the termination was regrettable.
- Exit interview can be documented.

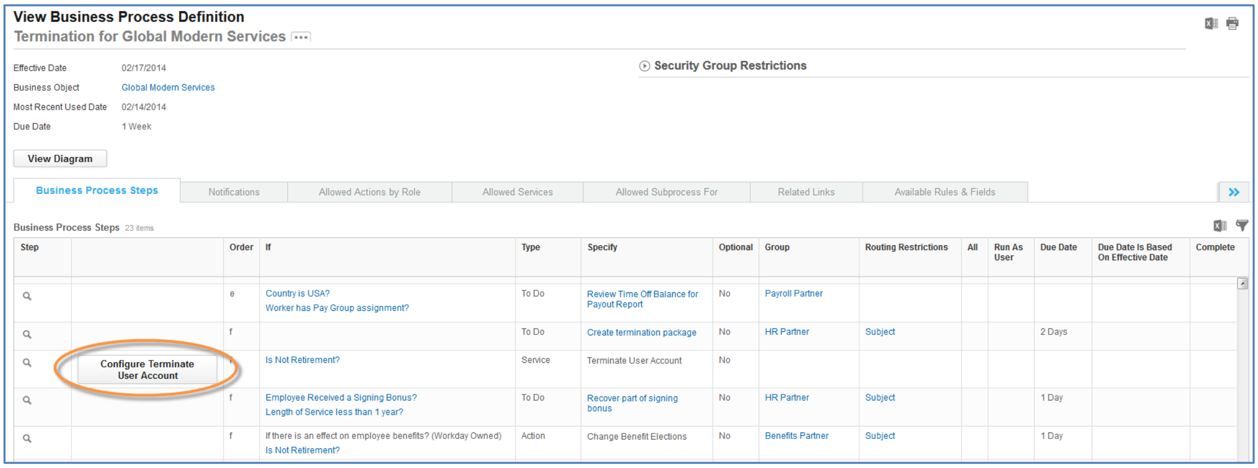


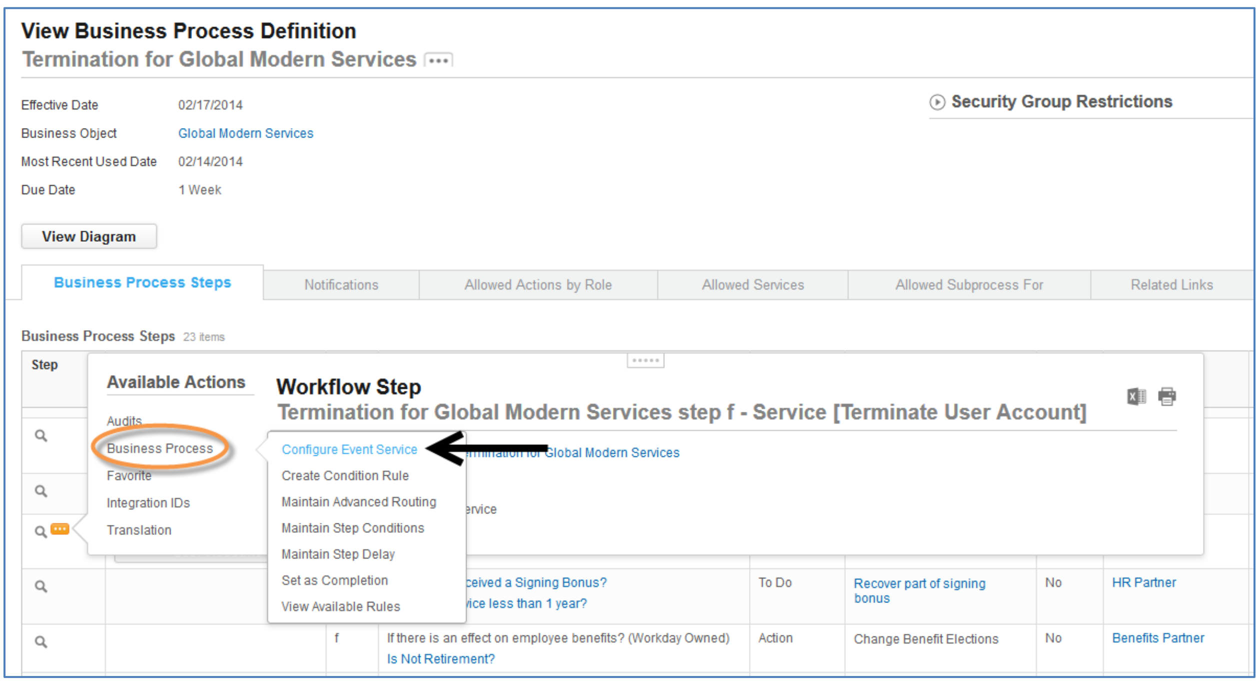
You have the ability to deny access to the Workday system for a worker. That activity is separate from the Termination event.



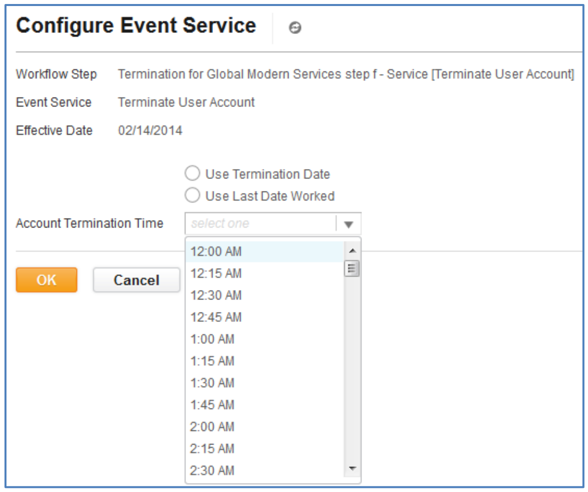
AUTOMATING WORKDAY ACCOUNT TERMINATION

The Termination business process can include the automatic disabling of a Workday account by including the Terminate User Account step in the business process. Once the step has been added to the business process it will need to be configured.



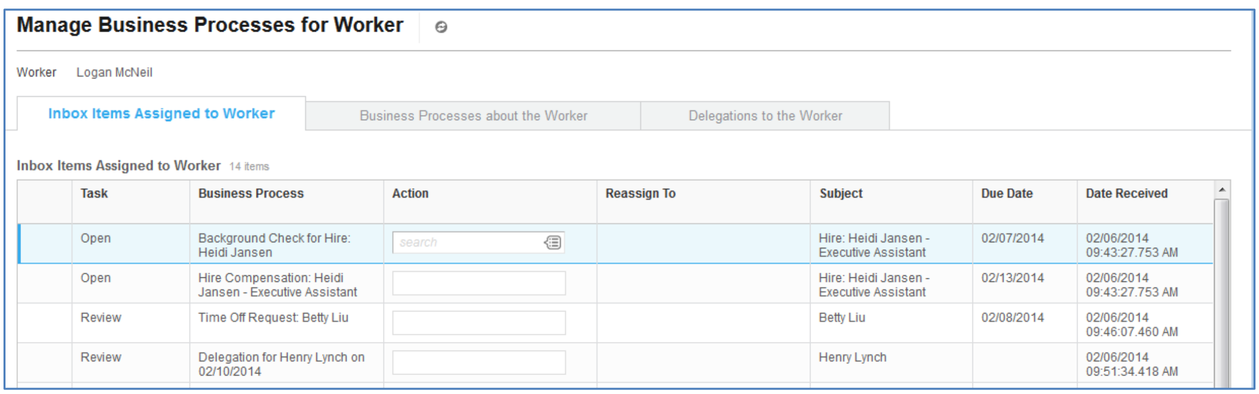


You have the option to configure the step to terminate the user account using the termination date or the last date worked as well as the time of termination.



MANAGE BUSINESS PROCESSES FOR WORKER

Including the Manage Business Processes for Worker step in your terminate business process will allow you to ensure that business processes don't 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.



CORRECT TERMINATION

The Termination business process can be corrected if information that was entered needs to be changed. This avoids the need to rescind a termination and then reenter all the information a second time.

Examples of data that can be corrected include the ability to change termination dates and reopen a position that was closed as part of the termination event.

ACTIVITY 8.9: TERMINATION

Business Case: You will process the termination for Abby Brennan in the Training supervisory organization. Abby is leaving Wealth of Knowledge to take another position.

Sign in as the Manager, Barry Sikes (bsikes)

INITIATE TERMINATION

1. In the **My Team** worklet, find the *Related Actions* icon off of employee **Abby Brennan**

   Job Change > Terminate Employee

2. Enter the following information:

Field Name	Entry Value
Termination Date	Tomorrow
Reason	Voluntary > Other Employment

3. Click **Submit** and **Done**

Sign in as the HR Partner, Logan McNeil (lmcneil)

REVIEW TERMINATE

1. Navigate to your Inbox and select the task *Terminate: Abby Brennan*
2. Click **Approve** to save

TO DO TASK

1. Click the **To Do** button for the *Exit Interview* task
2. Click Create Exit Interview to populate the exit interview form for Abby Brennan
3. Search for **Abby Brennan** in the Employee Prompt
4. Click **OK**
5. Enter the following information:

Field Name	Entry Value
Exit Interview Date	Today's Date
Interviewed By	Leave the default value
Reason for Leaving	Enter a short reason for leaving
New Employer	Unknown

Field Name	Entry Value
Exit Interview Comments	Enter a comment
Property to be Returned	Turn on check box
Return by Date	Tomorrow's date
Property Comments	Enter your comments

6. Click **OK** to save
7. Click **Done**
8. Note that the *Exit Interview* task is still in your Inbox. Click **Submit** to complete the To Do step.

   You can ignore any other tasks in your inbox

QUESTIONS

1. What step is awaiting action?

   ____

2. What is the overall status?

   ____

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.

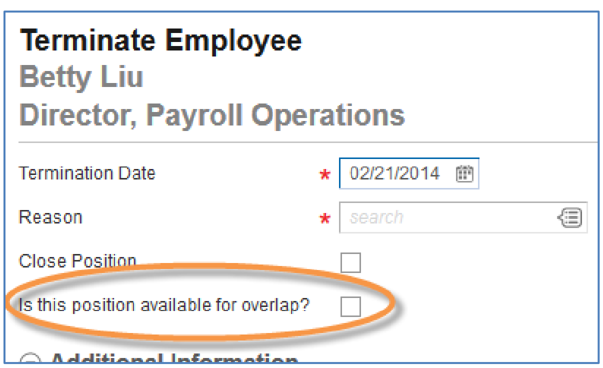
To take advantage of job overlap functionality, this must first be enabled in your tenant under the Edit Tenant Setup – HCM task. Once this is enabled, you will have the ability to hire, contract, add job, change job or start international assignment for a worker into an already-filled position as long 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 isn't overlapped by another position
- The position doesn't overlap another position

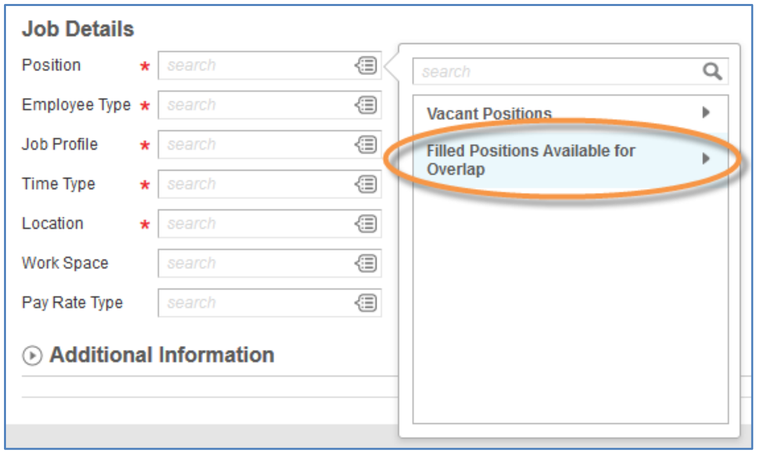
When dealing with overlap workers in workday, the following terminology applies:

- 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 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

Overlap workers take over all security roles associated with the position restrictions (including the manager role) during their tenure in an overlap position. They can delegate access to principal workers through business process delegation, but otherwise the role assignments aren't shared.

ORGANIZATION ASSIGNMENTS

With job overlap, Workday doesn't 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 IMPLICATIONS

The following reports count only one position when an overlap exists between two workers:

- FTE report
- Headcount and Open Position Analysis
- Headcount Report
- Open Position Summary

ACTIVITY 8.10: JOB OVERLAP

Business Case: Barry Sikes will be leaving Wealth of Knowledge in three week's time. In the interim, you would like to bring in his replacement to be trained. You will terminate Barry and hire his replacement into the Chief Training Officer position.

Sign in as Barry's manager, Logan McNeil (lmcneil)

PROCESS TERMINATION FOR PRIMARY WORKER

1. Select the **My Team** worklet on the Home landing page
2. Click on the *Related Action* icon off of **Barry Sikes**

   Job Change > Terminate Employee

3. Enter the following information:

Field Name	Entry Value
Termination Date	Three weeks from today
Reason	Select any reason you would like
Is this position available for overlap?	Check the box

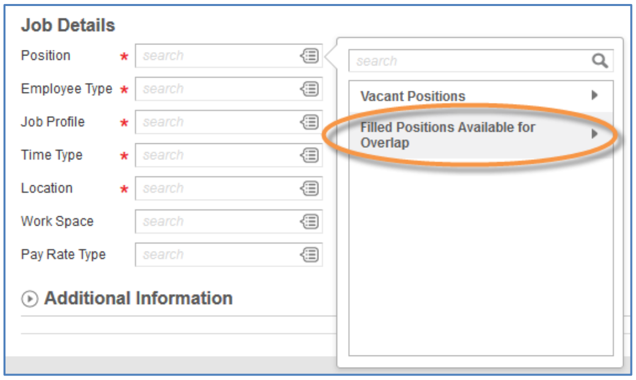
4. Click **Submit**
5. Open the *Exit Interview* **To Do** and click **Submit** (we will not complete the exit interview for Barry)
6. **Open** the *Assign Roles to Worker* task
7. Click **Submit** to ensure Barry's position, Chief Training Officer, keeps its current assignable roles
8. Click **Done** (you can ignore any remaining inbox items)

HIRE OVERLAP WORKER

1. Navigate to the *WOK* supervisory organization
2. Use the *Related Actions* icon off of **Wealth of Knowledge** to hire the overlap worker into the organization Barry is leaving
3. Select the following action and task:

   Hire > Hire Employee

4. Use existing pre-hire **Ashley Bingham**
5. Click **OK**
6. Enter **tomorrow's date** as the hire date
7. Click on the prompt for the **Position** field
8. Using the *Filled Positions Available for Overlap* folder, select **Chief Training Officer**



9. Enter a Time Type of your choosing
10. Enter a Location of **New York**
11. Click **Submit**
12. **Skip** the *Start a Background Check* task

CREATE COMPENSATION FOR NEW HIRE

1. **Open** the *Remuneration* task presented to you after the hire process
2. In the Propose Compensation template, find the Proposed column for **Salary**
3. Click on the icon in the Proposed Salary section. This will open assignment details.
4. Enter the amount of **$80,000**
5. Click Done
6. Click **Submit** to save
7. Note the next step in the business process and sign out

Sign in as Teresa Serrano (tserrano)

REVIEW EMPLOYEE HIRE

1. Navigate to your Inbox and click the on the *Hire: Ashley Bingham* task
2. Select **Approve** and sign out

Sign in as Logan McNeil (lmcneil)

ID CHANGE

1. In your Inbox, click on the *ID Change: Ashley Bingham* task
2. Click on within the National IDs field
3. Enter the following information in the corresponding field:

Field Name	Entry Value
Country	United States of America
National ID Type	Social Security Number (SSN)
Identification #	999-99-9997

4. Select **Approve** to save
5. **Review** the task *Review Pay Group Assignment* in your Inbox
6. **Approve** the proposed pay group that populates
7. Click **OK** to save
8. Click **Done**
9. Navigate to **WOK**
10. Using the *Related Action* icon go to:

    Supervisory Organization -> Supervisory Organization View As Of

11. Enter an effective date of **tomorrow**
12. View both Ashley Bingham and Barry Sikes in the Members tab of Wealth of Knowledge and note Barry's position vacate date as well as Ashley's overlap status

EVENT MANAGEMENT

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.

Action	When Action is Available	Examples 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
Request Delegation Change	Task must be "In Progress"	Whoever is assigned a task can request a task be delegated
Correct	Task can be "Successfully Completed" or "In Progress"	Business Process Administrator HR Partner HCM Corp Partner Implementer
Rescind	Task must be "Successfully Completed"	Business Process Administrator
Cancel	Task must be "In Progress"	Process Initiator

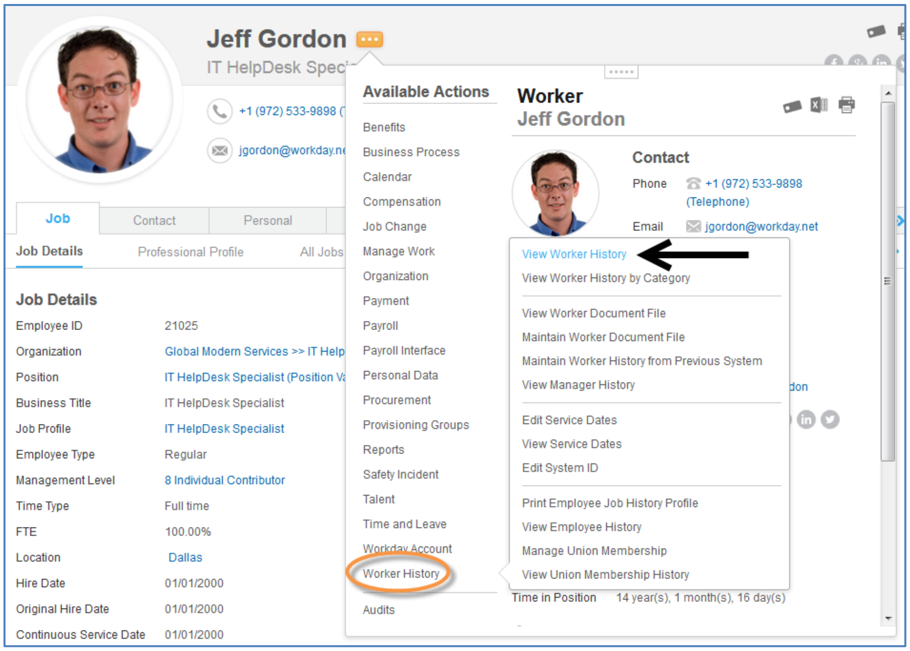
FINDING AN EVENT

In order to make changes to an event, such as rescinding the event or correcting a hire, first you need to locate the 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 three 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 past 30 days or during a particular time period
- Process Status worklet, if configured on a landing page
- View a worker's history by using the *Related Actions* off of the Worker

  Worker History > View Worker History

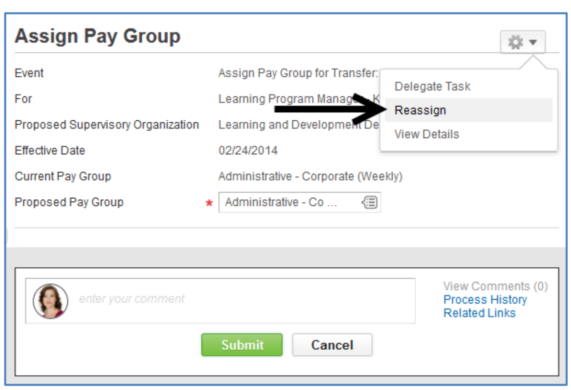


TASK REASSIGNMENT AND REQUEST REASSIGNMENT

Workday allows the ability to reassign tasks; this is a task called Reassign Tasks. 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 I need to complete for my direct reports. If I'm moved to a new position with new direct reports, the tasks can be reassigned to the person who will be filling my previous position.

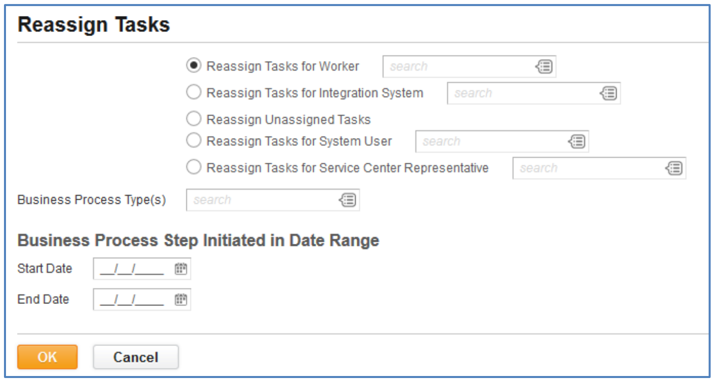
When you use the Reassign Task option, you are really requesting a reassignment. Your request will be routed for approval to the security groups listed in the business process security policy for that business process. The Business Process Administrator will also have the ability to approve the reassignment.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

This option is found using the gear icon off the task in your Inbox.

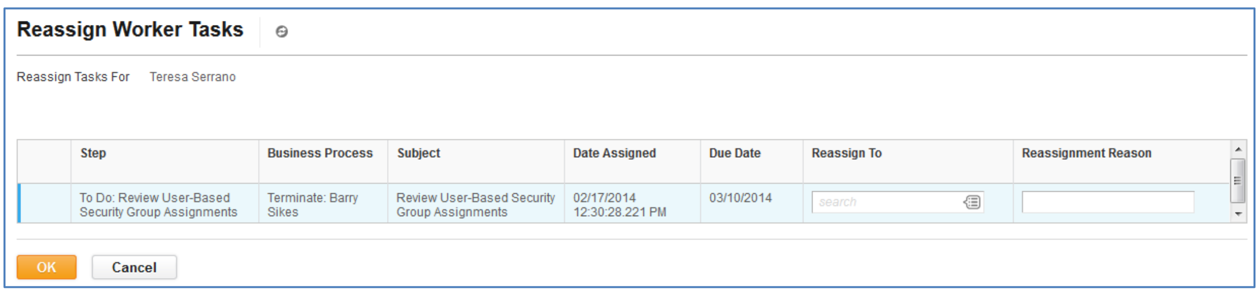


Tasks that have been assigned to someone's Inbox will remain there until they are completed, reassigned or delegated.

Another option is for the Business Process Administrator to reassign tasks from one person to another. 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.



Click OK to run the report and see a list of current Inbox tasks for the worker. Enter to whom the task should be reassigned and a reason for the reassignment. The task will then be permanently removed from one Inbox and moved to the other.

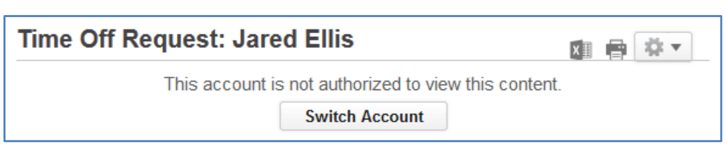


REQUEST DELEGATION CHANGE

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.

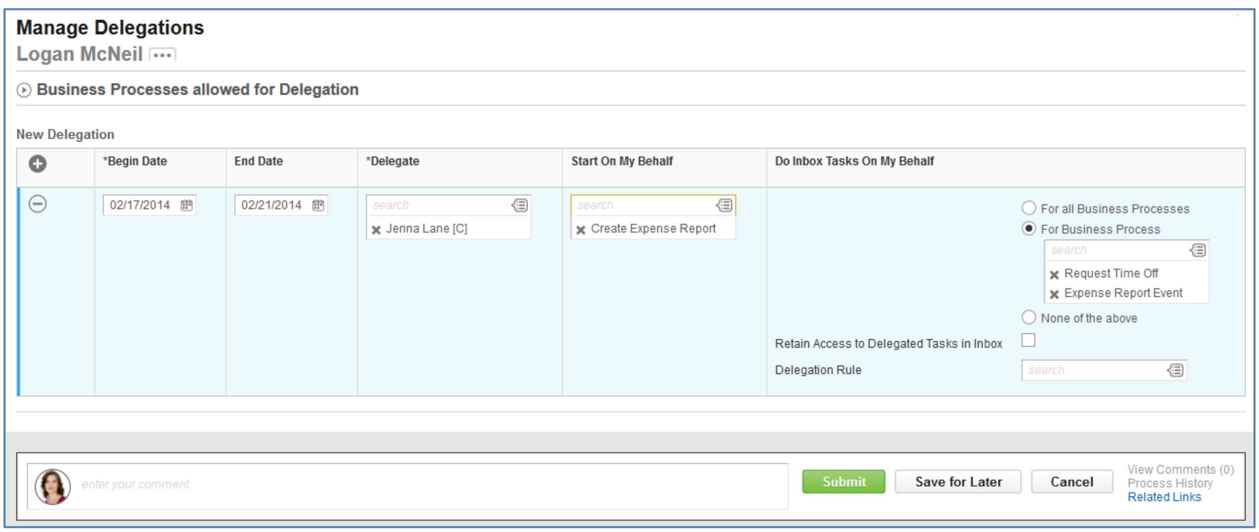


This will take you to a Delegation landing page and your application header will indicate you are acting on behalf of another user. The Delegation landing page will only display the tasks delegated to you as well as any Delegated Actions you can initiate on behalf of this user.

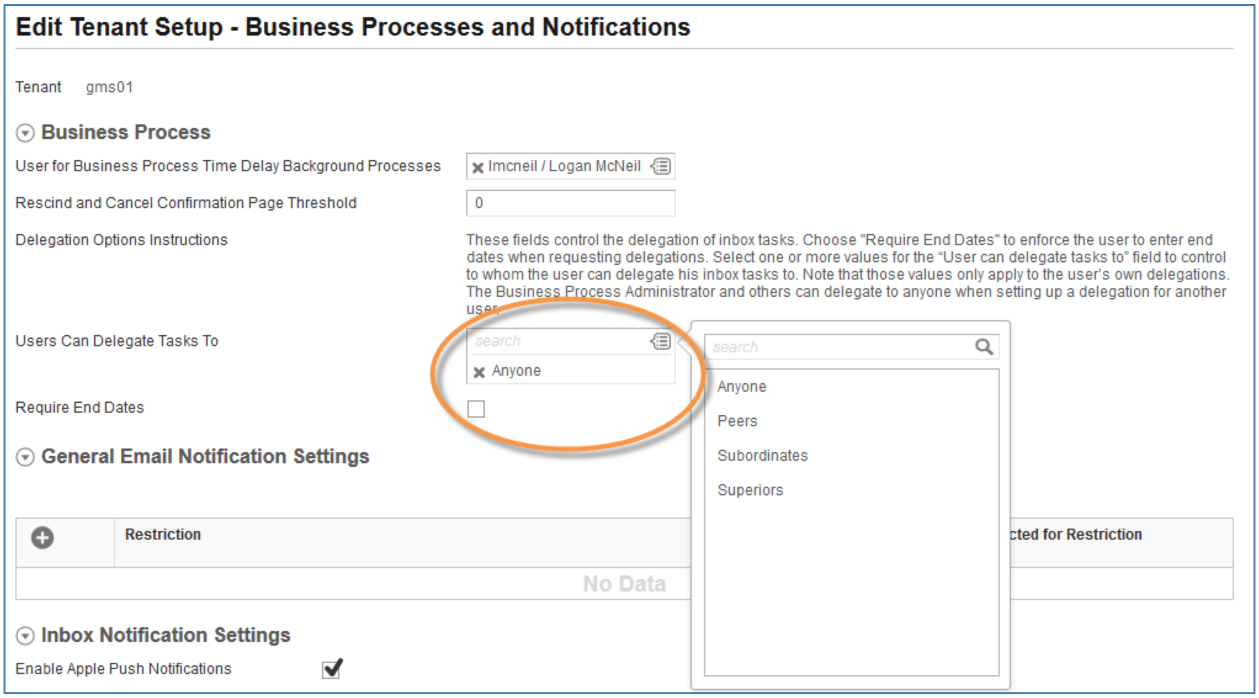
Delegation of one worker's tasks to another person can be done by anyone in the Workday system. This is a great reason to include a review or approval step in the Request Delegation Change business process. In addition, within Configurable Security you have the option to specify which business process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

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

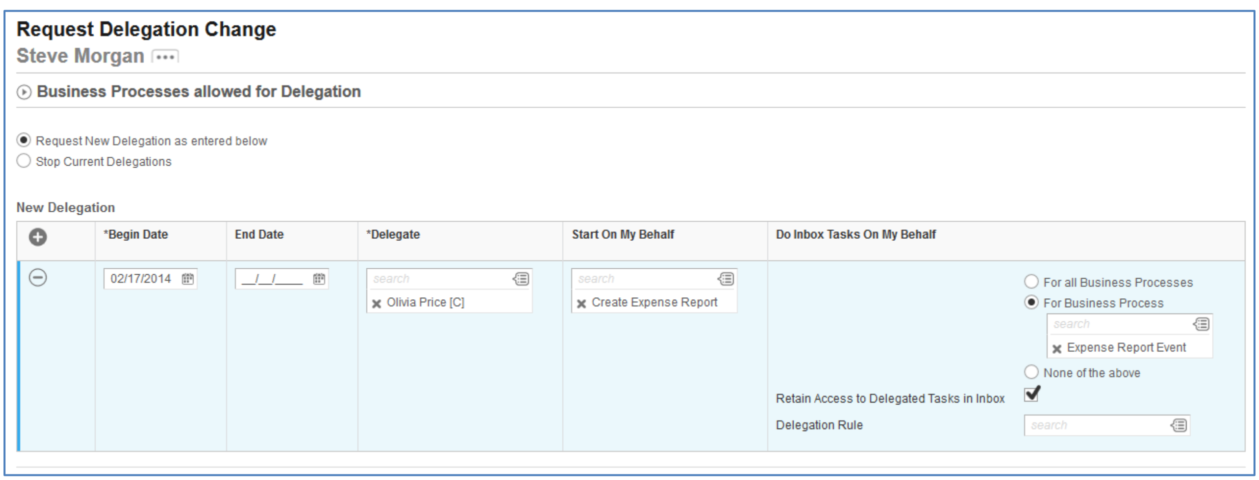
- Begin Date
- End Date: optional depending on tenant set up
- Delegate: who are you delegating to
- Retain Access to Delegated Tasks: tasks will still show up in your Inbox and be removed as they are completed
- Select which business processes you would like to delegate



The Edit Tenant Setup - Business Processes and Notifications page allows you to determine to whom users can delegate a task, as well as if an end date is required for all delegations:

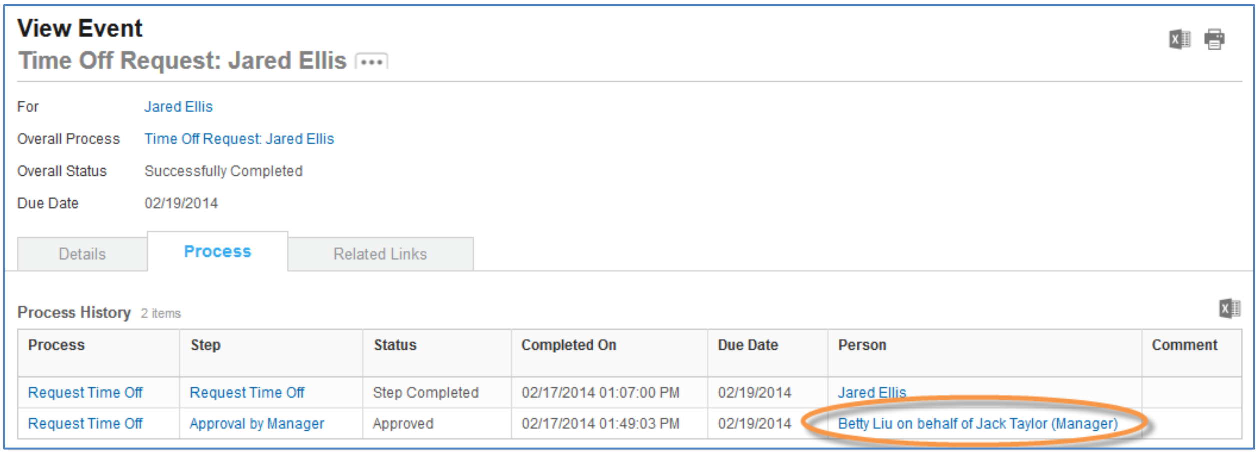


In addition to a worker being able to delegate her tasks to another worker, a business process administrator can also delegate one or more business processes on someone else's behalf. Use the *Manage Delegation Settings* task to change existing or set up new delegations. A few examples of when you might use this could be when managing an unexpected employee absence or 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:



You also have the ability to delegate the initiation of certain business processes, including:

- Change Organization Assignments for Worker
- Close Job Requisition
- Contract Contingent Worker
- Correct Time Off
- Create Job Requisition
- Create Position
- Edit Job Requisition
- Edit Position
- End Contingent Worker Contract
- Hire Employee
- Promote Employee
- Request Time Off
- Terminate Employee
- Transfer Contingent Worker
- Transfer Employee
- Expense Report Event
- Request Compensation Change
- Request One Time Payment

ACTIVITY 8.11: REQUEST DELEGATION

Business Case: You will sign in as Logan and delegate certain tasks to Alejandro Rojas

Sign in as Logan McNeil (lmcneil)

MY DELEGATIONS

1. Navigate to view your Inbox
2. Click on the gear icon in your activity feed
3. Click on **My Delegations** at the bottom of the menu
4. Click **Manage Delegations**
5. Add a new row and enter the following information:

Field Name	Entry Value
Begin Date	Today's Date
End Date	1 week from today
Delegate	Alejandro Rojas
Start On My Behalf	Create Position
Do Inbox Tasks On My Behalf	For all Business Processes
Retain Access to Delegated Tasks in Inbox	Check the box

6. Click **Submit** and sign out

Sign in as Steve Morgan (smorgan)

APPROVAL OF DELEGATION

1. Select the *Delegation for Logan McNeil* task in your Inbox
2. Click **Approve**

Sign in as Alejandro Rojas (arojas)

DELEGATION

1. Navigate to Alejandro's Inbox and note the tasks from Logan's inbox that he can now see
2. Click on **View Inbox**
3. Click **Switch Account** on the first task in your Inbox
4. Select **OK**

5. This will take you to the Delegation landing page where you can initiate tasks on behalf of Logan McNeil and take action on items in your Inbox. Notice the application header now says "On Behalf of: Logan McNeil" to indicate you are taking action on behalf of another user.
6. Sign out

QUESTIONS

1. Where can you find tasks that have been delegated to Alejandro?

 ____

2. Can he initiate anything on behalf of Logan McNeil? If so, what?

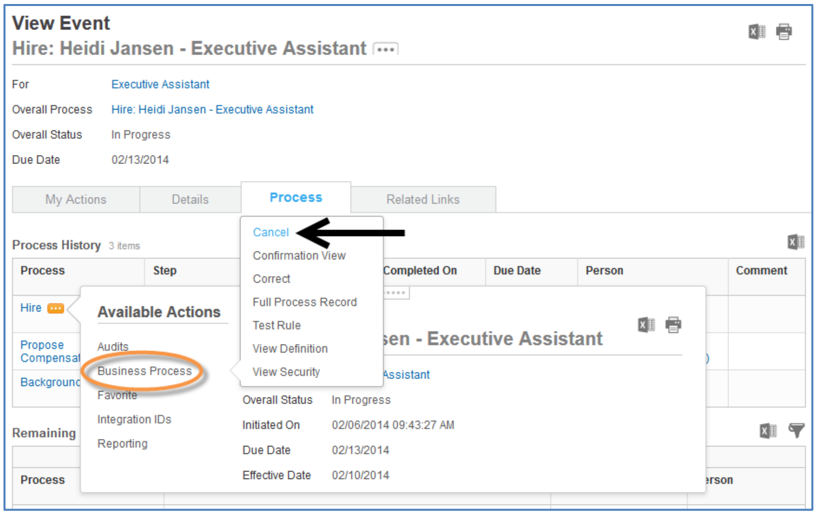
 ____

3. Where in the system do you determine what can and cannot be delegated?

 ____

CANCEL AND RESCIND BUSINESS PROCESS

Most business processes can be cancelled or rescinded. If a business process has not been completed then it can be cancelled. To rescind 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 related action menu on the business process 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.

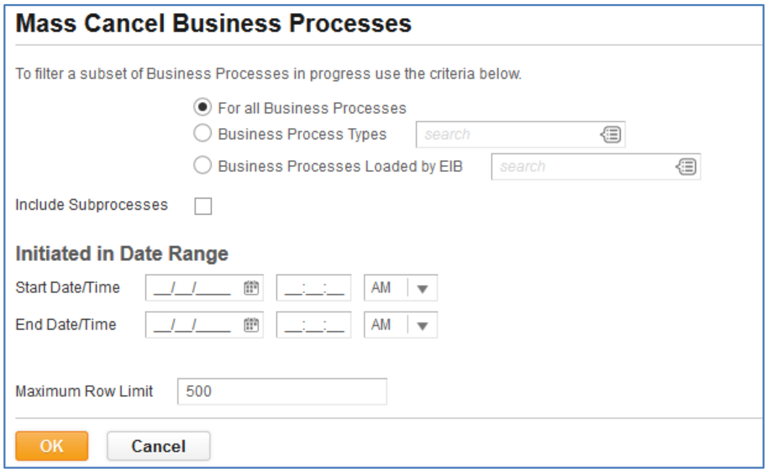
MASS CANCEL FOR BUSINESS PROCESSES

Mass Cancel Business Processes and *Mass Cancel To Dos* are not widely used options and hopefully are something you will not need very often. It allows you to pull back events that have been initiated with an incorrect configuration or effective dates and can remove to dos that have accumulated and are overwhelming a worker's Inbox.

As delivered, this administrative process can be run by workers with the Business Process Administrator user-based security group.

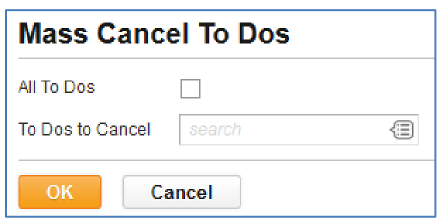
A common use for this process would be to pull back a compensation event such as merit or bonus after launching, but it could be used for any business process. If you realize that a business process is not configured correctly you may wish to pull it back in order to change the configuration. If you mass cancel you will have to reenter the events manually.

If canceling or rescinding a business process affects more than a certain number of business process events which you can specify, Workday asks you to confirm before canceling or rescinding the business process. The default value of the threshold is 25 events.



MASS CANCEL FOR TO DOS

The ability to create to dos seems like a great idea. Through this business process step you can remind people of things that must be done outside of the Workday system that are related to a specific business process such as Hire. If to dos begin driving you crazy because of an unanticipated volume, drastic steps may be necessary. That's where Mass Cancel for To Dos can be used to quickly reduce the volume of to do items in the security group's Inbox.



ACTIVITY 8.12: RESCIND AN EVENT

Business Case: Kelly Brown has decided not to take the Learning Program Manager position so her transfer event needs to be rescinded.

Sign in as Logan McNeil (lmcneil)

RESCIND THE TRANSFER

1. Navigate to the employee **Kelly Brown**
2. To view business process events about Kelly Brown, use *Related Actions* and select the following action and report (you can also select Worker History on the Job tab of Kelly Brown's profile):

    Worker History > View Worker History

3. Find the **Transfer: Kelly Brown** event in the report
4. Use the *Related Actions* icon off of **Transfer: Kelly Brown**
5. Select the following action and task:

    Business Process > Rescind

    Note: if the business process is still in progress, you will see *Cancel* instead of *Rescind*

6. Enter a reason for rescinding in the comment box.
7. Click **Submit** and **Done**
8. View Kelly's worker history and note the status of her Transfer event and any sub-processes related to the transfer

CORRECT BUSINESS PROCESS

Use this task to correct information entered during the business process. The fields that are available for correction are the same ones that are available when the process is initiated. Some of the most common corrections are the effective date of the event or fields such as position time type or standard weekly hours.

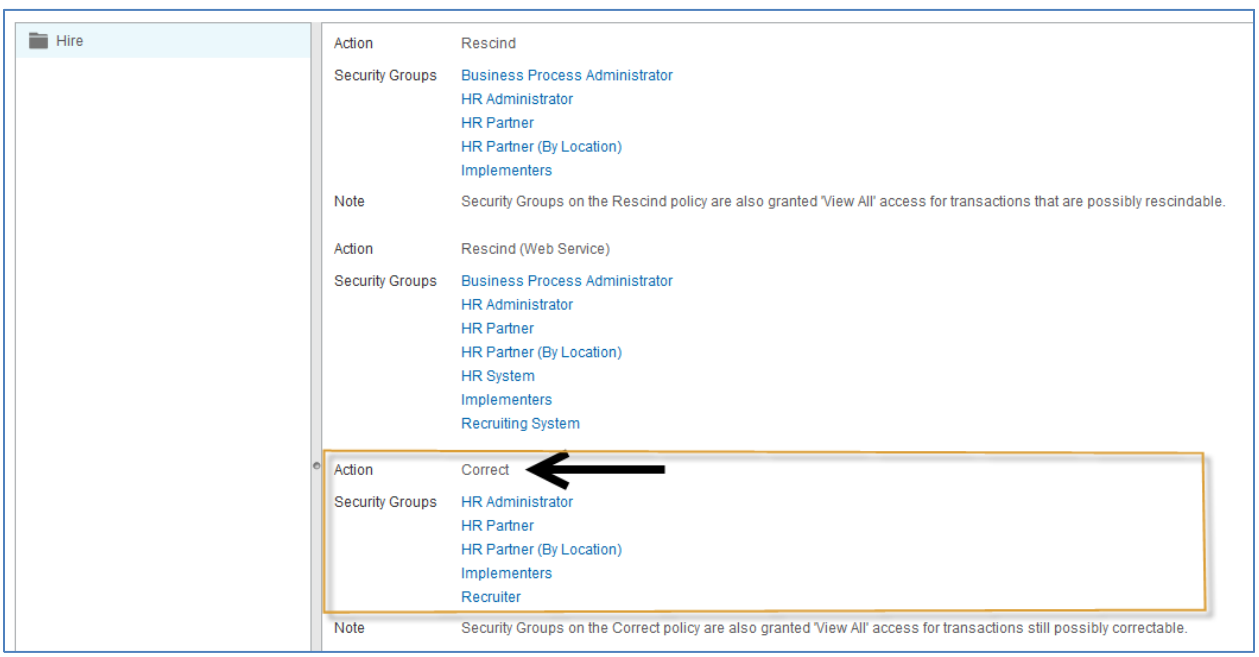
A correction can be done while the business process is still "In Progress" or after it's "Successfully Completed."

Workday offers the ability to correct over 80 business processes including those related to staffing, compensation, contact and personal information, talent management and financials.

There is some configuration that needs to be done to take advantage of these actions. This requires adding the appropriate security groups to the Correct action for each of these business processes.

Once you've identified the security group(s) who should have the ability to correct a business process, edit the business process security policy by adding the security group(s) to the Correct action.

Remember that any change to a security policy will require that you run the *Activate Pending Security Policy Changes* task.



To correct a business process related to a worker, find the event either through search or use the Related Action off the worker's name and navigate to Worker History and the View report.

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 this week or to request a compensation change on the first day of next year. You are never prompted for an entry date when editing, but an entry date is always stored in the system. These two types of dates used in combination allow for various types of reporting.

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 are listed below:

Hiring	Job Change
• Add Additional Job • Contract Contingent Worker • Hire Employee • Start International Assignment	• Change Job • End Additional Job • End 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 8.13: CORRECT HIRE EVENT

Business Case: Brady McCormick was hired into the Course Development Department. Once the hire was completed Logan McNeil was informed Brady would actually be starting a week later. Because Logan has the HR Administrator role, she is able to make the change.

Sign in as Logan McNeil (lmcneil)

CORRECT HIRE

1. Navigate to the **Hire: Brady McCormick** event (hint: view Brady's worker history)
2. Use the *Related Actions* icon off of the event name
3. Select the following action and task:

   Business Process > Correct

4. Complete hire date change:

Field Name	Entry Value
Hire Date	One week later than today's date
Comment box	Enter a comment saying what the past date was

5. Click **Submit** and **Done**
6. On Brady's worker history page, click on the **Hire: Brady McCormick** event
7. Click on the **Process** tab and view the status and comment you made on the original Hire process at the bottom of the page

CHANGE AND THE SUPERVISORY ORGANIZATIONS

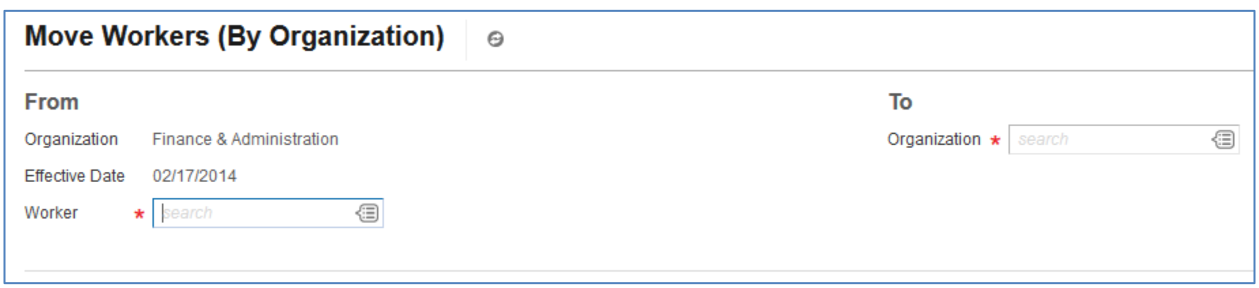
As discussed earlier, changes to the supervisory organization structure is part of business. These changes might occur as part of an acquisition or merger, growth over time or a change in reporting structure due to company reorganization. The *Create Subordinate*, *Assign Superior* and *Divide Organization* tasks were demonstrated in this guide. Two other reorganization tasks are:

Inactivating an organization

- To inactivate an organization that uses Headcount Management you need to move all headcount groups out of the organization prior to inactivating.
- To inactivate a Position Management or Job Management organization the individual positions and workers need to be moved first.
- You can choose to keep inactive supervisory organizations in their hierarchies to retain inheritance from superior organizations and to keep history of the supervisory organization hierarchy intact. An inactive organization can never have active subordinates.

Move Workers

- The *Move Workers (By Organization)* reorganization task allows you to move workers out of a supervisory organization and indicate which supervisory organization you would like them to be members of. This follows the business process framework, so you can set approvals as needed.
- When Headcount Management is enabled, you must move the entire group, not individual employees.



ACTIVITY 8.14: MOVE WORKERS AND INACTIVATE A SUPERVISORY ORGANIZATION

Business Case: The Learning and Development Department is no longer necessary in Wealth of Knowledge and will be inactivated. To inactivate an organization, you need to move any workers and/or unfilled positions out of the supervisory organization as of the inactive effective date.

Sign in as Logan McNeil

MOVE WORKERS

1. Navigate to **LearnDev**
2. Using the *Related Actions* icon off of **Learning and Development Department***,* select the following action and task:

   Reorganization > Move Workers (By Organization)
3. Enter an effective date of **tomorrow**
4. Click **OK**
5. In the **Worker** field, select the position **Learning Program Manager (Unfilled)**
6. In the **Organization** field, move the unfilled position to **Wealth of Knowledge**
7. Click **Submit** and **Done**

INACTIVATE ORGANIZATION

1. Click on the *Related Actions* icon off of the **Learning and Development Department**
2. Select the following action and task:

   Reorganization > Inactivate Organization
3. Enter an effective date of **tomorrow**
4. Click **OK**
5. Click on the **Move All to Superior** radio button to move Learning and Development's subordinate organization, Training Department, to Wealth of Knowledge
6. Click **Submit** to save
7. Click **Done**
8. Navigate to **Wealth of Knowledge**
9. Using the *Related Action* icon go to:

   Organization -> View Org Chart As Of
10. Enter an effective date of **tomorrow**
11. See that as of tomorrow all organizations will report directly to Wealth of Knowledge

CHAPTER REVIEW

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 and compensation.

Temporary workers are referred to as contractors or contingent workers in Workday. The [C] notation is displayed next to the contractor's name.

The termination date reflects the employee's last day of work. The employee is active in the system until midnight on the day after the termination date

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

You may correct events out of order; however Workday does not correct subsequent events automatically. You must use the supporting information displayed to you when correcting the process to manually adjust later processes, if necessary.

To find events regarding a worker, use the Worker History report from the related actions menu of the desired worker.

CHECK YOUR KNOWLEDGE

1. A worker is hired into what type of organization?

   ____

2. True/False: The pre-hire object is separate from the employee object.

   ____

3. How can you distinguish between an employee and a contingent worker with Workday?

   ____

4. True/False: You can rescind an event such as Hire when it is "In Progress".

   ____

5. If you enter the termination date of 01/31/2014:
   - The employee is no longer an employee on this date.
   - This is their last day as an employee.
   - The employee automatically can't access Workday on this date.

SAMPLE DECISION POINTS

1. How will you set up your ATS, if you use one?
2. Who can start the Hire, Change Job, and Terminate business processes?
3. What are your change job reasons and which Workday reason do they map to?
4. Who will be responsible for reassigning tasks?
5. Which business processes will you allow to be delegated? What is the business process through which a delegation gets approved
6. Who can cancel, rescind and correct business processes?

CHAPTER 9: SELF SERVICE

By giving your employees and managers access to Workday and to the tasks and information they need for their work and personal life, the Human Resource, Payroll and other groups are given the time they need to be a strategic influencer. Managers have the ability to run analytic reports, view dashboard and metric reports on their Workday landing page and have data about their own direct and indirect reports at their fingertips! Rolling out employee self service and manager self service can increase adoption of Workday throughout your organization!

OVERVIEW

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

- Workday Accounts
- Viewing Personal Data
- Professional Profile
- Employee Self Service (ESS) Overview
- Manager Self Service (MSS) Overview

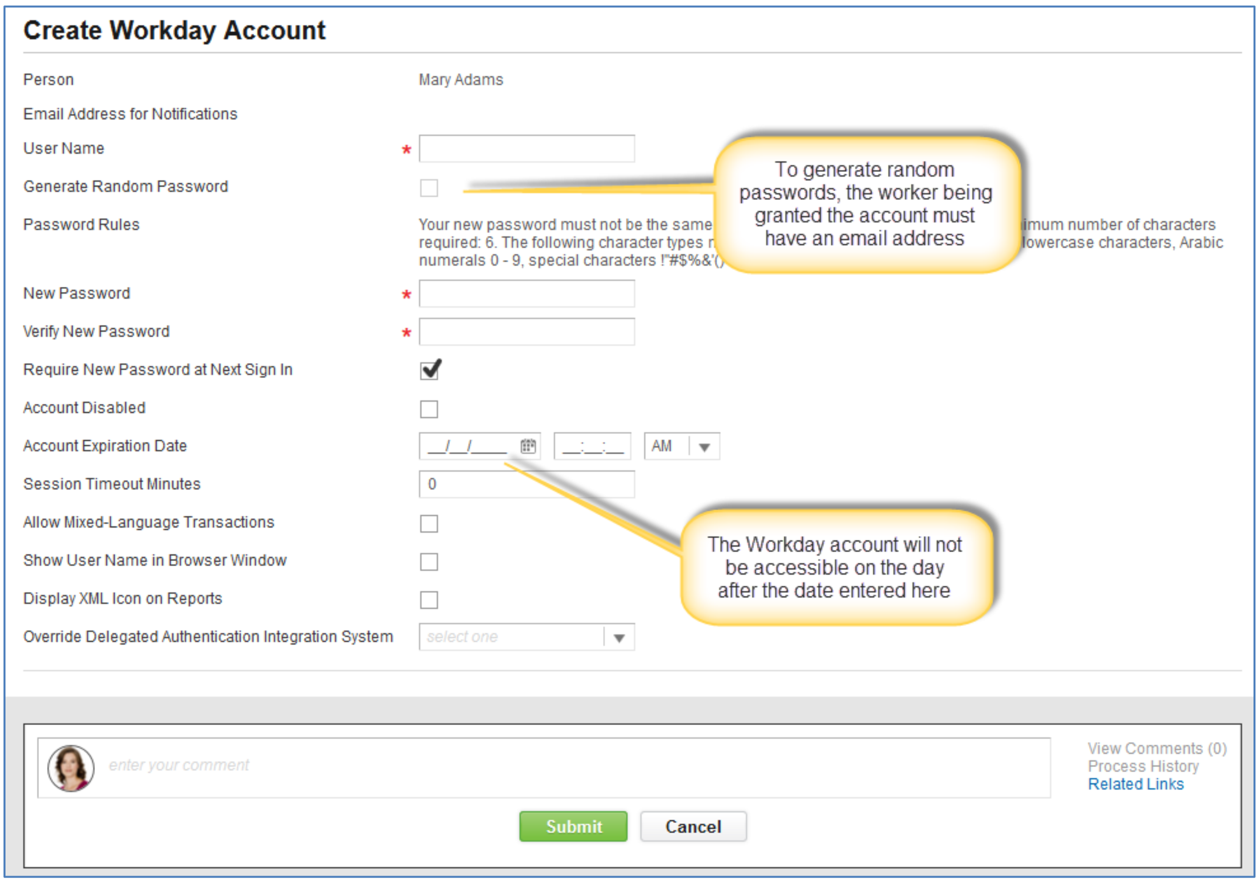
WORKDAY ACCOUNTS

Your membership into a security group, or groups, will control how much personal information you will be able to see and if there will be any actions you can perform. The personal information you can access will be very different when you are looking at your own data compared to at a fellow worker's data, if you are the manager or if you are the HR Partner.

In order to access the Workday system you need to set up a Workday Account for each employee after hire. This creates a user identification and password.

This can be done manually using the Related Actions icon off of the employee. Navigate to:

Security Profile > Create Workday Account



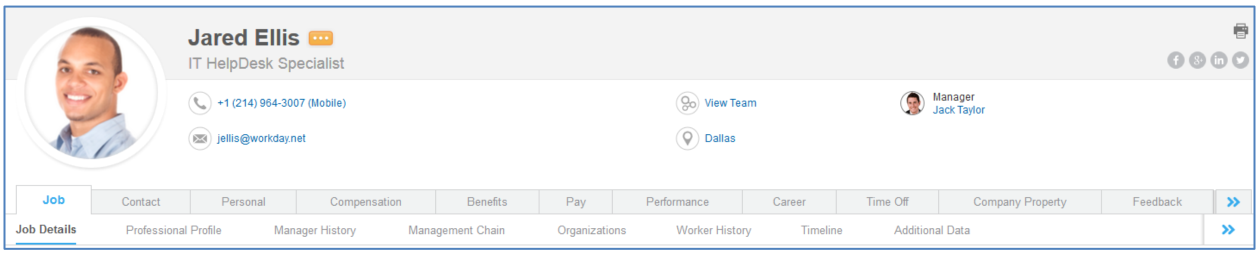
Use the *Maintain User Name Rules* task to specify how user names are formatted. You can specify the elements from which to construct the user name.

Many organizations will not use Workday account creation for security but will use an active directory approach, single sign on or delegated authentication. This will remove the need for creating a Workday account step as part of the hire process.

VIEWING PERSONAL DATA

Your role and security group will control how much personal information you will be able to see and if there will be any actions you can perform. If you sign in as Jared Ellis, who is 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. If you view the workers you have hired so far you will see that they have been assigned membership in multiple security groups. These are systems 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 security group and Employee as Self so that self service can be enabled.

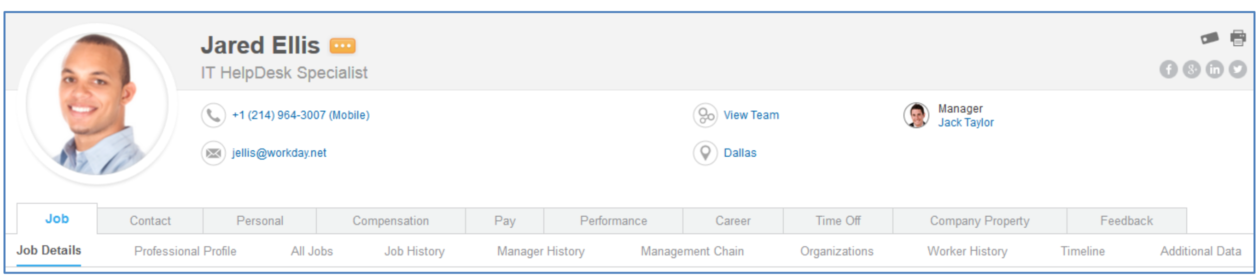
Employee's view of their own data:



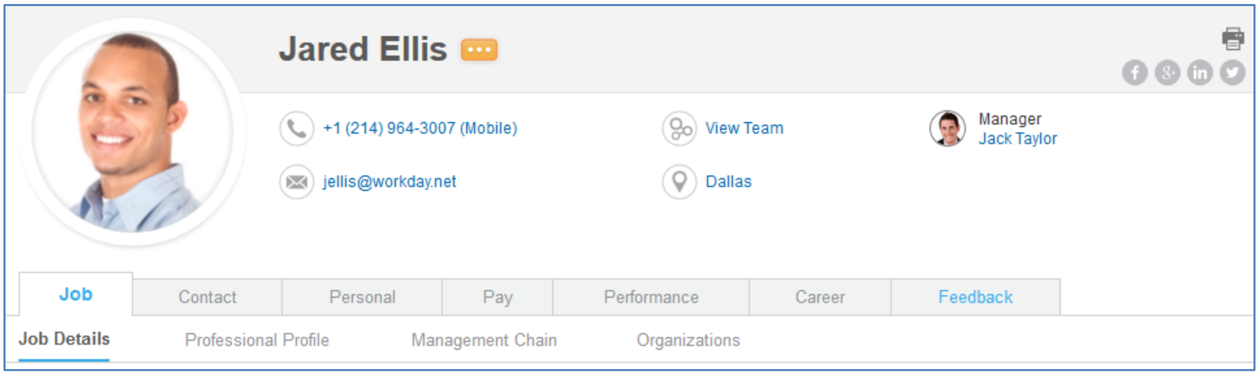
The employee's view of their own data is usually the most complete view. With the exception of certain combinations of security groups such as Logan McNeil enjoys, there is rarely a view of an employee as complete as the employee or worker's own view of his or her personal data.

Benefits, Pay History and Personal Data are available for the employee to view while the manager has no ability to see this information for their direct reports. In the factory defaults for security policies, a manager cannot view an employee's birth date or social security number for instance. A manager also cannot view an employee's emergency contact information.

Manager's view of employee data:



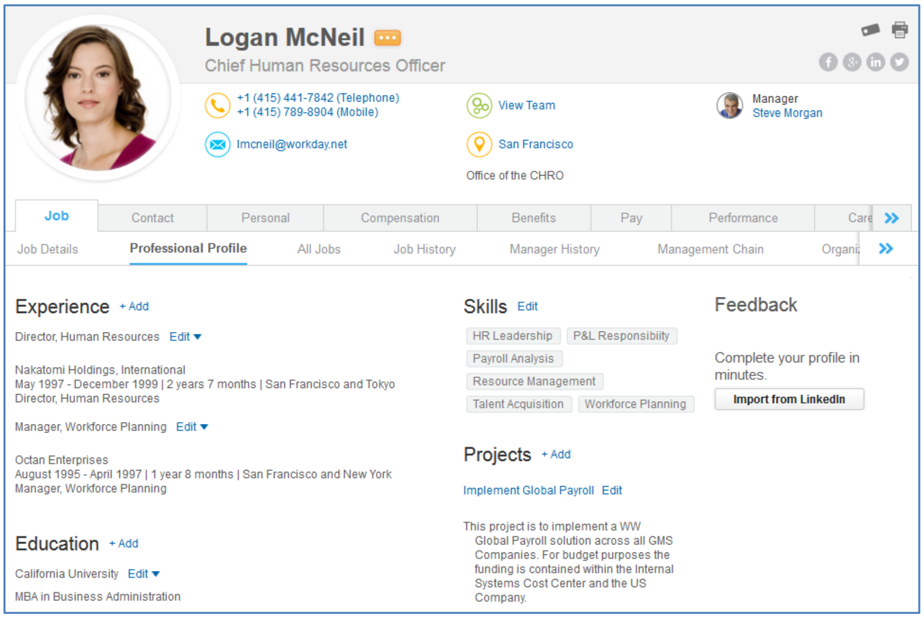
Employee's view of another employee's data:



An employee's view of another employee's data is very minimal. By default, an employee can only view other employees' basic data such as their job, the management chain and the organizations such as department, cost center, etc. that the employee is a part of.

PROFESSIONAL PROFILE

Workday delivers a professional profile that provides a user-friendly way to track key talent information about yourself and others. Professional profiles also display existing education, external job history, project and feedback information from Workday's Talent Management functionality.



Your configuration and the permissions of the person viewing the worker profile determine what Workday displays. For example, if Anytime Feedback is enabled, a worker can see feedback about themselves while a coworker can give feedback.

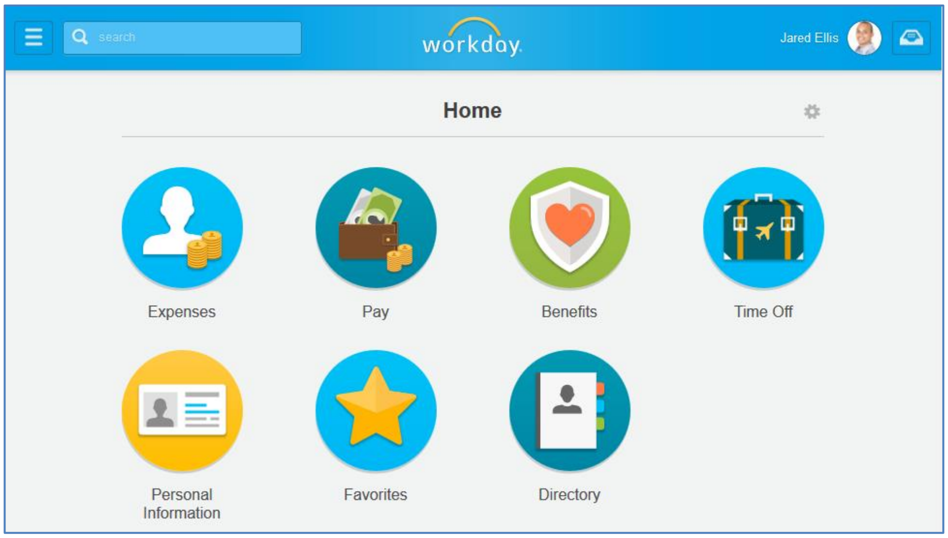
Workers can add, edit and remove their own experience, skills and education directly on their professional profile or use the Import From LinkedIn feature (if enabled) task to import it. This option enables you to securely access your LinkedIn profile and select skills, education and work experience to copy to your professional profile in Workday. Elements of the profile such as experience, education, and projects, can also be pulled in from Workday Talent Management or Financial Management.

Depending on your configuration, professional profiles can include the following components:

- Experience
- Education
- Projects
- Skills: Depending on security configuration, the Find Workers by Skills faceted search report automatically launches when you select a skill on a professional profile. Skills on the professional profile are different from those added in Workday Talent Management.
- Things in Common: Workers can see the schools, companies and skills they have in common with colleagues when they view someone else's professional profile.
- Feedback: Workers can see feedback about themselves, while colleagues can view or give feedback, depending on security configuration.

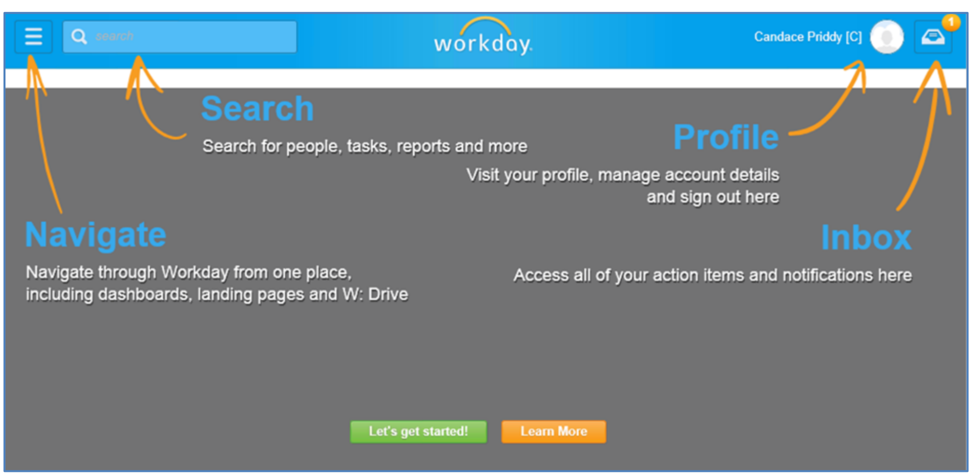
EMPLOYEE SELF SERVICE

A worker can manage their personal data through the Home landing page. Some data may be changed directly by the employee without approval, whereas other components may require an approval process. Data changes that are part of a business process can be configured for any level of approval or oversight that you desire. Whether or not approval is required will be based on your policies and the business processes configuration. Processes are generally in place for legal information that must be verified. Examples are marital status, legal name and emergency contacts.



QUICKTIPS

The first time a user signs in, Quicktips appears to help introduce your workers to navigation throughout the system. Quicktips acquaints you to the Main Menu, Search bar, Profile, and your Inbox. You also have the ability to configure where your workers are taken when the "Learn More" button is selected. If you do not configure this link in your tenant, the "Learn More" button will simply not appear. By selecting "Let's Get Started!" you can dismiss the quick tips and begin navigating through Workday.



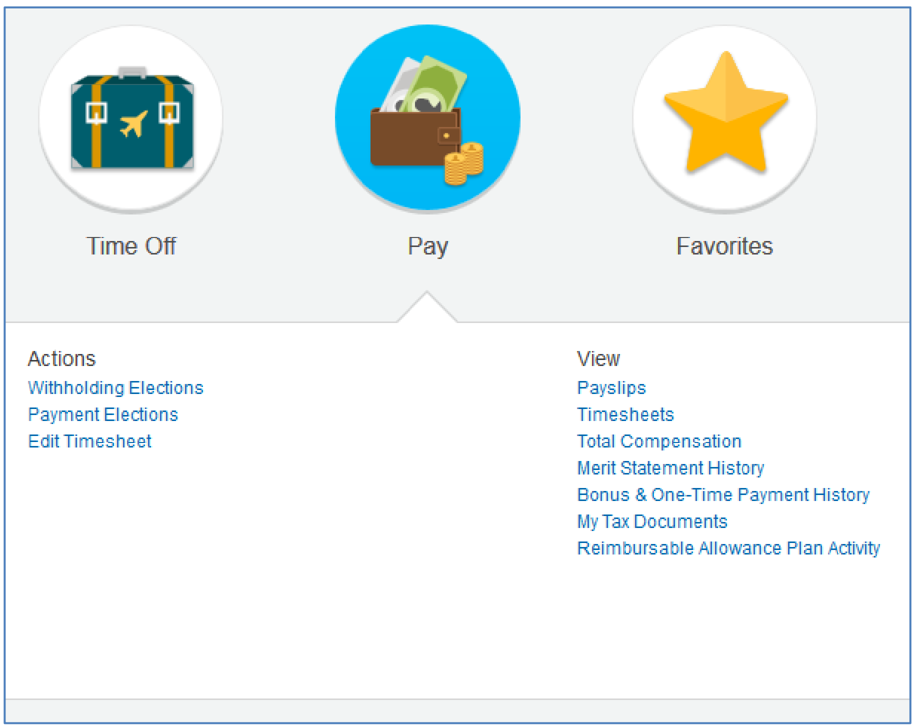
TAX WITHHOLDINGS AND DIRECT DEPOSIT

Even if you're not using Workday Payroll there is certain payroll related functionality which you can use. In the Pay Worklet, click the Withholding Elections action to enter either U.S. W-4 or Canada TD1 information. The business process Complete Federal Withholding Elections can include an approval step.

Employees can set up direct deposit using the *Add Payment Elections* task. You can set up multiple accounts for direct deposit and a deposit can be divided between those accounts. In the Pay Worklet, which can be added to your Home page, is the Payment Election hyperlink task which employees can select to set up their accounts.

All of this employee data is included in the Workday payroll interface extract for use by third parties. Like the self-service tax data functionality, this employee self-service feature can be turned off by restricting who can access the business process (Payment Election Enrollment event).

Direct deposit can be used with or without Workday Payroll, but along with the basic setup you will need to set up integration with the financial institutions.



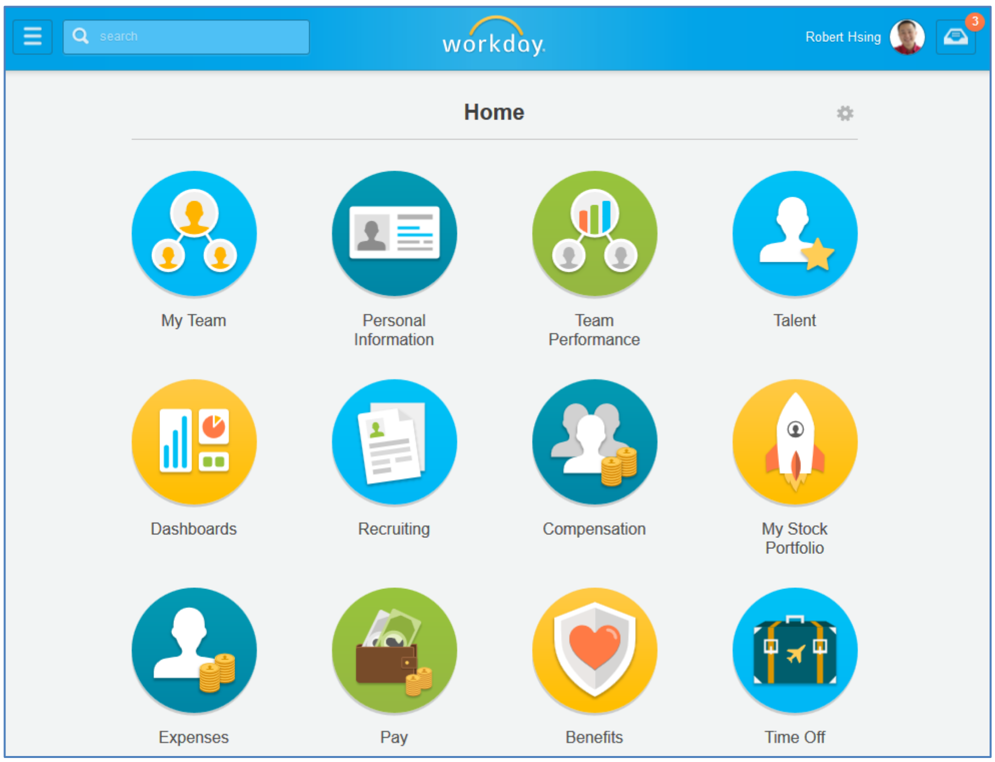
MANAGER SELF SERVICE

Manager self-service puts the information managers need at their fingertips, giving them the ability to more closely monitor and direct their team toward the strategic goals of the organization.

HOME

A manager has easy access to data and tasks related to their responsibilities through worklets on the Home landing page. Based on your business policies and procedures you may involve managers at different levels; they may initiate a business process such as job change, approve it or simply get a notification that it has been completed.

The My Team landing page is designed for managers. This page appears with Worklets for quick access to tasks and to view information on their direct reports.



Worklets can be added or removed as allowed by your organization. There may be required worklets and some of the worklets shown may not be available to you, depending on the functionality enabled in your Workday implementation.

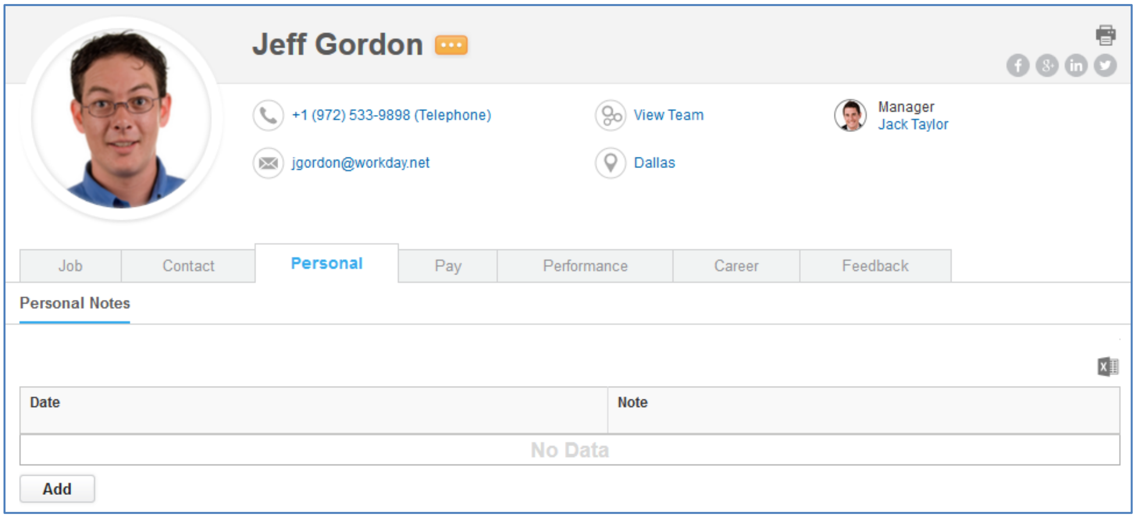
Required worklets and default worklets are set up in task *Edit Tenant Setup – Worklets*.

PERSONAL NOTES

To help you keep track of important conversational details, Workday enables you (all employees) to take personal notes about workers in the full browser application as well as the iPad app.

When viewing the worker you can click on the Personal tab and then on Personal Notes in the navigation ribbon where you can add, view, edit and delete personal notes that are visible only to you.

This feature is secured by the Worker Data: Personal Notes security domain. Workday recommends adding permissions for the Contingent Worker as Self and Employee as Self security groups. To take advantage of this feature you must also configure the worker profile to enable the personal notes tab.



ABSENCE: ESS/MSS IMPACT

Time Off and Absence Management have a high impact on employee/worker self service as well as manager self service. Workers can request time off, view time off balances now and at any date in the future (forecasting) and correct previously submitted time off requests. Managers can use the Time Off and Leave Calendar to view time off, leaves or both for their direct reports, depending on domain security. Managers can also initiate time off requests on behalf of their employees.

Job aids, ESS/MSS tool kits and other training related material should be considered if enabling Absence Management for Leave and/or Time Off.

ACTIVITY 9.1: EMPLOYEE AND MANAGER SELF SERVICE

Business Case: You have decided to rollout employee self service for leave, time off, payment elections, federal tax elections and personal data maintenance. It seems pretty simple to you so you have decided that your workers will need no job aids, training, pamphlets or other communication as to how to make changes. To test that theory we are going to have you make changes without any job aids whatsoever.

1. Sign in as new hire Keith Leonard and complete your Onboarding tasks (Hint: Getting Started can take you there)
2. Sign in as employee Jared Ellis and perform the following tasks:
    a. View your most recent payslip
    b. Request two days off, beginning exactly one month from today, using whichever time off bucket has enough hours
    c. Change your home address (note that this is a business process, which could be configured to have additional steps and approvals)
3. Sign in as manager Jack Taylor and perform the following tasks:
    a. Approve the time off request from your employee, Jared Ellis
    b. Add/change your Federal withholding as of today to Married but withhold at higher Single rate and adjust your allowances to nine (note that this is a business process and would need additional approvals before the changes take effect)
    c. Configure your Home landing page so that you have a Team Time Off worklet
    d. View the Time Off and Leave Calendar to see who on your team is out next month
4. Stay signed in as Jack Taylor and answer the below questions about the Home page:
    a. Which Worklet gives a manager easy access to tasks like Start Performance Review and Manage Organization Goals?

    ____

    b. What are three actions you can take from the My Team Worklet?

    ____

    ____

    ____

5. Sign out as Jack Taylor

CHAPTER REVIEW

Worker self-service can be activated by you based on your business practices and what product(s) you are implementing in your first phase.

Worker self-service may require additional approvals or reviews if the task is associated with a business process.

Training, job aids and manager and employee self-service kits may be part of the answer when deploying self-service.

CHECK YOUR KNOWLEDGE

1. Name at least four worker self-service tasks:

   ____

   ____

   ____

   ____

2. If a worker cannot add a new direct deposit, what might one of the reasons be?

   ____

SAMPLE DECISION POINTS

1. What will your Onboarding announcements be?
2. Which tasks will be a part of your Onboarding?

CHAPTER 10: INTEGRATIONS AND HIGH VOLUME EVENTS

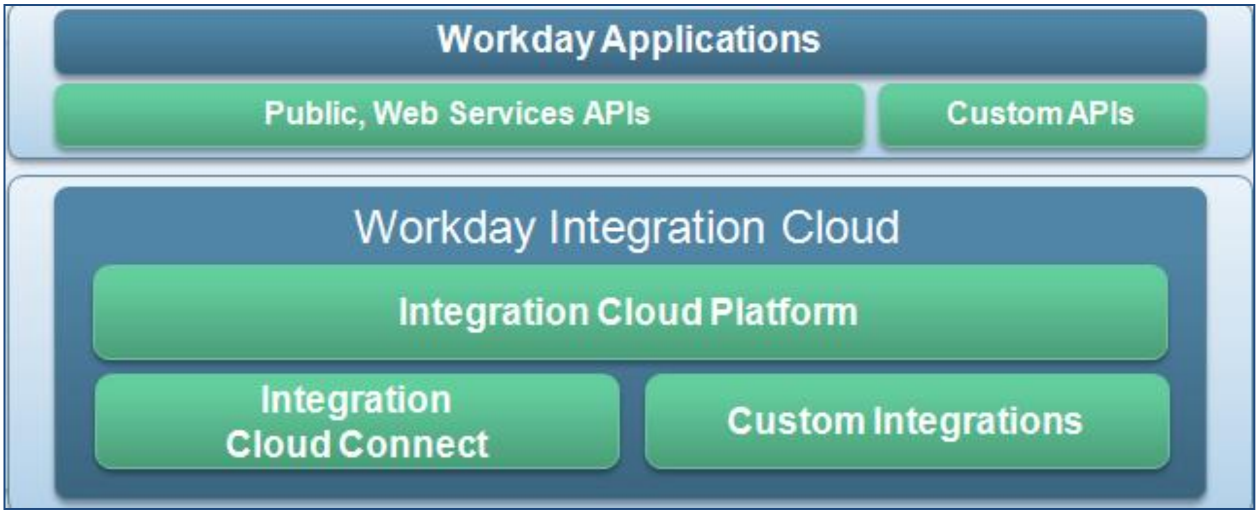
Integrations are a fact of life. Every customer is going to have some integration needs of variable complexity. Integrations are used to transport and transform data into Workday HCM from third party applications such as those used for Talent Acquisition and Recruiting or to move data from Workday HCM to third party applications such as Charles Schwab or Blue Cross. Workday has a library of configurable integrations already built and ready for customer use. Workday provides tools and consulting services to create tailored integrations or for customers to use to build their own integrations. Over 70% of integrations, including most standard/common integrations can be built using Workday Report Writer paired with an integration tool such as the EIB or RaaS.

High volume event transactions are used by the customer to mass load data into the Workday system. Mass hires, terminations, leave of absences and position edits are just some of the many high volume event transactions available to you. Using a Workday delivered template usually in the form of an .xml spreadsheet, you can alleviate the need for direct online entry in the Workday system and can even skip business processes if the high volume event is configured that way.

OVERVIEW

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

- Web Services API
- Integration Tools
- Cloud Connect
- Custom Integrations/Workday Integration Studio
- User/Customer Built Integrations
- Defining High Volume Events



WORKDAY WEB SERVICES API

The Workday Web Services API allows for programmatic access to Workday business services and data. It enables IT professionals at the customer to create 'do it yourself' extensions and integrations. The API provides the framework for all Workday I/O. The API has been developed to be a standards-based, public web service, versioned for backwards compatibility and interoperable with middleware or programming language of choice. The API is included with your Workday subscription and used by both customers and Workday; integrations are built accessing this API.

WORKDAY INTEGRATION TOOLS

These integration tools are designed to solve common integration use-cases. They enable the design, build, and deployment of integrations without the Workday infrastructure. The tools leverage the web services API and are used to create customer specific, build-to-suit integrations. The tools empower other business users in addition to IT to solve integration problems. They are configurable, schedulable and automatically upgraded from release to release.

INTEGRATION CLOUD CONNECT

Workday Cloud Connect includes packaged integrations and custom built-to-suit integrations in areas such as Workday Payroll, Benefits, External Payroll, Security, Financials, etc. Each and every week new integrations become available as part of the network. The five subcategories of packaged integrations are Benefits Network, Payroll Network, HCM Network, Financials Network and Spend Network.

CUSTOM INTEGRATIONS

Custom integrations are built, hosted and can be optionally maintained by Workday through extended service plans. Unlike packaged integrations from the Workday Cloud Connect, however, they do require redeployment for each new customer. These integrations tend to be more complex and may require periodic maintenance.

USER BUILT INTEGRATIONS

User built integrations take advantage of Workday's integration tools. These integrations are built using Workday's customer-facing, cloud-based integration tools. The two primary tools are the Enterprise Interface Builder (EIB) and Reports-as-a-Service (RaaS) and they are used to feed on premise and other cloud solutions. These tools are often called 'self service' integrations since customers can build their own integration scenarios through the standard Workday user interface. Workday's custom report creation tool, Report Writer, is often used for these integrations-paired with RaaS or EIB.

WORKDAY INTEGRATION STUDIO

Used in complex integration scenarios is the Workday Integration Studio. Information as to how to receive training for this application and its general availability can be found on the Workday Community. The Workday Integration Cloud allows developers to develop, deploy and execute integrations between Workday and third-party systems. It comprises the following components: Workday Studio IDE, Integrations, Collections and the Repository, Workday Application and the Cloud Runtime. In the Workday Studio IDE you create an assembly from a selection of re-usable components that include transport, routing, configuration and mediation steps. You deploy the assembly to Workday as an integration system, which then runs in Workday's cloud.

Although several simple integrations can be solved in Workday using the EIB, the Workday Studio is needed for integrations that cannot be resolved using the EIB. For example, if a custom report result contains thousands of rows, the large memory requirement on XSLT processing in the EIB can be reduced by using features in Studio called Splitters and Aggregators. EIB is also limited to one data source (for example, one custom report), one transformation and one destination (for example, an SFTP server). Assemblies built in Studio do not impose these restrictions.

List the integrations that you are currently using in your legacy HR system:

____

____

____

____

____

DEFINITION OF HIGH VOLUME EVENTS

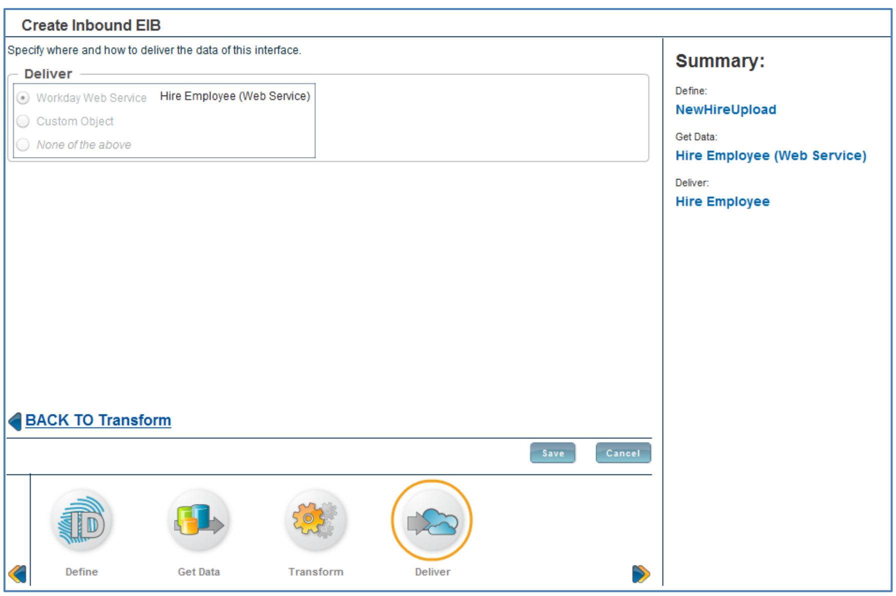
Does your company often make decisions that impact large groups of workers, creating the need to process transactions for a large population? By using the Workday delivered spreadsheet templates for business processes such as Hire and Terminate you can load data into the business process and either run through that process or automatically complete it.

There are four steps to create and process a high volume event. Using Hire as an example, the steps are as follows:

1. Set up the Hire EIB upload using the *Create EIB* task
2. Generate the Hire spreadsheet template
3. Prepare the Hire spreadsheet
    a. Find reference IDs using the *Integration IDs* report
4. Launch the Hire EIB upload with the spreadsheet attachment.

CREATE EIB

EIBs are defined using an intuitive Wizard-style interface in the application:



EIBs support a number of security features, including PGP encryption and digital signatures. You can also customize the inbound templates to reflect just the data that you want to load. You can track the progress, status and results of EIBs in your process monitor. You can configure notifications on success or failure.

EIB is deliberately simple. If your integration scenario involves multiple inputs, multiple outputs, complex logic, multiple destinations, sophisticated error handling, looping, branching or other programming features, then you should consider using Workday Studio.

GENERATE A SPREADSHEET TEMPLATE

For example, the following is a partial screenshot of the .xml EIB spreadsheet used for the High Volume Hire event.

Hire Information - (Required)

Area				Hire Employee	
Restrictions	Required	Conditionally Required	Information Only	Required	Conditiona
Format	Text	Lookup	Text	Lookup	Lookup
Fields	Spreadsheet Key	Applicant ID	Applicant Name	Supervisory Org	Position I
	1	A01061	Adam Carlton	Sales_Operations_supervisory	P-00046
	2	A01383	Andrew Shea	Program_Management_supervisory	P-00116

Understanding of the hire process and the required fields (both required by Workday and required by your organization) is important in order to properly fill out the spreadsheet for loading.

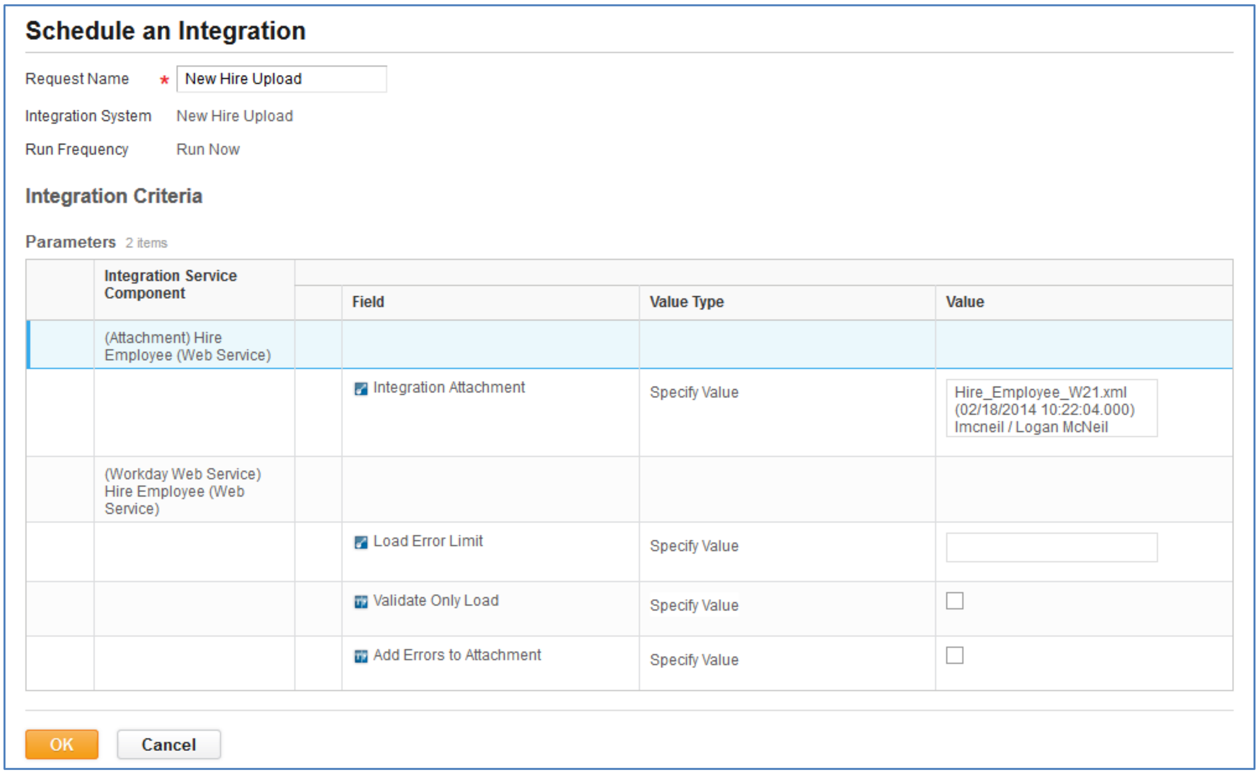
How automated do you want the business process to be? Your answer to this question will determine how the high volume event will be configured.

The levels of automation are as follows:

Level of Automation	Description
Full Automation	Import data into Workday using EIB and specify automatic processing to complete the business process without requiring approvals and bypassing to do tasks and notifications.
Manual Processing	If you want business process participants to manually complete all review and approval steps, as well as to do tasks and notifications, you can specify manual processing for the entire business process and either import all of your data into Workday using the EIB upload process or provide partial data in the spreadsheet and enter the rest manually.
Partial Automation	You can specify different levels of automation for the main business process and each supported sub-process. To require manual review and approval for some processes but not others, select a mix of automatic and manual processing options. For example, in the Hire process you might want to automate the Assign Organizations sub-process while using approval workflow for the Propose Compensation sub-process.

LAUNCHING THE EIB (INTEGRATION SYSTEM)

Delivered high volume events can be located in the Launch/Schedule Integrations task page. You must use the delivered Workday spreadsheet; instructions on how to generate the forms from the Workday system are available in the Workday Community.


Schedule an Integration

Request Name * New Hire Upload

Integration System New Hire Upload

Run Frequency Run Now

Integration Criteria

Parameters 2 items

Integration Service Component	Field	Value Type	Value
(Attachment) Hire Employee (Web Service)			
	Integration Attachment	Specify Value	Hire_Employee_W21.xml (02/18/2014 10:22:04.000) lmcneil / Logan McNeil
(Workday Web Service) Hire Employee (Web Service)			
	Load Error Limit	Specify Value	
	Validate Only Load	Specify Value	☐
	Add Errors to Attachment	Specify Value	☐

OK Cancel

DEMONSTRATION: HIGH VOLUME EVENT – HIRE

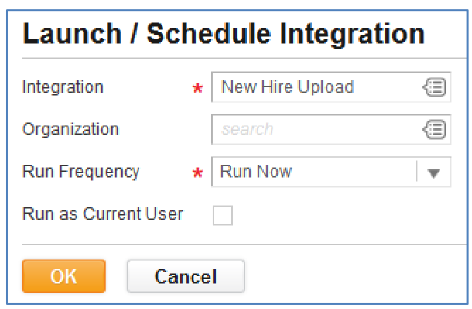
Business Case: Your instructor is going to create and launch a high volume event using a Hire EIB spreadsheet.

CREATE EIB

1. Search for the *Create EIB* task
2. Indicate this will be an Inbound integration
3. Name the EIB and click **NEXT**
4. Using a Template from Web Service Operation, search for the *Hire Employee (Web Service)* template
5. Save the EIB and
6. Generate a spreadsheet template and populate with the new hire information

LAUNCH/SCHEDULE INTEGRATION

1. Search for *Launch/Schedule Integration* in the search window
2. Find the EIB Integration you just created
3. Schedule the event to Run Now



4. In the integration attachment Value field of the *(Attachment) Hire Employee (Web Service)* row use the prompt box to select the **Create** step
5. Browse for the completed EIB spreadsheet on your computer and upload it
6. Ignore all other fields and run to upload the data - refresh till completed
7. Are there any errors? If so read the error report, if not, continue
8. Navigate to Logan's Inbox and notice the two new tasks as a result of the mass hire of the two workers

CHAPTER REVIEW

There are five subcategories of integrations in the Workday Integration Network.

Integrations are built using the Workday web services API.

Integration 'self service' tools are the Reports–as-a-Service (RaaS) and the Enterprise Interface Builder (EIB).

Most common use integrations can be built using Workday Report Writer paired with RaaS or the EIB.

The Workday Studio is available to customers for designing and creating more complex integrations.

CHECK YOUR KNOWLEDGE

1. True or False: Most standard or common integrations can be built using Report Writer

   ____

2. What is the main difference between packaged integrations and tailored integrations?

   ____

3. Give one example of an integration to Workday HCM and an integration from Workday HCM:

   ____

4. Why might you use the Integration Studio rather than the EIB to create a complex integration?

   ____

CHAPTER 11: REPORT WRITER, CUSTOM FIELDS, AND TRENDING

Workday delivers several robust options for managing your data in the system.

The Workday Report Writer gives you the option of creating custom reports to meet your business requirements. You may start with an existing report or you may create your own reports from the start. Either way, the reports will adhere to your security configuration so you have the comfort of knowing that critical data will not be exposed to those that should not have access.

With custom fields, you have the ability to create your own data elements that will allow you to store critical information in Workday and then report on that information if you choose. These custom fields will appear just as any other field in the system, will adhere to your security configuration and will be available to you when creating condition rules and custom reports.

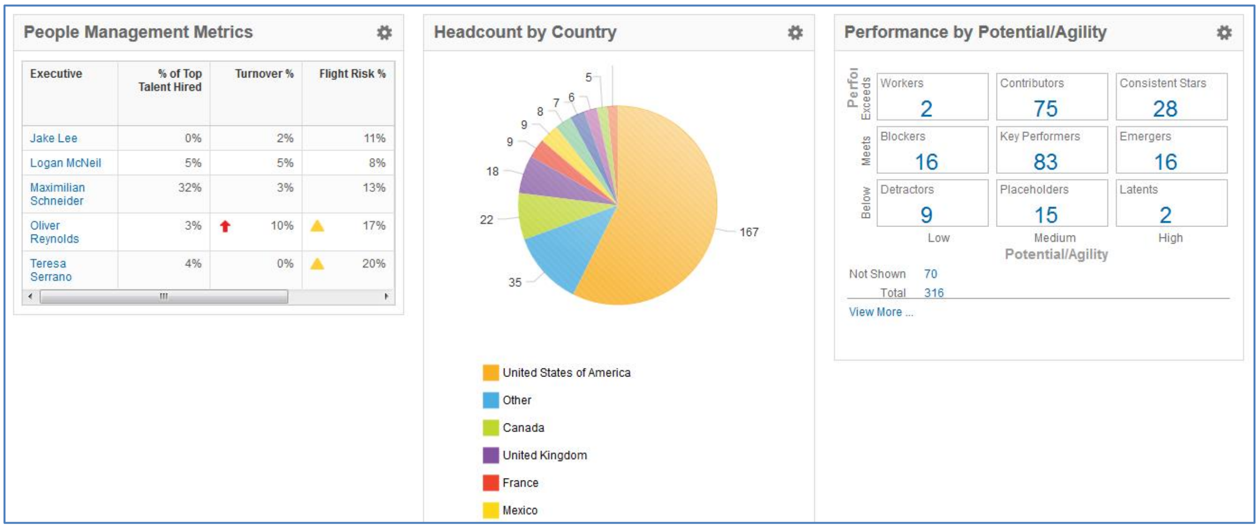
OVERVIEW

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

- Creating a Report Writer report
- Understand Types of Reports Available
- Explain the Importance of Data Sources
- Be able to use Contextual Reporting Tools
- Identify Standard Reports and Copy to a Custom Report
- Creating custom objects and fields
- Understand the Trending report type

REPORT WRITER

Workday's custom reporting tool helps you to create reports that you can run directly from your home page or from your favorite's page. As with all Workday actionable reports, you can drill down on items to obtain additional information and use related tasks to perform authorized actions on items within that report. You can download the information generated to an Excel spreadsheet or to a PDF document. Workday Report Writer can be used to create integrations or produce output for use in other applications such as a csv or a flat file. Workday Report Writer can be used to create Worklets which can be populated on your various landing pages to provide dynamically updated data available to upon sign on.



CREATING REPORTS

What you need to know about creating custom reports:

- Workday custom report writing tool.
- Access to custom reports is by the assignment of a user-based security group of Report Writer.
- You can copy some delivered reports.
- You can share custom reports with other users who have access to the data source designated in the report definition.

REPORT WRITER USER-BASED SECURITY GROUP

When you want to write a report you must be assigned to the Report Writer user-based security group to access the Report Writer definition pages. After you've created the report you will be the only person that can see or run it. If you want other users to be able to run or modify a copy of the report then you must share that report with other security groups or users.

REPORT WRITER NAVIGATION

There are three methods of navigating to Workday's Report Writer:

Search: If the string "custom report" is entered into the search box, all of the tasks associated with the report writer will be returned. Any other instance of the "custom report" string will also be returned. Once you have created a report you can find it by inputting a portion of the report name into the search box.

Related Action Icon: It is important to remember that a report is an object. Once you find your report it will be presented with a related action icon. The related action icon can then be used to initiate the Report Writer tasks.

Sitemap: The Sitemap in the Main Menu lists available reports and tasks for different functional areas within the Workday system. Clicking on a report name will run the report.

REPORT TYPES

There are two general types of reports within Workday—standard reports and custom reports.

Standard Report

- Standard reports are reports that come delivered with Workday. They are developed by Workday and are delivered to all Workday customers. Depending on the reporting requirements, standard reports may be defined using the Workday Report Writer or in XpressO (Workday's internal development tool). Standard reports that were designed using the Report Writer can be copied to create a custom report and then modified according to your requirements.

Custom Report

- Custom reports are designed and built by customers using the Workday Report Writer tool. They can be created new or as a copy of another standard or custom report.
- Every custom report has a report owner, which is the user who originally created or copied the report. This user is the only person who can make changes to the report definition or share the report with other users. Only the report owner and the Setup Administrator are allowed to transfer the ownership of a report from one user to another. The most common reason to transfer ownership is when the owner of a report leaves the company.

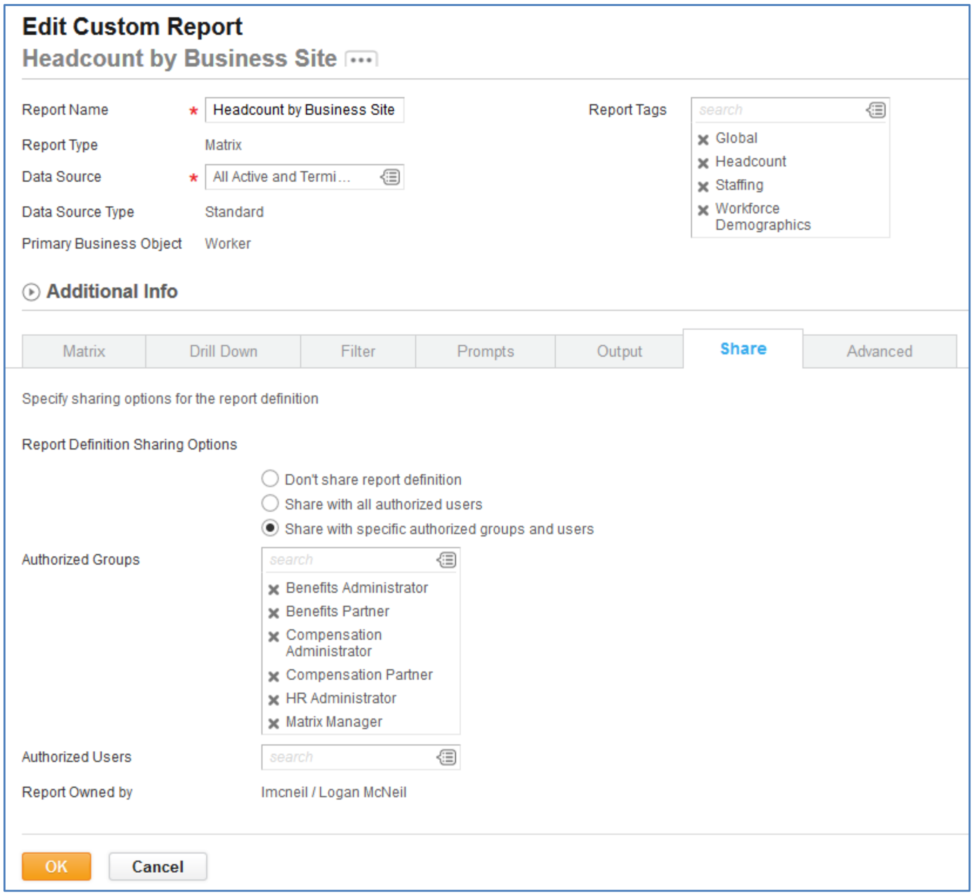
CUSTOM REPORT TYPES

- Report Writer provides several report types for creating custom reports and custom analytic solutions:
- Simple Report: Simple reports cannot be shared with other users. When you create a simple report you will not have access to advanced filtering. Once a simple report is created it can be converted to an advanced report.
- Advanced Report: Advanced reports can be shared with all authorized roles, certain authorized roles or certain authorized users. They can be used as Worklets as well as enabled to be a web service so that they can be accessed by other systems or third party applications. Advanced reports have expanded filtering capabilities.
- Matrix Report: Summarizes numeric data by one or two fields that contain repeating values and displays them in a matrix that can be rendered as a drillable table or chart. In addition to allowing you to define the fields that comprise the detail drill down, matrix reports also provide for filtering, run time prompts, Worklets and report sharing.
- Search Report: A search report displays search results based on values selected for facet filters on the report.
- nBox Report: An nBox report counts data and displays the results in a two-dimensional matrix.
- Transposed Report: A transposed report interchanges the rows and corresponding columns on the report.
- Trending: A report using trended data enables you to report on and analyze trends in worker data such as headcount and attrition over a period of time.

SHARING REPORTS

Even if the report is shared, this does not mean all users in Workday can run or even see the report. A user must have at least one of the security groups associated with the data source that was used to create the report. If you do not have any of those associated security groups then you will not be able to see or access the report that someone else has written and subsequently shared.

Assuming that you do have one of the security groups associated with the data source, then you will see the report name listed in the Shared Custom Reports column of the *Menu > Favorites*. You can also search for that report name in the search box and it will appear in the search results. Clicking on the report name will cause it to run while clicking on the related actions will take you to the report definition.



STEPS TO CREATE A REPORT

These are the steps to creating a report in the Workday Report Writer:

1. Choose Report Type and Data Source
2. Select Objects and Fields
3. Order Columns
4. Sort Output
5. Define Filter Criteria

DATA SOURCES

The first and most important step in developing a custom report is choosing a data source. Each custom report can have one data source. Each data source has a primary object as well as many secondary objects that have a one-to-one (1:1) or a one-to-many (1:M) relationship to the primary object. The result is that when you report against a particular data source the output will yield one instance (row) for every instance of the primary object.

Example: The All Active Employees data source will yield one instance of data for every employee that is active. That is, unless another filter is built into the report definition.

Data sources are defined and delivered by Workday. A data source has a primary business object. Workday delivers different data sources for the key primary business objects. The same primary business object may be represented by more than one data source depending on filtering and security groups required. Each data source associated with a primary business object has its own security.

The default prompt shows you the available data sources "By Category," in which they are listed by functional grouping. Another helpful prompt is "By Primary Business Object," which groups the data sources by the types of objects they return.

A data source can be designed to return all instances of the primary business object (e.g. All Workers) or it can have built-in filtering logic defined by Workday. If it has built-in filtering, the filter comparison value(s) can either be built into the data source (e.g. All Active Employees) or designed so the user is prompted for the comparison value when running the report (e.g. Employees by Organization, which always prompts the user for an organization).

The access defined for a data source controls whether a user can create or run a custom report based on that data source. Different data sources for a single primary business object may be delivered by Workday to allow reporting on different sets of instances, based on the security access of the user. Only data sources that are authorized for security groups to which you are assigned are displayed in the prompt list.

If you need more information on a data source, you can click the related actions icon next to the data source name in the Data Source report or just click the data source name to see its View Data Source report. You can see a description of the data source, the name of the primary business object, the prompts built into the data source, the security groups that can access the data source, the fields in the primary business object and corresponding security groups that can access them.

Example: The Worker business object may be associated with several data sources, which filter the workers. The My Direct Reports data source is one of these. If you use the Workers for an Organization and Subordinate Organization data source, the report requires you to specify the organization when you run it. The data source filters the instances of worker while the business object supplies fields such as name, address, ID and many more.

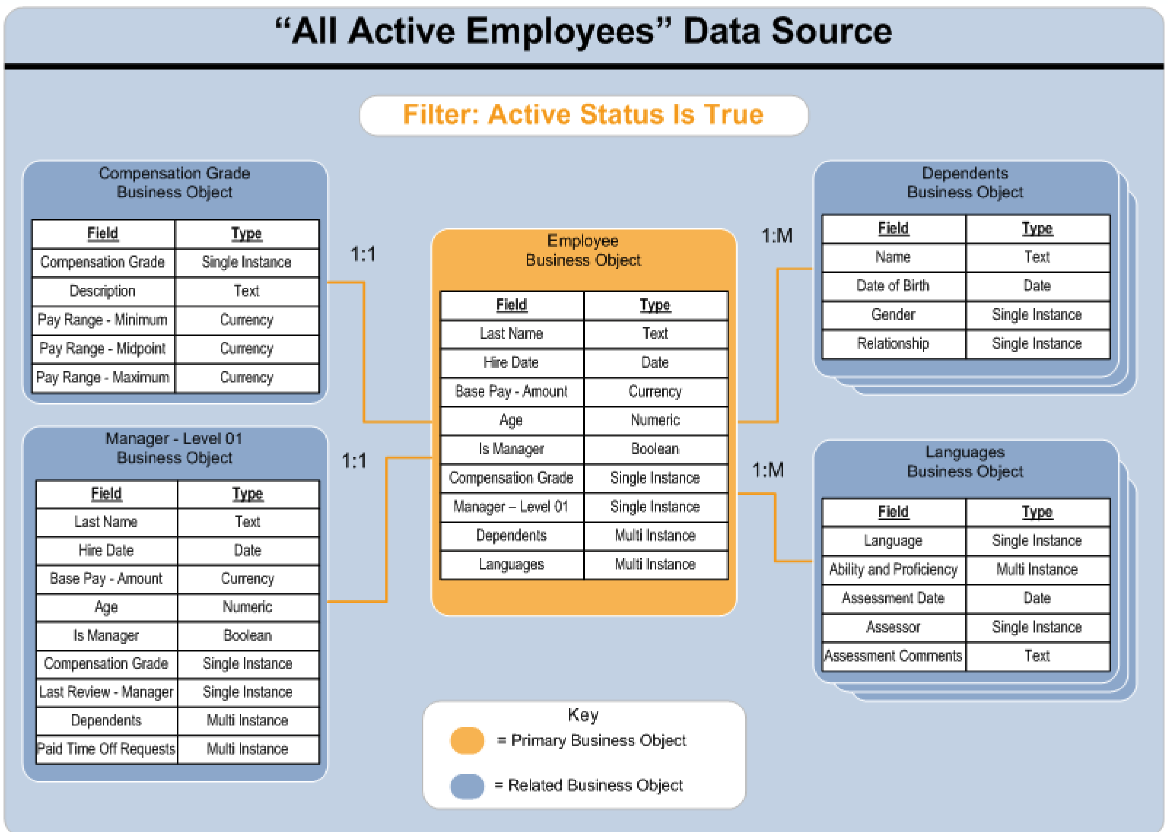
BUSINESS OBJECT FIELDS

In addition to text, date, currency, numeric and boolean type fields, a primary business object can include one or more fields that represent related business objects. There are two types of fields that describe the relationship a related business object has to the primary business object. They are single instance and multi-instance field types. Single instance fields have a one-to-one relationship between the primary business object and the related business object (e.g. an invoice is associated with only one customer). Multi-instance fields have a one-to-many relationship between the primary business object and the related business object (e.g. an employee can have many accomplishments).

Like data sources, report fields can also have access restrictions, although it is not required. If a field is restricted, only users in the appropriate security groups can:

- Access the field to use it in a report definition
- See data in that field when running a report

The "All Active Employees" Data Source



Notice the relationships of objects to objects with the 1:1 and 1:M indicators above. The example shows the All Active Employees data source which will return the Employee business object but only where the filter conditions are met.

CLASS REPORT FIELDS

Like a database table, each data source has many class report fields. Each class report field (CRF) is accompanied by a field type icon. Their icons and definitions are as follows:

Icon	Definition
	Primary Object: This icon represents the primary object from the report data source. If this field is placed onto the report the output will be represented as a hyperlink and be accompanied with a related action icon. The object's instance id will be passed through to the XML output once the report is published as a web service. This is also referred to as a self-referencing object.
	1:M Object: Adding a CRF with this icon will produce output that could potentially contain a list of values. It is also called a multi-instance or multi-value field. This type of output will be hyperlinked and usually include an accompanying related action icon (unless security offsets). The object's instance id will be passed through to the XML output once the report is published as a web service.
	1:1 Object: Adding a CRF with this icon will produce output represented as a hyperlink and usually include an accompanying related action icon (unless security offsets). The object's instance id will be passed through to the XML output once the report is published as a web service.
	Currency Field: This type of CRF represents a currency field.
	Boolean Field: This type of CRF represents a boolean or true/false field.
	Date Field: This type of CRF represents a date field.
	Numeric Field: This type of CRF represents a numeric field.
	Text Field: This type of CRF represents a simple text field.

REPORT SECURITY

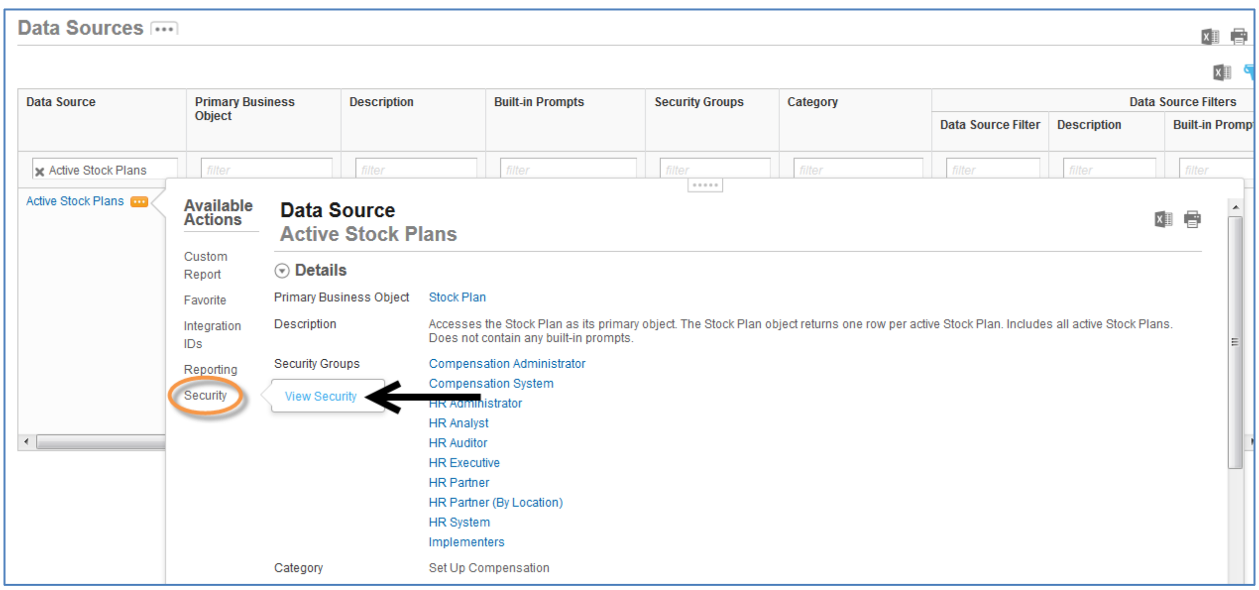
Workday secures every report and every data source as a securable item in a security policy. In addition, some fields within a data source may be secured separately. For example, a report that uses the All Active and Terminated Workers data source might include the employee name field and the beneficiaries field. Whoever can access the data source can access the employee name, but the beneficiaries field is restricted to its own set of security groups. Those who can see the report cannot see the beneficiaries unless they are also in a security group that is authorized to do so. Another example is managers who can see their staff's names, but not their national IDs.

Furthermore, there can be data sources or fields that are secured by role-based security groups, meaning that viewers can see only the instances that pertain to their organization. For example, managers in separate organizations might each see an employee report of the same name that uses the same data source and fields, but they see instances of only employees in their respective organizations.

This security also works for reports that are shared. Sharing a report does not override report security, so you can share a report only with those who are authorized to see it. You can share a report with someone who can see the report but not necessarily all the same fields you can see.

Additionally, when you create a report, you can select only the fields to which you have access.

The Data Sources report shows which security groups have access to each data source. You can click a data source to see the report fields associated with it and which security groups have access to each.



From the related actions icon off of a data source, access Security and then View Security to view the domain security policy in which the functional area that the data source is part of is secured. The information is also available from the preview, as shown above, and from the Data Sources report itself.

ACTIVITY 11.1: COPY STANDARD REPORT TO CUSTOM

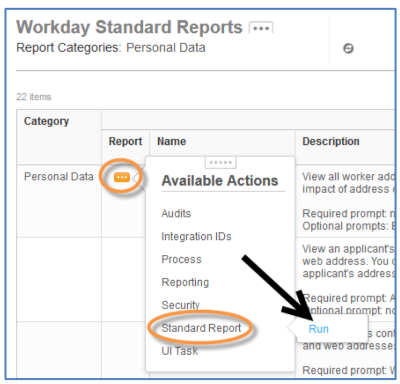
*Business Case: You have been asked to create an address change report for the payroll department based on workers. The Payroll department needs to know **when the address change happened**, **the pay group** and **the name of the workers' manager**. You decide to see if an existing report will work rather than create a new one.*

Sign in as Logan McNeil (lmcneil)

RUN STANDARD REPORT

1. Enter *Workday Standard* in the search box
2. Select ***Workday Standard Reports*** to run the report
3. Choose the report category **Personal Data**
4. Find the first report under the Personal Data category, **Address Change Report**
5. Run the report by using the *Related Actions* icon in the Report column to the left of the Name and select:

   Standard Report > Run



6. Use the date prompts of **1/1/2005** to **present date** and view the output
7. Does the output contain all the fields you were asked for? Refer to the business case above.

COPY STANDARD REPORT TO CUSTOM

We will now make a copy of the delivered report and edit it to include any missing fields.

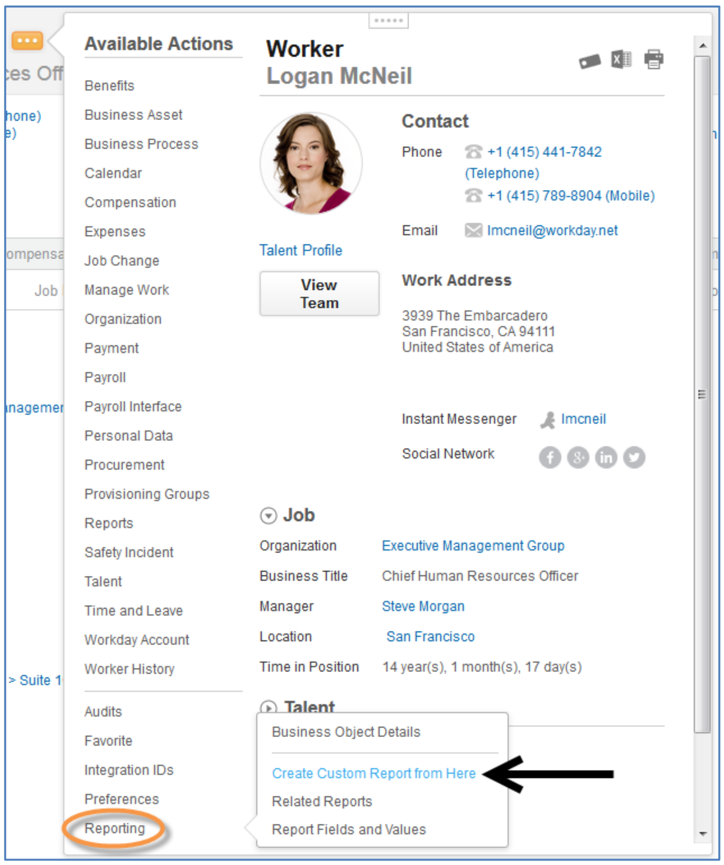
1. From the *Related Actions* icon off of **Address Change Report**, choose **Standard Report** and **Copy**
2. Change the name of the newly copied report to **Payroll Address Change** and click **OK**
3. Use a report tag of **Payroll** so it can easily be found and identified as a Payroll report
4. Insert two rows after **Legal Name – Social Suffix**
5. Add the Field **Worker's Manager** to one row and **Pay Group** to the other
6. Click **OK** to save and **Run** the report again. View the output – is this what you were asked to deliver?

CONTEXTUAL REPORTING TOOLS

While not properly labeled as such, there are certain Workday features and reports that can be used to enhance your knowledge of Report Writer and we have collectively labeled them as Reporting Tools for the purposes of this guide.

Contextual reporting options can be used to create reports directly, enhance your knowledge of fields, objects and data sources and detail existing reports that may be repurposed or customized.

From any object (an object appears as a link/url with a related actions icon next to it) you may select Reporting from the related actions icon to view the three options shown in the picture below:



The first choice in the menu is: Create Custom Report from Here. This option can be used to create a custom report writer report using this object (worker in this case) as the basis for available data sources that contain this object. The display, when selecting Create Custom Report from Here is not particularly user friendly and this is not the recommended way to create a report writer report. In particular, if the object in question has a multitude of related objects, such as our example of the worker object.

This option is helpful, however, for assisting in determining the data source or sources you would want to select when creating a report with this as the primary object.

It is also useful in viewing the number of related objects to a primary object. You will view all calculated fields associated with the business object as well if you have access to those fields.

CONFIGURABLE REPORTS

Workday enables you to generate configurable alerts based on a custom report. You can configure alerts to send relevant business information to users based on virtually any condition for which you can create a report in Workday. You use Configure Alert task to tie together an alert with a custom report. The filter criteria in the custom report should define the conditions on which you want to alert. The alert can be set to run immediately, once at a specified date/time in the future, daily, weekly or monthly. At the specified time, the alert is then sent to the target worker's Inbox.

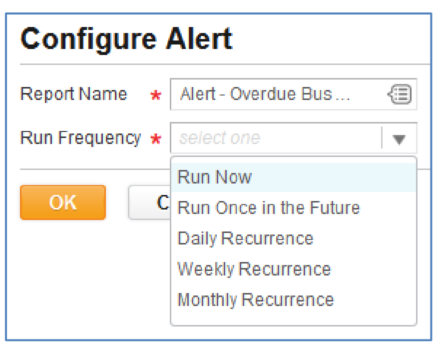
You can easily pass report parameters to a configurable alert. Additionally, you can associate a Workday task with an alert, giving alert recipients the ability to act immediately on the subject of the alert.

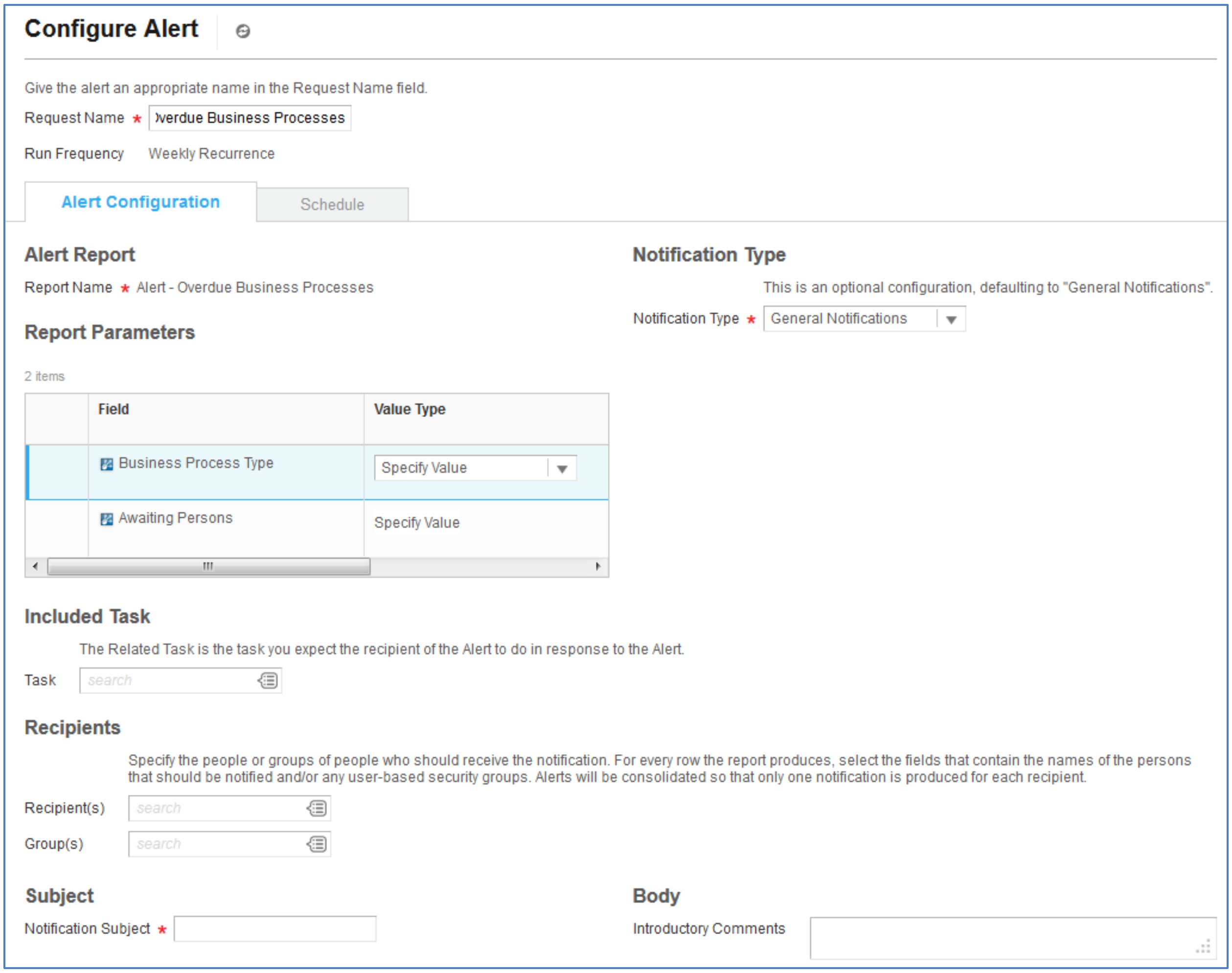
The benefit of configurable alerts is that users who receive such alerts do not have to manually look up information or run a report to obtain the related information; it simply appears in the their Inbox. Some possible uses for these types of alerts are as follows:

- Key metrics reached or milestones met
- Items overdue, like a project timesheet
- Exceptions, like credit card transactions with no expense reports
- Birthday and employment anniversary reminders to managers
- Time off reminders to your team
- And administrative tasks such as:
- Monitor overdue business process tasks
- Track contingent worker contract end dates
- Track I-9 employment eligibility or certification expiration dates

REPORT PARAMETERS IN ALERTS

You can configure report parameters when creating alerts. This enables you to use any custom report as the data source for an alert and to create multiple alerts from a single report by passing in different filter and prompt values for different alerts.




Configure Alert
Give the alert an appropriate name in the Request Name field.
Request Name
)verdue Business Processes
Run Frequency
Weekly Recurrence
Alert Configuration
Schedule
Alert Report
Report Name
Alert - Overdue Business Processes
Report Parameters
2 items
Field
Value Type
Business Process Type
Specify Value
Awaiting Persons
Specify Value
Notification Type
This is an optional configuration, defaulting to "General Notifications".
Notification Type
General Notifications
Included Task
The Related Task is the task you expect the recipient of the Alert to do in response to the Alert.
Task
search
Recipients
Specify the people or groups of people who should receive the notification. For every row the report produces, select the fields that contain the names of the persons that should be notified and/or any user-based security groups. Alerts will be consolidated so that only one notification is produced for each recipient.
Recipient(s)
search
Group(s)
search
Subject
Notification Subject
Body
Introductory Comments

CUSTOM FIELDS

You have the ability to extend Workday business objects by creating custom fields and objects for your tenant, so that you can persist and access data that is specific to your organization.

You can extend or create custom objects on business objects, including:

- Pre-Hire
- Asset
- Bank Account
- Former Worker
- Job Profile
- Company
- Cost Center
- Customer
- Location
- Position Restrictions
- Project
- Purchase Order
- Region
- Supervisory Organization
- Supplier
- Supplier Contract
- Worker (Effective Dated)
- Worker: Includes contingent worker, employee and implementer, but you cannot select these objects individually

You can create up to 20 custom fields per business object. In order to create a custom object, you must belong to a security group that is secured to the Custom Object Management security domain.

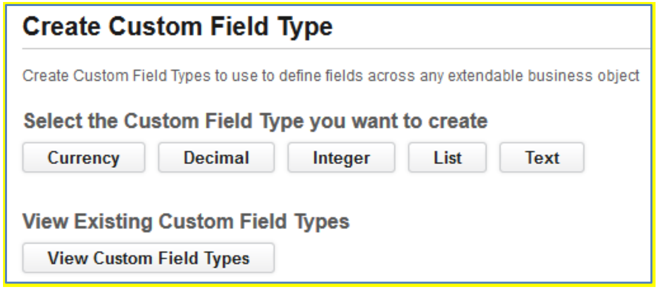
Custom fields can be used in both calculated fields and condition rules just as you would use Workday delivered fields. You can use custom fields in all condition rules (including business process condition rules) that can use calculated fields in their rule definitions. You can also edit custom fields within the context of the following business processes: Contract Contingent Worker, End Contingent Worker Contract, Hire and Termination. The Edit Additional Worker Data business process enables you to create or edit custom data in a stand-alone task outside of those four business processes.

Optionally, you can enable a custom object to have multiple instances; you can have up to 3000 instances of a custom object for each instance of a Workday business object. For example, if you create a "County" custom object on the location business object, you can store up to 3000 counties for each location.

A new task enables you to create custom field types. You can use custom field types to define fields across any extendable business object.

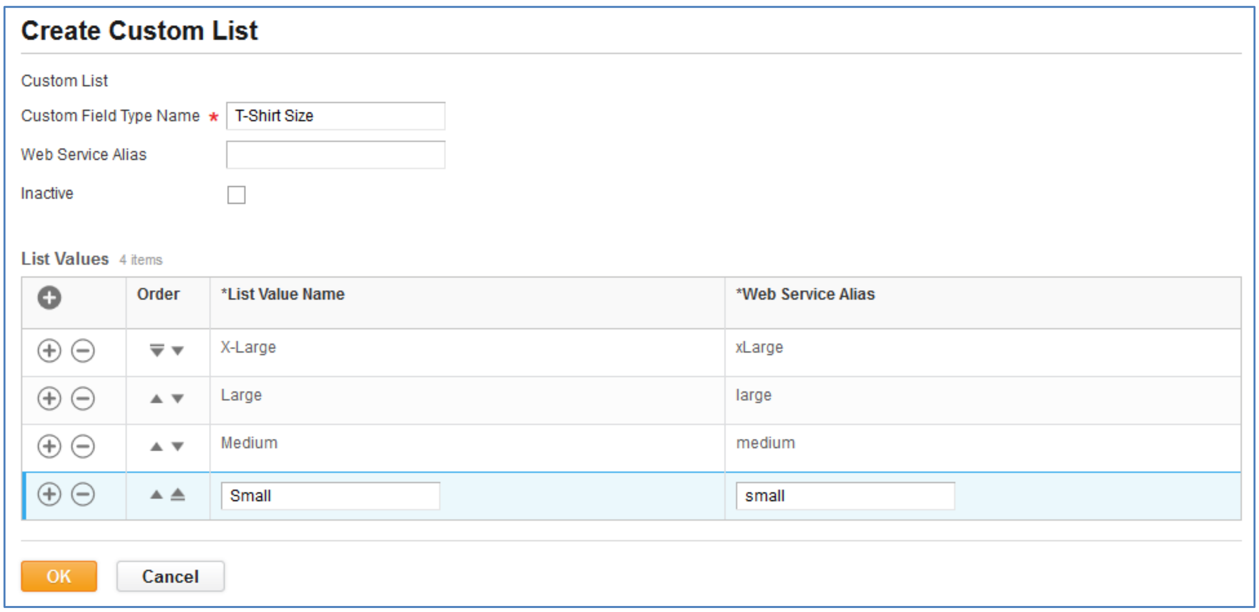
Workday also delivers the following standard custom field types:

- Boolean
- Currency
- Date
- Decimal
- Integer
- Paragraph Text
- Text

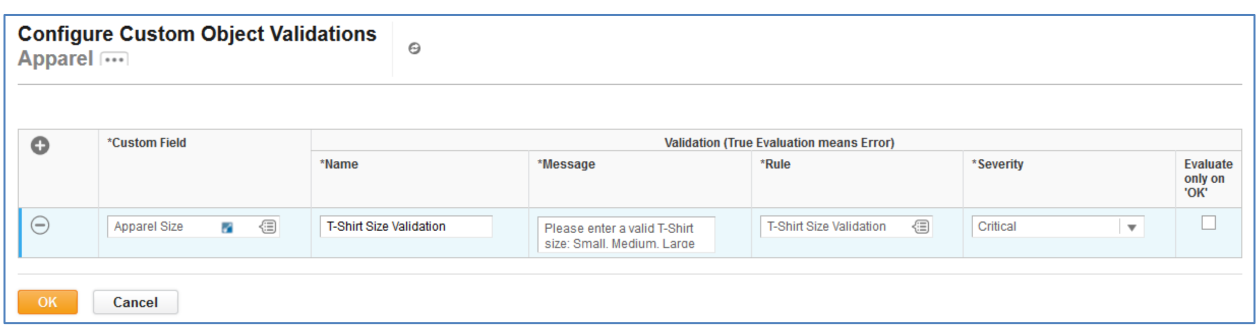


Once you have created a custom field type, you can then define a custom field of that type to use across any extendable business object in Workday.

The Create/Edit Custom Lists tasks enable you to create and edit your own custom lists of options for your custom fields so that you can control the set of values that a custom field can contain.



Additionally, you can ensure that data entered for a custom field is valid by creating a validation rule using *Configure Custom Object Validations* task. You can then link any rules you've created to the custom object by using the *Configure Custom Object Validations* task. When selecting the condition rule you'd like to use to evaluate the data for a specific custom object and custom field, you will also have the ability to enter a custom validation message, specify the severity of the error and configure whether the validation is evaluated immediately or after submitting.

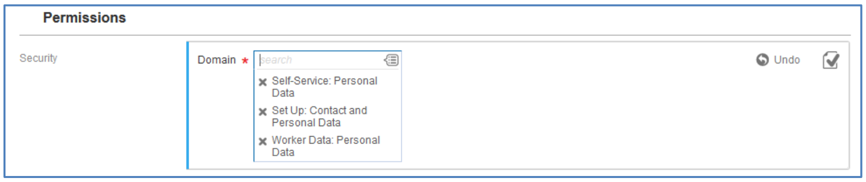


CUSTOM OBJECT SECURITY

Custom objects are secured by the Custom Object Management security domain. This domain contains users and groups allowed to view and modify custom object definitions for any object.

Workday manages security for custom objects and fields at the custom object level. All of the custom fields associated with a custom object inherit the same security assigned to the custom object. Your ability to view and modify a custom field depends upon your security access to the custom object.

You define the security policy on a custom object by securing the custom object to existing domains for which you have enabled security policies. The union of all view, modify and integration permissions on all of the security domains that secure the custom object control access to the view, modify, and integration tasks on the custom object and its associated fields.



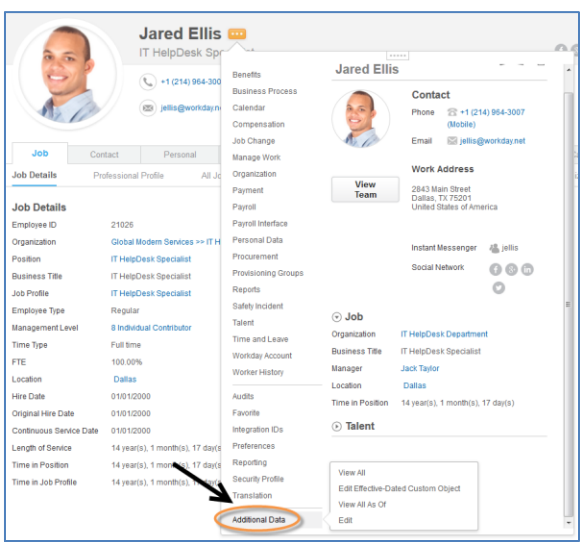
Condition rules can be used to determine when the custom object's data is visible to users during View tasks for Additional Data. For example, only HR Partners in the U.K. can see a custom object created to track performance in the United Kingdom. This option doesn't affect custom object visibility on Edit tasks for Additional Data and has no impact on data security.

Integration permissions on the security domains control whether an integration can get or put data based on the account that runs the integration. Your ability to build an integration is independent of integration permissions on the domains to which the custom object is secured.

Inactivated custom fields are read-only and do not appear in view and edit tasks. You cannot inactivate an entire custom object.

MANAGING CUSTOM OBJECTS

You can view custom fields from the related actions menu on an instance of an extended business object:



You can also add an additional data page to any profile group using the *Configure Profile Group* task. Once configured, you can view custom fields on the additional data page of the profile view for a worker, job profile or position restriction.

You can only edit custom fields from the related actions menu on the extended business object. When you edit a custom field, the edit takes place immediately.

To view or edit a custom field, you must have view or modify permissions to at least one of the security domains to which the custom object that contains the custom field is secured. In addition, you cannot display or edit inactive or deleted custom fields.

The *Purge Additional Data* task applies condition rules to permanently remove data from non-effective dated custom objects and their fields. Once the purge is complete, the task cannot be undone. The custom object definition remains and the custom object Audit Trail - Additional Data tab displays a record of the purge data event.

The *Delete Custom Field* task completely removes custom fields and their data from custom objects. You can only use this task for fields not referenced by reports, calculated fields, or condition rules and these fields can't be used as display ID or used as a reference ID for a custom object. Similar to purging data, the Delete Custom Field task cannot be undone.

Workday provides two custom field reports:

- The Custom Fields Status report enables you to quickly view all the custom fields that have been defined for a business object.
- View Custom Field Types report enables you to quickly view all the custom field types that have been defined for a specific metadata type.

You can use the *Edit Custom Object* task to inactivate and reactivate custom fields.

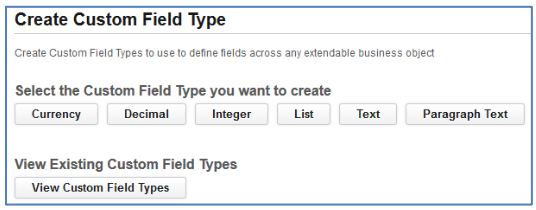
ACTIVITY 11.2: CREATE AND EDIT A CUSTOM OBJECT

Business Case: For company conferences you need to track the dietary restrictions of your workers. Rather than having to survey your workers before every conference, you decide to create a custom object in the system to store this information in Workday.

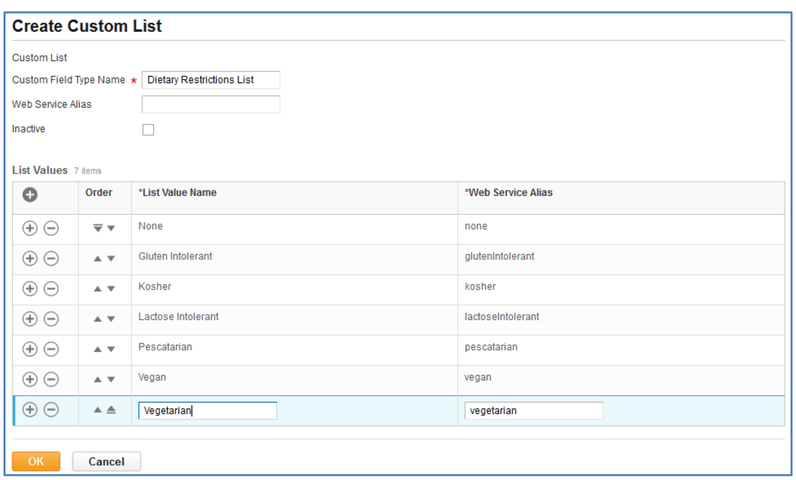
Sign in as Logan McNeil

CREATE A CUSTOM FIELD TYPE

1. Navigate to the ***Create Custom Field Type*** report
2. Select **List** as your custom field type



3. In Custom Field Type Name, enter **Dietary Restrictions List**
4. Enter the following list value names as individual rows within the list:
    a. None
    b. Gluten Intolerant
    c. Kosher
    d. Lactose Intolerant
    e. Pescatarian
    f. Vegan
    g. Vegetarian



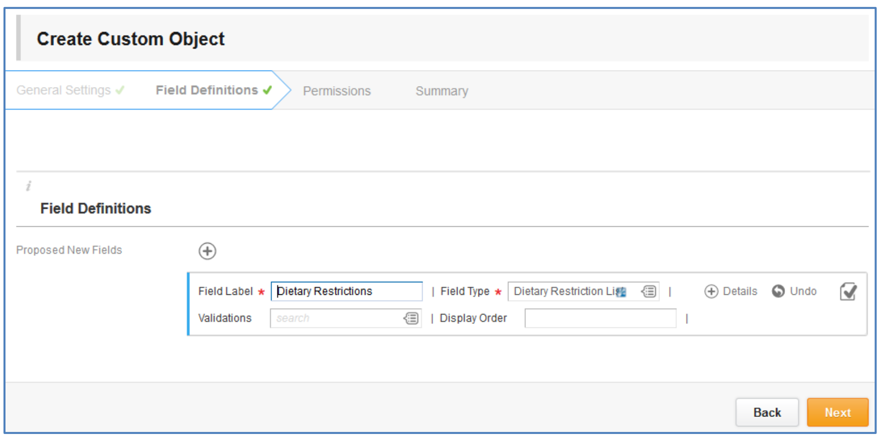
5. Click **OK** and **Done**

CREATE A CUSTOM OBJECT

1. Navigate to the ***Create Custom Object*** task
2. Select **Worker** as the Workday Object you wish to extend
3. Enter **Dietary Restrictions** as the Custom Object Name
4. Click **OK**
5. Review the general settings and click **Next** to advance to field definitions
6. For Proposed fields, click the ⊕ to add a row
7. Enter **Dietary Restrictions** as your *Field Label*
8. In the **Field Type** prompt, select

   By Type -> Custom List -> Dietary Restrictions List

9. You can leave Validations and Display Order blank



10. Click **Next** to advance to permissions
11. Enter the following security domains to secure view, modify, and integration access to your new custom object: **Self Service: Personal Data** and **Worker Data: Personal Data**
12. Click **Next** to be taken to the Summary Editor
13. Review your work and click **OK**
14. Click **OK** and **Done** to activate your new custom field

EDIT A CUSTOM OBJECT

1. From the *Related Actions* icon off of **Keith Leonard** employee record, go to:

   Additional Data -> Edit

2. Select **Dietary Restrictions** as the custom object
3. Select **Gluten Intolerant** as Keith's dietary restriction
4. Click **Done** and view Keith Leonard's Additional Data to see the populated custom field

WORKER TRENDING

Workday allows our customers the ability to trend up to 36 months of worker data, such as headcount or hires, and generate charts and analytics based on this data.

We offer you ten delivered reports (to be used as examples) which you can pull in the system to both view, and then edit and customize your own trending reports around subjects like headcount and attrition.

Worker Trending delivered reports:

- Headcount
    - Headcount and FTE by Month
    - Hire and Termination Counts by Quarter
- Turnover
    - Hire and Termination Counts by Quarter
    - Turnover Rate by Supervisory Hierarchy and Quarter
    - Termination Count by Type by Quarter
    - Termination Count by Performance Rating by Quarter
- Compensation
    - Average Total Compensation by Country
    - Average Compa-Ratio by Job Profile
- Other
    - Span of Control By Quarter
    - Worker Trending Audit

CHAPTER REVIEW

Reviewed the steps in creating a report.

Overviewed data sources and discussed the importance of them.

Identified some contextual reporting tools.

Reviewed Workday standard reports and demonstrated how to copy them to a custom report.

Discussed security and how it is enforced in Report Writer.

Reviewed the ten delivered trending reports.

Reviewed and created custom objects and fields that will allow you to store critical business data in Workday

CHECK YOUR KNOWLEDGE

1. You may create custom fields using several Workday business objects. What are they?

   ____

2. Name the output types available for Report Writer:

   ____

3. Accessing the system, list the data sources available for the primary business object of employee:

   ____

4. If you were a manager wanting to see only your own workers which data source(s) might you use?

   ____

5. Find a data source that has a built in prompt for date:

   ____

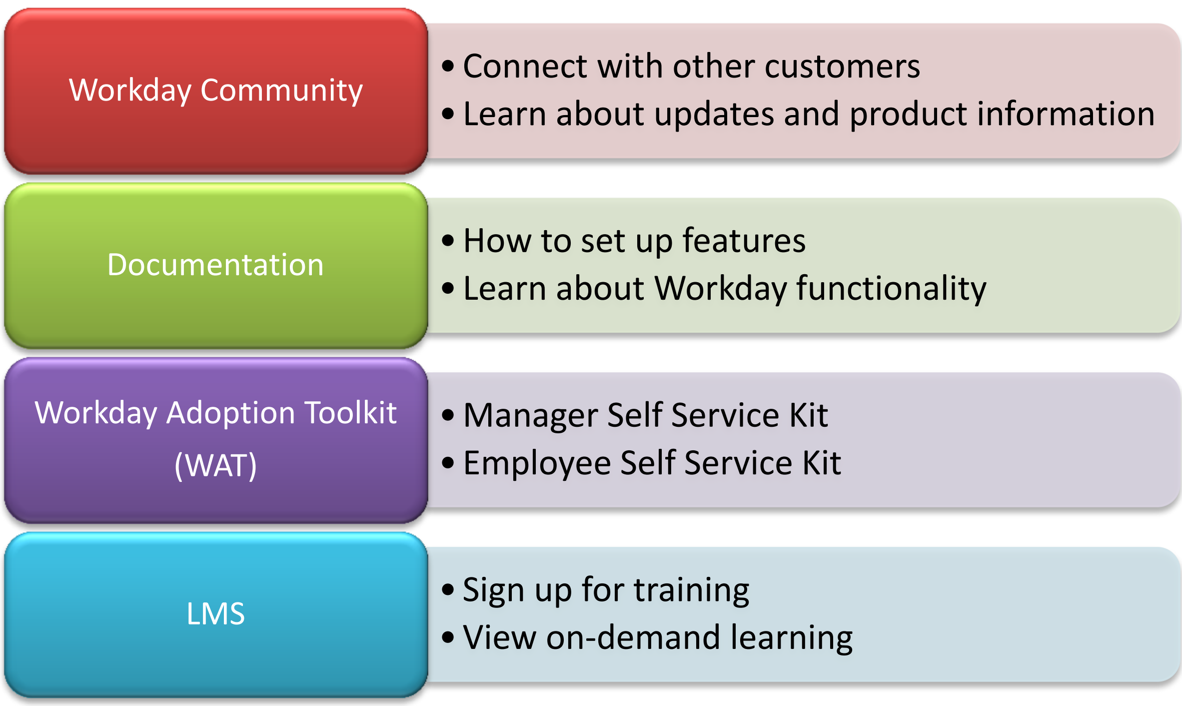
SAMPLE DECISION POINTS

1. Which standard reports will you utilize?
2. Do you need to create your own reports? If so, what type? What information will they include?
3. What custom information will you need to capture? Which Workday business object do you need to extend to store this information?
4. Who has access to this custom information?

CHAPTER 12: RESOURCES

Can you create a supervisory org without a location? How can I connect with other customers? What help is available for rolling out self service? Is there more training I can attend?

As a new customer you have a lot of questions that need answers. This chapter will introduce you to the resources that are available and give you the opportunity to try out a few things. The ability to get information and connect with other customers will help you be successful during your deployment and into post go-live.



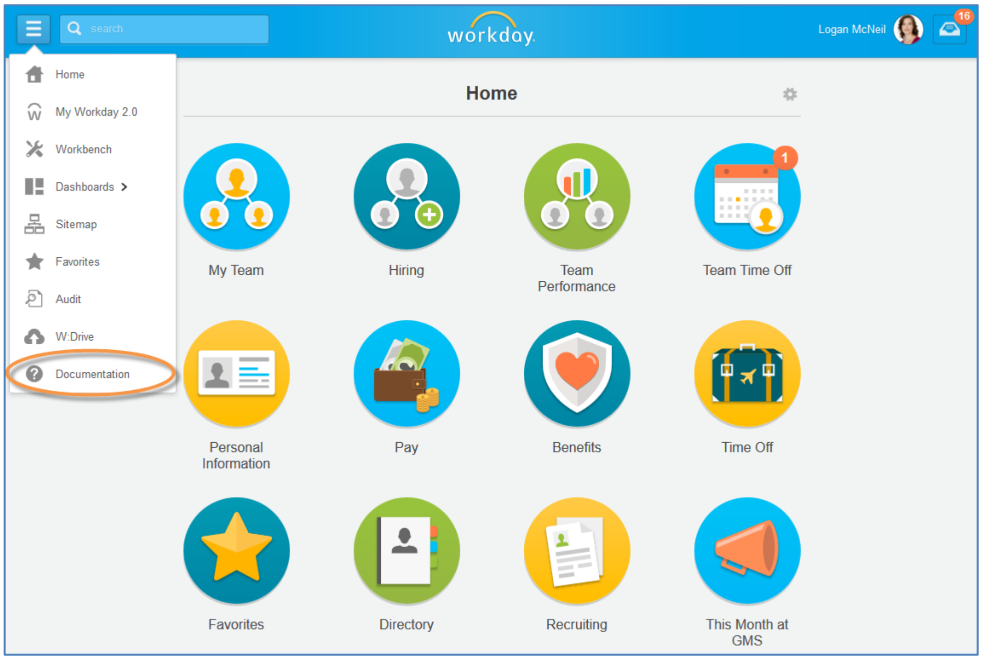
OVERVIEW

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

- Documentation
- Management Self Service (MSS) and Employee Self Service (ESS) Kits
- Workday Community
- Learning Management System

DOCUMENTATION

Workday documentation is product documentation written by Workday's documentation team and reviewed and approved by various members of Workday's development organization. This documentation resource is available by simply clicking on Documentation in the Workday Main Menu. You may refer to this standard material which is updated with each update of the Workday system.

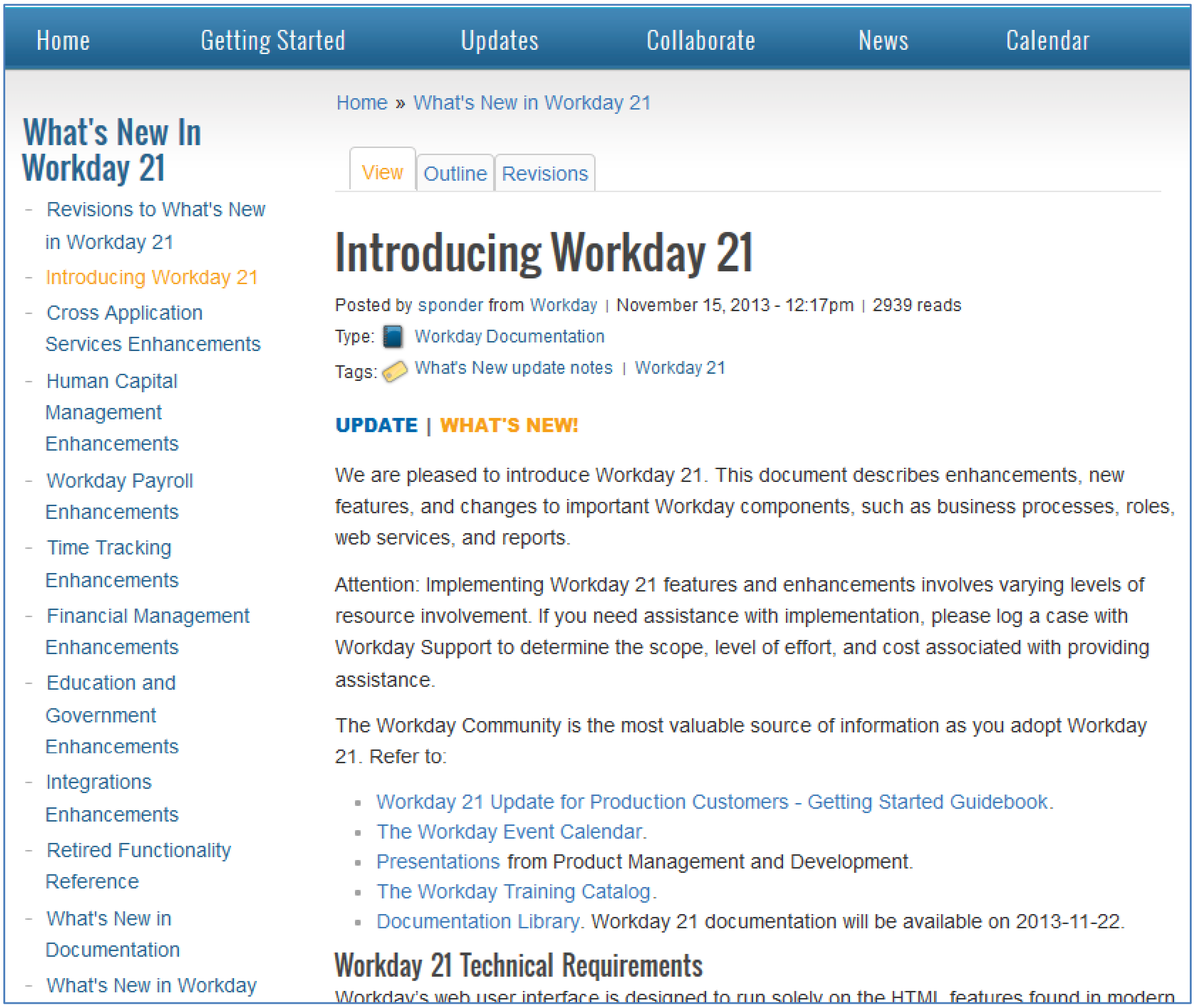


Workday documentation can be used to obtain information on some attributes of objects, system or procedures. It is an organized collection of sections that describe the structure, purpose, operation, maintenance and data requirements for Workday.

The Workday documentation is organized into the following major sections:

- What's New (in the current update)
- IT Administrator Resources
- Payroll for the U.S.
- Payroll for Canada
- Time Tracking
- Manage Finance
- Budgetary Control and Commitment Accounting
- Manage Projects and Work
- Education and Government
- Manage Security
- Manage Workday
- Manage Custom Reports and Analytics
- Manage Integrations
- Mobile Solutions
- Glossary of Terms

In addition, documentation is updated with each new release. Each section is updated and continues to address topics that span the various areas of Workday, such as tenant setup, security, organizations and business processes.



Click Printer-friendly version to see an HTML version formatted for printing. This link appears beneath section titles, near the top but when you get to a specific page, it appears at the bottom of the page. If you have a PDF printer driver, you can create your own PDF file of the printer-friendly version.

By default, access to the Workday documentation is granted to the All Users security group. However, you can control who can access through the security domain Workday Documentation Link in the System functional area.

WORKDAY ADOPTION TOOLKIT (WAT)

The Workday Adoption Toolkit is a collection of tools and resources designed to accelerate your Workday roll-out and quickly train your end-users on Workday. Each kit provides customers with customizable training materials (videos, frequently asked questions, facilitators guide, etc.) that can be used out of the box with little customization or act as the cornerstone of a larger training development plan.

When you are preparing to go live with Workday, you may be wondering what part your managers or employees will play and how you plan to bring all of your workers onboard. The Workday Knowledge Management team has developed the WAT to facilitate your Workday deployment and enhance the effectiveness of the Workday solution for your team.

KIT COMPONENTS

Items Included	Description
On-Demand Videos	Short visual demonstration published.
Screencast Production Scripts	Screencast Product Scripts include the audio transcript, step-by-step instructions for completing the task in Workday and guidelines for the placement of callouts and annotations.
Quick Reference Cards and Quick Reference Guides (Job Aids)	Visual step-by-step instructions for some of the most frequently requested procedures. These short 1-2 page QRCs and the longer QRGs replace the previous FAQ Guides.
Facilitator Guide	Training template for instructor-led classes or it can be repurposed into a user guide.
Activity Guide	A companion set of sample activities for the Facilitator Guide.
Messaging Materials	Sample posters, templates and other information to help you launch and communicate Workday.
Samples	Sample training content created using the materials provided in the toolkit.
Deployment Tools	Tips & Tricks, Lessons Learned and instructions for deploying visual demonstrations using Workday Quick-links

WORKDAY COMMUNITY

Welcome to the Workday Community! There are tons of things to see and learn here and you should be prepared to get involved. The strength of the Community is based on the strength of our customers, partners and employees who all contribute to making this an open forum.

When you log in for the first time you may want to start by navigating to the Workday Community Overview page to watch a six-minute introduction demo and the community policy document which outlines basic reminders of security and online courtesy. To get to this page, click:

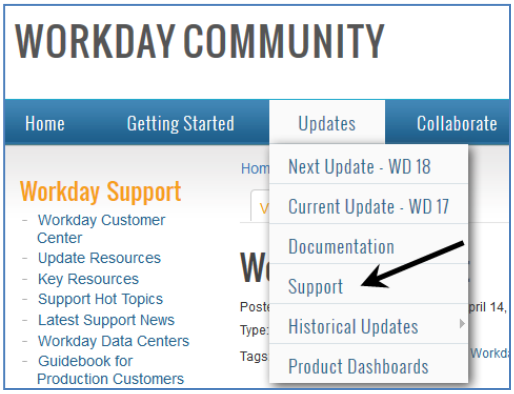
Getting Started > Workday Basics > Workday Community Overview

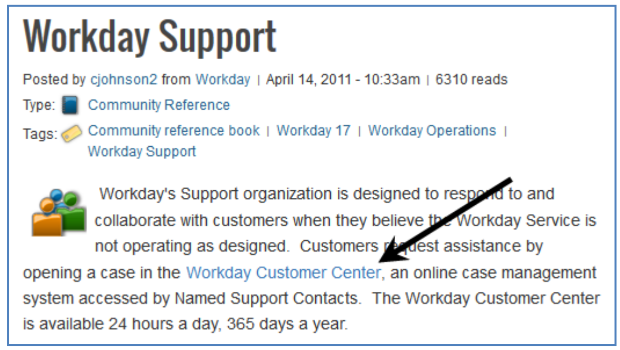
Now that you are in the Workday Community, what are some of the things you will want to do first? Here's a quick check list:

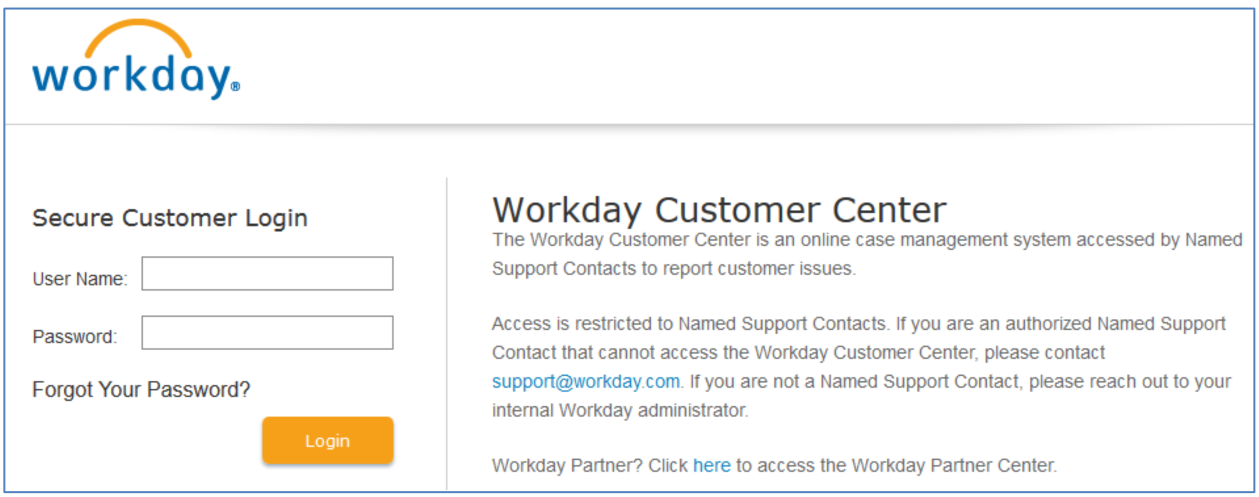
- My Account: Tell us who you are. Click on your user name in the top right corner of any page. Then click on the Edit tab to update your information including an optional photo, your company affiliation and areas of expertise.
- Join a Group: Click on the Groups link under the Collaborate menu item on the navigation bar at the of any page to see a list of all the public groups and select some to join and participate in.
- Upcoming Events: The Calendar lists all events, but check out the Upcoming Webinars section on the Home page to find out what's coming up. It could be a Workgroup on Payroll enhancements that asks for your thoughts or a "Coffee Break" session with HCM Product Strategy that discusses the Workday development plans. This is your opportunity to connect directly with Workday all year round.

SUPPORT

You have not gone live yet but you are wondering about how to get help once you are live, in production. The Workday Customer Center is your support line. It is easy to access the Workday Customer Center through the Workday Community by clicking on the Support link from the Updates menu on the navigation bar at the top of any page.







Not everyone in your company or in the Workday Community will use the Support link; access is limited to a designated support contact. This allows you to properly funnel support requests through those responsible for logging possible issues. Links are available on this page if you have questions regarding access.

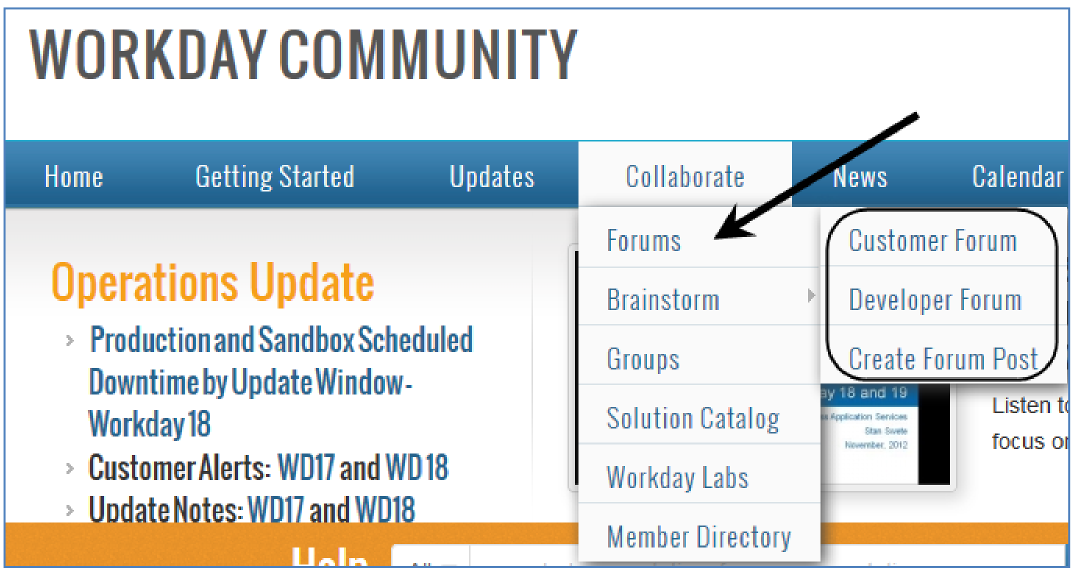
BRAINSTORM

The Brainstorm is all about customers: what you think, what you need and the direction you think the Workday products should go. You can start by reviewing some of the brainstorm ideas that other customers have already suggested and vote for the ones you consider high priorities for development. Your vote counts! Workday's product managers and development take your priorities into consideration for each and every update.

Search filters are available to help you find existing ideas. Search for Payroll or Talent, reports or Benefits and check to see if someone has already identified a need of functionality that you are interested in voting for or entering additional comments.

FORUM

The Forum is a great place to share information, present questions and find links to documentation. To find it, simply click on the Forum link from the Collaborate menu on the navigation bar at the top of any page. The navigation bar is also where you'll find the Brainstorm, Groups, Library and Calendar.



There are two types of forums you can leverage:

- The Customer Forum: A general forum for discussions between Workday customers and partners and the occasional Workday employee.
- The Developer Forum: A collaboration tool for people writing integrations and uploading programs for Workday deployments. This forum tends to contain more technical information than the Customer Forum.

SOLUTION CATALOG

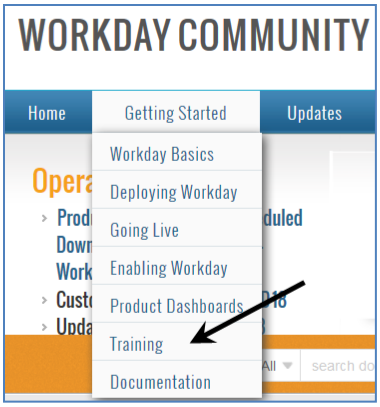
The Solution Catalog is a place for Community members to share different types of solutions they have configured themselves. Some of the types of shared solutions are:

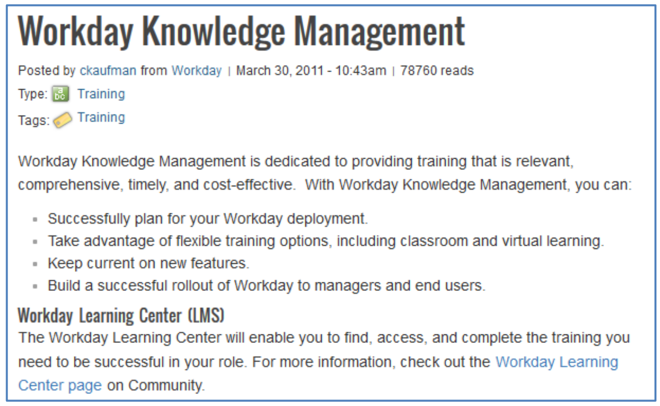
- Business Process Definitions
- Calculated Fields
- Report Definitions
- Studio Projects

The Solution Catalog is a great place to start when you need to create a complex report or integration, but it is important to keep in mind that a solution that works for one customer may not work for you. Always test in your sandbox first before deploying anything to your production environment!!

TRAINING CATALOG

The Training Catalog provides a list of current training offerings, including instructor led, virtual on-line and on-demand recorded courses. In addition, you can find information on training rates, the Manager and Employee Self Service Kits, free training videos about new features and contact information.





The Workday Training Catalog is grouped according to the phases of your deployment to make it easy for you to find the right training at the right time. The groupings are:

- Workday Basics: Are you a new Workday user? This collection of courses will provide you with the foundation you need to be familiar with the basic functions of Workday before you begin your deployment.
- Deploying Workday: As you begin to deploy Workday in your organization, this collection of courses will provide you with the knowledge needed to be successful.
- Life in Production: Once you have successfully deployed Workday, where do you go from there? This collection of courses will expose you to other aspects of Workday to maximize the full potential of this powerful tool.
- Subscription Libraries: These On-Demand Education Libraries are subscription-based offerings and are dispersed throughout the training catalog. These courses are a cost effective alternative to traditional education delivery, providing access to training 24/7 from any computer. Created in short, targeted segments, On-Demand Education is perfectly suited for system administrators who need immediate access to specific training. To inquire about a subscription, email TrainAdmin@workday.com.

LEARNING MANAGEMENT SYSTEM

Workday has partnered with Cornerstone, a learning management SaaS provider to manage our training delivery to you. Using the Workday Learning Center will make it easy for you to find, access and complete the Workday training you and your team needs to be successful in your roles.

Our Learning Management System (LMS) gives you the ability to do the following and more:

- Enroll in training
- Access recorded on-demand training
- View your student training history
- Sign up for a recommended training track
- Get information about new training offerings

Access to the LMS is managed through your organization's training coordinator. If you do not know who your training coordinator is, email TrainAdmin@workday.com.

CHAPTER REVIEW

Remember that you can access the Workday documentation to obtain information on some attributes of objects, system or procedures.

In addition, documentation is organized into a collection of sections that describe the structure, purpose, operation, maintenance and data requirements for Workday.

MSS/ESS kits are a great resource to help with the change management of your organization.

After joining the community, users should update their profile, join some groups and check out the upcoming events.

The Brainstorm in the Workday Community is one of the most popular customer tools and can be used to search for functionality enhancement requests that have already been created, vote for requests about which you feel strongly and add your comments.

The Workday Community includes links to product support and Workday training.

Workday's Learning Management System contains all Workday training content for a "one stop shop" experience.

CHECK YOUR KNOWLEDGE

1. Can you determine who has access to the Documentation link?

   ____

2. Name one component of either the MSS or ESS Kits:

   ____

3. True or False: The Workday Community is designed as a tool for Workday development.

   ____

4. What is the best way to get development to make one new feature or enhancement a high priority?
   - Check out Brainstorm and vote for everything.
   - Check out Brainstorm and vote only for what matters most to you.
   - Check out Brainstorm and make a comment on a request with details on your business requirements.
   - Check out your horoscope and find out if development is in your future.

CHAPTER 13: WORKDAY MOBILE

Stay in-touch and connected with your business and your team while on the move with Workday for iPad. Filter your personal activity streams including to dos, notifications, alerts and approvals. Navigate the organization using Workday's unique organizational swirl to explore the organizational structure and drill in on an individual worker's profile. Get insight into how the business is running with interactive analytics on Workforce Planning, Compensation and Talent Management. Drill down to analyze by different dimensions or inspect transaction level details. Users also can create custom reports for the iPad.

Available on the App Store

INBOX ON THE IPAD

The following Inbox content types are available on the iPad:

- Business process approvals
- Business process to dos
- Business process notifications
- Alerts for birthdays, anniversaries, upcoming time off and other custom alerts

When you select Inbox from the home page of Workday for iPad, you are initially presented with a compact view of the Inbox. However, you can maximize the Inbox display by touching any item in the compact view or touching the expand button. As with the full desktop browser version of Workday, you can use the Inbox on Workday for iPad to:

Make decisions to approve, deny or send back business process items. Your actions are recorded instantly by Workday, just as if you were using a full desktop browser.

Mark notifications as "read". Simply touch the Inbox's refresh button to see your changes.

Filter the Inbox with the same filters available to you in the full desktop browser version of Workday, including favorites.

ANALYTICS ON THE IPAD

The dashboard landing pages available in Workday are available on the iPad:

- Academic
- Compensation and Benefits
- Labor Cost Analysis
- Talent Management
- Expenses
- Workforce Planning

The dashboards can display Workday-delivered or custom Worklets. Charts are highly interactive, enabling you to drill down, display legend information directly on charts by touching the legend icons and toggle between table and chart views (in the table view, you can drill on totals). If you perform a series of drill downs, your recent drill down windows are shown in a reduced size on the left side of the current chart when in landscape mode (or at the bottom when in portrait mode), making it easy to see related charts and maximize them again if you'd like.

You also have the ability to comment on charts by touching the annotate button. You then can email the annotated chart to other individuals directly from the chart view.

Other actions you can take with charts include:

- Rotate pie charts and drill down on any segment of the chart.
- View any analytic indicators that are part of a worklet.

Exclusively for Workday for iPad, we deliver a Team Profile for managers that includes an actionable display of the team members and a calendar, as well as configurable compensation, talent and stats reporting tabs. We deliver the Team profile with several new standard reports. Like other profiles, this new composite view can be configured using the *Configure Profile Groups* tasks.

With the Team profile, managers have convenient views and access to:

- A Team profile group that Workday delivers preconfigured with worker cards for each team member. From here, managers have convenient access to all their direct reports, including navigation to individual worker profiles as well as selected actions, such as feedback, notes, and bookmarks.
- A consolidated Calendar view of birthdays, anniversaries, leave events, and time off.
- Three configurable team analytic profile groups: Stats, Compensation, and Talent & Performance.

APPLE PUSH NOTIFICATIONS

You can configure your Apple device so that Workday can push your Inbox update notifications to both your iPad and iPhone. These notifications can be sent to your devices even if you are not signed into Workday.

As long as your Workday tenant is enabled for this, you can sign in and associate your device with your Workday user account. If you do not want to receive notifications when you are signed out of Workday you must select “Don’t Allow” right after associating your device with your user account. To stop receiving push notifications you must use the app settings to turn off this feature.

DIRECTORY SEARCH AND ORGANIZATION SWIRL

The directory search provides quick access to worker data in the Workday directory, while the organization swirl introduces a highly interactive way to navigate your supervisory organizations. This display leverages the size and unique characteristics of the iPad device, making it simpler and more efficient to navigate organizations. In addition, you can:

- Expand organization levels by touching the photo associated with a manager. If the worker's photo appears to have a stack of additional photos beneath it, then you can expand their organization to see the workers within it.
- Create a new email addressed to the user whose email address you touch.
- Map a user's location by touching their address.
- Automatically transfer a worker's contact information from Workday into your iPad's contacts app.
- Expand the view of a worker to see additional details about their current job, compensation and job history, as well as talent data.
- Return to the Workday home page by touching the Workday logo at the top of the Workday for iPad app.

SETUP

Follow the instructions below to install and configure Workday for iPad:

1. Install the *Workday for iPad* application from the Apple App Store or directly from your phone using the App Store icon.
2. Launch the iPad's Settings application. Scroll down and touch Workday to open the Workday settings, where you can configure the service's web address and your tenant.
    - The web address defaults to *https://www.myworkday.com*, which is used for production tenants. You can change this for testing other environments like Sandbox.
    - Enter your Tenant name. If you don't know it, simply follow the instructions on iPad.
3. Launch *Workday for iPad* and sign-in with your normal Workday user name and password.

CONFIGURATION

There are several considerations to keep in mind when developing custom reports and Worklets that might be accessed via Workday for iPad.

Configuration considerations for the iPad include the following:

To configure the iPad in your tenant, you must belong to a security group that can:

- Configure security
- Access tenant setup tasks
- Author and configure custom reports (if you are going to use custom reports)

Access to Workday for iPad content is controlled by the Mobile Usage-iPad security domain, and its sub-domain:

- Inbox – iPad: This sub-domain specifically controls access to the Inbox on the iPad.
- Access to the organization swirl is controlled by the Report: Navigate Organization domain.
- Access to the dashboards is controlled by the Worklet: Dashboard domain and its associated sub-domains. This is the same domain that controls access to the dashboards in the full desktop browser application. Therefore you will have exactly the same access to dashboards on the iPad as you do when you access Workday via a desktop browser. The sub-domains of the Worklet: Dashboard domain control access to several other Management Dashboard child policies as well.

WORKDAY MOBILE SOLUTIONS

Workday provides mobile solutions for:

- iPhones and iPads with our native iOS apps: Workday for iPhone and Workday for iPad
- Devices that run on the Android platform
- BlackBerrys with a BlackBerry application that provides an icon to launch the Workday Mobile Web (basic website)

Features are streamlined and optimized for mobile devices. All features are delivered in English only. Some features include functionality exclusive to mobile devices, while others do not include all of the detail or functionality of the feature in the Workday browser application.

Below is a chart that shows features that are available for different mobile solutions:

Feature	Workday for iPhone	Workday for iPad	Workday for Android	Touch-optimized Mobile Web	Basic Mobile Web
Apple Push Notifications	X	X			
Change Contact Information	X	X	X	X	
Change Job	X	X	X	X	
Change Password	X	X	X	X	
Change Photo	X	X			
Check In/Out	X		X	X	
Dashboards	X	X	X	X	
Delegated Authentication	X	X	X	X	X
Directory Swirl	X	X	X	X	
Expense Receipts	X		X		
Feedback (Anytime and Get Feedback)	X	X	X	X	
Inbox	X	X	X	X	X
Mobile PIN Sign In	X	X	X	X	
Notebooks		X			
One-Time Passcode	X	X	X	X	

Feature	Workday for iPhone	Workday for iPad	Workday for Android	Touch-optimized Mobile Web	Basic Mobile Web
Payslips	X	X	X	X	
People (Find Workers)	X	X			
Performance Reviews	X	X			
Personal Notes	X	X	X	X	
Recruiting	X		X	X	
Reports	X	X	X	X	
Search for People	X	X	X	X	X
Self-Service Tasks	X	X	X	X	
Sign In Challenge Questions	X	X	X	X	
Single Sign-On	X	X	X	X	
Talent Card	X	X			
Team Profile	X	X			
Time Entry	X	X			
Time Off	X	X	X	X	

See the Workday Community for the most updated information on mobile devices and features.

REVIEW QUESTIONS

DAY ONE

1. True or False: Search allows you to use partial searches, abbreviations and misspelled words.

    ____

2. What is the name of the icon you select to view information or perform tasks on a landing page?

    ____

3. What is the primary organization type within Workday HCM?

    ____

4. How many organizations are allowed in Workday?

    ____

5. True or False: You cannot hire into a supervisory organization prior to the organization availability date.

    ____

6. Which of the following is NOT a reorganization task
    a. Inactivate Organization
    b. Create Superior
    c. Create Subordinate
    d. Move Workers
    e. Divide Organization
7. Name two Workday delivered organization types other than supervisory.

    ____

8. How do you find a list of all the search prefixes in the system?

    ____

9. What are the three staffing models and which allow for the use of the job requisition functionality?

    ____

10. What are the only fields required when creating a job profile?

    ____

11. Which staffing model does each of the supervisory organizations you created have?

    ____

12. Did we make hiring restrictions for the supervisory organization Course Development? If yes, what were they?

    ____

DAY TWO

1. True or False: Closing a position is considered a permanent change.

   ____

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

   ____

3. What must you do if you choose to have no hiring restrictions on a position/headcount/job?

   ____

4. A compensation package consists of __________ and __________, and compensation defaults during staffing events when you attach _____________________ to all compensation components.

5. Name two types of compensation plans.

   ____

6. Workday has divided the system into securable parts called ___________ and then divided that even further into _________ and ____________.

   ____

7. Navigate to the domain security policies for the functional area of "Staffing." What is the one securable action in the "Set Up: Staffing Model" domain?

   ____

8. Find the compensation grade "Management." What is the Minimum and Segment 4 Top for France (give answer in USD)?

   ____

9. List at least three business processes you will use in Workday HCM:

   ____

10. What is the name of the task you must perform after making any changes to security?

    ____

HCM FUNDAMENTALS: DAY 4 LAB

Business Case: You will use the next few hours exploring Workday without step by step instructions. Below are some guidelines. Write out what you want your structure to look like before creating it in the system. Read through the entire activity before starting.

Helpful hints before you start:

- Locations need to be created before the organizations can be created.
- You need to assign a reorganization event to new organization hierarchies.
- Plans and grades need to be created before the compensation package is created.
- Skip any optional business process steps in this activity (if it says Skip, then skip!)

PART ONE

To start, you will first want to login as Logan McNeil.

SUPERVISORY ORGANIZATION CREATION

Create the supervisory organization hierarchy for Acme Textiles in Workday:

1. Create a location as a business site in **Los Angeles** with the following address and phone numbers:
   - 333 South Figueroa Street, Los Angeles, CA 90071
   - Phone: 213-617-4444, fax 213-617-5555
2. Create a supervisory organization hierarchy using the staffing model of position management (hint: you will need to use or create a reorganization event for this).
   - **Acme Textiles** is the superior supervisory organization.
   - Make sure you Assign Roles in your organization to the Chief Human Resources Officer, Logan McNeil (look in the guide to see what nine roles we assigned to Wealth of Knowledge).
   - For Organization Assignments, use currently existing Company, Cost Center and Region organizations in the system (look in the guide to see what organizations we assigned to Wealth of Knowledge).

     HINT: If you do not assign organizations on your supervisory organization, you will need to assign them when you create positions.
   - Create two supervisory organizations as subordinates to Acme Textiles – one called **Acme Production Operations** and the other called **Acme Manufacturing**.

CREATE JOB PROFILES

1. Create an **Acme Chief Production Officer** job profile that you will use when creating positions within the Acme Textiles supervisory organization.
2. Create an **Acme Manufacturing Manager** job profile to also use when creating positions within Acme Textiles.

   HINT: Do not put these job profiles in a job family (unless you have created a job family).

CREATE POSITIONS

1. Create a position in Acme Textiles called **Acme Chief Production Officer**, using a hiring restriction of the job profile Acme Chief Production Officer you created and any other restrictions you choose.
2. Create a second position in Acme Textiles called **Acme Manufacturing Manager**, using a hiring restriction of the job profile Acme Manufacturing Manager and any other restrictions you choose.
3. Ensure all steps and approvals for the Create Position business process are complete (you will need to log in as different users to complete the process).

COMPENSATION

Create a compensation package and all compensation components within the package:

1. Create a **Compensation Eligibility Rule** that includes all Acme Textiles employees
   a. Use the **Job Profiles** you created as eligibility criteria

      HINT: Because you did not put your job profiles in a job family, you will need to utilize the search text box, not the prompt, to find your job profiles

   b. Use this eligibility rule on all compensation components you create below, with the exception of the grade profile
2. Create the compensation components
   a. **Grade**: Currency USD and Annual frequency, include a **Grade Profile**
      - Min = 100,000 / Segment 4 Top = 200,000
      - All Acme employees are eligible
      - Grade Profile: For Paris location, currency EUR and Annual frequency
        i. Min = 52,000 / Segment 4 Top = 90,000
        ii. Only employees in the location of Paris are eligible (*HINT: Use an existing eligibility rule in the system*)

   b. **Acme Salary Plan**: Use a Base Pay component
      - All Acme employees are eligible

   c. **Acme Allowance Plan**: $100 per month as a car allowance
      - All Acme employees are eligible
3. Create a **Compensation Package** and include all compensation components above

BUSINESS PROCESSES

You will now configure a hire BP for Acme Textiles. Before you begin, take a moment to think of some steps and condition rules that you think your enterprise will use once live with Workday. Feel free to use the system and your guide as a reference. Below, list at least five steps as well as two condition rules you think your enterprise will utilize:

1. Steps:
   - ____
   - ____
   - ____
   - ____
   - ____
2. Conditions:
   - ____
   - ____

*HINT: Remember, the order of steps in your business process matters. Based on your configuration, some steps may need to occur after the completion step or may have pre-requisites. The **Business Process Configuration Options** report defines these requirements.*

Once your supervisory structure has been created, your profiles and positions made, your compensation components, package and rules created, navigate to your Acme Textiles supervisory organization. Use the related action to create a new business process definition for hire.

Business Process > Create, Copy or Link Definition

Select the business process type of *Hire* and *None of the above* then click OK.

You will now be in edit mode and can configure your business process.

Your hire definition needs to have at least five steps (one of which needs to be a **To Do** step and one a **Service Step**), two condition rules and one notification. Make sure you assign your steps to security groups that you have supporting your organization.

Once you have created your hire definition you can continue with the steps below.

HIRE EMPLOYEES

Run the All Applicants for Contract/Hire report. Pick one of those pre-hires to hire into either of the positions you just created. Work through the Hire business process. Remember to check the status of the process to see what the next awaiting action is.

When it comes to propose compensation, confirm the package you created has defaulted and enter the salary amount.

Note: You will need to sign in as several other people during the hire process. The user name will always utilize the same naming convention that we have used in class and the password will be the same as well.

Hire another employee in the Paris location to confirm your compensation grade profile (EUR) is configured correctly and/or to test your business process condition rules.

PART TWO

REPORTS:

Run a few of the below reports:

Termination Details: View a detailed list of terminated workers in one or more organizations. Enables you to analyze turnover by organization and to view termination data for regulatory reporting. Details include each worker's hire date and termination date, length of service, termination category and reason, cost center, manager and compensation.

Headcount Report: View a list of worker headcount in an organization. Enables you to drill down on the numbers to create summarizations by category. Details include summary counts of workers, positions, hours and jobs.

Turnover Summary: View a summary of employee attrition in an organization for a given time period or date range. Details include starting and ending headcount, total terminations, total turnover percentage and a breakdown of voluntary and involuntary totals and percentages. Enables you to view and analyze turnover statistics by date. You can also perform related actions on the numbers to create data summaries, such as headcount by ethnicity or terminations by location.

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 group, earliest hire date, position count and number of pre-hires. If the organization uses headcount management, the number of available hours is also displayed.

Benefit Events Status Report: View workers with benefit events and their status. Details include: the benefit event type, event date, initiation date and submission date. Enables you to manage benefit events on a day-to-day basis. On this report there is also a link to enroll workers in their benefit elections or to cancel the benefit event.

SECURITY

Find the business process for Terminate (default definition) as well as the business process for Hire (default definition). Look at the business process security policy and answer the below questions:

1. Who can start the business process?

   ____

2. Who can do action steps in the business process?

   ____

3. What is the functional area of this business process policy?

   ____

BUSINESS PROCESS

Run the Business Process Configuration report for the Hire business process. Answer the following questions.

1. True or False: You can add the action of Request Budget Approval at any time during hire process.

    ____

2. True or False: The Propose Base Pay task does not initiate a sub-process.

    ____

3. True or False: You can only approve or deny from the Request One Time Payment action.

    ____

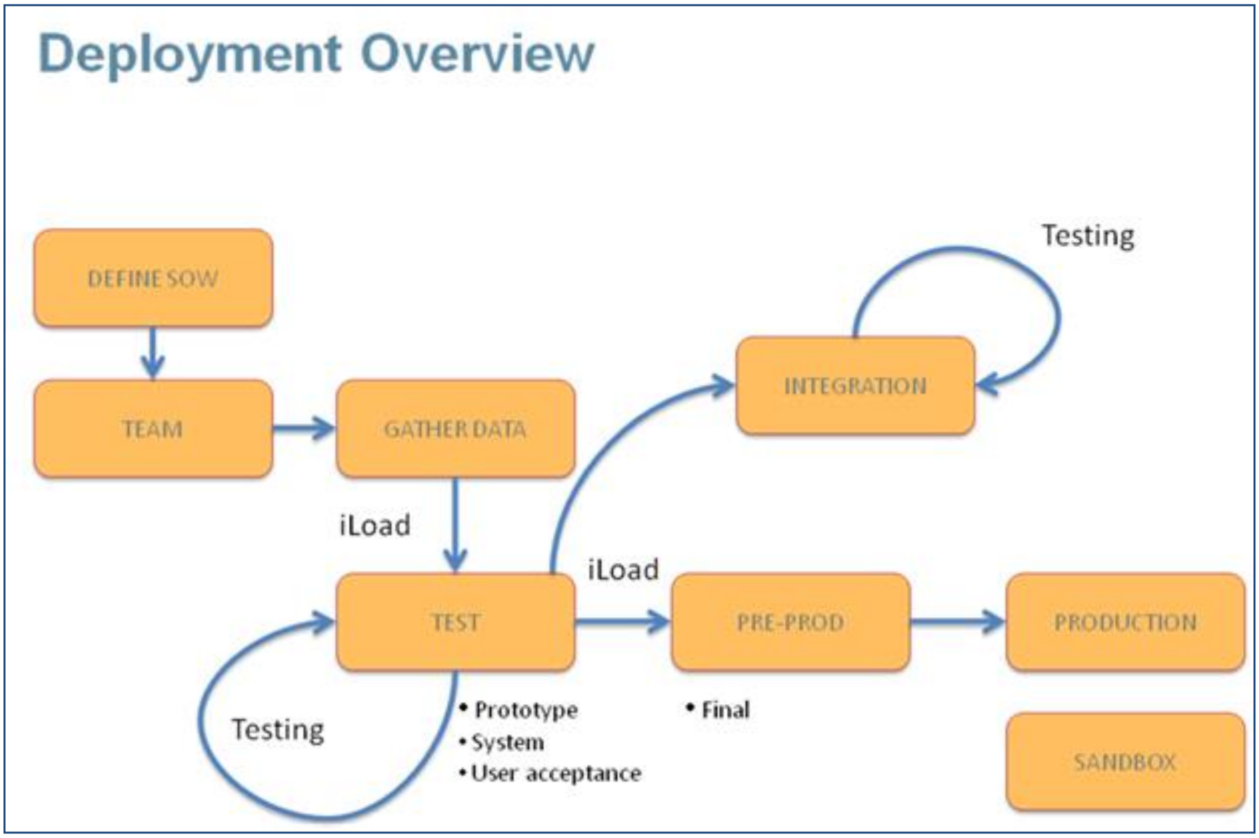
4. What review action must be completed before the completion step?

    ____

APPENDIX

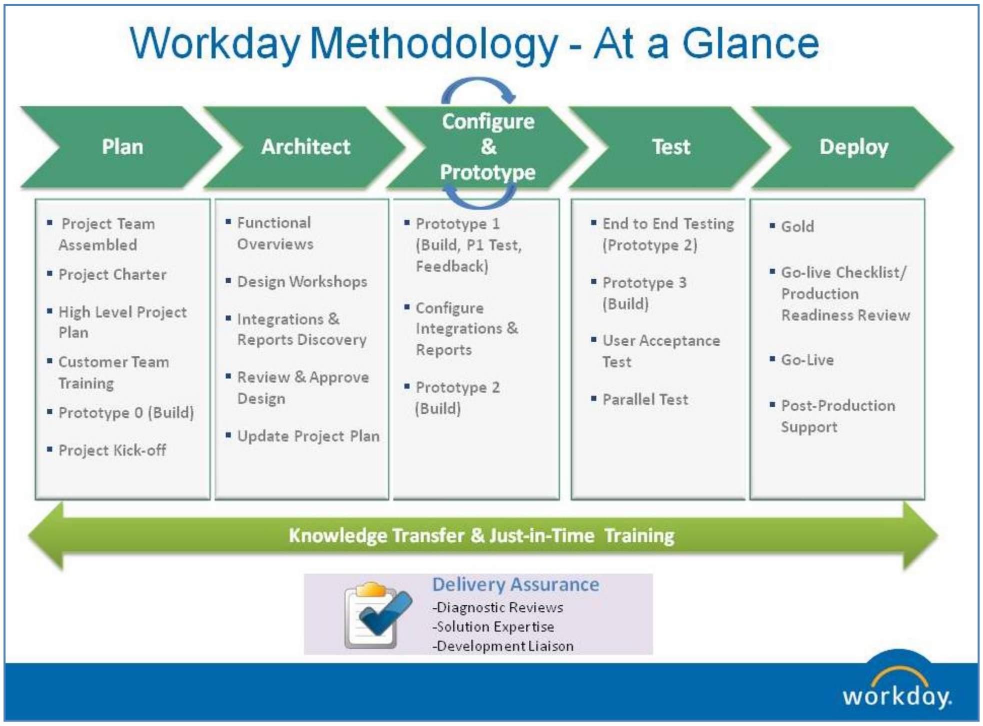
DEPLOYMENT OVERVIEW

This is a high level look at Workday's deployment process. It is Workday's goal to deploy customers as quickly and effectively as possible using as many features and functionality as possible without sacrificing customer satisfaction.



WORKDAY DEPLOYMENT METHODOLOGY

Workday deployments follow the Workday Accelerated Deployment Methodology. This proven, rapid methodology is based on years of experience deploying our products and was built specifically for our Software as a Service (SaaS)-based delivery model.



PHASES AND STAGES

Workday's methodology is based on key stages and phases throughout a deployment. There are five stages with the following key objectives:

Plan Stage: Set the overall project direction and administration while setting customer expectations.

Architect Stage: Analyze customer requirements and business processes by leveraging Workday's optimized configurations as a starting point.

Configure and Prototype Stage: Provide an iterative approach to configuring Workday based on the customer's needs.

Test Stage: Validate configuration decisions and system and user readiness.

Deploy Stage: Effectively transition customer to Production Support and Optimization Services.

Phases typically represent the deployment of net new product lines, like HCM, Payroll and Financials, as opposed to just rolling out additional product functions. For example, Phase One may consist of core HR, Benefits and Manager Self Service. Phase Two may include the deployment of Financials. Phases are determined initially in the Statement of Work, but are revisited for accuracy and approach during the Plan stage of a deployment. The stages of the methodology should remain the same regardless of phase.

WORKDAY STREAMLINED

The tables below show several tips and shortcuts that you may find useful when working in the Workday system.

Search Prefixes & Tips
Use "?" to see a list of search prefixes
Search with a prefix to restrict the search results (ex: bp:hire)
Use smart search techniques (using multiple separate character strings)

General Keyboard Shortcuts	
Copy Text	CTRL+C (works on any text you can highlight)
Cut Text	CTRL+X (works in any field in which you can enter text)
Paste Text	CTRL+V (works in any field in which you can enter text)
Scroll Up or Down	Use your mouse scroll wheel as a shortcut (it scrolls the active scroll bar, when there is more than one)

Application Search	
Move Focus to Search	CTRL + ENTER (not available on edit pages)
Close Search Results	ESC or UP ARROW
Re-Open Search Results	DOWN ARROW

Tabs	
Next Tab	RIGHT ARROW
Previous Tab	LEFT ARROW

Grids	
Move to Next Cell	TAB
Move to Previous Cell	SHIFT + TAB
Move to Next Row	ENTER (Does not work if the control that is inside the current cell handles itself)
Move to Previous Row	SHIFT + ENTER (Does not work if the control that is inside the current cell handles itself)

Promptable Fields	
Search	ENTER or TAB (after entering search text)
Open Prompt Normally	ENTER (with no search text)

Prompt Lists	
Next List	RIGHT ARROW, ENTER, SPACEBAR
Previous List	LEFT ARROW
Next Item in List	DOWN ARROW
Previous Item in List	UP ARROW
Select Multiple Items in List (When Allowed)	SHIFT+UP ARROW SHIFT+DOWN ARROW SHIFT+HOME SHIFT+END
Select All Items in List (When Allowed)	CTRL+A
Select Item(S) in List	SPACEBAR, ENTER
Dismiss Prompt	ESC

Buttons
Use the tab key to move from field to field on the page. When the focus gets to a button, use the spacebar to trigger the button.

Radio Buttons	
Next Radio Button	DOWN ARROW
Previous Radio Button	UP ARROW
Select Active Radio Button	SPACEBAR

Hyperlinks
Hyperlinks appear as blue text and become underlined when you rest the pointer on them.
Clicking a hyperlink displays a new page showing details about that item.
You can view more detail about aggregate numbers in reports and Worklets by clicking the hyperlink for a sum, average or count value. Workday displays a secondary window with details about the selected number. The drill down functionality also allows you to view data by dimension. Objects in the drill down window have related actions menus that enable additional actions.
When you right-click on some hyperlinks, including the related actions menu, you get a menu of options such as export to excel, see in new window, copy url and others. The menu varies depending on the nature of the link. The see in new window option opens the target page in a new browser window and is available when the link takes you to a view page. You can open up to six new windows this way.

Set Favorites
You can designate any task, report, view or business object (organization, employee, position and so on) as a favorite. Favorites then appear on your favorites page so you don't have to search for them each time you want to access them.
You access your favorite items on the Favorites tab in the Main Menu. Favorites are also available as a Worklet on landing pages.
To add items to your favorites, click Manage Favorites on the favorites tab. To add a business object to favorites, find the object and select Favorite > Add from the related actions menu.

Set Preferences
Access your user preferences by selecting Profile > Change Preferences. You can use this task to: • Set your preferred locale • Enable or disable the preferred currency reference view (if enabled by your organization) • Set your preferred currency • Set your preferred search category • Set your preference for generating email alerts for business processes and notifications
Note: If your organization has enabled the Currency Reference View, you will see the Enable Preferred Currency Reference View option. Enabling this view results in the simultaneous display of both the foreign currency value and your preferred currency value for certain currency fields in Workday delivered reports. Setting your preferred currency makes your preferred currency available for display in other cases in which the "user's preferred currency" field is used (typically within custom reports).

Managing Worklets
You can configure the actions and reports that a Worklet shows by following these steps: Access the Configure Worklet task. Select the Worklet you want to configure
In the actions area, custom reports area or system reports area, click the plus icon to add another entry.
Note: You can add a link to any custom reports you have created.
Use the arrow icons to move the selected items to the desired order.

Configure Landing Pages
You can specify your Worklet preferences for your landing pages. You cannot change your required Worklets. However, you can add or delete optional Worklets and change the order in which they appear, as follows: From the landing page, click the gear icon on the top right of the page. Click the "+" sign to add a new row or click "x" to delete an existing row. Each row corresponds to a single Worklet. If adding a row, click the search prompt button to the right of the empty row and select a Worklet from the list of optional Worklets presented. Use the up and down arrows next to the "+" and "x" signs to move the currently selected row up or down. Doing so changes the position of the corresponding Worklet on the page.

NOTES

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