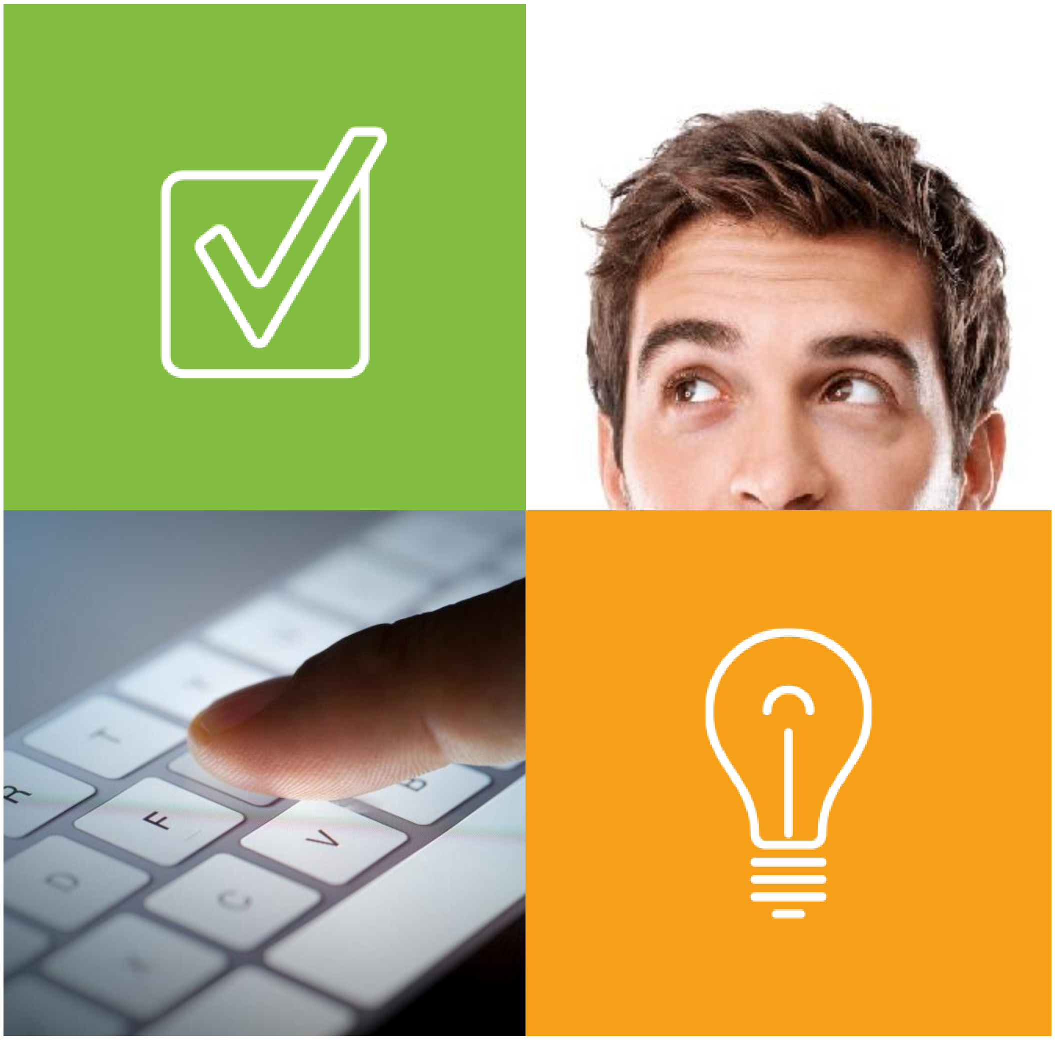
workday. EDUCATION



Business Process Fundamentals
COURSE MANUAL AND ACTIVITY GUIDE

CONTENTS

BUSINESS PROCESS FUNDAMENTALS FOR WORKDAY 24

BUSINESS PROCESS FRAMEWORK

DESCRIPTION

The Workday Business Process Framework consists of a powerful set of tools that enables you to automate time-consuming business processes and deliver the right information to the right people at the right time. Business Process definitions are used to configure business events in Workday. Through instructor led demos and activities you will learn about the different types of process steps, such as Action, Approval, Approval Chains and Checklists, and how they work and integrate with security groups. Also covered will be the creation of notifications and the use of condition rules within a business process, including topics such as granting security access to business process templates, and configuring questionnaires.

GOAL & OBJECTIVES

Business Process Administrators will gain an understanding of the <u>concepts</u> involving Workday Business Process Framework. In addition, students will gain helpful information regarding <u>maintaining</u> Business Process Definitions going forward.

OVERVIEW

- Business Process Framework
  - Terminology
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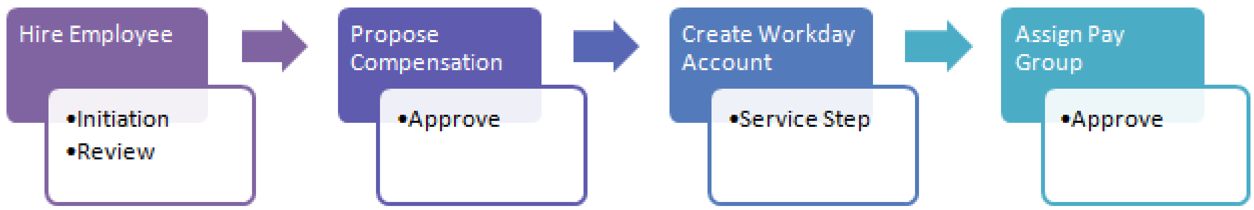
- Business Process Tips

DEFINE BUSINESS PROCESS

A business process is the definition of tasks that need to be done in order for an event to occur, the order in which they must be completed, and who must do them. The business process definition specifies the security group responsible for each step in the process, notifies the workers in these groups, and gets feedback on when each step is complete so it can move on to the next step. Steps can also be conditional.



Workday includes several predefined business processes that are identified in the system as Factory Defaults. These default business processes are available to any organization and are editable.

PROXY SESSIONS AID IN BP TESTING

Proxy Access Policies are a very useful mechanism for testing. Proxy access can be set up for use in any tenant environment *except* production. This security configuration is a real time saver when testing business processes or reports in your Sandbox or implementation tenants, because you don't have to log in and out as multiple users.

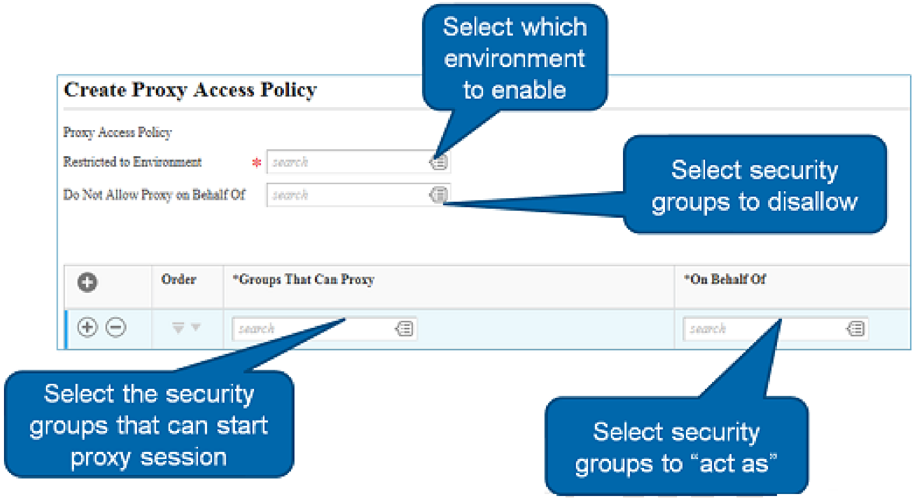
When you are signed into a proxy session, you can perform any action in Workday that the user on whose behalf you are authorized to do. Functionality that requires connecting to another service is not supported, including integrations, scheduled reports, business form printing, background conversions. Additionally, proxy users cannot access documents on the W: drive, Apple Push Notifications, email, notifications received through the user interface nor solutions.

Some key points and restrictions to keep in mind around proxy access:

- You can only configure one policy per environment
- Proxy access policies apply to non-production environments only
- Only unconstrained security groups can be configured with proxy access
- You cannot start proxy session when acting as a delegate
- No support for connecting to another service when in proxy mode.
    - Integrations
    - Scheduled reports

  - Business Form printing

- No access to W: drive documents, notifications when in proxy mode.



ORDER MATTERS

Workday evaluates the proxy access rules **in the order in which they are listed**, until a rule applies. Rules are checked in **order based on the user on whose behalf you are trying to proxy.** Once the first rule is found for that proxy on behalf of user, the system will check if you have a permitted security group to proxy on behalf of that user or not and stops.

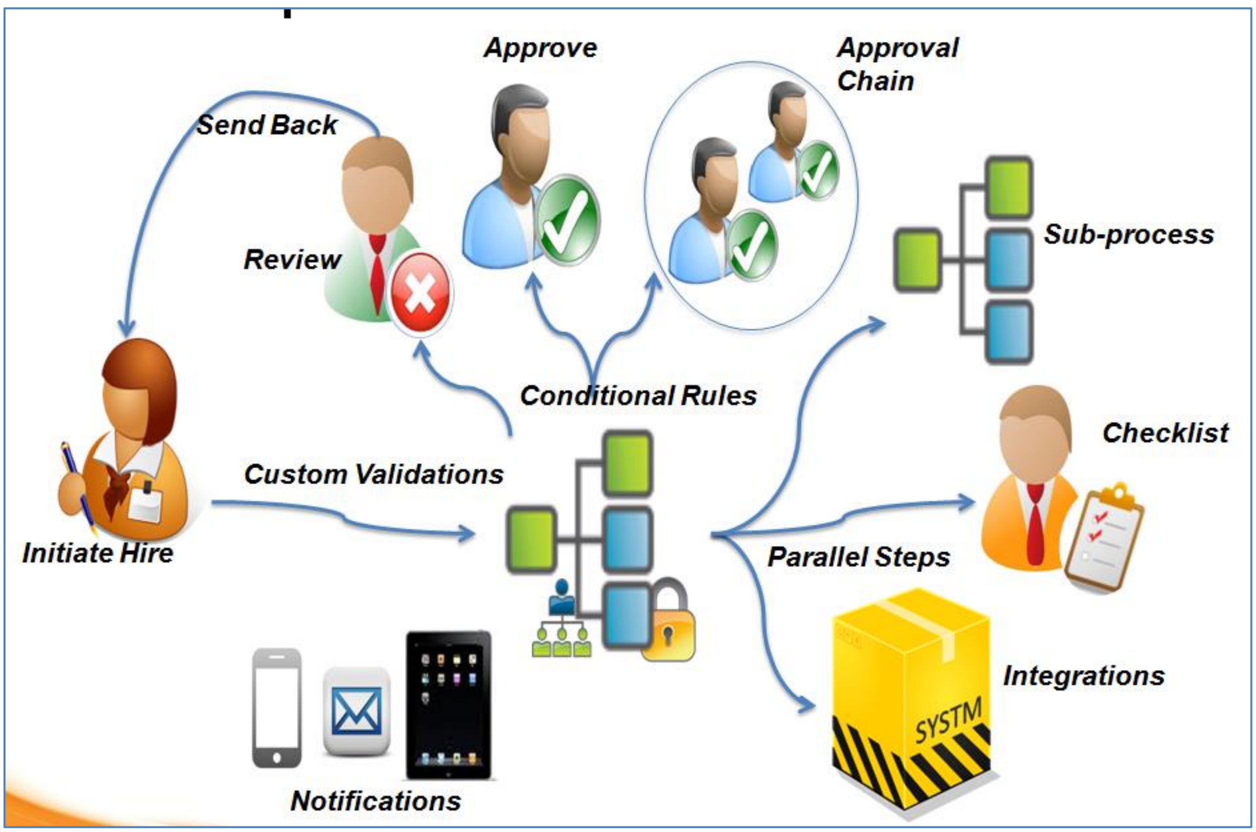
OVERVIEW OF BUSINESS PROCESSES FRAMEWORK

Workday is process driven. Applications are built on top of the business process framework. Most other applications were built before workflow. No bolt-on BPM solution needed: it is integral to Workday.

It provides:

- Application consistency
- Centralized audit trails
- Seamless integration with our system of record information, security and organizational structures

As an example, Workday's Business Process Framework seamlessly integrates "machines" and people in a built-in solution that is configurable and traceable with reporting and management tools.



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 define whether a step will be initiated. Notifications can also be defined to notify a Workday user that a step has begun, completed, or that a particular review response was selected, e.g., Deny.

ACTIVITY 1 – CONFIGURE HOME AND PROXY ACCESS

Business Case: You are a Business Process Administrator. Sign on to your system and configure the Home page with Business Process worklets that provide easy access to process information. Since Logan also has Security Configurator access, she will create a Proxy Access Policy.

Sign in as Logan McNeil (lmcneil)

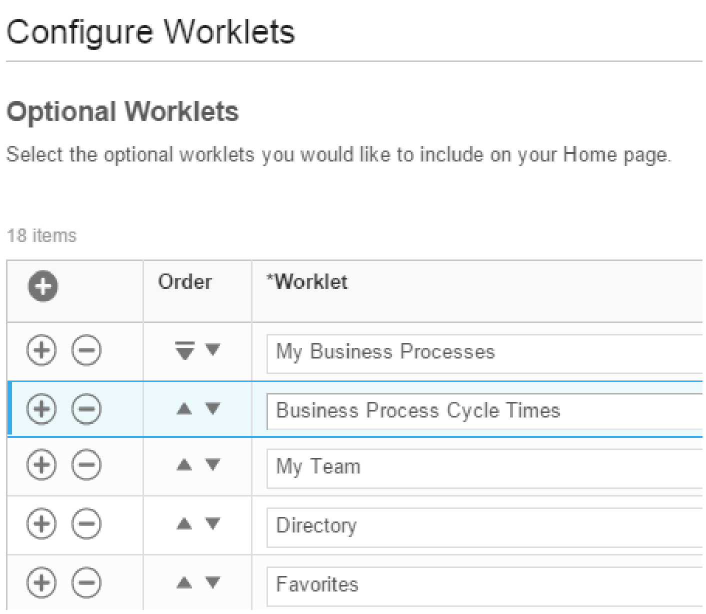
TASK 1: CONFIGURING HOME PAGE

Let's configure the Home page. Think of it as your personal dashboard where you will act on tasks, review notifications and initiate actions.

1. On the Home page, click the Configure this page link in the upper right.
2. From the Optional Worklets prompt, add and remove items. Use to add Worklets by inserting a row and then select from the prompt. is used to delete items. The arrow buttons can be used to reorder the worklets. Add the following worklets to Logan's home landing page:

Optional Worklets	Worklet
	My Business Processes
	Business Process Cycle Times

Your page should look similar to this:

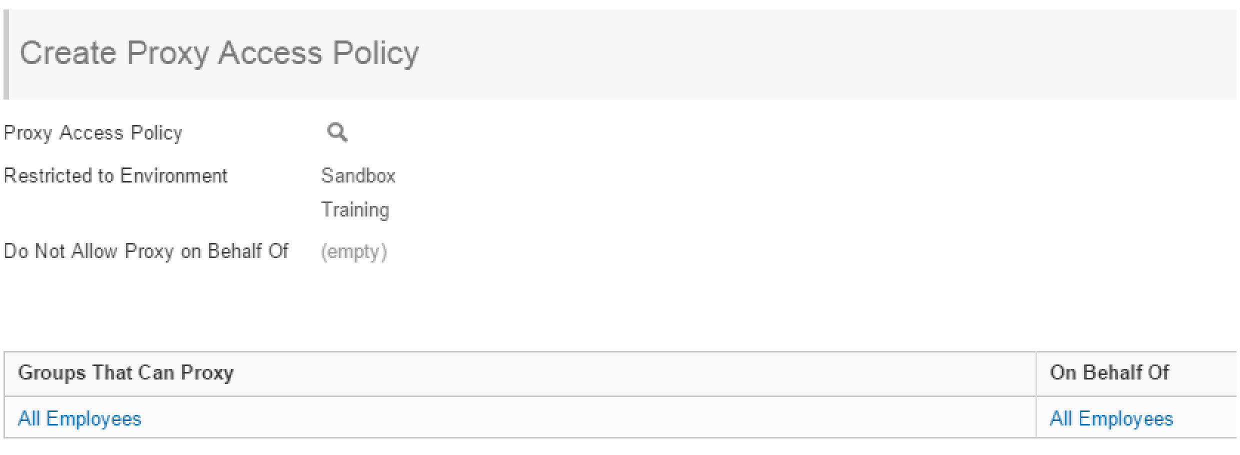


3. Click **OK** and then **Done**.

Note: The 2 worklets added above are delivered worklets configured by Workday. Custom worklets can also be configured by customers.

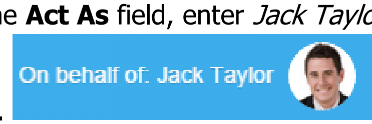
TASK 2: CREATE PROXY ACCESS POLICY

1. Search for the string '*create proxy*'
2. Click on the link to run the task to **Create Proxy Access Policy**
3. In the Restricted to Environment field, use the prompt icon to select both **Training** and **Sandbox**
4. Select **All Employees** as **Groups That Can Proxy**
5. Select **All Employees** in the **On Behalf Of** field
6. Click the **OK** button Your policy should look similar to this:



Note: This 'wide-open policy' is for training purposes only and is not intended as a recommendation to be considered in your environment. Your policy will likely be much more restrictive.

TASK 3: TEST PROXY ACCESS

1. Search for the string '*start proxy*' and click the link to execute the task
2. In the **Act As** field, enter *Jack Taylor* and click **OK.** Notice you are now acting on behalf of Jack. 

3. Search for the string '*stop proxy*' and click the link to execute the task

4. Check the confirmation box and click **OK.** Notice you are acting as yourself (Logan McNeil) again.

As we work through activities in class, you will have the option to start/stop proxy sessions or to log out/in as different users. From the **Security Profile** related action, you can access the Start Proxy task. No need to stop proxy each time.

BUSINESS PROCESS TERMINOLOGY

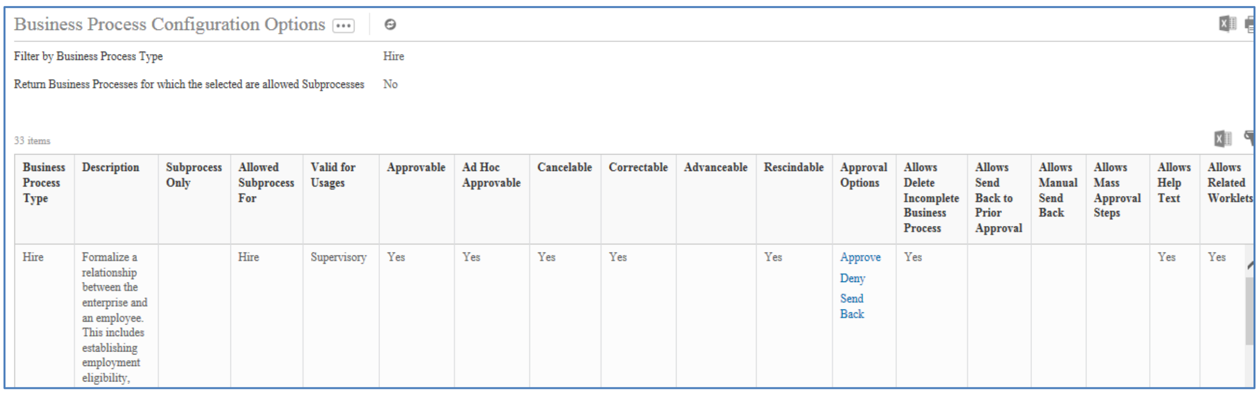
Term	Definition
BUSINESS PROCESS TYPE	A type of Business Process delivered by Workday that can be automated using Workflow (i.e. Hire, Terminate, Expense Report Event, etc.).
BUSINESS PROCESS DEFINITION	A Business Process is the definition of tasks that need to be done in order for an event to occur, the order in which they must be completed, and who must do them. Workday includes a number of predefined business processes for different purposes.
BUSINESS PROCESS INSTANCE	A business process instance is a business process that the initiator has started. For example, the "Hire for Organization X" business process definition becomes an instance when the initiator uses it to hire a particular applicant.
TASK	A task is a business process step that a user must complete. For example, task alert notifications are triggered by steps in a business process.
EVENT	An event is a transaction that occurs within your company such as hiring or terminating an employee. Workday Business Processes represent how Workday should respond to one of these events.
SECURITY GROUP	A security group is a group of people with specific responsibilities and permissions. When a Business Process runs, the step or task is sent to those in the security group configured for that step. If a role-based security group, the step includes all the workers in that role in the organization of the business process target.
TARGET	The target is the object that the business process operates on. For example, for Business Processes that deal with an employee record, the target is the employee. For business processes that deal with a financial object, such as a general ledger, the general ledger is the target. Since the target determines the organization, it controls which business process custom definition Workday uses.
INITIATOR	The user that initiates the business process instance

Workday delivers **Business Process Types** (e.g. Hire, Expense Report Event, Propose Compensation) and business process definitions can be created or copied for these types. Default definitions are available for each type via Factory Defaults and can be configured for your needs. Edit, usage and copy options for a given Business Process type are determined via the **Business Process Configurations Options** report.

BUSINESS PROCESS CONFIGURATION OPTIONS

The **Business Process Configurations Options** report can be run for any Business Process Type or for any sub-process-where it will return all Business Process Types that the sub-processes can be used in. This report details all available actions for a Business Process Type, what Approval Options are allowable, what sub-processes can be used in the Business Process, options on saving after an available action, restrictions, prerequisite actions, and more.

View a specific business process type and how it can be used. Details include whether the business process is a subprocess only, for what business processes it is allowed as a subprocess, organization types for which it is valid, approval options, whether it allows mass approval steps, and the allowed actions. Enables you to determine how a business process type can be configured by detailing the options available and any restrictions.


Business Process Configuration Options

Filter by Business Process Type Hire

Return Business Processes for which the selected are allowed Subprocesses No

33 items

Business Process Type	Description	Subprocess Only	Allowed Subprocess For	Valid for Usages	Approvable	Ad Hoc Approvable	Cancelable	Correctable	Advanceable	Rescindable	Approval Options	Allows Delete Incomplete Business Process	Allows Send Back to Prior Approval	Allows Manual Send Back	Allows Mass Approval Steps	Allows Help Text	Allows Related Worklets
Hire	Formalize a relationship between the enterprise and an employee. This includes establishing employment eligibility,		Hire	Supervisory	Yes	Yes	Yes	Yes		Yes	Approve Deny Send Back	Yes				Yes	Yes

This sample of the configuration options report shows some of the available actions in the Hire Business Process, options on saving for those actions, sub-processes that can be initiated, prerequisite actions 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. There is also a column that indicates whether an incomplete business process can be deleted.

Business Processes are also controlled by configurable security. There are restrictions as to what security group(s) can initiate and even perform functions with a business process such as an approval.

You cannot create your own business process types. 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 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.

If you would like to review all the default definitions that are in use run the **Business Process Types with Default Definitions in Use** report. We will discuss default definitions later in class.

ACTIVITY 2 – BUSINESS PROCESS CONFIGURATION OPTIONS REPORT

Business Case: In this activity, examine configuration options for Change Job Business Process using the Business Process Configuration Options Report.

Sign in as Logan McNeil (lmcneil)

HOW CAN A BUSINESS PROCESS BE CONFIGURED?

1. Search for Bus Proc Config.
2. Click to launch the Business Process Configuration Options report.
3. For the Filter by Business Process Type, enter or use the prompt to select **Change Job**.
4. For this activity, do <u>not</u> select the checkbox for Return Business Processes for which the selected are allowed Subprocesses.
5. Click the **OK** button.
6. What is the valid type of Organization for the **Change Job** Business Process?

   ____
7. What are the APPROVAL options?

   ____
8. Are there any **Required** actions?

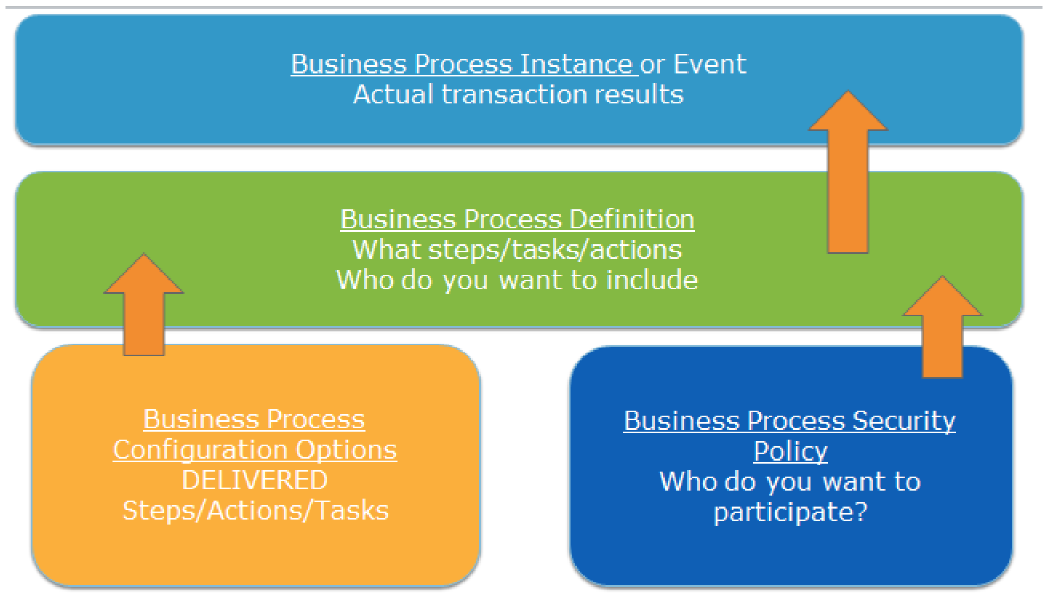
   ____
9. What is the prerequisite action(s) for the **Assign Roles to Worker**?

   ____
10. What is the prerequisite action(s) for the **Assign Pay Group**?

    ____
11. What are the restrictions for the **Change Benefit Elections Event**?

    ____
12. What is the subprocess that is initiated with the **Change Personal Information** action?

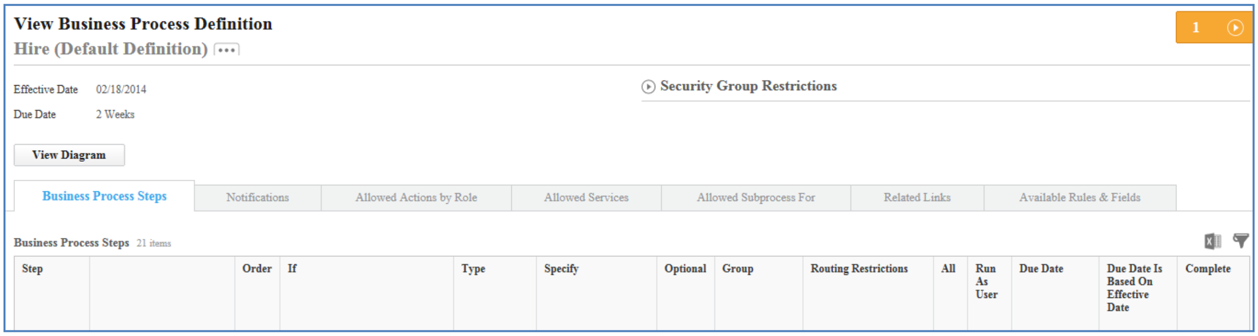
BUSINESS PROCESS RELATIONSHIPS



Business Process Definitions are configurable. Customers can configure business processes to include steps, tasks and actions based on their organizational needs. However, when configuring a business process definition, you must adhere to the rules provided for that type of business process based on the Business Process Configurations report. Customers can also configure business process definitions to indicate 'who can participate' or who should receive a task. These configurations are driven by the security groups that are authorized to participate in the Business Process Security Policy. The Business Process Security policy can be configured by the customer. We will cover Business Process Security Policies later today.

Once the business process definition is configured, the definition is utilized to execute the event or actual transaction results.

BUSINESS PROCESS DEFINITION OVERVIEW



Column	Definition
BUSINESS PROCESS STEPS	• **Can be sequential or happen in parallel**
NOTIFICATIONS	• **Sent to participants specified in workflow definition** • **Sent on process completion or entry into or exit from a step** • **Based on the user's preference (e-mail or within Workday)**
ALLOWED ACTIONS BY ROLE	• **List of actions (i.e. review, sub-processes) allowed in the business process**
ALLOWED SERVICES	• **List of actions (i.e. review, sub-processes) allowed in the business process**
ALLOWED SUB-PROCESSES	• **List of Business Process that the current business process is allowed to be a sub-process**
RELATED LINKS	• **Links to web pages external to Workday**
AVAILABLE RULES & FIELDS	• **List of fields and rules that can be used in a conditional rule**

BUSINESS PROCESS COLUMNS

Column	Definition
STEP	The related action 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. Use letters. Numbers are sorted alphabetically, not numerically, so 10 sorts before 2. The initiation step is always a. Then use the character b through z. If you use the exact same string. For example: 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 OK, even though e is missing. In addition, if you add an item with two letters, such as ca, it runs after step c.
IF	A condition is part of a business process step and consists of one or more rules an "if" statement. The step will not occur, if the condition is not satisfied.
TYPE	This is where you identify the type of step. For example: Action, Service, or To Do.
SPECIFY	This is where you specify the type of step. For example: Type = Action; Specify = Propose Compensation
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. This step appears in everyone's inbox automatically and is removed when someone completes the step.
ROUTING RESTRICTIONS	You can optionally define routing restrictions and alternate routings for certain business process step types (*Initiation* and *Checklist* step types cannot be rerouted)
ALL	If the All column is NOT checked, as soon as one person in the assigned group approves the request, the notification disappears from everyone else's inbox and the business process continues.
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 complete.
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.

Column	Definition
COMPLETE	When a completion step finishes, the business process is listed as complete, even if there are more steps to do. For example, a person can be listed as "hired," even if the steps for having the new employee enter their personal information and W-4 form are not done, yet. 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

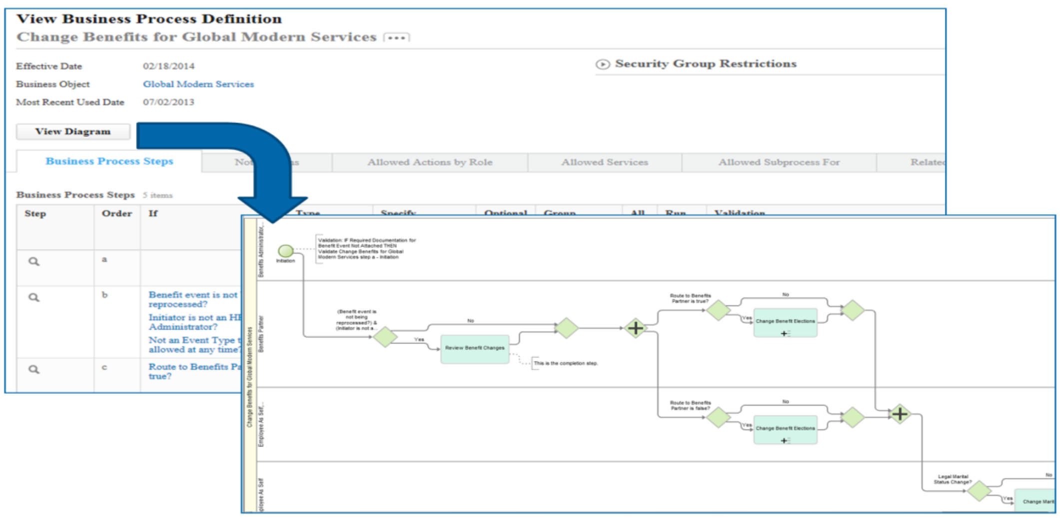
Type	Definition
INITIATION	The initiation step is always the first step in a business process.
ACTION	An action or event that occurs within Workday. For example: An Action step of Review Employee Hire within the Hire Default Definition.
APPROVAL	An Approval step gives the designated approver the opportunity 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.
COMPLETE QUESTIONNAIRE	Workday provides the ability to distribute questionnaires as a part of a business process. The benefit is the ability to gather relevant information for making data-driven decisions.
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 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.

BUSINESS PROCESS VISUALIZATION

Our traditional way to view the business process definition has always been in Excel like view. This is really good when editing a business process. However, Workday also offers a pictorial view of the business process using a visualization tool.

One may click on the "View Diagram" button to trigger the pictorial. There are multiple swim lanes that represent the various security groups that will participate in the process along with the action. Note, this is not a bolt-on solution needed: it is integral to Workday.



EDITING BUSINESS PROCESSES

EDITING THE BUSINESS PROCESS DEFINITION

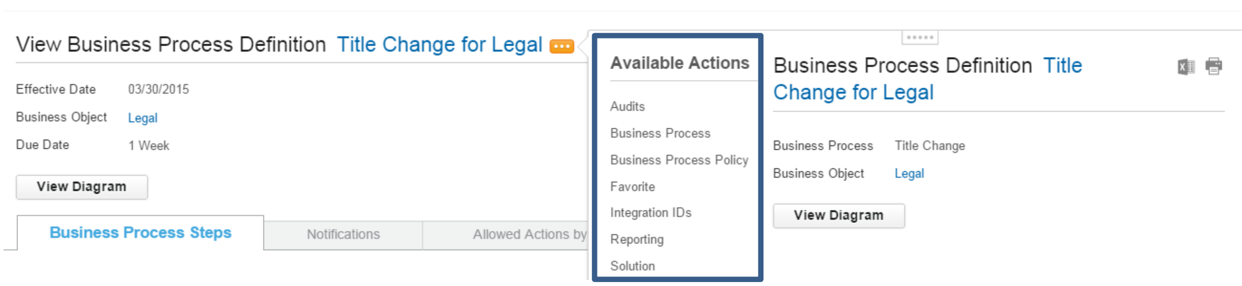
Workday's Business Process Framework allows for configurations of the Business Process Definition and its individual Workflow Steps.

Actions that can be taken in a given Business Process definition are governed by allowed configurations for that Business Process type - see **Business Process Configuration Options** report. Business Process Configuration options cannot be edited or modified.

Permissions, restrictions and security groups that can be included in a given Business Process definition are determined in the **Business Process Security policy** for the given Business Process type. Security policies are editable by Security Administration users.

Edits to a business process definition are effective dated. Note: Business process transactions or events already 'in flight' will not pick up edits made to a definition while 'in flight'. Only newly initiated transactions (post the edit) will pick up the new definition.

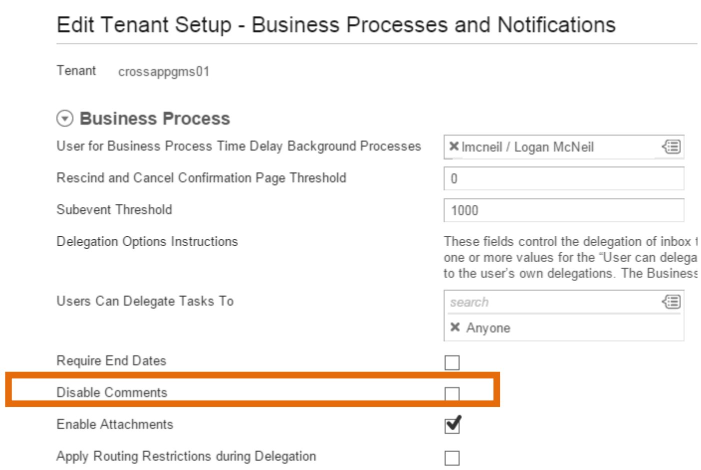
If there is more than one copy of a Business Process Definition for a given type, the system will determine the definition to use based on the context of the Target. It is a recommended best practice to use the default definitions.



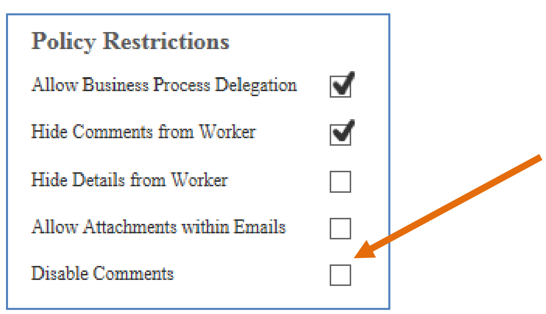
BUSINESS PROCESS COMMENTS

Business Process comments are a great way to document reasons for actions by participants in a business process. In some cases, comments are required, for example when performing actions like Manual Advance, Correct, Deny, Rescind, Add Approvers, Send Back. However in some situations, a Business Process Administrator might decide to remove one or more comments from an event. This can be accomplished as a related action off the business process event. Select **Business Process > Remove Comments** and then select the check box next to each comment that you want to remove.

The Workday tenant can also be configured to suppress the Comment field on the business process toolbar. This action prevents comments from being recorded or displayed for all business processes from that time forward. Again, this does not apply to actions that require a reason such as Manual Advance, Correct, Deny, Cancel, Rescind, Add Approver and Send Back. To suppress the Comment field on the business process toolbar, access **Edit Tenant Setup – Business Processes and Notifications**.



Individual business process security policies can also be configured to disable comments for the specific process. This is done by editing the security policy in the **Policy Restrictions** section. Changes to a security policy require the execution of Activate Pending Security Policy Changes task.



Business Event comments that are removed can be accessed from the task **User or Task or Object Audit Trail**. Select the task – Remove Comments for Business Process.

ACTIVITY 3 – TITLE CHANGE FOR LEGAL BUSINESS PROCESS

Business Case: In this activity, we will review and discuss the Title Change for Legal Business Process and then initiate the event to further discuss the outcome.

Sign in as Logan McNeil (lmcneil)

TASK 1: REVIEW BUSINESS PROCESS DEFINITION

1. Search for the string *bp: change legal*.
2. Locate the **Title Change for Legal** business process and click on the link.
3. Let's Discuss the Business Process. Note: This definition includes some integrations steps. Integrations involve communications to external systems. We won't be investigating the integrations themselves, just understand that the Integration step type can be included in business process definitions to initiate the integration automatically.

TASK 2: INITIATE BUSINESS PROCESS OF TITLE CHANGE

Sign in as Emily Mills (emills) (or start proxy session)

1. Search for the string *bus title*.
2. Select the **Change My Business Title** task.
3. Enter the following information:

Field Name	***Entry Value***
Effective as of	Today's Date
Proposed Business Title	Corporate VP Paralegal

4. Enter comments, something like 'per my performance review'.
5. Click the **Submit** button.
6. Click **Done**.

7. Sign Out if not in proxy session

TASK 3: APPROVAL CHAIN BY MANAGER

Sign in as John Chen (jchen) (or start proxy session)

1. Click on John Chen's photo to access his **Inbox**.
2. Click on the link for the Title Change task.
3. Notice that you can approve or send back Emily Mills' request. Under the More option, you can chose to Deny or Cancel. If you click Cancel, the task remains in your Inbox. You decide to approve the Title Change.
4. Enter comments, something like 'I agree and approve'.
5. Click the **Approve** button.
6. Click **Done** on the confirmation page.
7. Sign Out if not in proxy session

Sign in as Teresa Serrano (tserrano) (or start proxy session)

8. Click on Teresa Serrano's photo to access her **Inbox**.
9. Click on the link for the **Title Change** task in her Inbox.
10. Notice that you can approve or send back Emily Mills' request. Under the More option, you can chose to Deny or Cancel. If you click Cancel, the task remains in your Inbox. You decide to approve the Title Change. Enter any comments you wish.
11. Click the green **Approve** button.
12. Click **Done** on the confirmation page.
13. Sign Out if not in proxy session, else Stop Proxy Session.

TASK 4: APPROVAL BY HR PARTNER

Sign in as Logan McNeil (lmcneil)

1. Click on Logan's photo to access her **Inbox**.
2. Click on the Review button for the Title Change task.

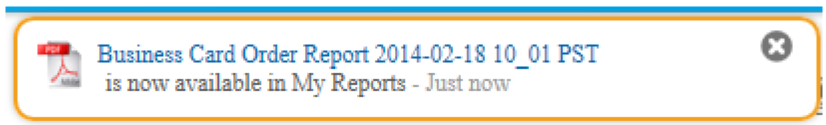
3. Notice that you can approve or send back Emily Mills' request. Under the More option, you can chose to Deny or Cancel. If you click Cancel, the task remains in your Inbox. You decide to approve the Title Change.

4. Click the green **Approve** button.

5. Expand **Details and Process.** Notice that the Overall Status is *Successfully Completed*. Review the Details and Process tabs.

6. Click the Process tab. The Report: Business Card Order Report has launched.

TASK 5: REMINDER: ORDER BUSINESS CARDS



1. Notice a notification was received. It may take a minute to appear. Click on the X to dismiss. The notification can also be read from the Notifications tab in the Inbox. (It may take a few minutes to appear.)

2. Click on Logan's photo to access her **Inbox**.

3. Notice the task Reminder: Order Business Cards for the Title Change in the Actions tab and the Notification.

4. Click on the link to the task.

5. Optional: Click on the link to review the PDF attached file.

6. Click the green **Submit** button to send the data directly to the business card vendor.

7. Click **Done.**

8. Sign Out, unless using proxy sessions.

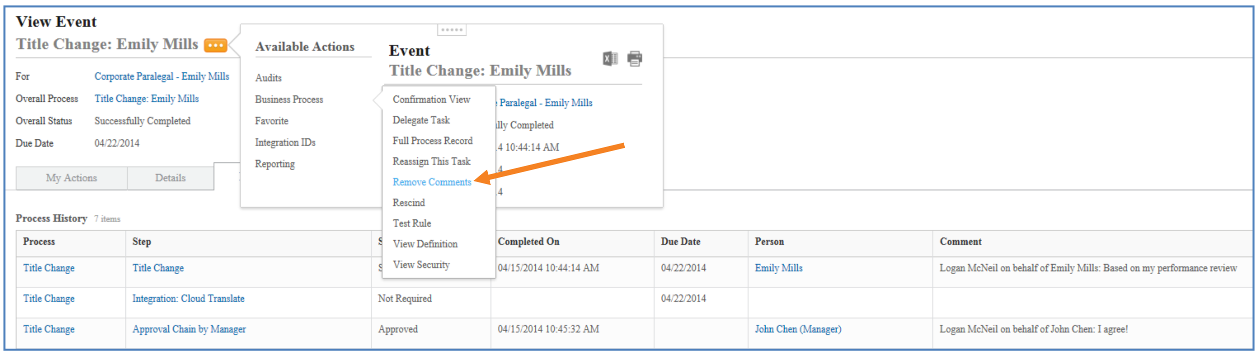
TASK 6: REVIEW PROCESS OF TITLE CHANGE

1. Search for **Emily Mills**.

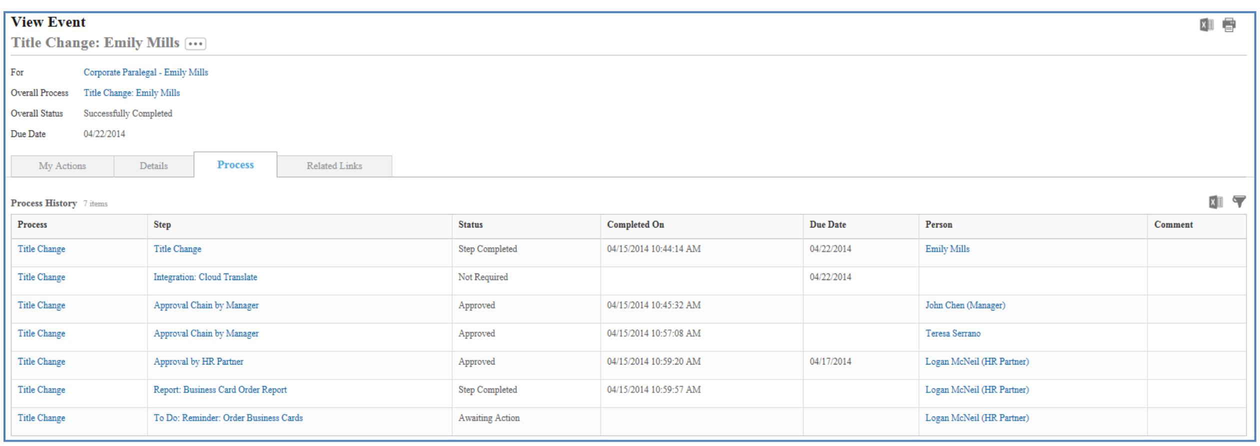
2. Notice her new title is in effect.

TASK 7: REVIEW PROCESS AND REMOVE COMMENTS

1. Click on Logan's photo to access her **Inbox**.
2. Click the **Archive** tab and select **Title Change: Emily Mills**
3. From the **Process** tab, review the comments that were entered during the process
4. Use the related action off of the event to navigate to **Business Process > Remove Comments**



5. Check the boxes to select comments.
6. Click **OK**
7. Click the Process tab again. Notice that the comments have been removed.



ORGANIZATIONS

ORGANIZATIONS

Organizations are used to run business processes, aggregate data for reports, and assign workers to their management and support teams. Some types of organizations can be combined in a hierarchy to represent a structure. 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.

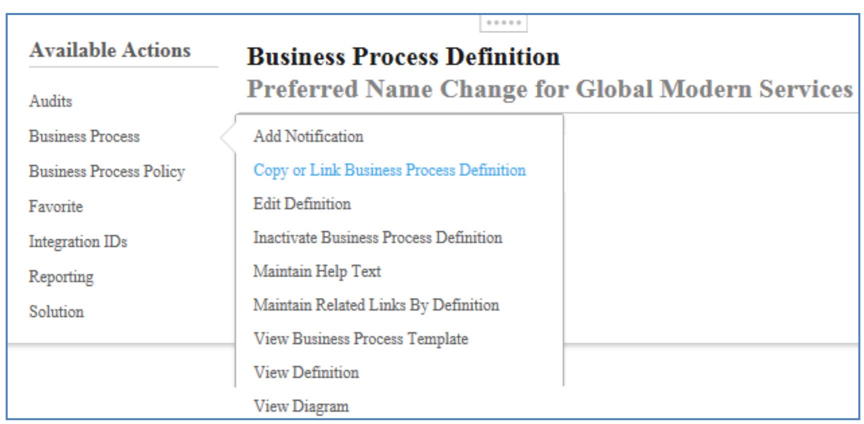
Supervisory Organizations are the foundation to HCM. They group workers into a management hierarchy. A Supervisory Organization can be a business unit, department, group, or project. Jobs, positions, and compensation structures are associated with supervisory organizations, and workers are hired into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

Pay Group is an organization type, like a supervisory organization, that can be secured to organization roles to control who can set up and run the payroll process and which employees the role can access.

Companies are the primary organization type used by Workday Financial Management. All financial transactions are for a company, and most financial reports are run in the context of a company, such as balance sheets and income statements.

We recommend that you create a company for every internal entity with a separate tax ID.

COPY/LINK DEFINITIONS



Workday allows you to decide how to use business process definitions. In most cases, best practice is to use the default definition and condition rules to determine the execution flow. However in some situations, it is preferable to create separate definitions for different organizations where the execution steps vary greatly.

When you create a copy of a definition for an organization, the copy can be edited independently of the definition that was copied, adding steps and logic that pertains to the specific organization.

Definitions can also be linked to organizations, but they then share the same configuration.

ACTIVITY 4 – COPY/LINK BP DEFINITIONS

Business Case: In this activity, we will explore the copy and link actions of a business process definition. Remember that in most cases, best practice is to use the default definition and condition rules to determine the execution flow.

Sign in as Logan McNeil (lmcneil)

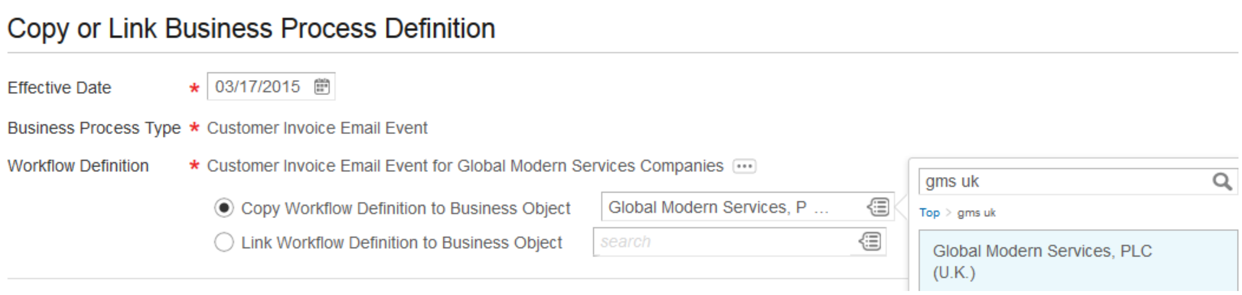
TASK 1: COPY BUSINESS PROCESS DEFINITION

1. Search for the string *bp: cust invoice email glob*.

2. Locate the **Customer Invoice Email Event for Global Modern Services** business process.

3. From the related action menu, select **Business Process > Copy or Link Business Process Definition**.

4. Select the radio button to **Copy Workflow Definition to Business Object**. Choose **Global Modern Services, PLC (U.K.)** from the prompt.



5. On step b, Review Customer Invoices for Emailing, **remove the Security Group - Accounts Receivable Specialist**. In the U.K. only the Accounts Receivable Analyst will be responsible for this step.

6. Click **OK**

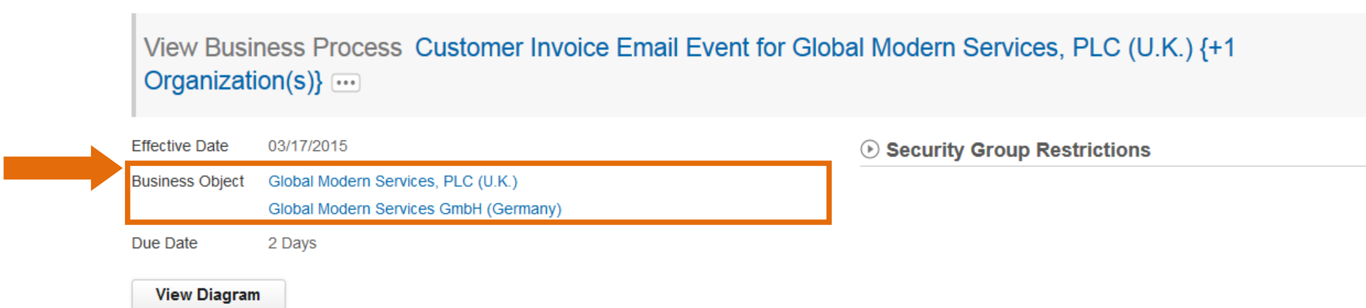
7. Click **DONE**

We now have a definition specific to the company, Global Modern Services, PLC (U.K.). Steps can be added/removed as desired for Global Modern Services, PLC (U.K.). Changes to this definition do not affect the definition for Global Modern Services.

TASK 2: LINK BUSINESS PROCESS DEFINITION

1. Search for and locate the **Customer Invoice Email Event for Global Modern Services, PLC (U.K.)** business process, *bp: cust invoice email glob*
2. From the related action menu, select **Business Process > Copy or Link Business Process Definition**.
3. Select the radio button to **Link Workflow Definition to Business Object**. Choose **Global Modern Services GmbH (Germany)** from the prompt.
4. Click **OK** and **Done**.

Any changes you make to the **Customer Invoice Email Event for Global Modern Services, PLC (U.K.)** business process definition affect BOTH Global Modern Services, PLC (U.K.) and Modern Services GmbH (Germany). This does not change the GMS definition because we didn't *link* to that definition. The organizations that are linked to the same business process definition are listed under the title of the BP.

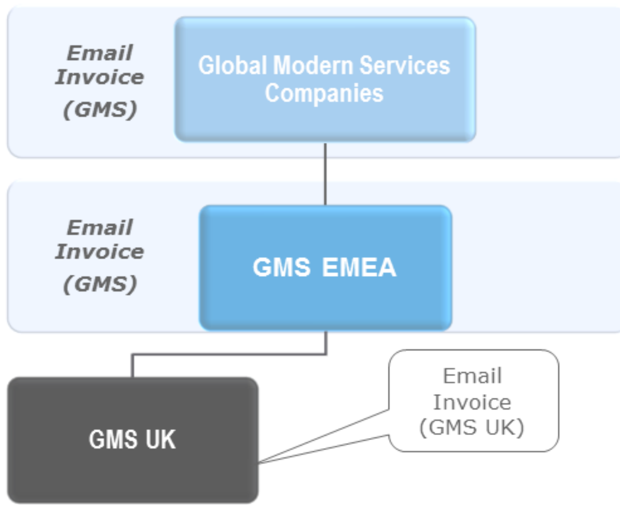


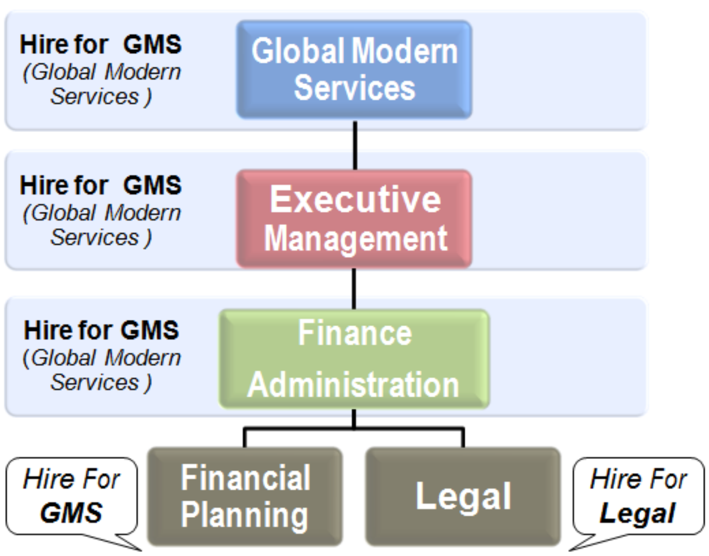
ORGANIZATIONS – PROCESS HIERARCHY

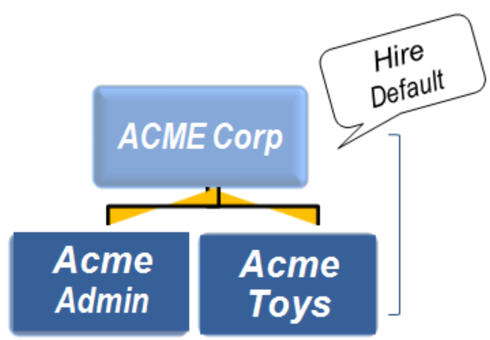
One may create organization specific business processes (BP) in addition to the default definition. Workday utilizes a process hierarchy to determine which business process to use.

First Workday checks if there is a business process associated with the organization where one is doing a task (i.e. hiring a new employee). If there is a specific BP, then Workday will use that one (i.e. Hire for Legal). Otherwise, Workday will check if the superior organization has an associated BP and will use that one (i.e. Legal Name Change for Global Modern Services). If there is still no BP associated with the any superior organization along the hierarchal chain, then Workday will use the default BP.

Examples:







Run Business Process Configuration Options report to see what types of organizations are valid.

Business Process Configuration Options •••

Filter by Business Process Type: Hire

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

30 items

Business Process Type	Description	Subprocess Only	Allowed Subprocess For	Valid for Usages	Approvable	Ad Hoc Approvable	Cancelable	Correctable	Advanceable	Rescindable
Hire	Formalize a relationship between the enterprise and an employee. This		Hire	Supervisory	Yes	Yes	Yes	Yes		Yes

MULTIPLE MANAGERS

A new feature in WD24 is the ability to assign one or multiple managers to a supervisory organization, which is a common requirement in some industries where shift workers report to multiple managers.

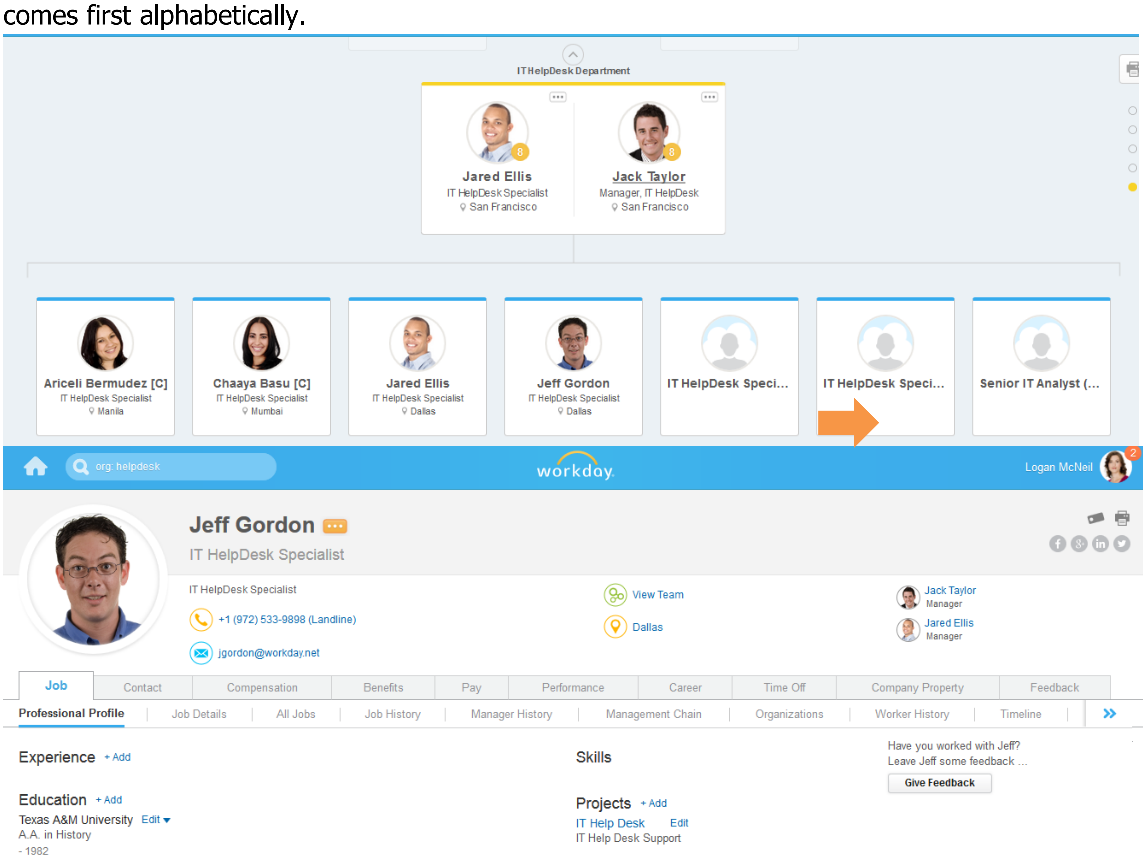
If your requirements support the use of multiple managers, in the Maintain Assignable Roles task, ensure that the Restricted to Single Assignment check box is not selected for the Manager role.

When an organization has multiple managers:

- More than 1 position can occupy the Manager role.
- 2 or more managers share equal responsibility for workers in an organization.
- All managers have the same abilities to initiate, view, and approve transactions on a group of workers.
- All managers display as equals on organization charts.

After you assign multiple managers to a supervisory organization, any associated organization charts display multiple managers by placing them adjacent to one another at the top of the organization.

Business processes that don't require a single assignment manager route to all managers. Any of them can take action on the steps associated with the Manager role. Note that the IT HelpDesk Department in GMS has multiple managers. Business process and integrations that require a single assignment manager use either the designated manager (if one has been specified) or the manager whose last name comes first alphabetically.



ACTIVITY 5 – ADD STEPS TO THE HIRE BUSINESS PROCESS

Business Case: In this activity, we will add multiple steps to the Hire for IT HelpDesk Department Business Process that will be routed to the HR Administrator. In addition, we will set the completion step.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT BUSINESS PROCESS DEFINITION ACTIVITIES

1. Search for the string *bp: hire*.
2. Locate the **Hire for IT HelpDesk Department** business process.
3. Use the related action to select **Business Process** > **Edit Definition**.
4. Use **today's date** for the Effective Date.
5. Click the **OK** button.
6. Add a new step by clicking on the add row icon.
7. To make the new step 3rd in the order, enter a *c* in the **Order** field.
8. Use the drop down arrow under the **Type** field and select **Action**.
9. Now click on the prompt icon for the **Specify** field and choose **Review Employee Hire**. This task is allowed based on the Business Process Configuration Options report for the hire type of bp.
10. Select the **Allowed Actions by Role** tab. Which Security Groups are allowed to be assigned the Review Employee Hire action? We will explore this topic later today.

Review Employee Hire		Alternate Approver HR Administrator HR Partner HR Partner (By Location) Management Chain Manager Recruiter

11. Go back to the **Business Process Steps** tab.

12. Enter the **HR Partner** as the Group that will be assigned this step.

13. Scroll right and set a due date of **2 days**.

TASK 2: ADD ADDITIONAL STEP TO THE BUSINESS PROCESS

1. Add another new step by clicking on the add row icon.

2. To make the new step, enter an *e* in the Order field. Note: In order to follow step c, the next step can be any value that follows c.

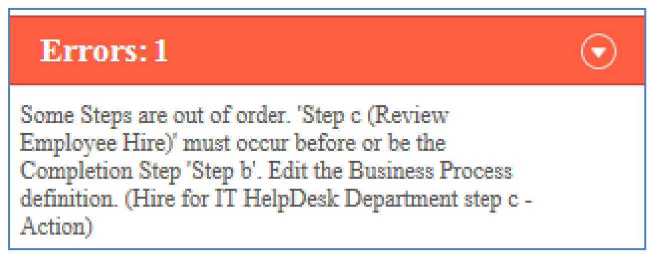
3. Click the drop down for the Type field and select **To Do**.

4. Now click on the **Specify** prompt icon and select **Assign employee office** from the **All Active To Do Types** prompt.

5. Enter **Facilities** as the Group that will be assigned this step.

6. Click **OK** to save the business process changes. (*Notice the error at the top of the page)*

7. Do not click the Done button.



TASK 3: SET THE COMPLETION STEP

1. In case you happen to navigate away, find the Hire for IT HelpDesk Department business process by searching for *bp: hire*.

2. The completion step is set while the business process is in VIEW ONLY mode.

3. Use the Related Action icon on step c, Review Employee Hire.

4. Initiate the **Business Process** > **Set as Completion** task.

5. Use **today's date** as the effective date and hit the **OK** button.
   Note: In the Business Process Definition notice the 'Yes' in the **Complete** column. Also note that the error message is gone.

6. Click **Done.**

7. Sign Out.

Why did we get an error when saving the added steps? We were not in compliance with the Business Process Configuration rules for our hire business process. By making the Review Hire step the completion step, we have complied with the rules.

ACTIVITY 6 – TEST HIRE BUSINESS PROCESS

Business Case: In this activity, we will test and discuss the configuration changes made to the Hire Business Process for the IT HelpDesk Department.

TASK 1: HIRE AN EMPLOYEE TO TEST THE CHANGES

Sign in as Jack Taylor (jtaylor) (or start proxy session)

1. Search for '*Dion*'. Change the Search Category from Common to **All of Workday**.
2. Click on the Related Action off of Dion Jackson's name, select **Hire > Hire Employee.**
3. The following values should default:

Field Name	***Entry Value***
Supervisory Organization	IT HelpDesk Department
Existing Pre-Hire	Dion Jackson

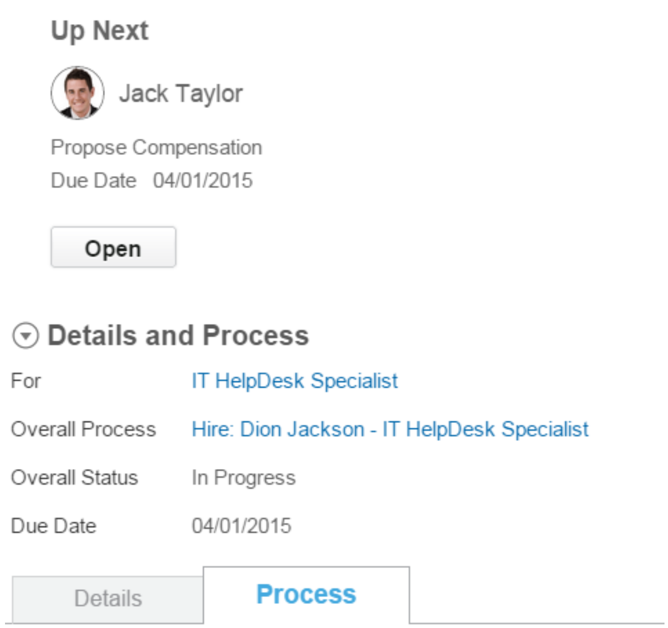
4. Click the **OK** button.
5. Complete the hire information:

Field Name	***Entry Value***
Hire Date	Select today's date
Hire Reason	Select New Hire > Fill Vacancy
Position	IT HelpDesk Specialist (1st in list)
Employee Type	Default Value
Job Profile	Default Value
Time Type	Default Value
Location	Default Value

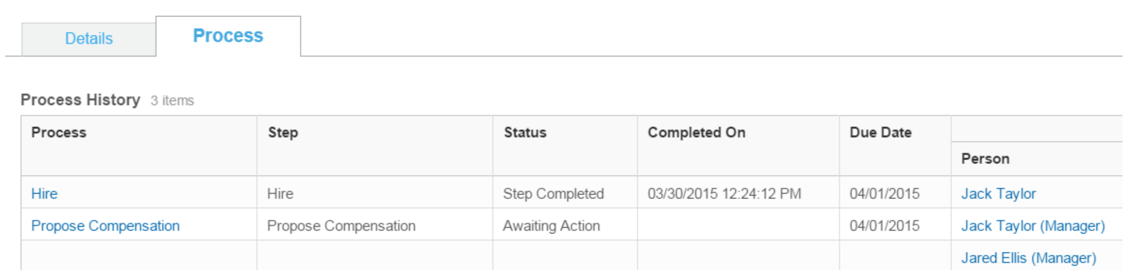
Pay Rate Type	Salaried

6. Click the **Submit** button.

7. Notice that Jack will be proposing Compensation for his new hire. Expand the Details and Process information.



8. Look at the Process tab and notice that the Propose Compensation step went to both Jack and Jared. Why? Since the IT Helpdesk has 2 managers, they both received the transaction.



Process	Step	Status	Completed On	Due Date	Person
Hire	Hire	Step Completed	03/30/2015 12:24:12 PM	04/01/2015	Jack Taylor
Propose Compensation	Propose Compensation	Awaiting Action		04/01/2015	Jack Taylor (Manager)
					Jared Ellis (Manager)

TASK 2: PROPOSE COMPENSATION FOR HIRE

1. Click on the **Open** button for the **Propose Compensation** task. Notice the interface looks different. Later we will talk about the template that you are viewing in this task.

2. Click on the **Add** button on the Salary row; then click the prompt to open Assignment details

3. In the **Compensation Plan** field, select *General Salary Plan* from the All Compensation Plans prompt.

4. Enter **$58,000** in the amount field.

5. Click the **Done** button.

6. Notice the Assignment Details now includes *$58,000.00* as the Proposed Change.

7. Click the **Submit** button.

8. Click the **Done** button on the confirmation page.

9. Click the Workday logo and navigate to the **My Team** page.

10. Is Dion listed? No …. Why not?.... The hire is not complete until the HR Partner reviews it.

11. **Sign Out** or stop proxy session

TASK 3: REVIEW EMPLOYEE HIRE

Sign in as Logan McNeil (lmcneil)

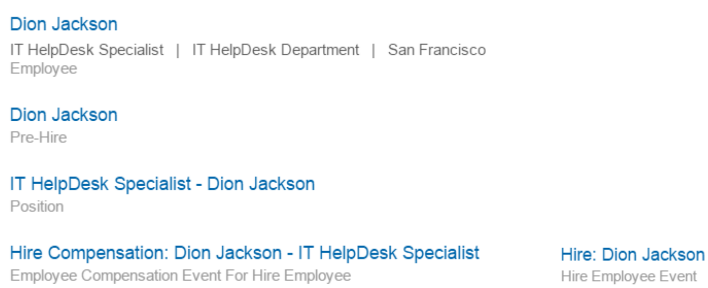
1. Click on Logan's photo to access her **Inbox**.

2. Because Logan is the HR Partner for the IT HelpDesk Department, she must Review the Employee Hire.

3. Click on the **link** button for the **Hire: Dion Jackson – IT HelpDesk Specialist** transaction. Then click the **Review** button.

4. Click the green **Approve** button, then click **Done**. At this time, you do not need to complete the remaining To Do. We will use it later. The hire is complete!

5. Search for Dion Jackson. You should see both pre-hire and employee information, Dion's position and 2 events associated with Dion:



6. End of Activity.

BUSINESS PROCESS DEFINITIONS AND EFFECTIVE DATES

BUSINESS PROCESS DEFINITIONS AND EFFECTIVE DATES

The effective date for a business process definition is the date on which a proposed change in the business process becomes available. If an effective date is set in the future, the proposed change does not take effect until that date. Effective dates apply to items such as business processes, consolidated approvals, condition rules, and so on.

Workday asks you to specify an effective date whenever you create or edit one attributes of a business process definition. When you open an item, use today's date to see the current one and a future date if you know there is a version not yet in effect.

When actually running a business process, the effective date is the date when the event will take effect. For example, for a business process that gives a pay raise, the effective date is when the raise begins. For hiring a new employee, the effective date is the first work day.

To see business process definitions of varying effective dates, use the related action off of the business process definition and choose, View Definition.

Event initiation date	Event effective date	Event Completion Date	BP def'n used?
Jan 14, 2015	Feb 1, 2015 (e.g. future hire)	Feb 1, 2015	B
Jan 2, 2015	Dec 29, 2014 (e.g. retroactive hire)	Jan 15, 2015	A
Feb 1, 2015	Jan 3, 2015 (e.g. retroactive hire)	Feb 15, 2015	C

bp:	Edits made to BP Def'n Effective as of....	
A	Jan 1, 2015	Add an approval step
B	Jan 3, 2015	Add a notification
C	Jan 15, 2015	Add a "to do" step

FIND EVENTS

Use the Find Events report to search and filter business process events by various criteria, such as business process type, initiating worker, organization, and status.

When you select a value for any filter category, or facet, the Find Events report dynamically updates the resulting list of business process events and facet value counts. The facet value counts indicate the number of business process events that satisfy the current filter criteria and help you narrow your search criteria.

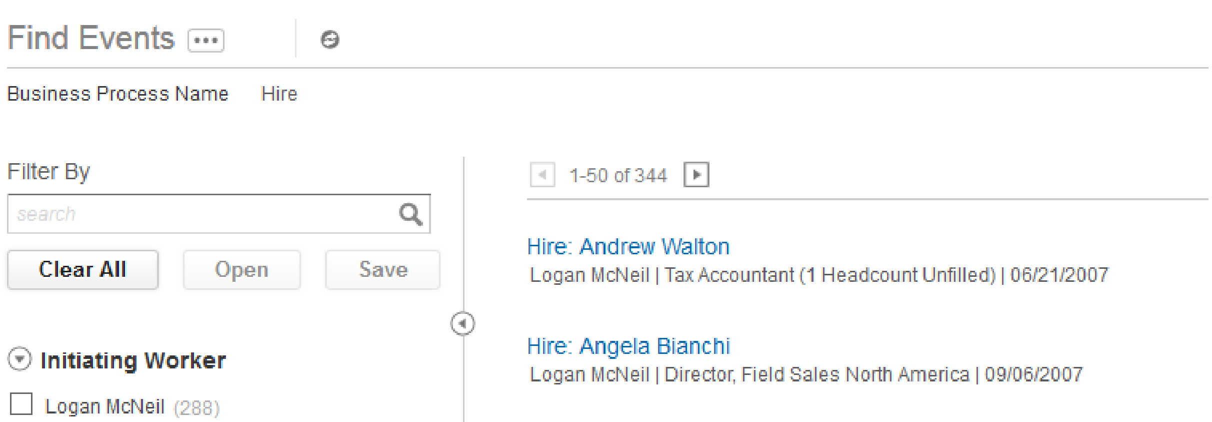
Workday displays the following search facets on the Find Events report:

- About Worker
- Business Process Type
- Initiating Worker
- Organization
- Status

Facets are non-tenanted and correspond to generic categories. Each facet contains one or more facet values. For example, the Initiating Worker facet displays values for workers in your organizations.

By default, no facet values are selected. As you 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 business process events. For facets with many possible values, a prompt enables you to select an additional facet value.

Workday displays 50 events at a time in the search results. Click Previous or Next to page back and forth. The Excel icon applies only to the search results currently displayed.



NOTIFICATION ON A COMPLETED EVENT

In order to make users aware that a business event has been completed, notifications can be configured on a business process definition. From the related actions menu of a business process definition, select Business Process > Add Notification.

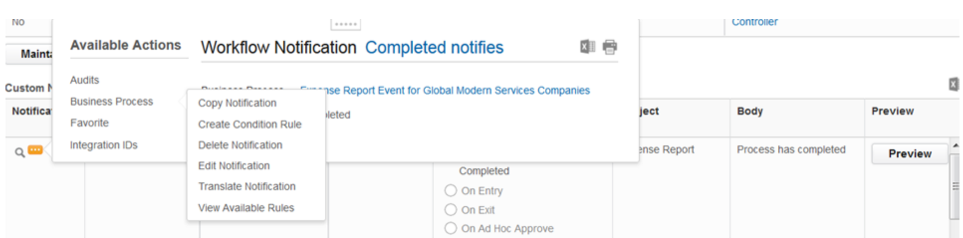
To associate this notification with a step, configure the notification to trigger on step entry or exit, and then select the trigger step.

As you complete the task, consider:

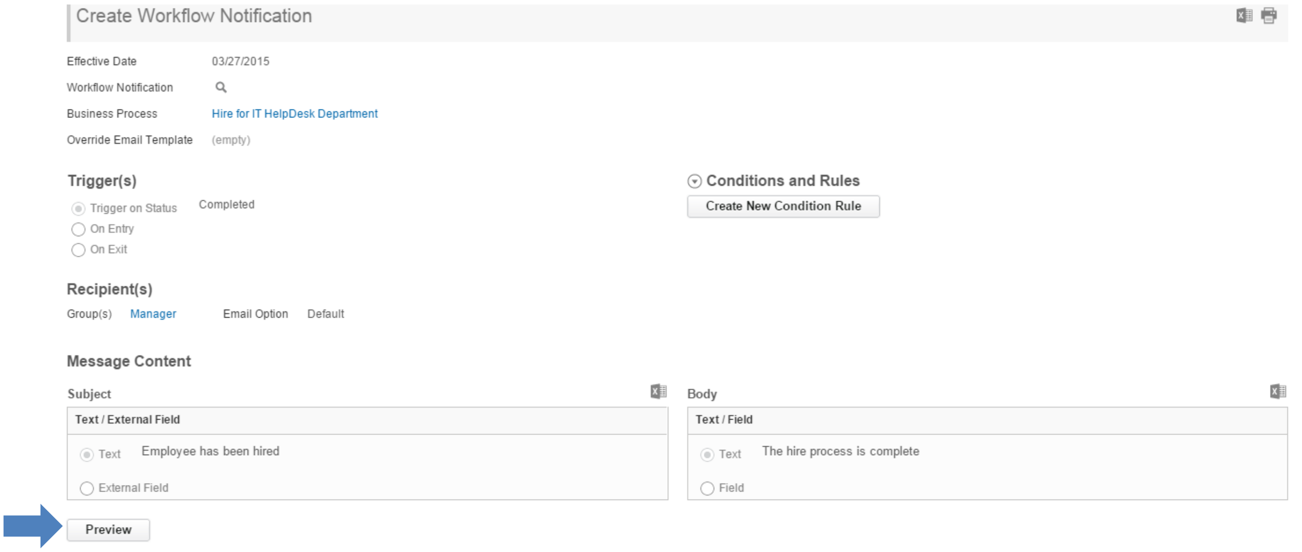
Field	Description
Effective Date	Prevents the notification from unexpectedly changing in the event record of the business process after triggering.
Override Email Template	You can only associate one email template with a business process definition. Use the Maintain Email Templates task to designate which email template is the Default and which templates are Active.
Do Not Include Notification Details Link	Select this option if the notification's recipients don't have Workday accounts.
Trigger(s)	Specify if the notification is triggered by the status of the business process as a whole, or when the business process begins or exits the step you specify.
Conditions and Rules	Notification triggers include the trigger specification and the rules you specify. Both triggers must be met before the notification is sent.
Email Options	You can change the Email Option for all custom notifications defined for one or more business process types with the Mass Update Email Address Option on Notifications task. Recipients of business process notifications don't automatically receive access to the business process itself.

You can add attachments only if email attachments are enabled in the business process security policy and for the tenant as a whole. Email attachments are not virus-scanned.

Click Preview to send a sample of the configured notification to your Inbox. The sample notification contains field names, not values. You can select the User Language of the sample notification; by default, Workday sends the sample notification in your preferred language. From the Notifications tab in the business process definition, notifications can be modified using the related actions:



Notifications will be covered in more detail later in this class.



ACTIVITY 7 – MODIFY EXPENSE REPORT EVENT FOR GLOBAL MODERN SERVICES COMPANIES

Business Case: In this activity, we will simplify the Expense Report Event for Global Modern Services Companies business process by removing some steps. We will also add a notification to let workers know when their expense report has been processed.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT BUSINESS PROCESS

1. Search for your business process by searching for *bp: expense*.
2. Use the Related Action icon for the Expenses Report Event for Global Modern Services Companies to initiate the **Business Process** > **Edit Definition** task.
3. Use **today's date** as the effective date and hit the **OK** button.
4. Remove the following steps:

- step e – Approval
- step g – Approval
- step h – Action Review Expense Report
- step i – Action Audit Expense Report

5. Do we need to reorder the remaining steps?
6. Click **OK** to save.

TASK 2: ADD NOTIFICATION

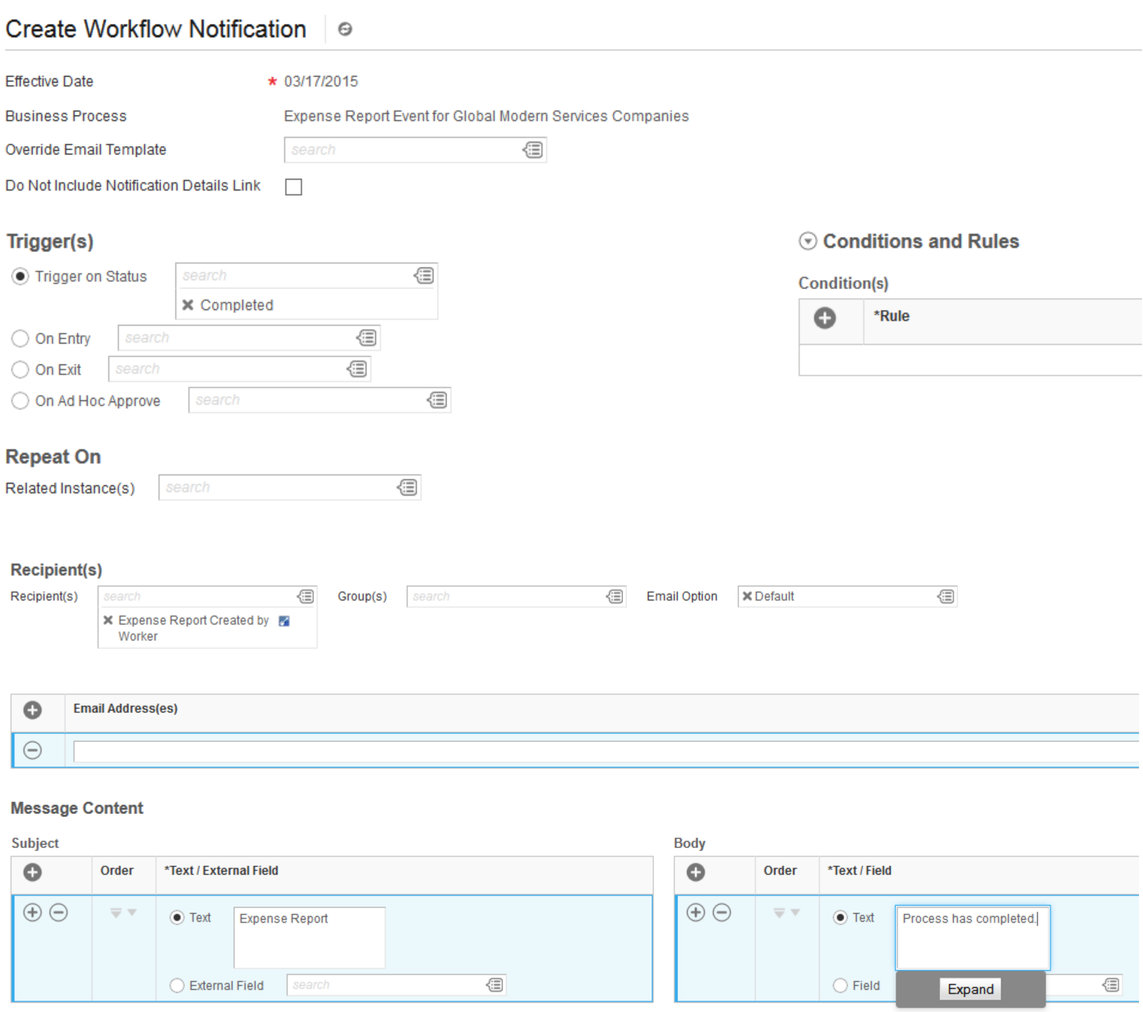
Although we will discuss notifications in more detail later, we will add a notification to let workers know when their expense report has been processed.

1. Click on the Notifications tab to see the existing notifications.
2. From the related action of the business process definition, navigate to **Business Process > Add Notification**.
3. Click **OK** to accept today as the effective date.
4. Click the radio button to select **Trigger on Status** and choose **Completed** from the prompt

5. In the **Recipient** field, select **Expense Report Created by Worker** from the Worker category.

6. Click + to add a row and then enter 'Expense Report' as the **Subject** and for the **Body** type 'Process has completed'

7. Click **OK**



8. Click **Preview** button.

9. You will be taken to a See Sample Notification screen – leave the default set to English.

10. Select **DONE**.

11. Select Logan's photo to access her Notifications. View the sample notification.

Preview Notification Details

8 second(s) ago

Preview Notification	Notify Logan McNeil of Expense Report
Business Process Definition	Expense Report Event for Global Modern Services Companies
Notification	Completed notifies
Language	English (United States)
Subject	Expense Report
Message	Process has completed

12. End of Activity.

ACTIVITY 8 – TEST EXPENSE REPORT EVENT

Business Case: In this activity, we will test the changes made to the Expense Report Event for Global Modern Services Companies.

Sign in as Logan McNeil (lmcneil)

TASK 1: ENTER EXPENSE REPORT

1. Enter 'create exp rep' in the search box.
2. Select the **Create Expense Report** task.
3. Leave the default values.
4. Click the **OK** button to continue.
5. Leave **today's date** as the Expense Report Date.
6. In the Business Purpose field, select or enter **Internal Meeting / Event**.
7. Complete the expense report line:

Field Name	***Entry Value***
Date	Today's Date
Expense Item	Airfare
Quantity	1 (leave default)
Per Unit Amount	550.00
Total Amount	550.00 (leave default)
Airline	United
Origination	San Francisco
Destination	Chicago

8. (Optional) Attach the airline receipt.docx file by dragging and dropping it, or using the paperclip icon to attach it. Doing so will avoid receiving a warning message.

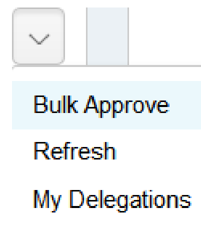
9. Click **Submit** to save

10. Click **Done** on the confirmation page and Sign Out, unless using proxy sessions

TASK 2: APPROVAL OF EXPENSE REPORT

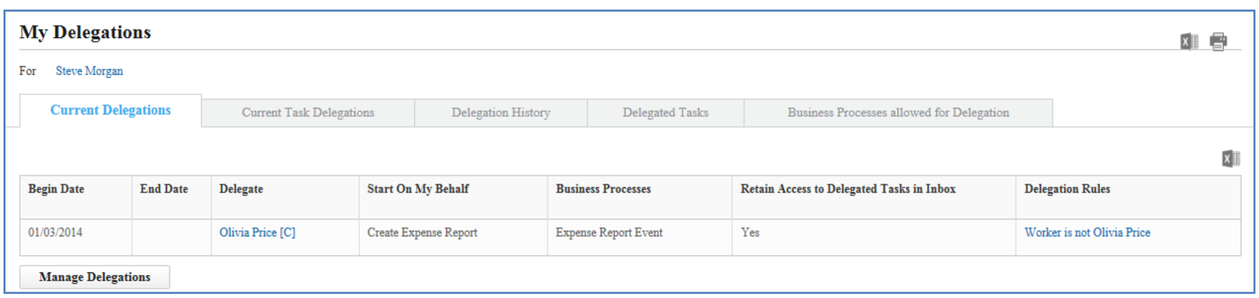
Sign in as Steve Morgan (smorgan) (or start proxy session)

1. Click on Steve's photo to access his **Inbox**. A pie chart report showing expense data will appear. Click the 'x' to close this report.



2. Click on the down arrow and select **My Delegations** option.

3. Note that Steve has a delegate configured. We will discuss setting up delegation later, but for now, we will have Steve's delegate Olivia complete the task.



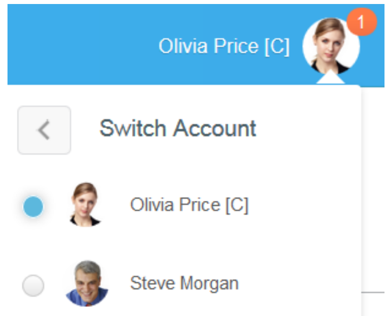
4. **Sign Out**.

TASK 3: COMPLETE APPROVAL OF EXPENSE REPORT (AS A DELEGATE)

Sign in as Olivia Price (oprice) Use the same password as Logan when logging in as any other GMS user.

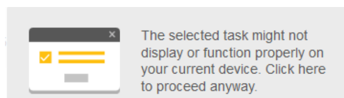
Note: You cannot start proxy as Olivia because the policy is set up for Employees and Olivia is a Contingent Worker. Additionally you cannot act as a delegate from within a proxy session.

1. Click on Olivia's photo and scroll down to choose the option to **Switch Account**, and choose **Steve Morgan**.



2. Navigate to Steve's **Inbox** using his profile photo. Notice you are acting *on behalf of Steve Morgan.*

3. The following message may appear. Click to proceed:



4. In Steve Morgan's **Inbox** , click the link for the Expense Report Task.

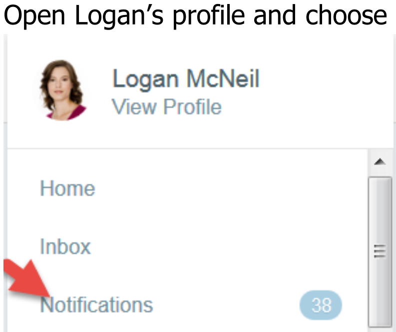
5. Now Olivia can review the expense report. Click the **Approve** button.

6. Click **Done** and **Sign Out**.

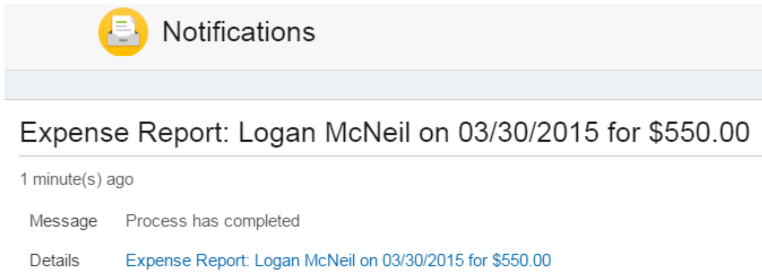
TASK 3: REVIEW EXPENSE REPORT EVENT

➲ Sign in as Logan McNeil (lmcneil)

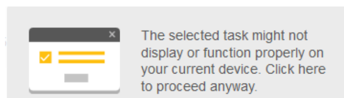
1. Open Logan's profile and choose **Notifications**.



2. Notice Logan has received the notification we configured. Click it to view.

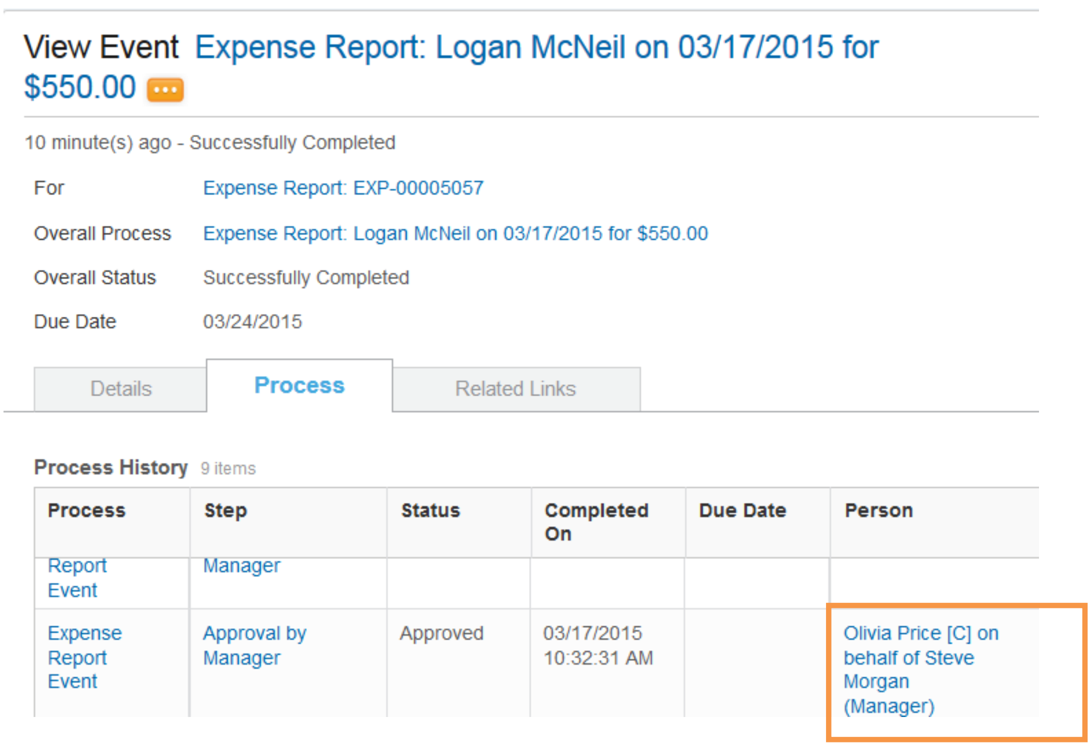


3. Select Logan's profile again to access the **Inbox**. Choose the **Archive** tab. The following message may appear. Click to proceed:



4. Click the link for Expense Report: Logan McNeil on <date> for $550.00 in the Details

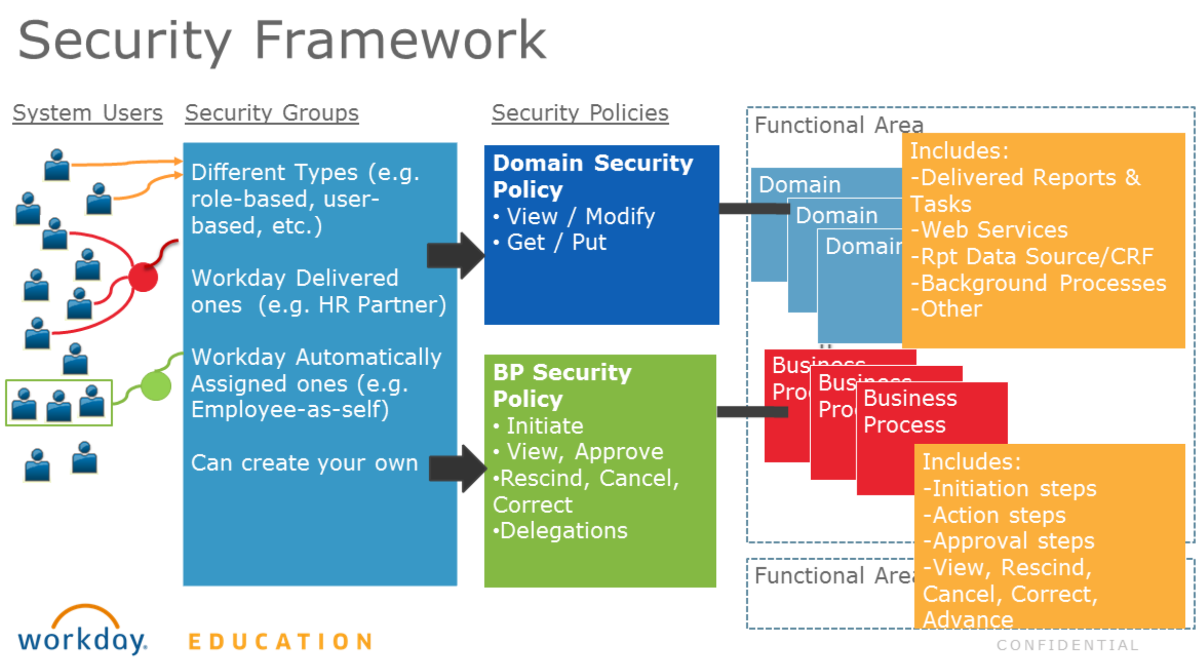
5. Click the **Process** tab. Note the Approval by Manager was completed by Olivia Price on behalf of Steve Morgan.



CONFIGURABLE SECURITY

Workday provides a configurable Security Framework. 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.

In the diagram below you can see how Workday grouped parts of the system into Functional Areas. These functional areas contain Domain and Business Processes.



Components of Configurable Security

- Domain Security Policies – which security group can view or modify data within the domains
- Business Process Policies – which security groups can participate in the business process
- Security Groups – groups of users who need to perform actions or access data
- If changes are made to security policies, they must be activated by running the task **Activate Pending Security Policy Changes**. This is a tenant-wide task, and will activate any pending security policy changes across the tenant.

Security Groups enforce security and:

- Control what you can do
- Control what you can access
- Security Groups are used in business process steps.

SECURITY GROUPS

Workday provides several types of security groups for you to use to connect workers with security policies. Types can have unconstrained (U), constrained (C) or mixed content sensitivity.

Roles are also used to drive business processes 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.

Type	Purpose	Assigned To	Example
USER-BASED (U)	Perform administrative or set up tasks	User directly	Report Writer; Security Administrator
ROLE-BASED (C/U)	Access is specific to one or more Organizations	Position	HR Partner; Benefits Partner; Accountant
SERVICE CENTER-BASED (C/U)	Allow 3rd party users limited access	Service Center Representative	3rd Party HelpDesk
JOB-BASED (C/U)	Auto-population security based on user's job criteria	Job related criteria eg. Job Profile, Job Family…	CFO
INTEGRATION SYSTEM (C/U)	Access to run integration systems	System accounts	Credit Card System
SEGMENT-BASED (C)	Access to selected components (a segment) of the secured item	Securable items for Suppliers, Customers, Pay Components…	Users can access only certain Suppliers
LOCATION MEMBERSHIP (U)	Auto-populated security based on a user's location	One or more locations	Users in Building X, Users in USA
ORGANIZATION MEMBERSHIP (U)	Auto-populated security based on orgs to which they belong	One or more organizations-of any type such as Company, Supervisory, Hierarchies, etc…	Users in IT HelpDesk supervisory org, Users in Financial Planning cost center
AGGREGATE (MIXED)	Users must meet specifications of ANY security groups	Multiple security groups	Users in location USA or Corporate HR Partner role
INTERSECTION (MIXED)	Users must meet specifications of ALL security groups	Multiple security groups	Users in location USA and Corporate HR Partner role
LEVEL-BASED (C)	How people in a certain level can access people in other levels	Leveled structures, such as management level or compensation grade hierarchies	Enable workers in a given management level to view Talent Data for workers in lower levels

ROLE-BASED SECURITY GROUPS

A role-based security group is associated with an organization role. Roles are defined with one or more positions, each of which is likely to have workers in it. Since membership in a role is set through an organization, access to securable items through a role-based security group is limited to workers in those organizations.

Because Workday must match the members of the role-based groups to the secured item by their organization, this is considered a context-sensitive security group; the group might have many affiliated workers, but only workers in the same organization as the secured item have access to the secured item.

The role definition for an organization specifies whether the specified workers have access to subordinate organizations. In that way, if no worker is specifically assigned to the role in organization ABC, Workday can search up the hierarchy until it finds a worker assigned to that role.

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

- 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.

USER-BASED SECURITY GROUPS

A user-based security group is a group to which you directly add workers as members. When the security group is used to grant workers permission to access items in a security policy, all the users in the group have that permission.

This is the least restrictive group. It is not context sensitive, in that it makes no attempt to match the context of the workers in the group (organization or ownership) with the context of the secured item. Use user-based security groups for administrators who you want to have enterprise-wide access.

HR Administrator	Report Writer	Compensation Administrator
Payroll Administrator	Benefits Administrator	Organization Administrator
Talent Administrator	Security Administrator	Finance Administrator

JOB-BASED SECURITY GROUPS

A job-based security group is associated with job profiles, job categories, job families, management levels, and exempt/non-exempt jobs. You can associate a job-based security group with only one of these types. Users become associated with items in a policy when their job-related information is associated with a job-based security group that is used in a security policy.

It is important to note, that, like role-based security groups, Workday figures out the organization to which a particular instance of the securable item applies and, depending on how the group access rights are defined, controls whether access is granted to workers in that organization, that organization and subordinates, or all organizations of the defined type.

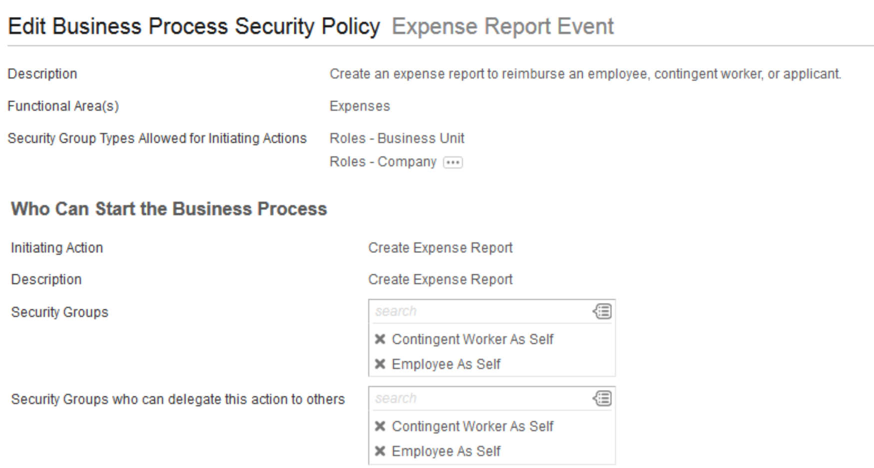
WORKDAY-DELIVERED SECURITY GROUPS

The membership in these user-based security groups is automatically populated by Workday. You cannot create, edit, or delete these groups. They include **All Users, All Employees, All Contingent Workers, Employee as Self** and many more. With update 22, a new security group is delivered called **Manager for Majority of Event** that is only used in employee reviews. It is derived by comparing a worker's manager at the start, midpoint, and end of an event. For employee reviews, the event timespan is the timespan of the review period. If the manager at the midpoint and end of the event is the same, that manager is the Manager for Majority of the Event; otherwise the manager at the start of the event is the Manager for the Majority of Event.

BUSINESS PROCESS SECURITY POLICIES

Business process security policies are collections of securable items related to business processes, including initiation steps and actions steps. They also are where you specify permissions for actions on events, for example the ability to view, approve, rescind, cancel, and correct a given event. Each business process type has its own security policy. They include several sections:

- Who Can Start the Business Process (Initiating actions)
- Who can do Action Steps in the Business Process (Allowed Actions)
- Who can do Actions on Entire Business Process (View, Approve, Rescind, Cancel, Correct, Advance)
- Other Policy Restrictions & Settings



ACTIVITY 9A –SECURITY GROUPS AND SECURITY POLICIES

Business Case: Activity 9 consists of 4 parts. The ultimate goal is to have the Chief Financial Officer approve proposed compensation for the IT HelpDesk over $70K.

In 9A, we will configure the Propose Compensation for It Business Process Policy. We will enable the CFO for the Review Compensation action step.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT BUSINESS PROCESS SECURITY POLICY

1. Search for the string *bp: propose*.
2. Click on the **Propose Compensation for IT HelpDesk Department** link.
3. Use the related action icon and select **Business Process <u>Policy</u>** > **Edit.**
4. Click the icon in the **Review Compensation** Action Step section of the business process – Add the **Chief Financial Officer** (which is a job-based security group held by Teresa Serrano).

TASK 2: ACTIVATE PENDING SECURITY POLICY CHANGES

1. Search for *activate*.
2. Click the **Activate Pending Security Policy Changes** task.
3. Enter *CFO job based security changes for Propose Compensation for IT HelpDesk Department* into the comment section.
4. Click the **OK** button.
5. Review the Business Process Security Policies listed. Click the **Confirm** checkbox.
6. Click **OK**.

CONDITION RULES

CREATE OR MAINTAIN STEP CONDITIONS

A condition is part of a business process step and consists of one or more rules. A condition rule can consist of one or more logical statements, separated by the logical operators AND/OR. Once created, this new rule can appear on the list of delegation, alert, or condition rules.

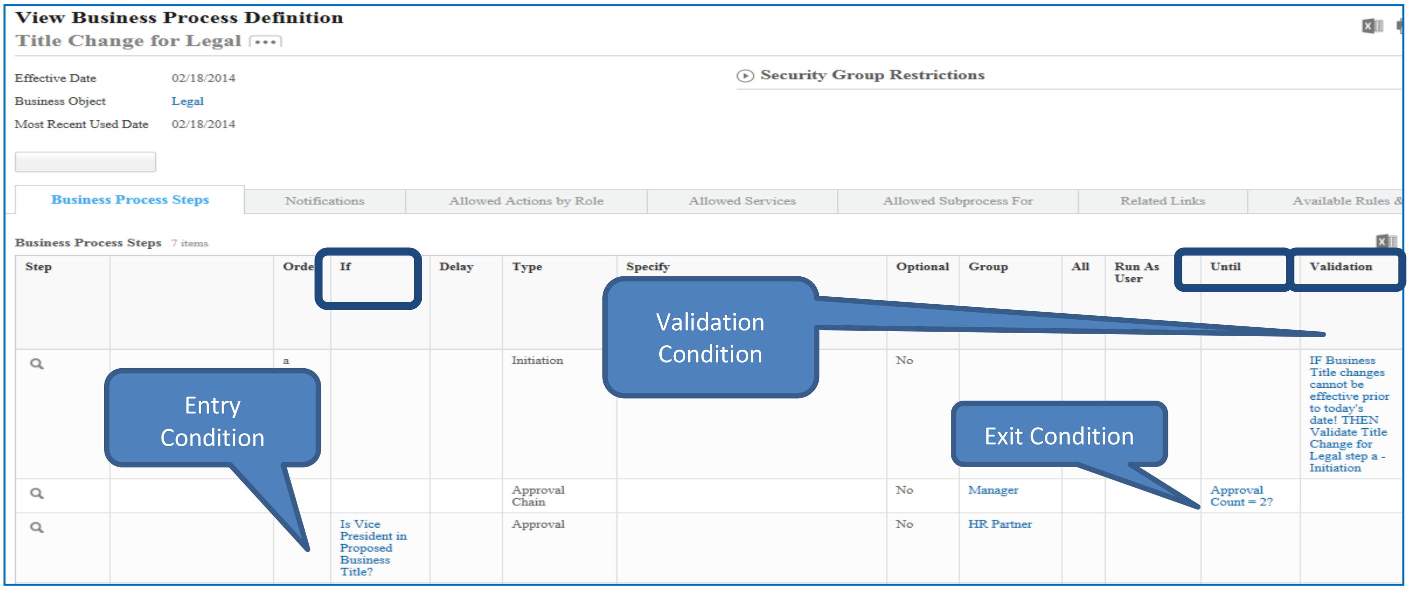
You can optionally define entry conditions for any steps, except initiation steps. For approval chain steps, you can also define while-running conditions and exit conditions. In addition, initiation steps and action steps can also include validation conditions that can block a step from exiting, as explained below.

Condition	Explanation
VALIDATION CONDITIONS	Initiation steps and action steps can have a validation condition. If any condition is true, the step is blocked from exiting. If all conditions are false, the step will exit and the process will continue. Note: For validation conditions to be available on initiation steps, the ability to revise the associated business process must be built in to the business process delivered by Workday. This ability is required in order to send the step back to the user's inbox when a validation condition is encountered. Examples: Create Position, Create Expense Report
ENTRY CONDITIONS	All types of steps can have an entry condition, except initiation steps. If the condition is true, the step runs. If the condition is false, the step is not required. Some business process definition steps have entry conditions for Action steps that are supplied by Workday and which you cannot edit. However, you can specify additional entry conditions for these steps. Both the Workday conditions and your conditions are evaluated when the business process is performed. Workday skips any step that does not satisfy all the entry conditions.
WHILE RUNNING CONDITIONS	Only an Approval Chain step can have a while-running condition. This condition works like an entry condition for each approver in the chain. It compares the next approver to some value and if the condition is true, the step is routed to that approver. If the condition is false, it skips the current approver and moves on to evaluate the next approver in the chain.
EXIT CONDITION	Only an Approval Chain or an Integration step can have an exit condition.

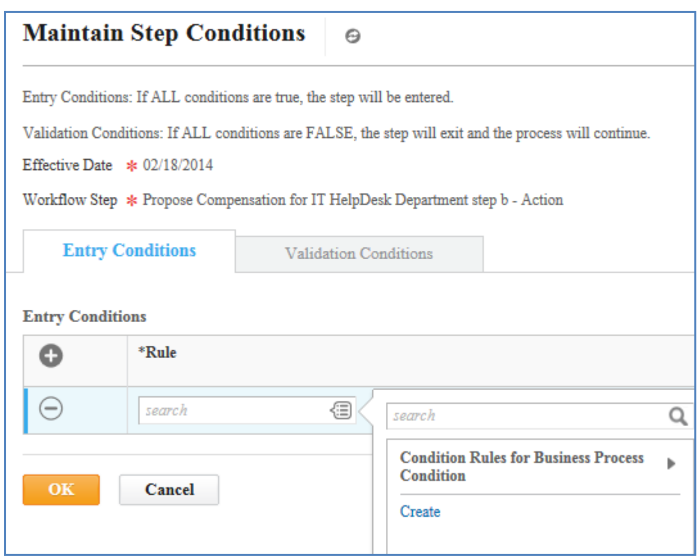
For approval chains, this condition evaluates the approver who just completed this level of the chain, and if the condition is true, the approval chain step exits. Like the While Running condition, an Exit condition is also working while the chain is running, but the difference is that when the condition is met the Exit condition exits the step. When the While Running condition is not met, it skips to the next level in the chain.

If the Exit condition is never met, the approval chain step exits after reaching the highest approver in the management hierarchy.

For an Integration step, the exit condition tests for a response from the external service before the step can exit.



To add or change the condition associated with a business process step, select **Business Process** > **Maintain Step Conditions** as a related action on the desired step while displaying the View Definition page of a business process definition.



ACTIVITY 9B – CONDITION RULES

Business Case: In 9B, we will configure the Propose Compensation for It HelpDesk business process. We will add a condition rule that routes an approval task to the Chief Financial Officer to approve proposed compensation over $70K.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT SUB-PROCESS DEFINITION

1. Find the Propose Compensation for IT HelpDesk Department business process by searching for *bp: prop comp help.*
2. Click on the **Propose Compensation for IT HelpDesk Department** link to view the definition.
3. Use the related action icon to select the **Business Process** > **Edit Definition** task.
4. Use **today's date** for the Effective Date.
5. Click the **OK** button.
6. Add a row by clicking on the icon.
7. It should be the second step with an Order of ***b.***
8. Set up as an **Action step**.
9. Click on the Specify prompt and choose the **Review Compensation** action.
10. Assign this step to the **Chief Financial Officer**.

The CFO is only available to assign because we edited the Business Process Security Policy in Activity 9A.

11. Click the **OK** button to save the changes- <u>Do NOT Close</u>.

…activity continues on next page…

TASK 2: CREATE THE CONDITION RULE

1. Use the related action icon on the new step (Step b) to initiate the **Business Process** > **Create Condition Rule** task.

	b	Action	Review Compensation	No	Chief Financial Officer

2. Enter Rule Conditions:

Field Name	***Entry Value***
Description	*If base pay proposed > 70k*
Source External Field or Condition Rule	Base Pay Proposed – Amount
Relational Operator	greater than
Comparison Type	Value specified in this filter
Comparison Value	70000

3. Click on the **OK** button to save.

View Condition Rule If base pay proposed >70k

Description	If base pay proposed >70k
Comment	(empty)
Category	(empty)
Derived Logic	Base Pay Proposed - Amount greater than or equal to 70000

Rule Conditions | Rule Usage

Rule Conditions

And/Or	(	Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value
And		Base Pay Proposed - Amount	greater than or equal to	Value specified in this filter	70000

At this point the rule has been created and added to the rule library or repository. Also, the new step has been added. Now the rule has to be added as a step condition.

TASK 3: MAINTAIN STEP CONDITIONS TO ADD RULE TO STEP

1. Click the Rule Usage tab. Then click the link to **Propose Compensation for IT HelpDesk step b – Action.**

2. Click the link to **Propose Compensation for IT helpdesk Department** to return to the BP definition.

3. Use the related action icon on step 'b' navigate to **Business Process** > **Maintain Step Conditions** task.

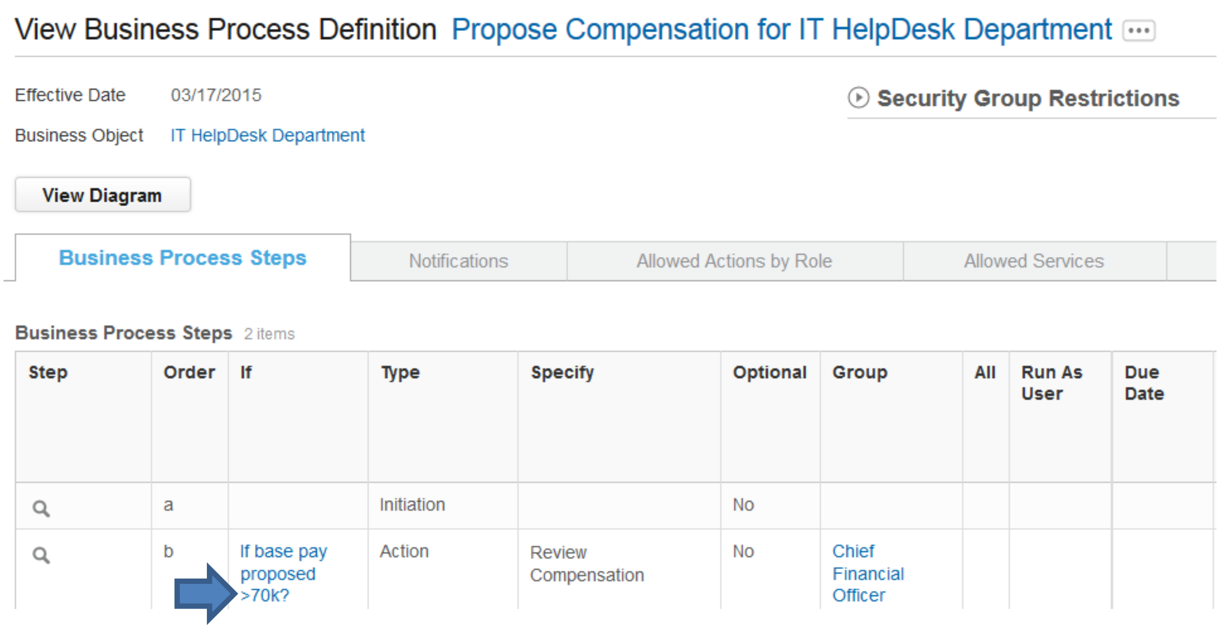
4. Accept **today's date** as the Effective Date and click the **OK** button.

5. Add a row by clicking on the icon on the Entry Conditions Tab.

6. Click the icon and choose the **If base pay proposed > 70k** condition rule.

7. Click the **OK** button to save.

8. Click **Done** on the confirmation page.



View Business Process Definition Propose Compensation for IT HelpDesk Department

Effective Date 03/17/2015

Business Object IT HelpDesk Department

Security Group Restrictions

View Diagram

Business Process Steps | Notifications | Allowed Actions by Role | Allowed Services

Business Process Steps 2 items

Step	Order	If	Type	Specify	Optional	Group	All	Run As User	Due Date
	a		Initiation		No				
	b	If base pay proposed >70k?	Action	Review Compensation	No	Chief Financial Officer			

We will test these changes in the next activity.

ACTIVITY 9C – TEST CONDITION RULES, JOB-BASED SECURITY GROUPS AND SECURITY POLICIES

Business Case: In 9C, we will test our configuration of the **Propose Compensation for IT HelpDesk** business process by hiring an pre-hire with a proposed salary over $70K

Sign in as Logan McNeil (lmcneil)

TASK 1: INITIATE HIRE PROCESS

1. Search for *Jackie Wilson*. (Logan's search category is set to **All of Workday)**.
2. Click on the Related Action off of Jackie Wilson's name; select **Hire** > **Hire Employee**.

Field Name	***Entry Value***
Supervisory Organization	From the prompt > Supervisory Organizations by Manager > Jack Taylor > **IT HelpDesk Department**
Existing Applicant	Jackie Wilson

3. Click the **OK** button.
4. Complete the hire information:

Field Name	***Entry Value***
Hire Date	Today's Date
Hire Reason	New Hire > Fill Vacancy
Position	Senior IT Analyst
Employee Type	Regular
Job Profile	Senior IT Analyst
Time Type	Full Time
Location	Dallas

Pay Rate Type	Salaried

5. Click the **Submit** button to initiate the hire process.
6. Click **Done** and Sign Out if not using proxy sessions

TASK 2: PROPOSE COMPENSATION

Sign in as Jack Taylor (jtaylor) (or start proxy session)

1. Using Jack's profile photo, access his **Inbox**.
2. Click the **Hire Compensation: Jackie Wilson** task.
3. Click on the **Add** button on the Salary row.
4. In the Compensation Plan field of the Assignment Details, select *General Salary Plan* as the Salary Plan.
5. Enter **$70,001** in the amount field.
6. Click the **Done** button.
7. Click the **Submit** button to save.
8. Click the **Done** button on the confirmation page.
9. Sign Out if not using proxy session.

TASK 3: REVIEW PROPOSED COMPENSATION

Sign in as Teresa Serrano (tserrano) (or start proxy session)

Notice: This is one of the steps that incorporated giving the CFO the ability to Review Compensation amounts greater than 70k by using a condition rule.

1. Using Teresa's profile photo, access her **Inbox**.
2. Click the **link** for the **Hire Compensation** task.
3. Review the data

Notice Teresa **cannot** view the salary information. Since the business process type (propose comp) uses a Business Process Template, an additional configuration must be set up to give her access to view the salary information.

4. Choose **More**, and Click **Close.**

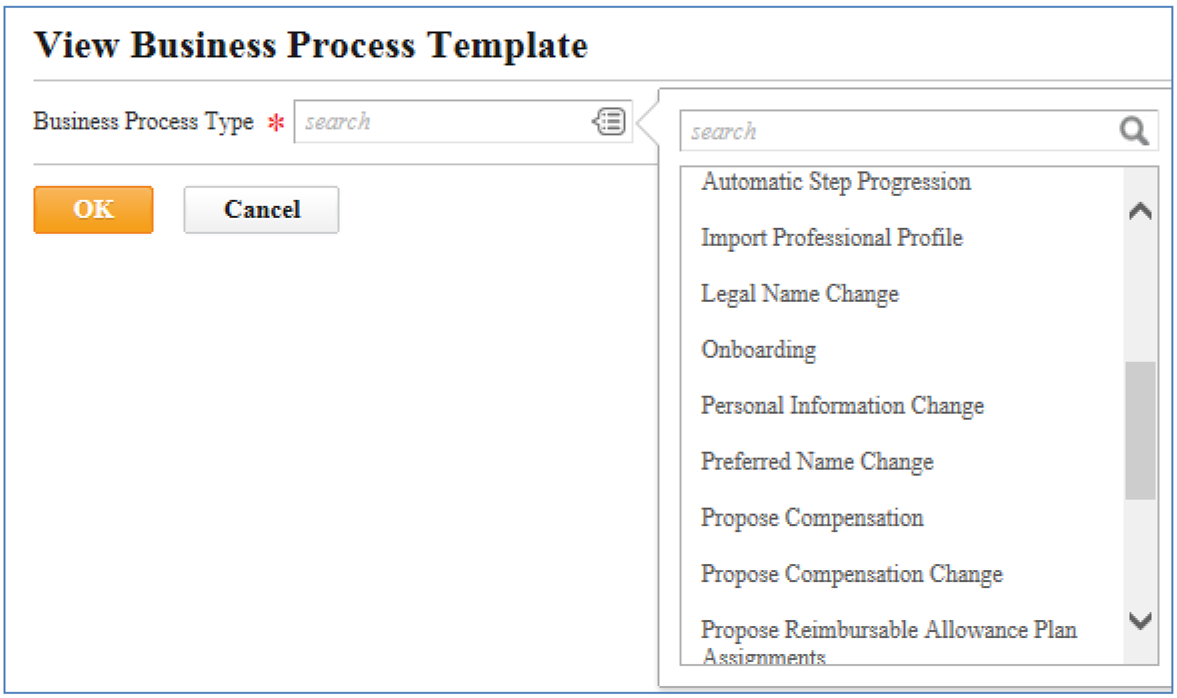
5. Sign Out if not using proxy session; else **stop proxy** session.

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 processes like Onboarding, Hire, Contract Contingent Worker, Edit Position, Change Job, Transfer Contingent Worker Inbound, Performance Reviews, and Propose Compensation.

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

Important: If the business process you are working through utilizes this Template Driven UI than you will need to configure *both* the Business Process Policies and the Domain Security Policies that the template utilizes.



STEPS TO EDIT THE BUSINESS PROCESS POLICY

To edit a business process policy do the following:

1. Find the business process
2. Edit the business process policy
3. If the process utilizes a Template Driven UI, edit both the BP security policies as well as Domain Security Policies
4. Activate security changes
5. Test the Changes

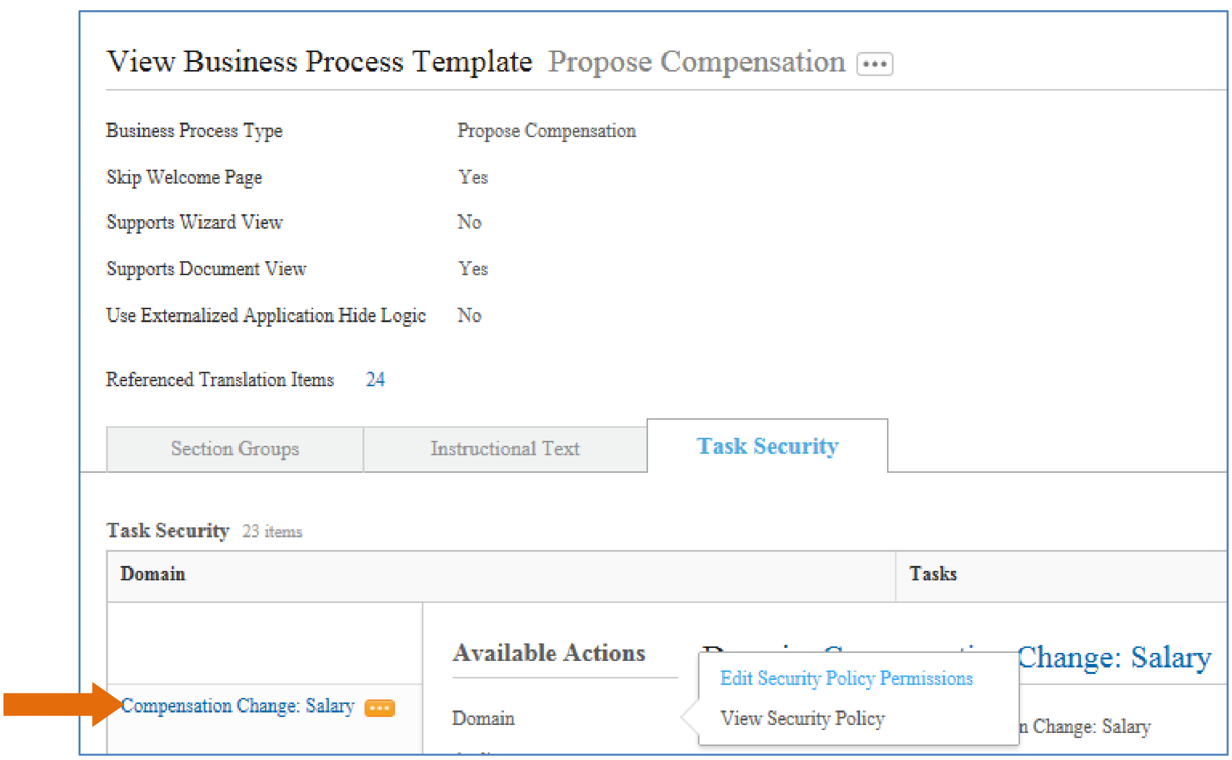
ACTIVITY 9D – BP TEMPLATE AND SECURITY POLICIES

Business Case: In this activity, we will configure the Domain Security Policy for the business process template used by the Propose Compensation business process. We will then test our configuration.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT DOMAIN SECURITY POLICY FROM TEMPLATE

1. Search for the string *bp: prop comp help*
2. Navigate to the **Propose Compensation for IT HelpDesk Department** definition
3. Use the related action and select **Business Process > View Business Process Template**
4. Click on the **Task Security** tab
5. Find the Domain- **Compensation Change: Salary**



6. Use the related action off the Domain and select **Domain > Edit Security Policy Permissions**
7. Add the *Chief Financial Officer* Security Group to this policy to **View and Modify** permissions.
8. Click **OK**
9. Click **Done**

TASK 2: ACTIVATE PENDING SECURITY POLICY CHANGES

1. Search for *activate*.
2. Click the **Activate Pending Security Policy Changes** task.
3. Enter *CFO job based security changes for Propose Compensation for IT HelpDesk Department* into the comments section.
4. Click the **OK** button.
5. Review the **Domain Security Policy** affected. Click the **Confirm** checkbox.
6. Click **OK**.
7. Sign Out if not using proxy sessions

TASK 3: REVIEW PROPOSED COMPENSATION

Sign in as Teresa Serrano (tserrano) (or start proxy session)

1. Click on Teresa's profile photo to access her **Inbox**.
2. Click the **link** button for the **Hire Compensation** task.
3. Review the data. Notice Teresa can now see the proposed salary.
4. Click to **Approve**, then **Done.** Notice that Teresa can not see who is routed the next step in the business process. Why not?
5. Sign Out or stop proxy session

We will leave the Hire event process In Progress with remaining steps awaiting action.

CONFIGURABLE VALIDATION MESSAGE TEXT

Workday enables you to override a default validation message with configurable message text. There are three areas in Workday where validation messages are used:

- Absence types
- Business process validations
- Custom validations (used in Financials)

Although these validation messages take different forms, they are all based on condition rules and relay messages to the end user when the condition rule is encountered.

We added a new menu item on the condition rule related action menu, **Validation** > **Configure Validation Text**. It enables you to add as many text fields as necessary in any order you choose, mixing static text fields with dynamic content (report fields) to control the exact validation message that you want to display.

As an example, you can configure validation text on absence types. Then if you try to use an absence type in a way that isn't approved, you'll see the configured validation text message, rather than the name of the condition rule preventing the action. Similarly, for a business process, you might create a condition that prevents you from exiting a step while a particular condition is true. If you configure a corresponding validation message that says you have to change the condition before continuing, this can provide more context than simply displaying the condition rule name.

ACTIVITY 10 – CREATE VALIDATION RULE AND CONFIGURE VALIDATION MESSAGE

Business Case: In this activity we will create a validation rule and configure the message. We will be configuring the Hire for IT HelpDesk Business Process. Setting up this configuration creates a requirement where it currently may not be set up in the system.

Sign in as Logan McNeil (lmcneil)

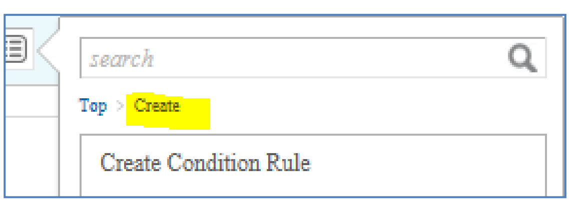
TASK 1: CREATE CONDITION RULE

1. Search for the string *bp: hire*.
2. Locate and click the link to **Hire for IT HelpDesk Department** business process. Recall that In order to create condition rule the business process is in VIEW ONLY mode.
3. Use the related action icon on the initiation step (Step a) to navigate to **Business Process** > **Maintain Step Conditions** task.

4. Click **OK** to accept today as the effective date.

This time we will use the intra-task create option to create our condition rule. It allows us to create and add the rule in one action, rather than two steps as we did earlier.

5. Click to add a row. Then click the prompt icon for the Rule on the far right.
6. Select **Create > Create Condition Rule**



7. Click **OK**. Configure the rule as follows:

Field Name	***Entry Value***
Description	*If Pay Rate Type is empty*
Source External Field or Condition Rule	Pay Rate Type - Proposed
Relational Operator	Is empty
Comparison Type	Value specified in this filter
Comparison Value	Leave default

8. Click on the **OK** button twice to save.

9. Click the **Done** button.

Notice the **Validation** column appears and our validation rule is displayed on step a.

TASK 2: CONFIGURE VALIDATION MESSAGE

1. Use the related action icon on the Validation Rule **Validation** > **Configure Validation Message.**

2. Select the radio button for **Text** and enter '*Please be sure to enter the Pay Rate Type!*'

3. Click the **OK** button to save.

4. Click **Done.**

ACTIVITY 11 – HIRE TO TEST VALIDATION RULE AND MESSAGE

Business Case: In this activity we will test the validation rule and message. We will initiate the Hire Process.

Sign in as Logan McNeil (lmcneil)

TASK 1: HIRE PROCESS TO TEST THE CHANGES

1. Search for Brady McCormick. Logan's search is set to the **All of Workday** category.
2. Click on the Related Action off of Brady McCormick name. Select **Hire > Hire Employee**.
3. Enter **Supervisory Organization**:

Field Name	***Entry Value***
Supervisory Organization	IT HelpDesk Department
Existing Pre-Hire	Brady McCormick

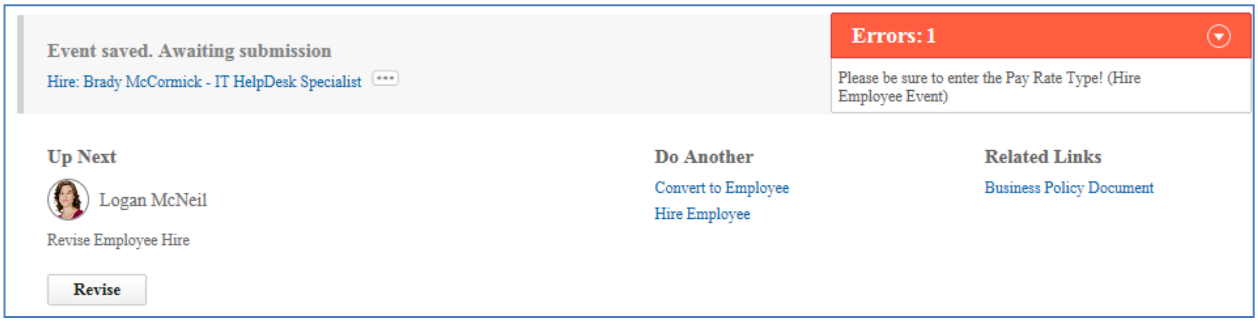
4. Click the **OK** button.
5. Complete the hire information:

Field Name	***Entry Value***
Hire Date	Today's Date
Hire Reason	New Hire > Fill Vacancy
Position	IT HelpDesk Specialist
Employee Type	Regular
Job Profile	IT HelpDesk Specialist
Time Type	Full time
Location	San Francisco
Pay Rate Type	Leave blank to test the rule

6. Click the **Submit** button to initiate the process

TASK 2: REVISE EMPLOYEE HIRE

1. Notice the Critical Message – Your attention is required! *Please be sure to enter the Pay Rate Type*! (Hire Employee Event) This error occurred based on Validation Rule on the initiation step.



2. Click on the **Revise** button for the **Employee Hire** task.

3. Locate the Pay Rate Type Field and enter **Salaried**.

4. Click the **Submit** button to save.

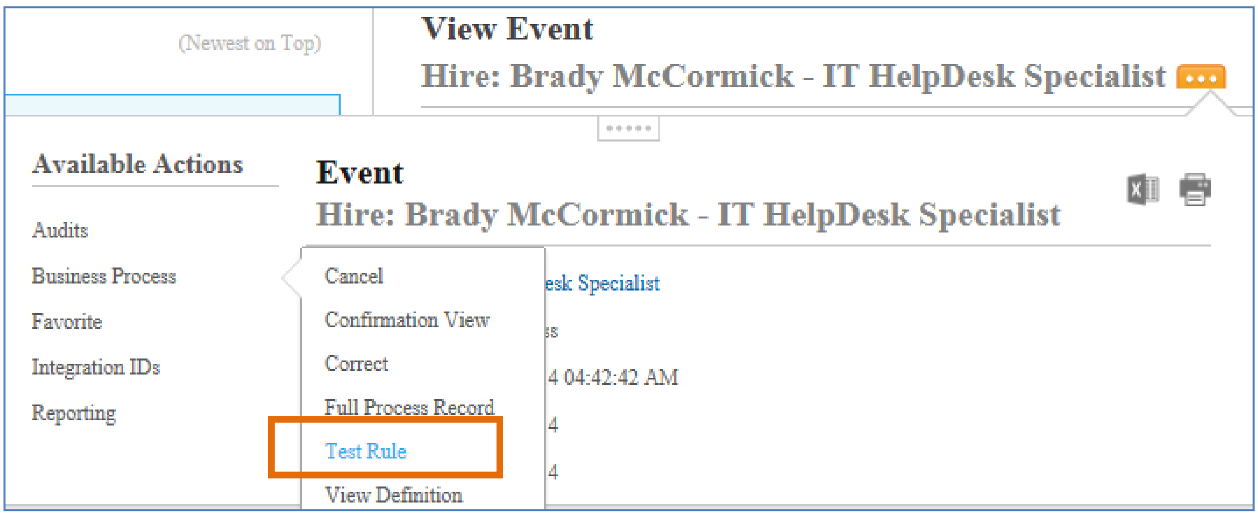
5. Click **Done.**

At this time, do not complete the remaining steps. We will use them later in class.

TROUBLESHOOTING CONDITION RULES

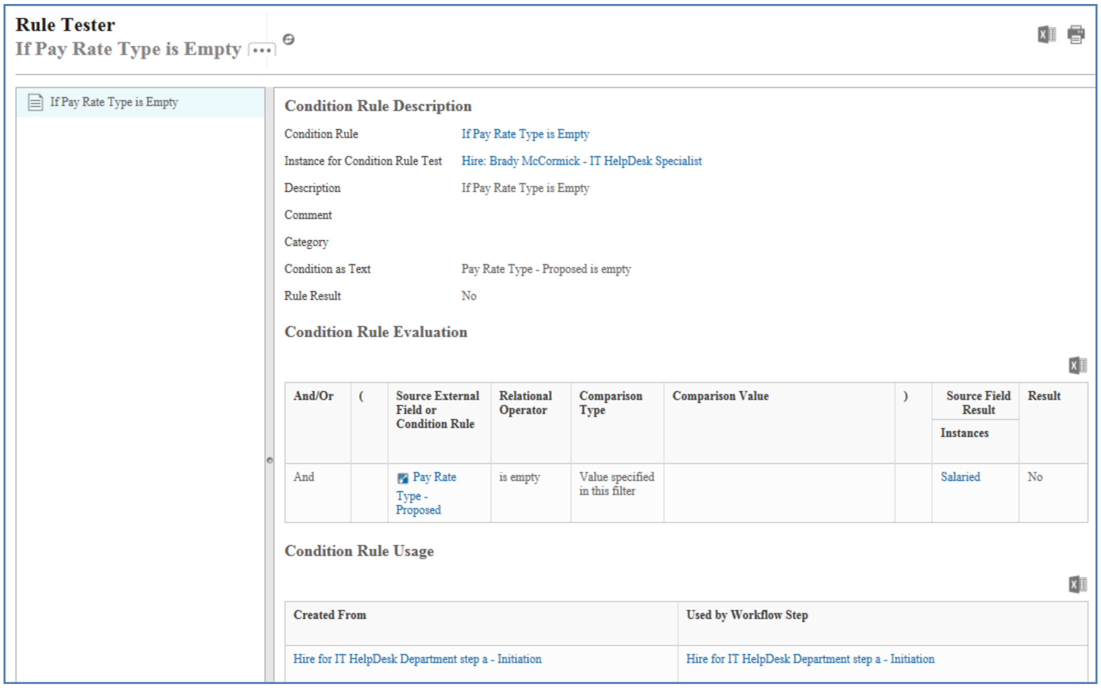
CONDITION RULE TESTER

Workday delivers the ability to troubleshoot business process condition rules to ensure that your business process works as expected. The new Rule Tester task enables you to see the full execution flow of a condition rule, and whether each condition in the rule succeeds or fails. The Test Rule task is only available as a related action from business process events that contain one or more condition rules.



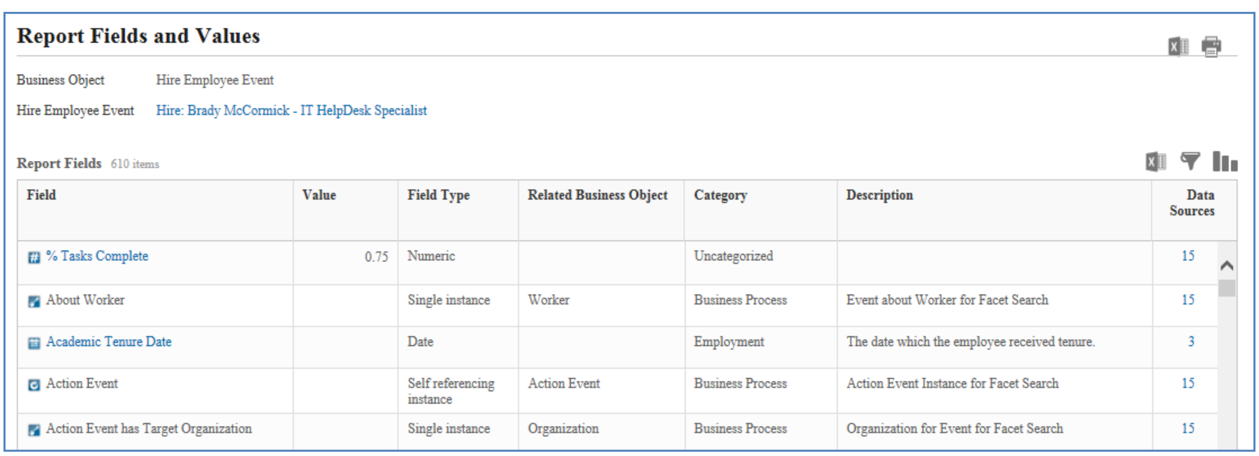
This task is secured to the Business Process Administration security domain and it displays:

- A description of the condition rule
- An evaluation grid for each condition in the rule.
- A view of where the condition rule is used and whether it is used by other rules as a sub-rule
- How the condition rule was created
- Where the condition rule is used



When condition rules are not acting as you expect, consider the following in your troubleshooting process.

- Always test one condition at a time
- Use either the Business Object Details or Workday Data Dictionary report to assist in finding available fields
- Run the Report Fields and Values report from the Event related action to verify correct values are used in your rule



Field	Value	Field Type	Related Business Object	Category	Description	Data Sources
% Tasks Complete	0.75	Numeric		Uncategorized		15
About Worker		Single instance	Worker	Business Process	Event about Worker for Facet Search	15
Academic Tenure Date		Date		Employment	The date which the employee received tenure.	3
Action Event		Self referencing instance	Action Event	Business Process	Action Event Instance for Facet Search	15
Action Event has Target Organization		Single instance	Organization	Business Process	Organization for Event for Facet Search	15

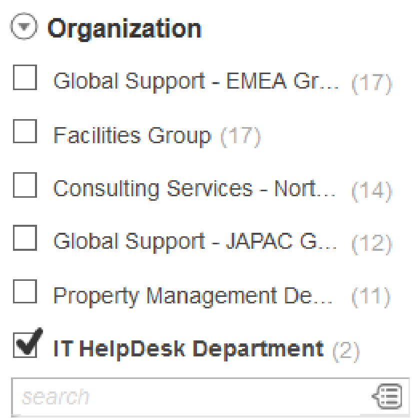
ACTIVITY 12 – USING THE CONDITION RULE TESTER

Business Case: In this activity, we will use the Condition Rule Tester to see the results of the validation rule.

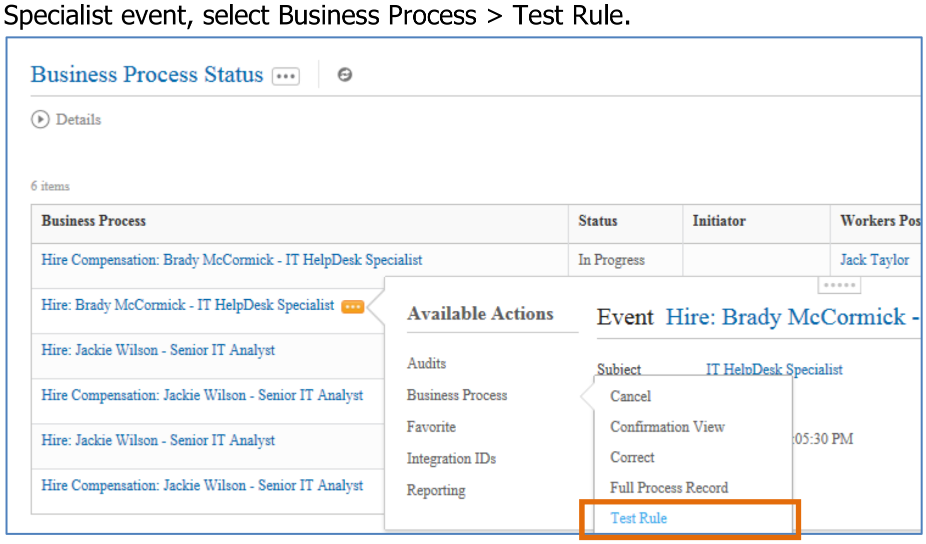
Sign in as Logan McNeil (lmcneil)

USE THE CONDITION RULE TESTER – HIRE EVENT

1. Search for and run the **Find Events** faceted report. Choose **hire** as the business process type. Use the Organization facet to only access events associated with the **IT Helpdesk Department**.



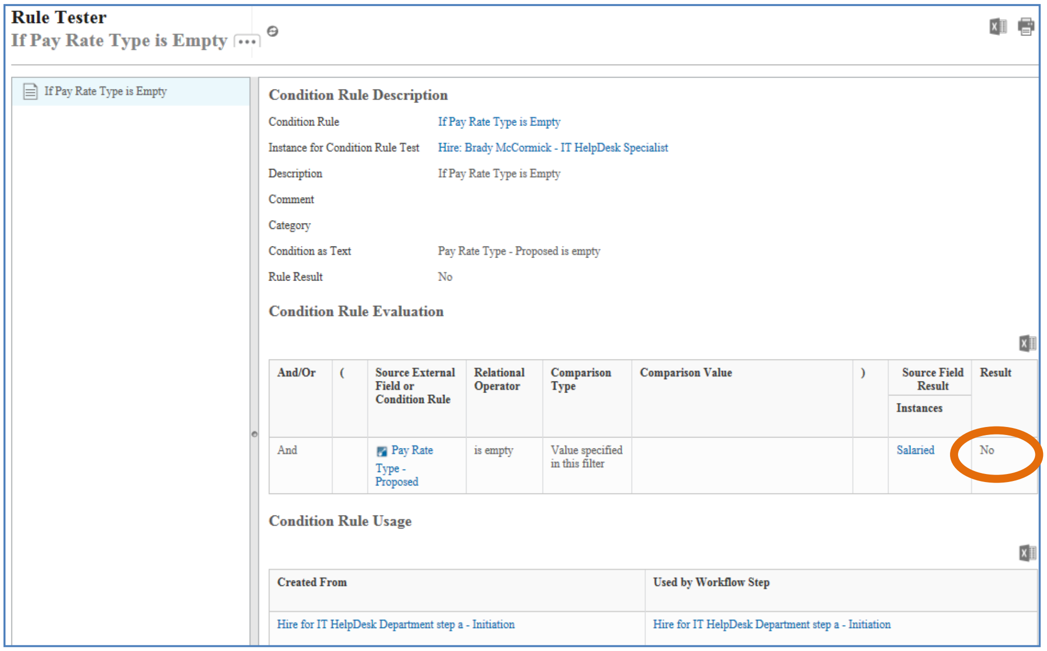
2. Locate the event **Hire: Brady McCormick – IT HelpDesk Specialist**
3. From the Related Action off of the Hire: Brady McCormick – IT HelpDesk Specialist event, select Business Process > Test Rule.



4. In the Condition Rule prompt, select **If Pay Rate Type is empty**.

5. Check the box to **Include Condition Rule Usages** and click **OK**

6. Shown here you see that the rule did not fire because we had revised the entry to include the Pay Rate Type.



USE THE CONDITION RULE TESTER – HIRE COMPENSATION EVENT

1. Click the back button twice in your browser to return to the list of hire events for the IT Helpdesk.

2. Click the link to view the event for **Hire: Jackie Wilson – Senior IT Analyst**.

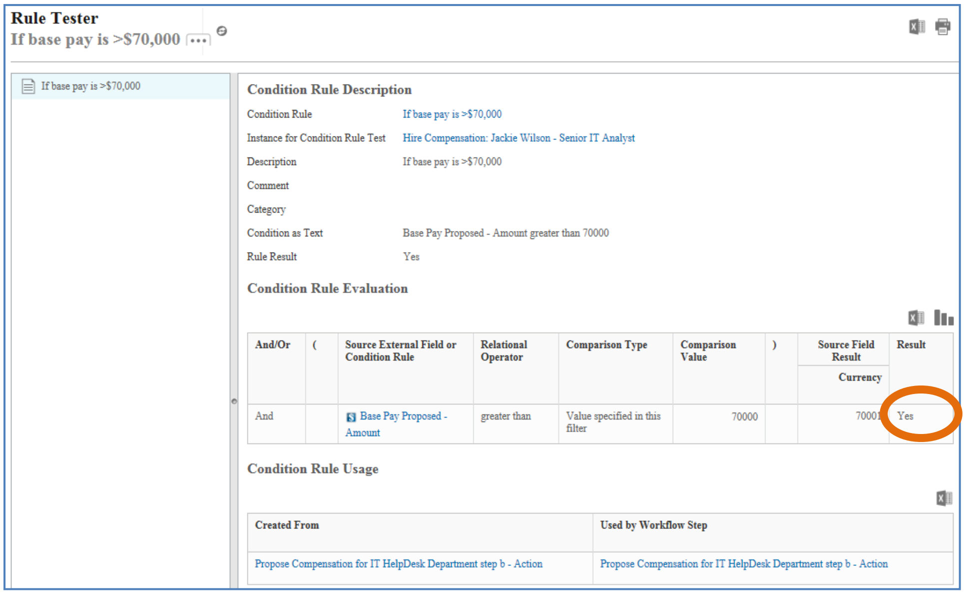
3. Click the **Process** tab of the event

4. From the related action of either **Propose Compensation** step in the Process History, select **Business Process > Test Rule.**

5. In the Condition Rule prompt, select **If base pay proposed is >70k**

6. Check the box to **Include Condition Rule Usages** and click **OK**

7. Shown here you see that the rule did fire. Use the rule tester to see condition rules fire later in class.



MORE STEP CONFIGURATIONS

Step Label Override	•Define and Override the Label on a BP Step
Step Help Text	•Configurable Instruction Text for Any BP Step
Related Links	•Create Links to Websites relevant to the Process
Step Delay	•Postpone a Task From Appearing in the Inbox until a Specified Timeframe Has Been Met
Advanced Routing	•Define Routing Restrictions and Alternate Routings for BP Steps
Questionnaire	•Define Routing Restrictions and Alternate Routings for BP Steps
Report/Report Group	•Specify a report or report group to be run as a step. Outputs to W: drive •Optionally, create To Do that presents link to report(s)
Review Document	•Create a document that can be delivered in a business process

In the upcoming activities, we will configure and test all of the options listed above.

MAINTAIN STEP LABEL OVERRIDE

You can use the Maintain Step Label Override to change the label on the sub-process step within a business process. This is a simple functionality but very useful if the sub-process name needs to be changed for the end user visibility.

MAINTAIN STEP HELP-TEXT

Help text is defined at the step level of a business process, enabling you to define distinct help text for each step. Except for the initiation step, you can configure the help text so that it appears only if a specific condition is met (through the use of condition rules).

For example, you might set up condition rules that apply to different locations, like United States and Barcelona. You could then specify that, based on these condition rules, users based in the U.S. see help text that applies to their location, while users based in Barcelona see different help text specific to their site.

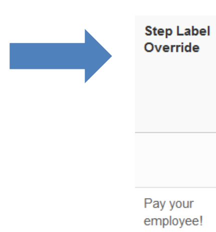
ACTIVITY 13 – MAINTAIN STEP LABEL OVERRIDE AND MAINTAIN HELP TEXT

Business Case: In this activity, we will maintain step label override and help text for the Hire for IT HelpDesk Department. These changes are small but powerful enhancements to the overall process.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT BUSINESS PROCESS STEP

1. Search for the string *bp: hire*.
2. Locate the **Hire for IT HelpDesk Department** business process and click the link to display the definition.
3. Use the related action for Propose Compensation step (step b); **Business Process** > **Maintain Step Label Override**.
4. Use **today's date** for the Effective Date.
5. Click the **OK** button.
6. In the Step Label Override field enter *Pay your employee!*
7. Click the **OK** button to save your changes.
8. Click **Done** on the confirmation page.
9. Note there is now a new column in the business process defn:

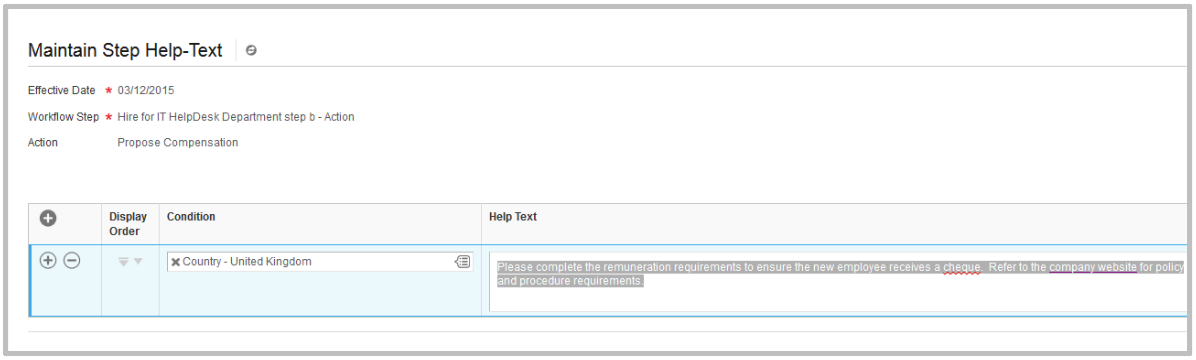


TASK 2: MAINTAIN STEP HELP-TEXT

1. Related Action for the Propose Compensation Step (step b); **Business Process** > **Maintain Step Help-Text**.
2. Effective **today's date** and click **OK** to continue.

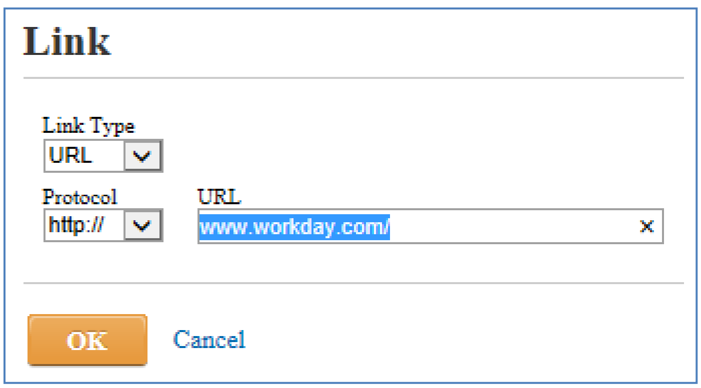
3. In the condition field, select **Country - United Kingdom** rule.

4. Enter Instructions or help text for the Manager receiving this task. Example: *Please complete the remuneration requirements to ensure the new employee receives a cheque. Refer to the company website for policy and procedure requirements.*



5. To create a link, click on the Format Text button. Highlight the words "*company website*" using your mouse then click **Link** icon 

6. In the URL field, enter www.workday.com



7. Click **OK** to save.

8. Make the text larger and colorful.

9. Click **Done**.

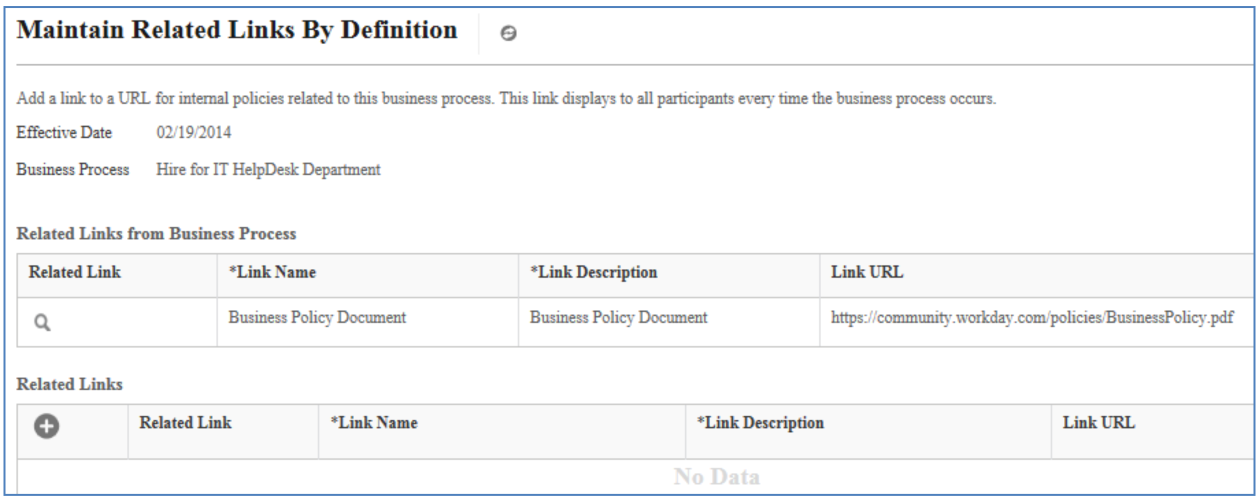
10. Click **OK** to save.

11. Click **Done** on the confirmation page.

MAINTAIN RELATED LINKS

Workday also provides a way that you can create links to web sites relevant to the process, such as links to internal policies or other important documents. These links appear to all participants whenever the business process runs. This function is available from the related action of the business process then select **Maintain Related Links By Definition**.

Related links can also be defined at the Business Process Type level. Links defined at the type level are inherited down to all definitions of that type. This is illustrated in the graphic below as Related Links from Business Process.



Maintain Related Links By Definition

Add a link to a URL for internal policies related to this business process. This link displays to all participants every time the business process occurs.

Effective Date 02/19/2014

Business Process Hire for IT HelpDesk Department

Related Links from Business Process

Related Link	*Link Name	*Link Description	Link URL
	Business Policy Document	Business Policy Document	https://community.workday.com/policies/BusinessPolicy.pdf

Related Links

	Related Link	*Link Name	*Link Description	Link URL
		No Data		

ACTIVITY 14 – MAINTAIN RELATED LINKS

Business Case: In this activity, we will maintain related links for the Hire for IT HelpDesk Business Process. This will allow users the ability to link to the Community Website from the Hire Business Process.

Sign in as Logan McNeil (lmcneil)

1. Find the Hire Business Process for the IT HelpDesk Department (bp: Hire for IT HelpDesk)
2. In the header area of the business process definition, click on the Related Action for the **Business Process > Maintain Related Links By Definition**
3. Use **today's date** as the Effective Date and hit the **OK** button.
4. In the Related Links section, add a row and enter the Link Name: *Workday Community Documentation*.
5. In the link description: *Workday Community Documentation*
6. Then enter the link URL: https://community.workday.com/doc/books
7. Click **OK** to save the business process changes.
8. Click **Done** on the confirmation page.

MAINTAIN STEP DELAY

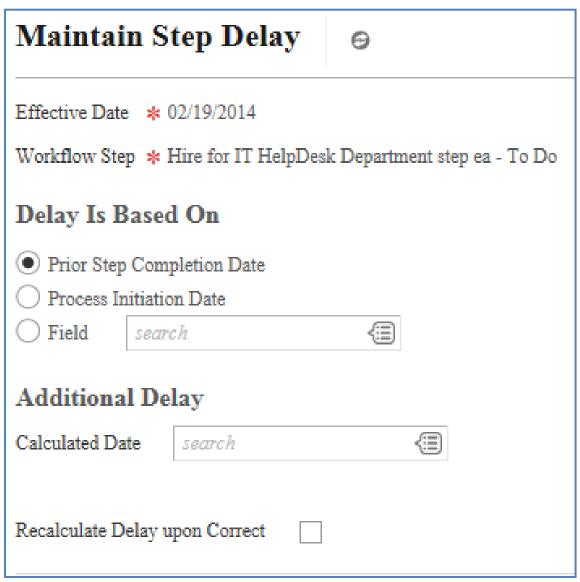
If a step should have a built-in delay associated with it, select **Maintain Step Delay** from the related actions menu for the step and specify the length of the additional delay.

Adding a built-in 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. 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 reference field). During the step delay period, the process is associated with the user as specified in Edit Tenant Setup - Business Processes and Notifications

When using step delays, note that step priority is enforced as usual. For instance, assume a business process includes three steps: steps a, b, and c. If step b has a delay of 20 days, then step c will not run for at least 20 days, the earliest point at which step b can be completed.

Workday provides a **Recalculate Delay on Correct** check box in the Maintain Step Delay related action of any business process step. Check this box if you want step delay time to recalculate should the process be corrected.

Use the **Maintain Calculated Dates** task to enter the calculated date name that you want to appear on the Due Date list.



Additionally, if a step is within its specified delay period, you can force the completion of the specified delay if you need to cancel or change the business process instance. To do this, access the **Reschedule Delayed Business Process Transactions** task to select the business process instance. Then select the Business Process Type of the instance you want to reschedule, and a Start Date and End Date that contain the scheduled completion date of the delayed step. In the Reschedule to Date prompt, select the date on which you want the delayed step to complete.

CONFIGURE A TO DO

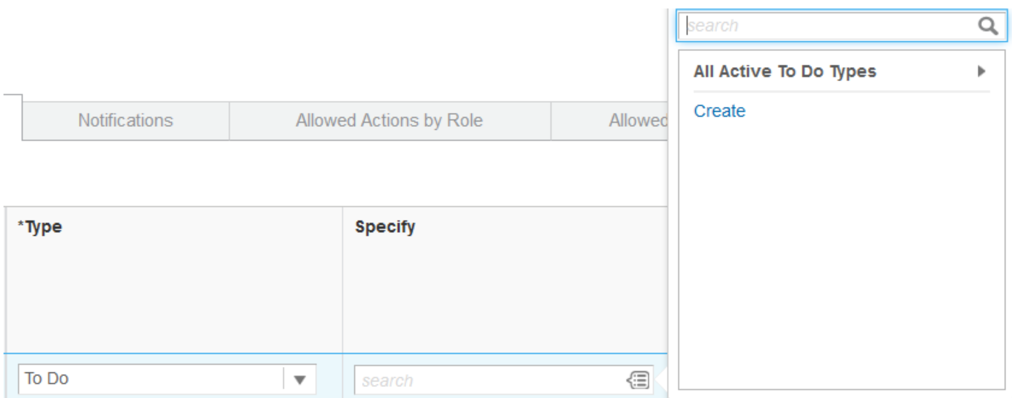
A To Do is an external task that you can add as a step to a business process. You can group To Dos into Checklists and add them as steps to business processes. The To Dos report lists each defined To Do and where it is used. You can also use a mass action to cancel To Do steps.

When you create or edit a business process, and you specify a To Do for a To Do step or a Checklist, either select an existing To Do at the prompt or select Create To Do.

If you are creating a new To Do, enter an effective date and a description. You cannot enter an effective date if you create a new To Do from the Maintain To Dos task. The effective date defaults to today.

When you edit a To Do, enter any instructions that might help the user complete the task.

When you associate a Workday task with the To Do, everyone who then receives the To Do as part of a business process sees a link in their Inbox that takes them directly to the associated task, enabling them to take action immediately.



ACTIVITY 15 – CREATE A TODO AND MAINTAIN STEP DELAY

Business Case: In this activity, we will add a step for a new To Do and maintain a step delay which is a useful configuration to delay a step within business process so the task is presented at a meaningful time.

Sign in as Logan McNeil (lmcneil)

EDIT BUSINESS PROCESS DEFINITION

1. Search for your business process by searching for *bp: hire*.
2. Locate the **Hire for IT HelpDesk Department** business process.
3. Use the related action for Hire for IT HelpDesk Department; **Business Process** > **Edit Definition**.
4. Use **today's date** for the Effective Date.
5. Click the **OK** button.
6. Click on ⊕ to add an additional step (hint: *ea* or *f*).
7. Type of Step = To Do
8. Click on the prompt icon in the **Specify** column.
9. Click on the **Create** option.Then click on **Create To Do**.
10. Effective as of = **Today's Date**.
11. To Do Description = **Verify Signed Documents**.
12. Click **OK** to save.
13. Assign to **HR Partner** security group.
14. Click **OK** to Save.
15. Use the related action on the Verify Signed Documents step navigate to **Business Process** > **Maintain Step Delay**.
16. Use **today's date** as the Effective Date and hit the **OK** button.

17. In the Delayed Is Based On section, select the **Process Initiation Date** radio button.

18. In the Additional Delay field enter or use the prompt to locate and select **1 Week**.

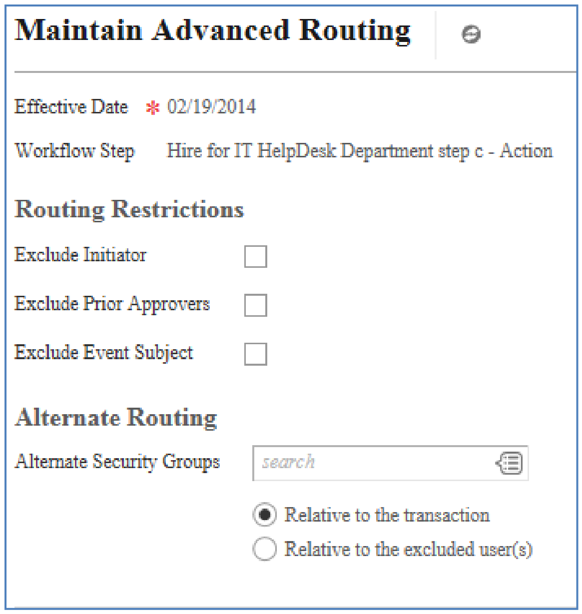
19. Check the box to **Recalculate Delay upon Correct**. (This will automatically recalculate the step delay should the process be corrected.)

20. Click **OK** to save the business process changes.

21. Click **Done** on the confirmation page.

MAINTAIN ADVANCED ROUTING

You can optionally define routing restrictions and alternate routings for certain business process step types. Restrictions enable you to configure individual workflow steps so that selected individuals are excluded from the workflow routing based on your selections**. If routing restrictions cause all assignees to be excluded, the step is skipped as not required.**



Alternate Security Groups - 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).

The Alternate Security Groups prompt includes the security groups for the step (from the security policy for the business process definition), plus Manager. If Manager is not a valid security group for the step, then Relative to the transaction is not selectable.

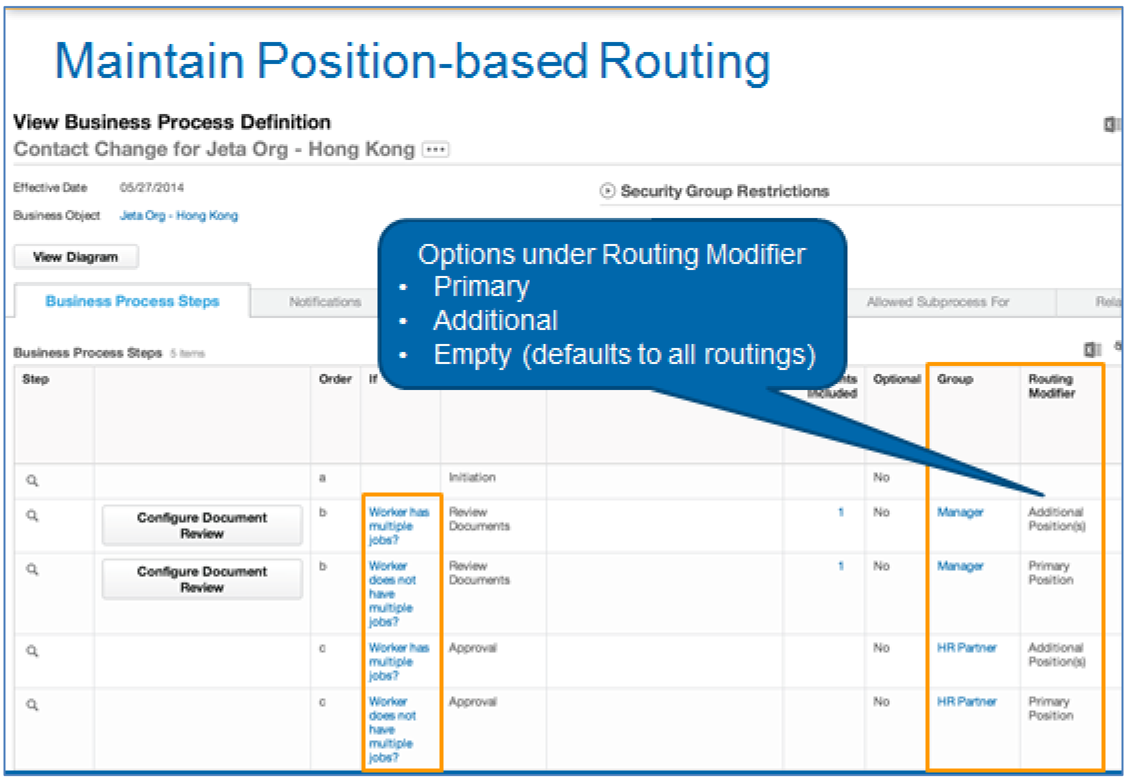
- **Relative to the transaction** - Specify alternate security groups based on the context of the transaction or event when routing the transaction (e.g. Manager of the Target).
- **Relative to the excluded user(s)** - Specify alternate security groups based on the context of the excluded user (e.g. if the initiator is excluded, the initiator's Manager).

The initiation and checklist type steps cannot be rerouted.

MAINTAIN POSITION-BASED ROUTING

Certain business process types may require you to specify routing according to a worker's primary or additional positions for workers that have multiple jobs. However, in the business process definition, you can only select security groups such as Primary Manager or Primary HR Partner; you cannot specify that the business process step be routed to the manager of the worker's additional position(s), or to other security groups of the worker's primary position or additional position(s).

Position-based routing can be enabled for any business process step type in Workday, but only for business processes that have been configured by Workday to support using a routing modifier.



If you select Additional Position(s) as the Routing Modifier for a step and the worker has more than one additional position, the step is routed to the specified group for <u>all</u> of the worker’s additional positions.

If you select Additional Position(s) as the Routing Modifier for a step, the specified group must be configured with access rights set to either **Role has access to the positions they support** or **Role has access to all positions**.

ACTIVITY 16 – MAINTAIN ADVANCED ROUTING

Business Case: In this activity, we will add a routing restriction to the Hire for IT HelpDesk. This restriction will exclude the initiator and routing to an alternate security group.

Sign in as Logan McNeil (lmcneil)

EDIT HIRE BUSINESS PROCESS

1. Search for your *bp: Hire for IT HelpDesk Department*.
2. Go to the **Review Employee Hire** step. Click on the Related Action; **Business Process** > **Maintain Advanced Routing**.
3. Use **today's date** for the Effective Date.
4. Click the **OK** button.
5. In the **Routing Restrictions** section, click on the check box for **Exclude Initiator**.
6. **Alternate Security Groups** field enter **Manager**.
7. In the **Alternate Routing** select the **Relative to the excluded user(s)** radio button.
8. Click the **OK** button.
9. Click **Done** on the confirmation page.

We will TEST all the changes to the Business Process in the next activity: Maintain Action Label Override, Maintain Help Text, Maintain Related Links, plus Maintain Step Delay and Routing Restrictions.

ACTIVITY 17 – HIRE AN EMPLOYEE TO TEST CHANGES

Business Case: In this activity, we will Test the many configuration changes we performed to the Hire for IT HelpDesk Department. We will also discuss the various changes.

Sign in as Logan McNeil (lmcneil)

TASK 1: INITIATE HIRE PROCESS

1. Search for *Michael Montgomery*. Logan's search category is set to **All of Workday**.

2. Click on the Related Action off of Michael Montgomery Pre-Hire; select **Hire** > **Hire Employee**.

Field Name	***Entry Value***
Supervisory Organization	IT HelpDesk Department From the prompt > Supervisory Organizations by Manager > Jack Taylor >
Existing Pre-Hire	Michael Montgomery

3. Click the **OK** button.

4. Complete the hire information:

Field Name	***Entry Value***
Hire Date	Today's Date
Hire Reason	New Hire > Fill Vacancy
Position	Senior IT Analyst
Employee Type	Regular
Job Profile	Senior IT Analyst
Time Type	Full time
Location	London

Pay Rate Type	Salaried

5. Click the **Submit** button to save and initiate the process.
6. Click on the Related Link of **Workday Community Documentation**. Did the link open?
7. Access the Workday window or tab and then return back to original page.
8. Click the **Done** button on the confirmation page.
9. Sign Out if not using proxy sessions.

TASK 2: PROPOSE COMPENSATION

Sign in as Jack Taylor (jtaylor) (or start proxy session)

1. Using Jack's profile photo, access Jack's **Inbox**.
2. Notice the item in Jack's inbox now says 'Please pay your employee'
3. Because Michael was hired to the London location, the help text you configured in Activity 13 displays toward the top of the window. Click the **company website** link to verify it takes you to the desired web address.
4. Navigate back to the tenant to complete the rest of the activity.
5. Click on the **Add** button on the Salary row.
6. In the Compensation Plan field of the Assignment Details, select *General Salary Plan* as the Salary Plan.
7. Enter **$70,001** in the amount field.
8. Click the **Done** button.
9. Click the **Submit** button to save.
10. Click the **Done** button on the confirmation page.
11. Sign Out if not using proxy session.

Activity continues on the following page…

TASK 3: REVIEW PROPOSED COMPENSATION

Sign in as Teresa Serrano (tserrano) (or start proxy session)

Notice: This is one of the steps that incorporated giving the CFO the ability to Review Compensation amounts greater than 70k by using a condition rule. Also note that Teresa sees the compensation data presented by the Template Driven UI .

1. Using Teresa's profile photo, access Teresa's **Inbox**.
2. Click the **link** for the **Hire Compensation** : Michael Montgomery task.
3. Review the data and click **Approve**.
4. Click **Done**
5. Sign Out if not using proxy sessions.

TASK 4: REVIEW HIRE

Sign in as Steve Morgan (smorgan) (or start proxy session)

1. Click on Steve's photo to access his **Inbox**.
2. Click the **link** for the **Hire: Michael Montgomery** task.
3. Review the data and click **Approve**.
4. Click **Done**
5. Sign Out if not using proxy sessions.

TASK 5: TO DO

Sign in as Christine Nguyen (cnguyen) (or start proxy session)

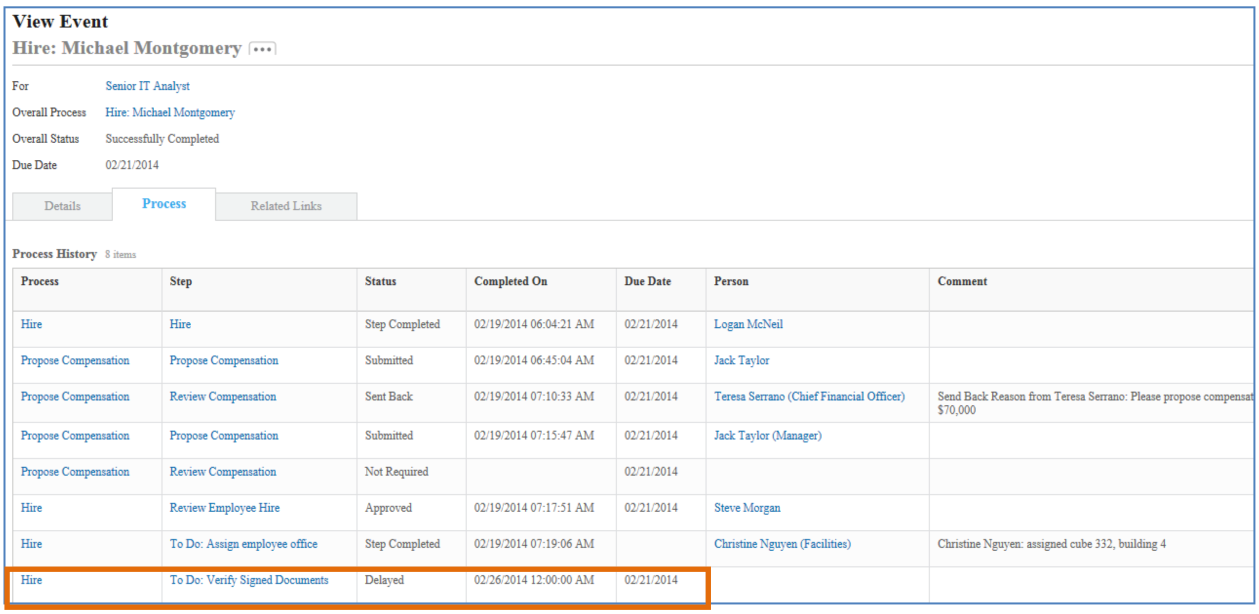
1. Click on Christine's photo to access his **Inbox**.
2. Click the **link** for the **Assign Employee Office: Hire: Michael Montgomery task**.
3. Enter *Assigned Cube 332, Building 4* in the Comment field.
4. Click the **Submit** button.

5. Click **Done** and Sign Out or stop proxy session.

TASK 6: VERIFY DELAYED STEP

Sign in as Logan McNeil (lmcneil)

1. Click on Logan's photo to access her **Inbox**.
2. Click the link to view the Inbox
3. Click the **Archive** tab
4. Select the **Hire Michael Montgomery** event
5. Click the **Process** tab
6. Notice the **To Do: Verify Signed Documents** step has a Delayed status.


View Event

Hire: Michael Montgomery

For	Senior IT Analyst
Overall Process	Hire: Michael Montgomery
Overall Status	Successfully Completed
Due Date	02/21/2014

Details | Process | Related Links

Process History 8 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Hire	Hire	Step Completed	02/19/2014 06:04:21 AM	02/21/2014	Logan McNeil	
Propose Compensation	Propose Compensation	Submitted	02/19/2014 06:45:04 AM	02/21/2014	Jack Taylor	
Propose Compensation	Review Compensation	Sent Back	02/19/2014 07:10:33 AM	02/21/2014	Teresa Serrano (Chief Financial Officer)	Send Back Reason from Teresa Serrano: Please propose compensat $70,000
Propose Compensation	Propose Compensation	Submitted	02/19/2014 07:15:47 AM	02/21/2014	Jack Taylor (Manager)	
Propose Compensation	Review Compensation	Not Required		02/21/2014		
Hire	Review Employee Hire	Approved	02/19/2014 07:17:51 AM	02/21/2014	Steve Morgan	
Hire	To Do: Assign employee office	Step Completed	02/19/2014 07:19:06 AM		Christine Nguyen (Facilities)	Christine Nguyen: assigned cube 332, building 4
Hire	To Do: Verify Signed Documents	Delayed	02/26/2014 12:00:00 AM	02/21/2014		

Review Questions

1. Is Michael Montgomery an employee? Who is his manager?

Answer: Search for Michael Montgomery and click on the Management Chain.

2. What is the Overall Status of this Event?

Answer: Locate the Hire: Michael Montgomery event (you saw it in Logan's inbox.)

3. Why is the transaction routed to Teresa Serrano? And what can she see?

Answer: We created a Condition Rule to route to the CFO for approval if the base pay is >70,000. She can see the Salary.

4. Why can't Teresa see where the process is routed next?

Answer: The CFO was only granted permission to view the Propose Compensation business process which is completed with her approval. To see the Hire process would require permissions on the Hire BP security policy.

5. Why was the transaction routed to Steve Morgan?

Answer: We created an Advanced Routing restriction excluding the initiator for the Review Hire step and routed instead to the Manager of the Initiator. Steve is Logan's manager.

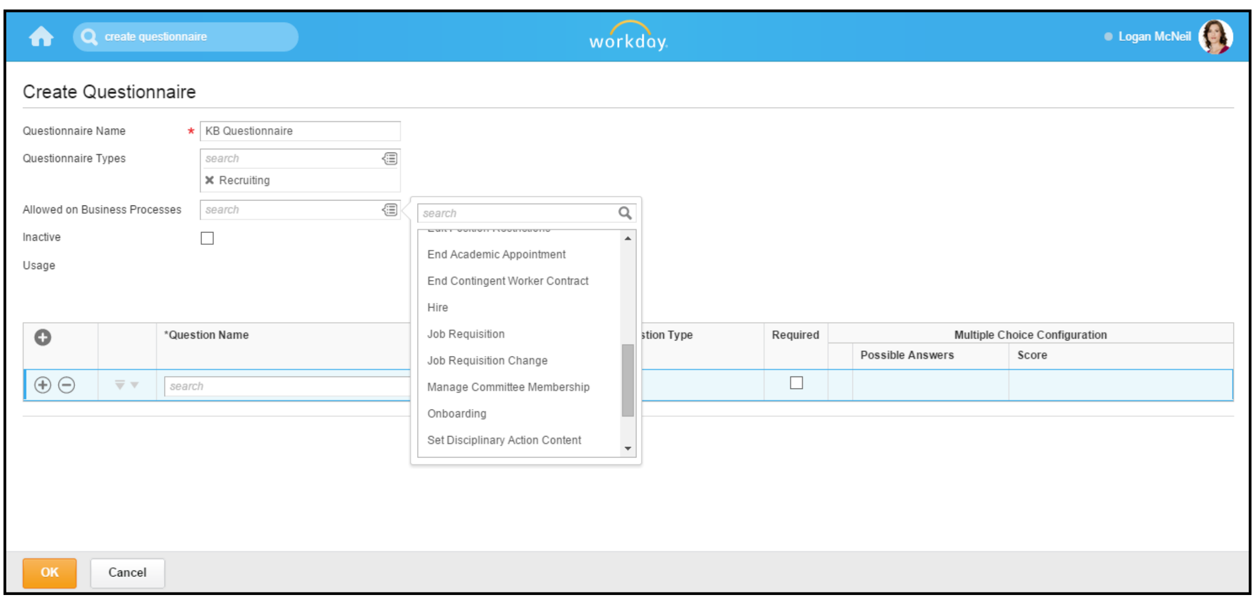
CREATING QUESTIONS AND QUESTIONNAIRES

Workday provides you with the ability to include a questionnaire as part of a business process. This enables you to gather relevant information during the business process. You can configure questionnaires to contain questions. These questions are configurable and reuseable. When creating questions, you must select one of the following question types:

- Date
- Multiple Choice - Multi Select
- Multiple Choice - Single Select
- Numeric
- Text

Based on the Business Configuration Options Report, the Complete Questionnaire step type can be included in the following business processes:

- Change Job
- Contract Contingent Worker
- Create Position
- Edit Position
- Edit Position Restrictions
- End Contingent Worker Contract
- Hire
- Job Requisition
- Job Requisition Change
- Onboarding
- Termination
- Start Disciplinary Action



ACTIVITY 18 – CREATE A QUESTIONNAIRE

Business Case: In this activity we will create questions and a questionnaire to be used later in a termination process. The employee that is being terminated will be sent an Exit Interview questionnaire as part of the termination process.

Sign in as Logan McNeil (lmcneil)

CREATE QUESTIONNAIRE

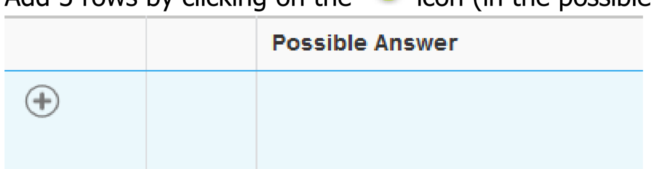
1. Search for the task *Create Questionnaire*

Field Name	***Entry Value***
Questionnaire Name	Exit Interview for R&D
Questionnaire Type	Leave blank
Allowed on Business Processes	Termination

2. Click on the field **Question Name.** Select the prompt and **Create,** and **Create Question.**

Field Name	***Entry Value***
Question Name	Recommend organization?
Question Body	How likely are you to recommend this organization to others as a good place to work?
Quesiton Type	Multiple choice – single select

3. Add 3 rows by clicking on the icon (in the possible answer section).



Configure the following 3 possible answers:

- Very Likely
- Likely
- Not Likely

4. Click **OK.**

5. Add a row by clicking on the plus icon  by the field **Question Name to** configure a second question**.** Select the prompt and **Create,** and **Create Question.**

Field Name	***Entry Value***
Question Name	Describe why leaving
Question Body	Please describe in detail why you are leaving our organization.
Quesiton Type	Text

6. Click **OK.**

7. Using the arrow buttons on the left, reorder the questions if needed to display the 'Describe why leaving' question to be the first to appear.

8. Click **OK.**

9. Use the **preview** button to see how the questionnaire will appear to the employee.

10. Click **OK.**

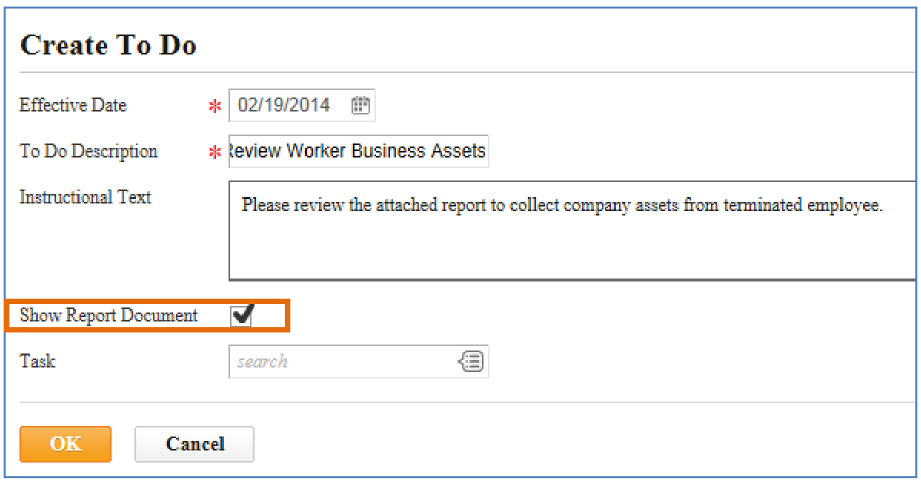
REPORT STEP

You can specify that any Workday standard or custom report be run as a business process step by simply adding a step; set the step **Type** to *Report* and specify which report to use.

When the business process is run, the security associated with the report will be enforced (that is, the report shows only the information that is secured to the recipient). Therefore, if two recipients have access to different report data, then one recipient could receive a report with different data than the other recipient.

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 will also receive a notification if logged in when the step fires.

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 STEP

Workday provides a **Report Group** step to enable users to share instances of reports or tasks among other users. The business process follows the report group configuration to select the users to share the reports or tasks with as well as the output type.

When you select a **Report Group**, the business process generates one instance of each report that is contained within the group. Each report instance is then associated with the appropriate security group that should have contextual access to the report output. In addition, the Run As User value is populated with the owner of the Report Group.

Note: You cannot configure the security group to which a **Report Group** step can be routed. The business process follows the report group configuration to select the users to share the reports with as well as the output type

On the Report Criteria tab, you can select the Value Type and Value for each report field. On the Output tab, select the number of days after which the report output file is deleted and whether or not to output an empty report.

Note: You can also configure the business process to not wait for a **Report Group** step to complete, but to move immediately to the next step in the business process. You can select an Effective Date for Report Group steps in business processes. When you first configure a Report Group step, the Effective Date is set to the current date; however, you can select an Effective Date the next time you configure the step.

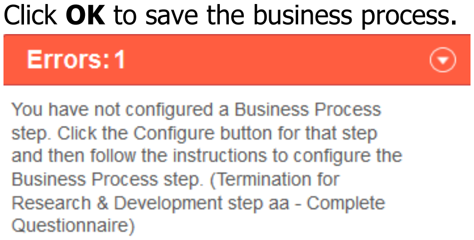
ACTIVITY 19 – ADD A QUESTIONNAIRE AND CREATE A TO DO TO ALLOW THE REVIEW OF REPORTS IN INBOX

Business Case: In this activity, we will add our questionnaire to the termination process for research and development organization. The terminated employee will complete the questionnaire. The HR partner will be able to review the results of the questionnaire as part of the business process as well. We will also create a To Do to allow Managers to review the Worker Business Asset Report from their Inbox.

Sign in as Logan McNeil (lmcneil)

TASK 1: CONFIGURE QUESTIONNAIRE

1. Search for the string *bp: termination research*
2. Click on the link for Termination for Research & Development business process. Review the definition.
3. Use the related action icon located next to the Termination for Research & Development, **Business Process > Edit Definition**.
4. Click the OK button to accept today as effective date.
5. Add a row by clicking on the icon.
6. It should be the second step with an Order of **aa**.
7. In the type field, select **Complete Questionnaire**.
8. Assign this step to the **Security Group - Employee as self**.
9. Click **OK** to save the business process. The following error message will appear.



10. Click the **Configure Questionnaire** button.
11. Click the **OK** button to accept today as effective date.
12. Choose **Exit Interview for R&D**
13. Click **OK**

14. Click **DONE**

Once the employee has completed the questionnaire, we can associate the questionnaire results with the Review step in the termination so the HR partner can review the termination and the questionnaire results.

15. In View mode, find step b - **Review Employee Termination**
16. Use the related action on the step to choose, **Configure Supporting Information**
17. Click the OK button to accept today as effective date.
18. Under the section, **Include Questionnaire Response,** choose **Complete Questionnaire Step** and find **step aa-Complete Questionnaire.**
19. Click **OK**
20. Click **DONE**

Now we will configure ToDo associated with a report with the terminated employee's assets.

TASK 2: ADD TO DO WITH A REPORT

1. Use the related action icon located next to the Termination for Research & Development, **Business Process > Edit Definition**.
2. Click the OK button to accept today as effective date.
3. Add a row by clicking on the icon.
4. It should be the second step with an Order of **ca**.
5. In the *Type* field select **To Do**.
6. In the *Specify* field, use the prompt and select **Create** > **Create To Do**.
7. Complete the following *To Do* information:

Field Name	***Entry Value***
Effective Date	Today's date
To Do Description	Review Worker Business Assets
Instructional Text	Please review the attached report to collect company assets from terminated employee.
Show Report Document	Select Checkbox

8. Click on the **OK** button to save.

9. In the *Group* field, enter **Manager**.

10. Click the **OK** button to save. Click **Done** on the confirmation page.

ACTIVITY 20 – TEST QUESTIONNAIRE AND TO DO ALLOWING REVIEW OF REPORT

Business Case: In this activity, we will initiate a termination to test the questionnaire we configured for the employee, the HR Partner's review of the term (including the questionnaire), and the ToDo associated with the Business Assets report on the Termination for Research & Development.

Sign in as James Brooks (jbrooks) or start proxy

TASK 1: TERMINATE EMPLOYEE

1. Find the **My Team** Worklet. Scroll down to find **Brad Harper**.
2. Use the related action to select, **Job Change**, **Terminate Employee**.
3. On the Terminate Employee page enter the following information:

Field Name	***Entry Value***
Termination Date	Today's Date
Reason	Voluntary > Other Employment

4. Click **Submit.**

NOTICE: The business process moved onto the next step which is the questionnaire to Brad Harper, the employee being terminated.

5. Click **Done**

Sign in as Brad Harper (bharper) – (or start proxy)

TASK 2: COMPLETE QUESTIONNAIRE

1. Click on Brad's photo to access his **Inbox**. Click the **link** to *Terminate Brad Harper - Complete Questionnaire – Exit Interview for R&D Terminate: Brad Harper* task.
2. Complete the questions and click Done.
3. Stop Proxy.

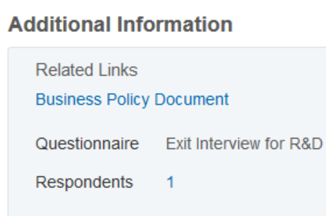
Sign in as Logan (lmcneil) – (or start proxy)

TASK 3: REVIEW TERMINATION

1. Click of Logan's photo to access her **Inbox**.

2. Click the link to **Terminate Brad Harper - Review Employee Termination Director, Research & Development: Brad Harper**

3. Scroll down to the Additional information section
   click on the 1 to review the Respondents questionnaire



4. Click on **Approve** and **Done**

5. Log out as Logan!

Sign in as James Brooks (jbrooks) – (do not start proxy as report links not supported in proxy session)

TASK 4: REVIEW TO DO

1. Click on James' photo to access his **Inbox**. Click the **link** to **Review Worker Business Assets: Terminate Brad Harper task.**

2. Review the **Complete To Do** task and notice the *Instructions*.

3. Click on the link to **Worker Business Assets** report to download the Excel Report Document.

4. Click **Submit**.

5. Click **Done** and **Sign Out.**

DOCUMENTS

You can create a document within Workday that you can then deliver using a business process. The **Create Document** task enables you to add a document to Workday. You can directly upload the document into Workday as an attachment, or you can provide a direct link to a document on an external system. The **Create Document** task is secured by the *Document Library* security domain in the *System* functional area.

Additionally, you can define document categories to organize and manage different types of documents that are associated with workers or other objects in Workday. Plus, you can restrict access to documents by creating security segments that limit the document categories that are visible to a particular role. The security segments specify which document categories the role can create, edit, or view. For example, you may want Benefits Administrators to be able to manage Benefits-related documents only, and not have the ability to create or edit payroll documents.

Note: Security segments for document categories are different from other security segments in Workday. The segments place restrictions on particular roles, not on the document categories themselves.

The **Document Status** report is a standard Workday report that you can run on any document that you added to Workday. When you run this report, you must select the **Business Process Types**, as well as the **From Moment** and **To Moment**. The **From Moment** and **To Moment** represent the period of time in which the selected business process types were run.

The results of this report show the business status : **Not Started**, **In Progress**, or **Completed**. Drill down on each value to display the names of the workers to whom the status applies, and the documents that are being reviewed as part of that business process.

REVIEW DOCUMENTS BUSINESS PROCESS STEP

The **Review Documents** step type enables you to use a business process to distribute documents to workers. To make a document available to a Workday business process, you must first add the document to Workday using the *Create Document* task. This task enables you to upload a document directly as an attachment, or provide a direct link to a document on an external system.

Workday also enables Business Process Administrators to include a report output as part of a Review Document step, by selecting a single custom or standard report from the prompt. You can only select one report output type document per Review Document step.

You can obtain acknowledgements or e-signatures of any documents distributed by a business process and enable or require a worker to upload a document to Workday. You can add one or more condition rules to a document in the Review Documents step of a business process and you can have multiple documents included in a single Review Document step. Each document has its own set of condition rules that are applied when the step executes. If the conditions don't resolve to true for a particular document, then that document isn't included for review. In addition, you can report on the status of documents in a business process.

ACTIVITY 21A – CREATE DOCUMENT

Business Case: You will create a document that will be used as Evidence of Insurability as part of the Change Benefit for Life Event Business Process.

Sign in as Logan McNeil (lmcneil)

TASK 1: CREATE DOCUMENT

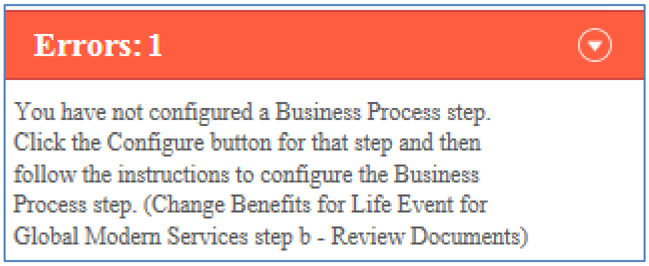
1. Access the **Create Document** task from the search.
2. Enter **Today's date** in the *Effective Date* field.
3. Enter **Evidence of Insurability** in the *Name* field.
4. In the *Document Category* field, select or enter **Benefits**.
5. Include the following *Description: Evidence of insurability is required when people apply for certain forms of medical and more commonly life insurance.*
6. In the Document Type field, select **Link**.
7. Click **OK**
8. Enter **Evidence of Insurability** in the *Document Link Name* field.
9. Enter http://www.workday.com in the *Document Link URL* field. This would be the actual link to the document. For training purposes, we will just access the Workday page.
10. Click **OK** and **Done** on the confirmation page.

TASK 2: ADD REVIEW DOCUMENT STEP TO BP DEFINITION

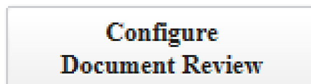
1. Search for **bp: change life global.**
2. Click on the link for **bp: Change Benefits for Life Event for Global Modern Services.**
3. Use the related action **Business Process** > **Edit Definition**.
4. Use **today's date** as the *Effective Date* and click the **OK**.
5. Replace row **b** by deleting the existing step b and adding a new one**.** In the *Type* field, select **Review Documents** from the drop down list.

6. In the *Group* field, select **Employee As Self**.

7. Click the **OK** button to save. Notice the error:



8. Do not click **Done** on the confirmation page.

9. Click on  .

10. Use **today's date** as the *Effective Date* and click the **OK**.

11. In the Document Effective As Of, enter **Event Date**. It can be found in the Benefits category.

12. Under the **Documents** section, in the *Document* field, enter **Evidence of Insurability** from the Benefits category.

13. Enter the following instructions: "*Please use the intranet site to locate and complete the required evidence of insurability form. It may be mailed or faxed to us. See details on the form."*

14. Select **e-signature** for the *Signature Option*.

15. Enter the following Signature Statement: *"When you check the "I AGREE" checkbox, you are certifying that you have received the **Evidence of Insurability** form.*"

16. Click **OK** and **Done**

17. Sign Out if not using proxy sessions

ACTIVITY 21B – TEST REVIEW DOCUMENT

Business Case: In this activity you will test the previous business process configuration of Review Document. During this example, we will initiate the process as Jared Ellis.

Sign in as Jared Ellis (jellis) (or start proxy session)

TASK 1: INITIATE BENEFIT EVENT

1. Click the **Benefits** worklet on Jared's Home landing page.

2. Click the **Benefits** link under the **Change** options.
3. Select **Birth/Adoption of Child** in the Benefit Event Type field.
4. Enter **Today's Date** in the Benefit Event Date field.
5. Insert a row in the Attachments section, click on the **Attach** button.
6. Attach the **birth certificate demo.docx**
7. Click **Submit** and review the Details and Process.
8. Click **Done** on the Confirmation page.
9. Sign Out if not using proxy sessions.

Sign in as Maria Cardoza (mcardoza) (or start proxy session)

TASK 2: REVIEW BENEFIT CHANGES

1. Click on Maria's photo to access her **Inbox**. Click the **link** to *Benefit Event: Jared Ellis*.
2. Click the button to **Approve**.
3. Click **Done** and Sign Out if not using proxy sessions

➲ Sign in as Jared Ellis (jellis) (or start proxy session)

TASK 3: CHANGE BENEFIT EVENT

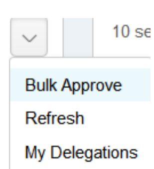
1. Click on Jared's photo to access his **Inbox** (a related worklet appears, click the 'x' to shut it down). Click on the *Benefit Change – Birth/Adoption of Child task.* There are **8 pages** of information to navigate through.
2. Click on **Continue**.
3. You are on step 2 of 8. Click on **Continue** to move to the next page.
4. You are on step 3 of 8. Click on **Continue** to move to the next page.
5. You are on step 4 of 8. Click on **Continue** to move to the next page.
6. You are on step 5 of 8. Click on **Continue** to move to the next page.
7. You are on step 6 of 8. Click on **Continue** to move to the next page.
8. You are on step 7 of 8. Click on **Continue** to move to the next page.
9. Click on **Continue** again to move to page 8 of 8. Scroll down to check the **I Agree** checkbox for Electronic Signature towards the bottom of the page.

* Note: This is not the Review Document configuration and signature that we configured. We will see that as the final step.

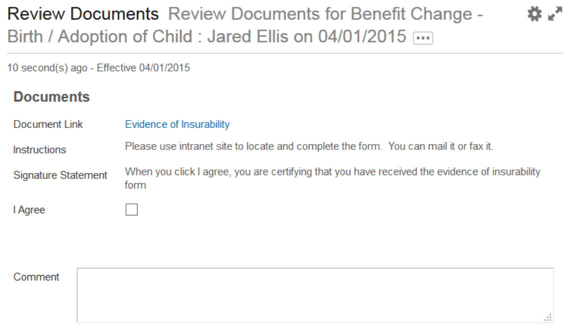
10. Click **Submit.**
11. Click **Done** on the Submit Elections Confirmation page.

TASK 3: REVIEW DOCUMENT FOR BENEFIT CHANGE

1. In the *Inbox* click the **Refresh** button to display the **Review Documents** *for Benefit Change Event*.



2. Click on the Review Documents item in the inbox. You will finally see the Review Documents configuration we added to the business process.



3. Review Document by clicking on the **Evidence of Insurability** link (which will take you to http://www.workday.com)

4. Navigate back to the tenant. Then click in the **I Agree** checkbox.

5. Click **Submit** and **Done.**

6. **Sign Out** or stop proxy.

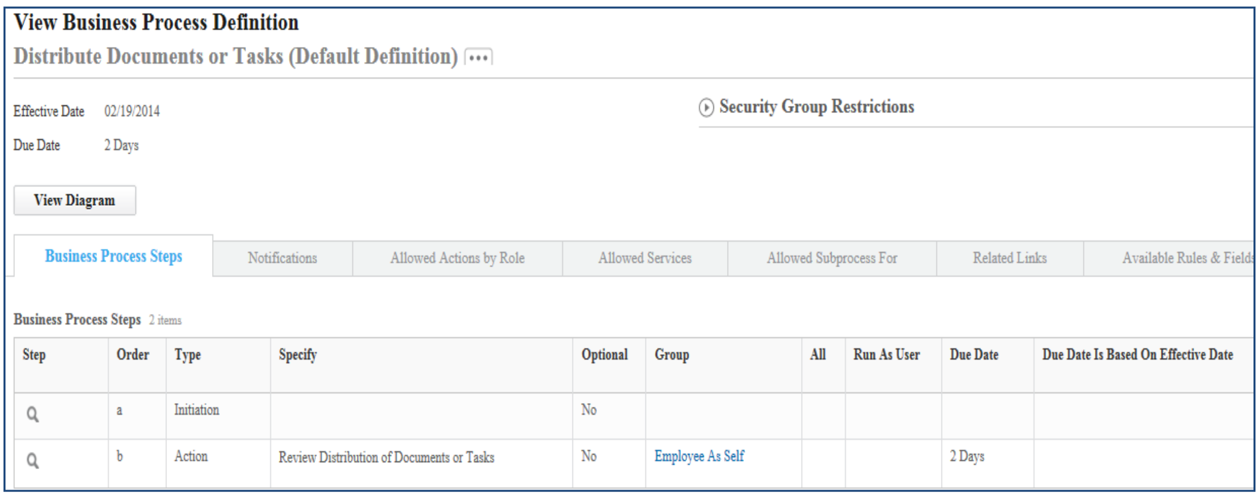
DISTRIBUTE DOCUMENTS OR TASK

Workday provides a business process, **Distribute Documents or Tasks** that enables you to distribute a document (for acknowledgement or electronic signature) or a task (To Do) to all workers in one or more organizations.

When you use the Distribute Documents or Tasks business process, you can now use the new Role(s) and User(s) prompts to specify who receives the distributed documents or tasks.

Note:

- You can select both roles and users at the same time; however if a role and a user resolve to the same worker, only one item is displayed in that worker's Inbox.
- If a role cannot be resolved to any user, Workday displays a warning message stating that there is an unassigned role for that particular organization.



We will explore the ability to distribute tasks in the next demo. The activity will be optional.

ACTIVITY 22 – DISTRIBUTE DOCUMENTS OR TASKS (OPTIONAL)

Business Case: In this activity you will distribute a task to Add Emergency Contacts to the IT HelpDesk supervisory organization. Testing will show that Jared Ellis and other members of the IT HelpDesk receive the task to complete.

Sign in as Logan McNeil (lmcneil)

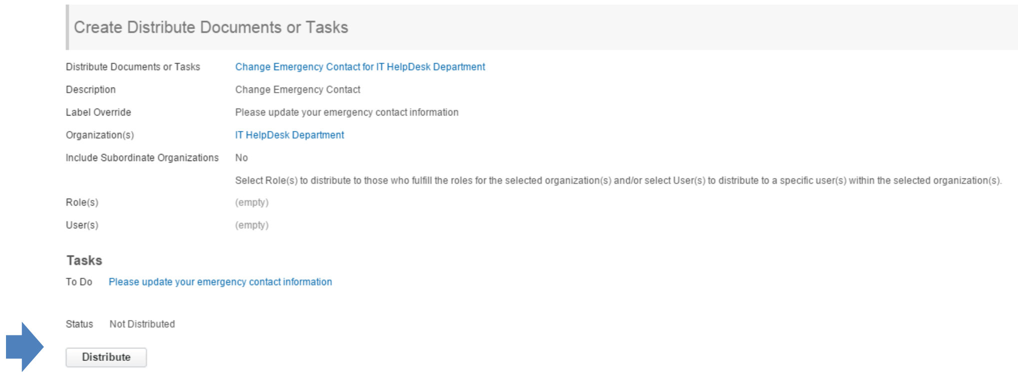
TASK 1: REVIEW BUSINESS PROCESS DEFINITION

1. Search for *Create dist doc* and click the **Create Distribute Documents or Tasks** link to execute
2. From the **Distribute** drop down, select **Task**
3. Click **OK**
4. Complete the page as follows:

Field Name	***Entry Value***
Description	Distribute Change Emergency Contacts
Label Override	Please update your emergency contact information
Organizations	IT HelpDesk Department
Tasks – To Do	Prompt, and choose Create, Create To Do

5. Enter the following in order to Create a new To Do:

Field Name	***Entry Value***
Effective Date	Today's date
To Do Description	Please update your emergency contact information
Instructional test	Leave blank
Tasks – To Do	Change My Emergency Contacts



6. Click the **Distribute** button

7. Click **Refresh** in the Background Process window until status is Completed

8. Click on Logan's photo to access her **Inbox**. Select the **Archive tab** to see that multiple Inbox items have been sent to all the members of the IT Helpdesk.

TASK 4: ACCESS INBOX TO VERIFY RECEIPT OF TASK

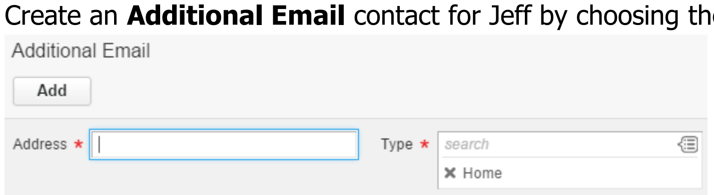
Sign in as Jeff Gordon (jgordon) (or start proxy session)

1. Access Jeff's **Inbox**.

1. Click the **Distribute Change Emergency Contacts** task

2. Review the window. Notice the overall process, and the convenience button to Change Emergency Contact. Jeff will receive some warnings regarding the impact of updating the Emergency Contact information.

3. Create an **Additional Email** contact for Jeff by choosing the **Add** button:



4. Click **Done**.

5. Access Jeff's **Inbox** again and **Submit** the To Do. Refresh Jeff's Inbox to ensure the To Do no longer appears. If the To Do is not submitted, it will remain in Jeff's inbox, until it is submitted.

Sign in as Logan McNeil (lmcneil)

1. To check the status of the tasks, search for *View Distribute Documents or Tasks*

2. Locate the Distribute *Change Emergency Contacts for the IT Helpdesk*

3. At the bottom of the screen look for the status:

Status

	Distributed
Number of Events Generated	5
Number of Events Completed	1
Number of Events In Progress	4

4. Note that one event has been completed. Click on the number 4 to view the events in progress.

(End of activity).

APPROVALS FOR BUSINESS PROCESSES

REVIEW (ACTION STEP)

The review step allows the person receiving it not only to approve the task but also enrich the process by editing data related to that task on the approval page.

APPROVAL

Approval allows the person receiving it to **approve, send back** or even **deny** a task. However, the approver cannot edit the data on the page.

If an approver selects Deny on an approval from a parent process, then business process will terminate. This means all Workday data that was changed as part of the business process up to that point would be restored to the state it was in before the business process started.

If an approver selects Send Back for an Approval step, they are presented with options to send the step back to any step in the parent process including the Initiation step. They also can send the process back to the Initiation step of any sibling of the current process. For some business processes, approvers may send the task to additional approvers (i.e. adhoc approvers) if the Business Process Security Policy has been configured with allowed security groups.

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 role-based security group that starts the chain. Everyone in the role specified in that security group is notified that they have an approval. Unless the step's All column is checked, as soon as one person in the role approves the request, the notification disappears.

Supervisory Management Chain 5 items

Organization	Manager
Global Modern Services	Steve Morgan
Executive Management Group	Steve Morgan
Information Technology	Oliver Reynolds
IT Services Group	Anthony Rizzo
IT HelpDesk Department	Jack Taylor

If you need a series of approvals that are not within the same management chain, use separate, sequential Approval steps.

If you route an Approval or Approval Chain business process event to an alternate security group based on routing restrictions for the business process step, Workday displays **Approval by Alternate** or **Approval Chain by Alternate**:

- Beneath the Next Steps that display after you submit the step
- In the Process History of the business process step.

CONSOLIDATED APPROVAL

A Consolidated Approval means approving one or more selected steps at one time. This step type generates a custom approval page that includes data from included actions to be approved all in one custom approval page. The user can then approve or deny the included steps in one approval page. 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.

CONSOLIDATED APPROVAL CHAIN

Consolidated Approval Chain combines the features of a Consolidated Approval step with that of an Approval Chain step, simplifying certain business processes, such as hiring an employee, which may go all the way to the top of an approval chain. You also now have ability to manage a worker's Inbox tasks, which is particularly useful when an employee is terminated or transitions to another role.

Consolidated Approval Chain step type enables you to define a business process so that it:

- Shows data from multiple steps in the business process (just like a consolidated approval step).
- Routes the approval up the management chain (just like an approval chain step).

The ability to provide both a consolidated approval step and an approval chain step in a single step simplifies the definition of business processes while providing a more streamlined process flow.

Similar to the Approval Chain step type, you must select **Configure Consolidated Approval Chain** as a related action on the associated step of the business process definition to set up the approval chain.

MASS APPROVAL

A mass approval is useful when a multi-organization event requires approval by the same role; this type of step is available only for business processes that deal with multiple objects. Examples include Accounting Journal Intercompany Event, Create Project, and Spend Authorization business process types.

In these cases, a parent business process looks at a specified plan that lists workers and their organizations. A step in this parent process spawns child processes for every organization to which the plan refers. Place the Mass Approval step in the child process, or in the final child process if there is more than one. The Mass Approval step in the child process automatically creates a line item in the approval notification for every child process. With the Mass Approval step, the approver gets one Inbox approval notification for all organizations, and can select individual organizations to approve or deny.

ACTIVITY 23 – CONFIGURE AD HOC APPROVAL AND CONSOLIDATED APPROVAL CHAIN

Business Case: In this activity, we will configure to allow ad hoc approval and a consolidated approval chain with an exit condition on the Hire for Global Modern Services.

Note: This is for Global Modern Services, not IT HelpDesk

Sign in as Logan McNeil (lmcneil)

TASK 1: CONFIGURE AD HOC APPROVAL

1. Search for the string *bp: hire glo*.
2. Use related action on the **Hire for Global Modern Services** link and navigate to **Business Process Policy > Edit**
3. Under the Who Can Do Actions on Entire Business Process section, locate the **Action: Ad Hoc Approve** and add the following Security Groups: HR Partner, Manager, Payroll Interface Partner
4. Click **OK** to save your changes; then click **Done**.
5. Search for the string *activate* and select **Activate Pending Security Policy Changes**
6. Enter a **Comment** and **Confirm** your security activation.
7. Click **OK** to save.

TASK 2: EDIT BUSINESS PROCESS

1. Search for the string *bp: hire glo*.
2. Click on the **Hire for Global Modern Services** link.
3. Use the related action icon and select **Business Process** > **Edit Definition.**
4. Effective as of **today's date**.
5. Click **OK** to continue.

6. Add a new row by clicking on the icon.

7. Enter the following information:

Field Name	***Entry Value***
Order	ca
Type	Action (select from drop down)
Specify	Review Employee Hire
Group	HR Partner

8. Add a new row by clicking on the icon to enter the consolidation approval chain step.

9. Enter the following information:

Field Name	***Entry Value***
Order	cb
Type	Consolidated Approval Chain
Group	Manager

10. Click **OK** to save.

Notice the 3 critical errors. One of them is appearing because the consolidated approval step requires configuration.

TASK 3: CONFIGURE CONSOLIDATED APPROVAL STEP

1. Click on the Related Action off of the Consolidated Approval Chain step; **Business Process** > **Configure Consolidated Approval**.

2. Effective as of **today's date**.

3. Click **OK** to continue.

4. Select the **Hire** and **Propose Compensation** events by clicking the check boxes.

Note: you have the ability to override the label and indicate the order that the events will appear on the Consolidated Approval (Make any desired changes).

5. Click **OK**.

6. Click **Done**.

Notice there are still 2 critical errors at the top of the business process page. This is because we have violated a rule from the Business Process Configuration Report regarding the completion step. We will take care of this error a little later on in the activity.

TASK 4: ADD EXIT CONDITION

1. Click on the related action icon on the consolidated approval chain step and select **Business Process > Maintain Step Conditions.**

2. Click **OK** to accept today as the Effective Date.

3. Select the **Exit Conditions** tab.

4. Add a new row by clicking on the icon.

5. Enter or select **Approval Count=2** as the Approval Rule

6. Click **OK** to save.

TASK 5: SET COMPLETION STEP

1. Click on the related action icon of the **Consolidated Approval Chain** step *cb* and select **Business Process > Set As Completion**.

2. Click **OK.**

3. *Notice all errors are resolved at this time*.

ACTIVITY 24 – HIRE EMPLOYEE

Business Case: In this activity we will initiate an employee hire event to test the ad hoc approval and consolidated approval chain configuration.

Sign in as Logan McNeil (lmcneil)

TASK 1: HIRE EMPLOYEE

1. Search for *Anju*. Notice Logan's search category is set to **All of Workday**.
2. Click on the Related Action icon next to Pre-Hire, Anju Bhatti's name.
3. Select the **Hire** > **Hire Employee** task.
4. Leave the Supervisory Organization set to **Human Resources**
5. Click **OK.**
6. On the Hire Employee page enter the following information:

Field Name	***Entry Value***
Hire Date	Today's Date
Reason	New Hire > Fill Vacancy
Position	Executive Assistant
Employee Type	Regular (default)
Job Profile	Executive Assistant (default)
Time Type	Full Time (default)
Location	San Francisco (default)
Pay Rate Type	Salaried

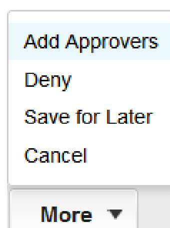
7. Click **Submit**.
8. Click the **Skip** link on the Start a Background Check task.
9. No reason is necessary. Click **OK**.

TASK 2: PROPOSE COMPENSATION FOR NEW HIRE

1. Click the **Open** button for the **Propose Compensation** task.
2. Click the **Add** icon to open Assignment Details in the **Salary** row
3. Select **General Salary Plan** as the Compensation Plan.
4. Enter **60,000** as the amount and click **Done**
5. Click **Submit**.

TASK 3: REVIEW EMPLOYEE HIRE

1. Logan receives the next event we added to the business process to Review Employee Hire since she is the HR Partner. Click on the **Review** button for the Review Employee Hire task.
2. Click **More**, and select **Add Approvers** button and select **Payroll Interface Partner > Betty Liu** as Additional Approvers.



3. Enter a comment, if you wish. Click **Submit**.
4. Click **Done**

TASK 4: AD HOC APPROVAL

Sign in Betty Liu (bliu) (or start proxy session)

1. Click on Betty's photo to access her **Inbox**.
2. Select the **link** for the **Hire: Anju Bhatti** task.
3. Click **Approve**
4. Click **Done.** Notice that Betty does not have visibility to remaining steps. Why not?
5. Sign Out if not using proxy sessions; else stop proxy.

TASK 5: CONSOLIDATED APPROVAL CHAIN

Sign in as **Logan McNeil (lmcneil)**

1. Click on Logan's photo to access her **Inbox**.
2. Select the **link** for the **Hire: Anju Bhatti** task.
3. Notice that Logan is reviewing both staffing and compensation details.
4. Click **Approve** to save. Pay attention to who is responsible for the next step in the process and their security group.
5. Click **Done** on the confirmation page and Sign Out if not using proxy sessions..

CONSOLIDATED APPROVAL CHAIN CONTINUED

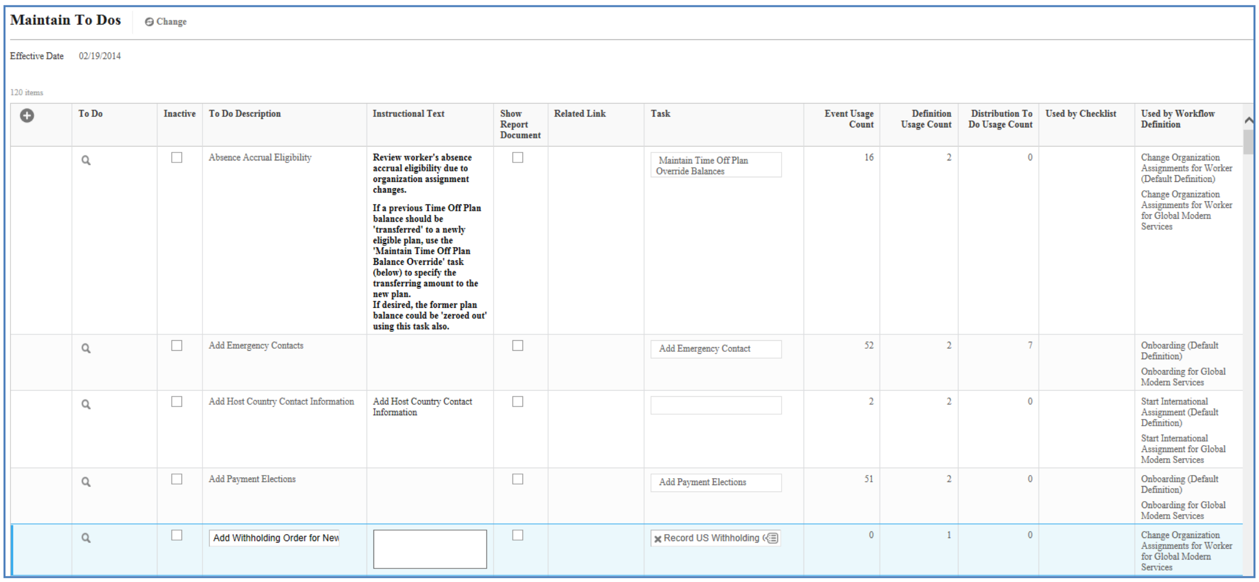
Sign in as **Steve Morgan (smorgan) (or start proxy session)**

6. Click on Steve's photo to access his **Inbox**.
7. Select the **link** for the **Hire: Anju Bhatti** task.
8. Review the entire consolidated approval chain.
9. Click **Approve** to save.
10. Expand Details and Process. What is the Overall Status of this Event?
11. Click **Done** on the confirmation page.
12. Sign Out if not using proxy sessions; else stop proxy session.

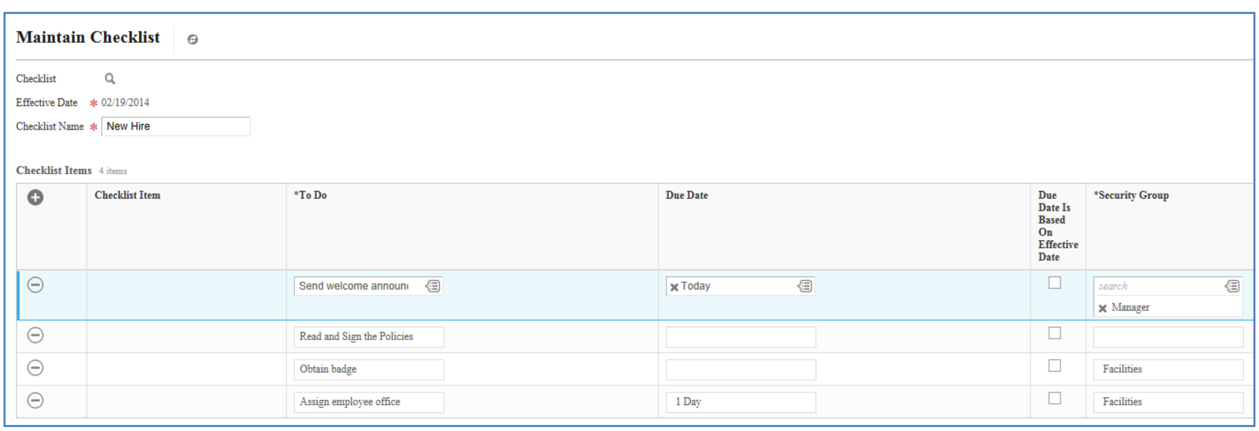
MANAGING BUSINESS PROCESSES

TO DOS AND CHECKLISTS

The **Maintain To Dos** task allows you to edit and manage To Dos. You can add To Dos, edit existing To Dos, and delete To Dos not used in a workflow definition. You can also now embed a Workday task in a **To Do** item. Anyone who then receives the To Do as part of a business process will see a button in Inbox that takes them directly to the task and can take action immediately on the To Do item. If the recipient of the To Do does not have the needed security permission for the task, he/she will not see the task button or link.



A **Checklist** is a type of step in a business process. It is a list of To Dos or external tasks. The **Maintain Checklist** task allows you to edit and manage checklists by adding or removing To Do items.

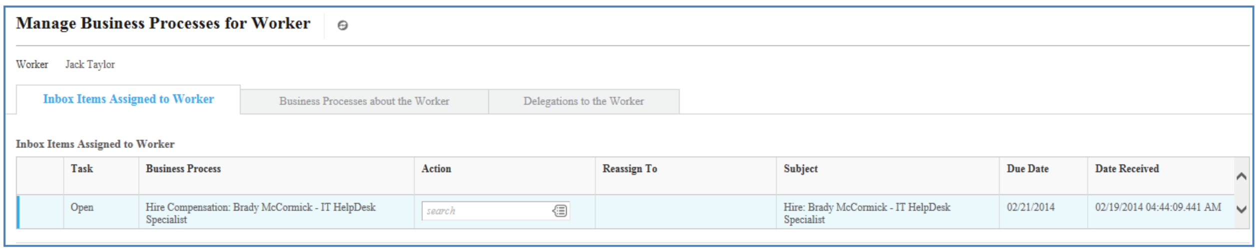


MANAGE BUSINESS PROCESS FOR WORKER

The **Manage Business Processes for Worker** task enables you to control access to Workday Inbox tasks for another worker (such as terminated worker) from a single, convenient location. You can also configure this task as a sub process on certain event types. The task gives you access to two categories of Inbox tasks and events:

Inbox Items Assigned to Worker lists the tasks assigned to a worker, select an action, or reassign. However, cancellation of the Business Process is only available if it is allowed.

Business Process about the Worker lists business processes for which the worker is the subject. You have the option to cancel any selected business processes about the worker.

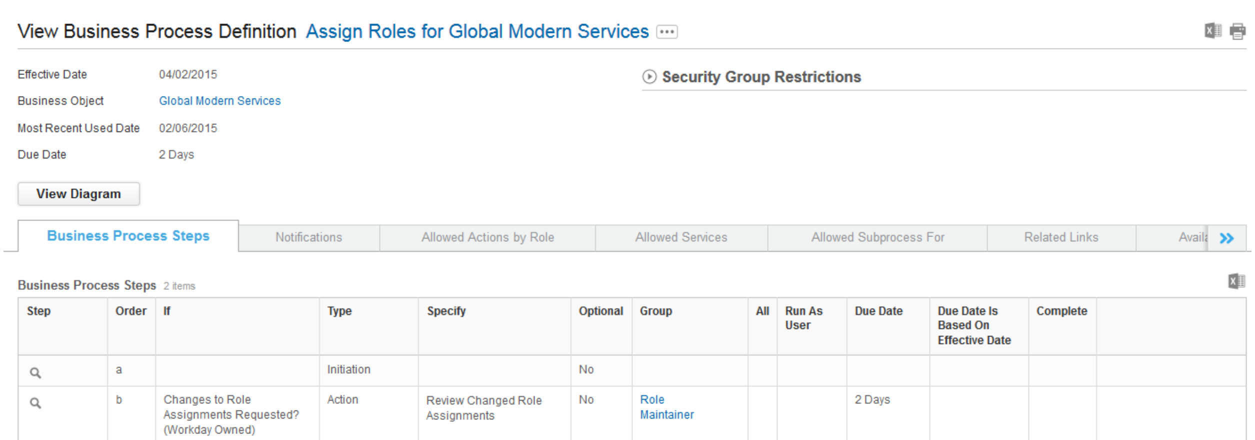


You can configure the Manage Business Processes for Workers sub process on the following event types:

- Change Job
- Terminate Employee
- End Contingent Worker Contract
- Request Leave of Absence

ASSIGN ROLES

The **Assign Roles** business process provides a convenient way to change organization roles, without having to navigate to this option directly from an organization. It is also available as a sub process on most inbound and outbound staffing business processes. The below screen shot is a sample of the Assign Roles definition.

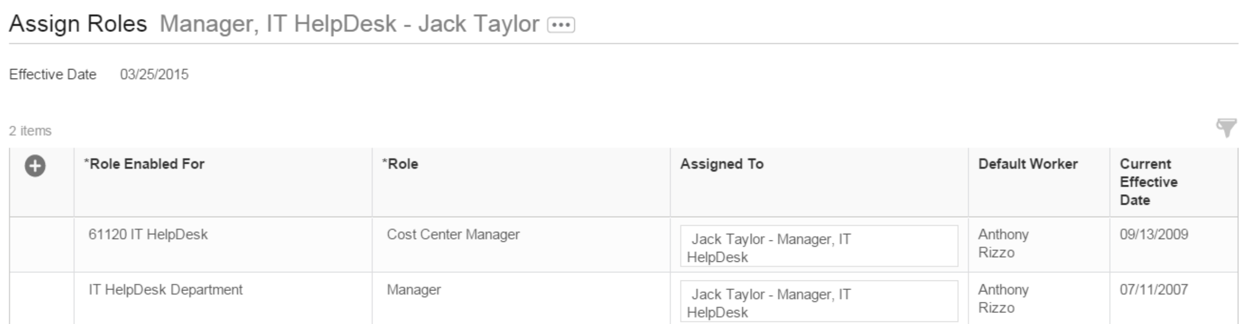


When you use this sub process, Workday routes all new role assignments to the appropriate approver for the role assignment. The appropriate approver is the person specified in the Assigned by Security Groups field of the Maintain Assignable Roles task to assign people to that particular role (most often the Security Administrator).

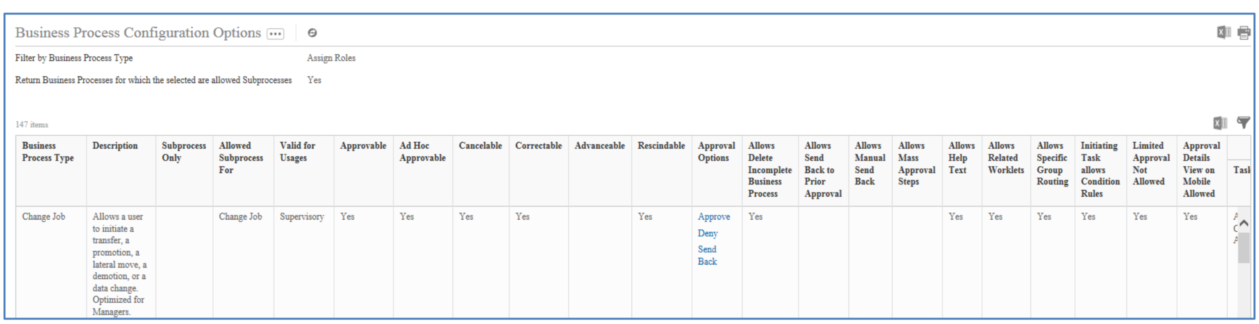
A Workday-delivered security group, Role Maintainer, secures the new **Assign Roles** business process. Additionally, to use this feature for staffing events, you must add it as a sub-process to your staffing business process definitions. Otherwise, no configuration is required to use this as a standalone business process.

You can add **Assign Roles** as a sub-process to business processes such as the following:

- Change Job
- Create Subordinate
- Divide Organization
- End Additional Job
- End Contingent Worker Contract
- Request Leave of Absence
- Request Return from Leave of Absence
- Termination



To see a complete list of business processes for which Assign Roles is allowed as a sub-process, run the **Business Process Configurations Options** report for Assign Roles Business Process Type and check the box to *Return Business Processes for which the selected are allowed Subprocesses.*



EMBEDDED ANALYTICS

You can make analytical information available to decision makers by embedding worklets in business processes. This powerful feature allows the performer in a business process the ability to view a report with relevant details to assist in making a more informed decision.

Worklets are either custom reports that you create and enable as worklets or standard reports that Workday has preconfigured for use in compensation, staffing and talent business processes. To see a list of steps where embedded analytics is allowed along with current configurations, run the **Business Process Steps Enabled for Worklets** report.

Business Process Steps Enabled for Worklets

Effective Date 09/12/2014

265 items

Business Process Definition		
	Business Process Steps enabled for Worklets	Worklets
Add Additional Job (Default Definition)	a - Add Additional Job	
	b - Review Add Additional Job	
	e - Consolidated Approval by Manager	
Add Additional Job for Global Modern Services	a - Add Additional Job	
	b - Review Add Additional Job	
Assess Potential (Default Definition)	a - Assess Potential	Retention Risk Prediction Stock Summary
Assess Potential for Global Modern Services	a - Assess Potential	
Assign Costing Allocation (Default Definition)	a - Assign Costing Allocation	
Assign Costing Allocation for Global Modern Services	a - Assign Costing Allocation	
Change Benefits (Default Definition)	b - Review Benefit Changes	

Keep in mind that only those with proper security access will be able to perform the configuration. Run the **Business Process Security Policies for Functional Area** report for the System area to see which security groups have permission. Check the Manage: All Custom Reports, Security Administration and Business Process Administration domains.

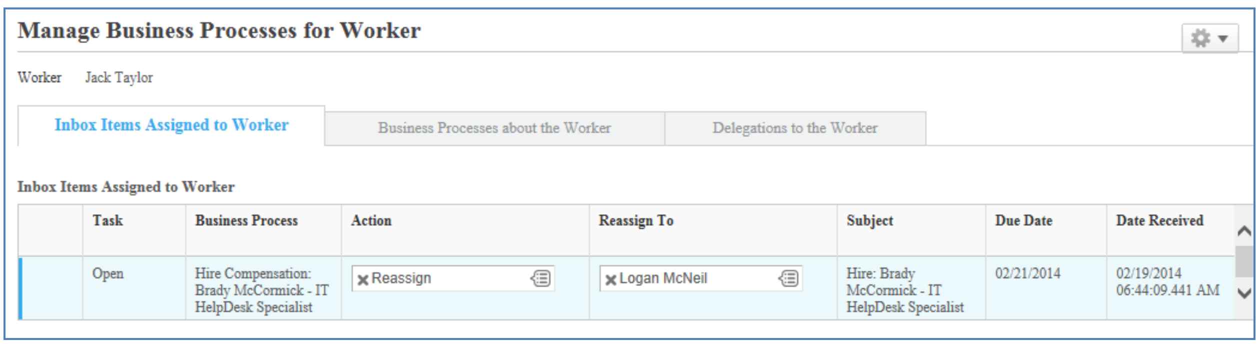
ACTIVITY 25 – ASSIGN ROLES & MANAGE BP TASKS & EMBEDDED ANALYTICS

Business Case: In this activity, we will initiate a Termination Event in order to discuss and review the Assign Roles to Worker and Manage Business Process tasks. We will configure a validation condition to require a comment when initiating a termination. Additionally we will configure embedded analytics.

Sign in as Logan McNeil (lmcneil)

TASK 1: VERIFY INBOX ITEMS EXIST

1. Search for the string *man bus proc*
2. Click the link to execute the **Manage Business Processes for Worker** task
3. In the **Worker** field, enter Jack Taylor and click **OK**



Notice that from the **Action** prompt, you could reassign this open task. We will instead include the manage Business Processes for Worker in the Termination business process.

4. Click **Cancel**

If you do not see any open tasks for Jack Taylor, go back and complete Activity 11.

TASK 2: EDIT BUSINESS PROCESS

1. Search for the string *bp: termination glo*.
2. Click on the **Termination for Global Modern Services** link.
3. Use the related action icon and select **Business Process** > **Edit Definition.**
4. Effective as of **today's date**.
5. Click **OK** to continue.

6. Remove Step c – Approval to the HR Executive Security Group

c	Termination is Involuntary?	Approval				No	HR Executive

7. Remove 2nd Step e – Approval to the Works Council Security Group

e	Country with Works Council Staffing Approval?	Approval				No	Works Council

8. **Find** *step g – Action – Manage Business Processes for Worker – note there are multiple step g's.*

9. **Change the step order** from *g* to *bb*

			bb	ow only if there are Cancelable Events or Event Records Awaiting Person or Delegations? (Workday Owned)		Action	Manage Business Processes for W

1. **Find** *step e – Action – Assign Roles to Worker*

2. **Change the step order** from *e* to *bc*

			bc	Allow only if there are role assignments to worker? (Workday Owned)		Action		Assign Roles to Worker

3. Click **OK** to save the business process changes. Your business process definition should look like this:

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

Business Process Steps 26 items

Step		Order	If	Type	Specify	Step Label Override	Documents Included	Optional	Group	Routing Restrictions	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete
		a		Initiation				No							
		b		Action	Review Employee Termination			No	HR Partner	Initiator, Approvers, Subject			1 Day		
		bb	Allow only if there are Cancelable Events or Event Records Awaiting Person or Delegations? (Workday Owned)	Action	Manage Business Processes for Worker			No	Manager				2 Days		
		bc	Allow only if there are role assignments to	Action	Assign Roles to Worker			No	HR Partner	Subject Alternate: Alternate			Today	Yes	

4. **Click OK to Save your changes.**

5. Find step bc**.** Use the related action on the step to choose**, Business Process>Set as Completion Step.**

6. Use **today's date** as the Effective Date and click the **OK**.

7. From the related action off of the business process definition, select **Business Process > Maintain Related Worklets**

8. Select **step b Review Employee Termination**

9. Click the **Maintain Step Related Worklets** button

10. Click the **Add** button

11. Select **Employee Talent Analysis** as the Worklet Name

12. Review to prompt configuration. This will run the worklet report in context of the target of the business process

13. Click **OK** to save

14. Click **Done**.

Task 3 and Task 4 are optional. If you would like more practice configuring conditional rules, please complete Tasks 3 and 4. The tasks will require the initiator of the termination to enter comments regarding the employee's termination. If you do not want to attempt these optional tasks, skip ahead to Task 5 – Initiate Termination.

TASK 3: MAINTAIN STEP CONDITIONS - OPTIONAL

1. In order to create condition rule the business process is in VIEW ONLY mode. Click the link to **Termination for Global Modern Services** to access the business process definition.

2. Find the initiation step a.

3. Use the related action icon to initiate the **Business Process > Maintain Step Conditions** to create and add the condition rule in one action.

4. Use **today's date** as the Effective Date and click the **OK**.

5. Add a row by clicking on the icon.

6. Click the icon and choose the prompt and select **Create > Create Condition Rule**

7. Click **OK**

8. Type a Description, "**Comments required**."

9. Select or enter **Comments** in the *Source External Field or Condition Rule* field. (By Category > Business Process > Comments)

10. Select **is empty** in the Relational Operator field.

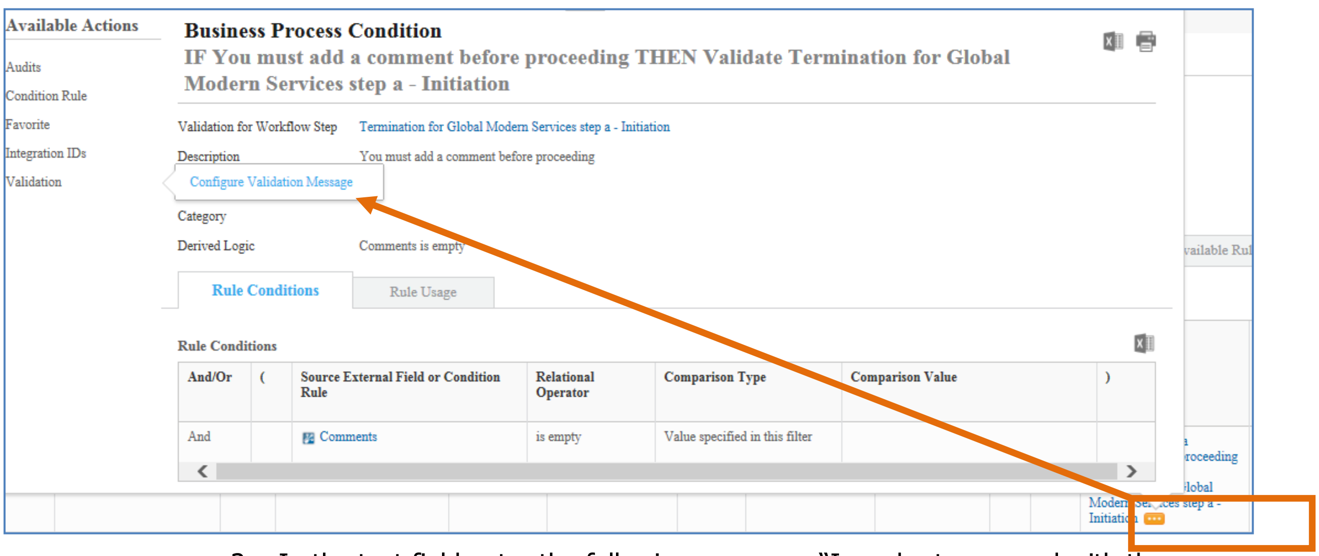
11. **Value specified in this filter** should default in the Comparison Type field.

12. Click **OK** twice.

TASK 4: CONFIGURE VALIDATION MESSAGE - OPTIONAL

1. Find the initiation step a. Scroll to the right to see the Validation column.

2. Use the related action icon on the *Validation Rule* to initiate the **Validation** > **Configure Validation Message** task.



3. In the text field enter the following message; "In order to proceed with the termination process, please include comments."

4. Click **OK.**

5. Click **Done** on the confirmation page.

6. Sign out if not using proxy sessions

TASK 5: INITIATE TERMINATION

➲ **Sign in as Anthony Rizzo (arizzo)(or start proxy session)**

1. Click on **My Team** from the Home page.

2. Find the Related Action icon off of Jack Taylor select **Job Change** > **Terminate Employee.**

3. Enter the following information:

Field Name	***Entry Value***
Termination Date	Today
Reason	Voluntary > Other Employment
Close Position	Do not check the box
Last Day of Work	Today

4. Click the **Submit** button to save.

5. If you configured the conditional rules in Task 3, 4 and 5 , you will notice the error message requiring comments be entered. Click **Revise** and enter **Comments**.

6. Click **Submit** to save and proceed.

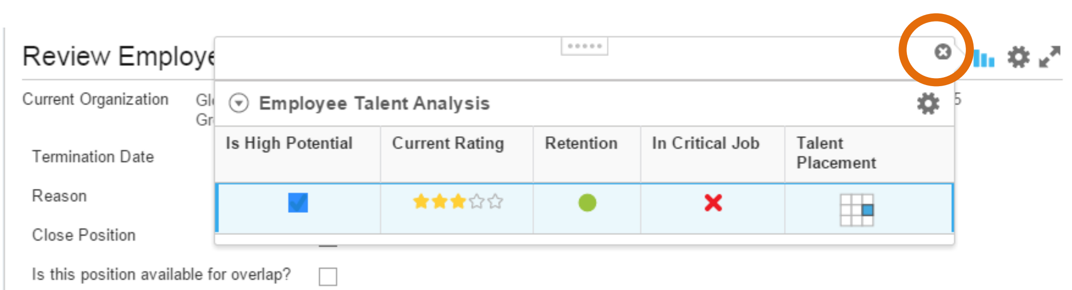
7. Sign Out if not using proxy sessions; else stop proxy session

Sign in as Logan McNeil (lmcneil)

TASK 7: REVIEW EMPLOYEE TERMINATION

1. Open Logan's inbox and click the **Terminate: Jack Taylor** action

2. Notice the Employee Talent Analysis report we embedded opens



3. Click the X to close the report once you have reviewed it. It can be reopened again from the icon.

4. Click to **Approve**

5. Sign out if not using proxy sessions

Sign in as Anthony Rizzo (arizzo)(or start proxy session)

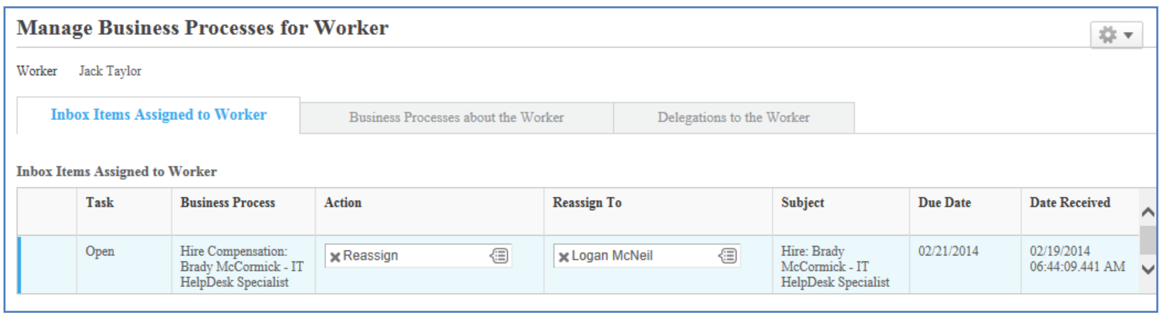
TASK 8: MANAGE BUSINESS PROCESSES FOR WORKER

1. Open Anthony's Inbox.

2. Select the **Terminate: Jack Taylor** task.

3. Anthony can now, via the *Manage Business Processes for Worker* task, see the open tasks in Jack's inbox related to awaiting Business Process transactions.

4. Select the *Action:* **Reassign** and *Reassign To* **HR Partner > Logan McNeil**.



5. Click **Submit**. This will trigger a reassignment request that gets sent to the Business Process Administrator security group in the tenant.

6. Expand **Details and Process**. Note the Overall Status of Terminate: Jack Taylor process is Successfully Completed.

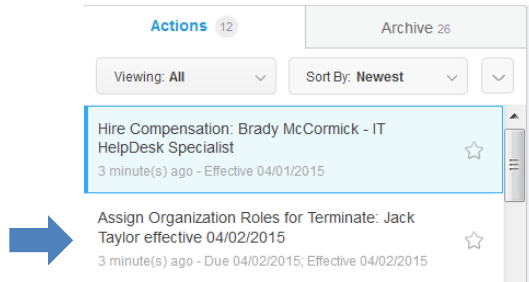
7. Click **Done** and Sign Out if not using proxy sessions; else stop proxy session.

Sign in as Logan McNeil (lmcneil)

TASK 9: ASSIGN ROLES TO WORKER

1. Check Logan's inbox

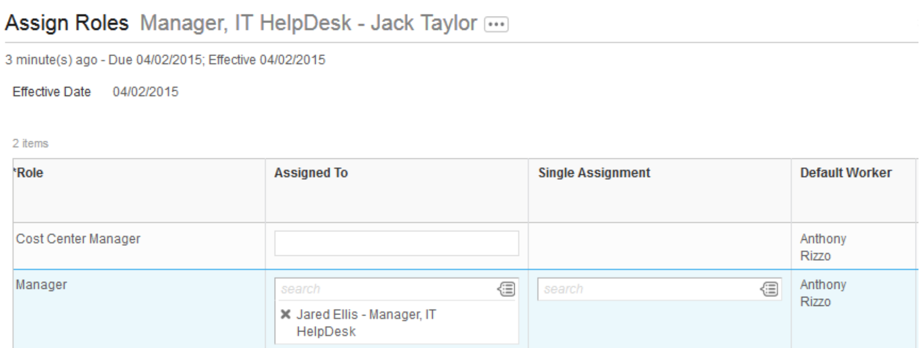
2. Notice she has not only the task to Assign Organization Roles for Termination: Jack Taylor, but she also has the event to approve the Reassignment of the Hire Compensation event for Brady McCormick (since Anthony Rizzo reassigned it to Logan).



3. Choose the **Assign Organization Roles for Terminate** task.

4. Notice that Jack Taylor is assigned the role of Cost Center Manager and Manager of the IT HelpDesk Department. Jared Ellis is also assigned to the Role of IT HelpDesk Department Manager.

5. Remove both roles from Jack Taylor by clicking on the X in the Assigned To column. Leave Jared Ellis as the IT HelpDesk Department manager. The role assignment for the Cost Center Manager will default to Jack's Manager, Anthony Rizzo.



6. Click **Submit** to save.

7. Click **Done**.

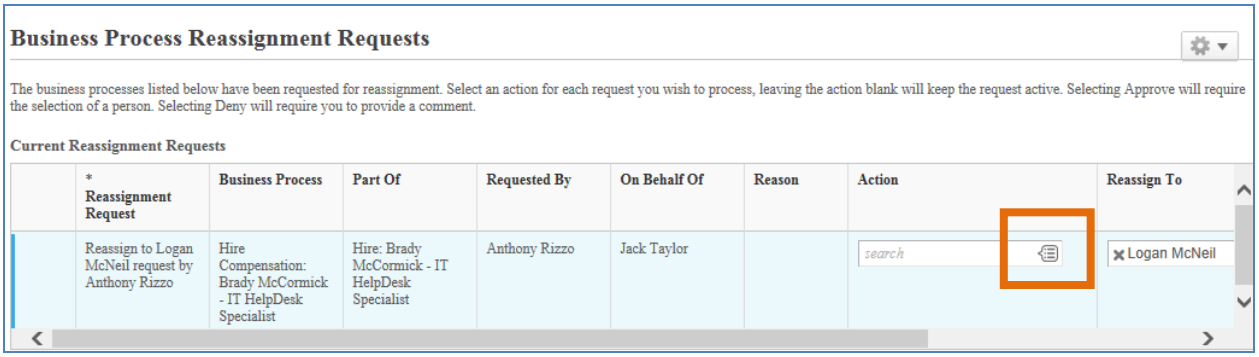
BONUS STEP

Sign in as Logan McNeil (lmcneil)

1. View her Inbox. Notice the **Hire Compensation: Brady McCormick – IT HelpDesk Specialist** task. Click to open the task.

2. Notice **Business Process Reassignment Requests** is displayed

3. View the reassignment request to see her options:



4. Select to **Approve** the reassignment from the Action prompt.

5. Click **OK** and click **Done** on the confirmation page.

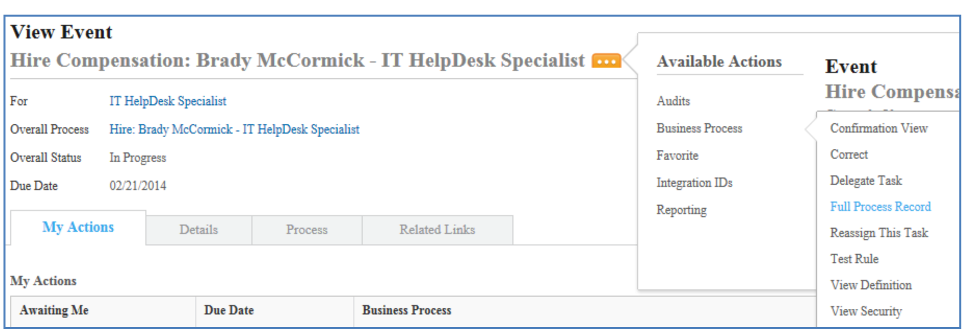
EVENT MANAGEMENT

As events such as hire, transfer and termination occur you may need to make rescind, correct, or cancel the event entirely. Workday gives you multiple ways to manage events that are either in progress or successfully completed. You can also reassign tasks and manage delegations.

Action	When Action is Available	Who is Responsible
REASSIGN TASK	Task must be "In Progress"	Business Process Administrator or whoever is assigned a task can request reassignment
DELEGATION	"In Progress" or Initiation	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

Actions to cancel, rescind, correct or troubleshoot events can be found off the related action icon of the given Event object. If canceling or rescinding a business process affects more than the number of business process events that you specify in Edit Tenant Setup - Business Processes and Notifications, Workday asks you to confirm before canceling or rescinding the business process. The default value of the threshold is 25 events.

The **Business Process> Full Process Record** along with **Reporting>Report Fields and Values** can provide great troubleshooting resources.

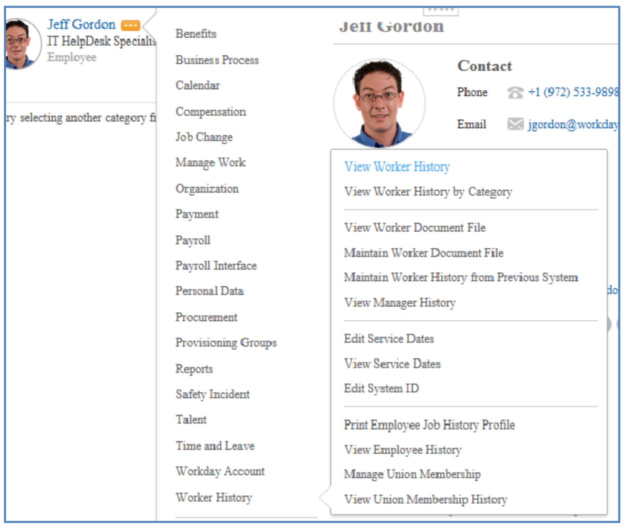


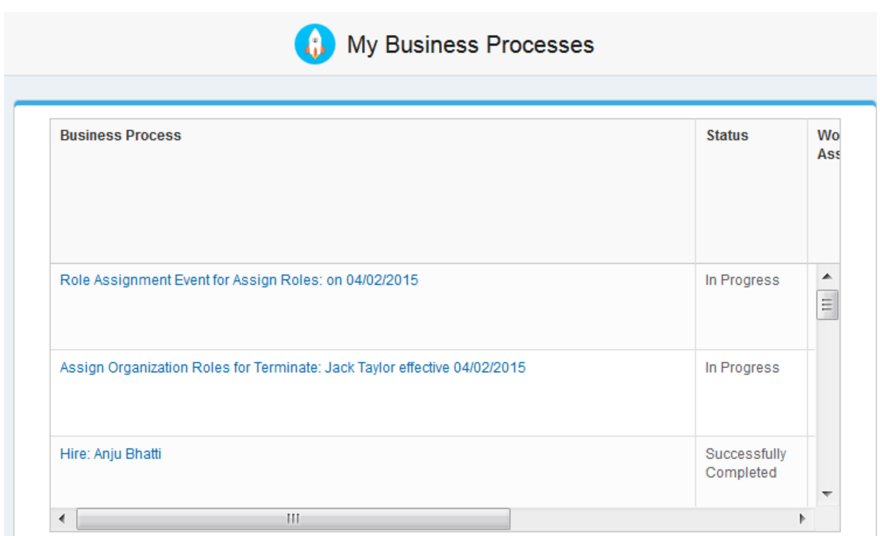
FINDING AN EVENT

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.

There are several ways to find an event. Below are a few examples of ways to locate events within Workday:

- Search “event: <worker>”
- Worker Profile, Related Action off of the Worker, View Worker History
- Find Events – new faceted report in WD24
- From the Inbox, Archive tab
- From the Worklet – My Business Processes

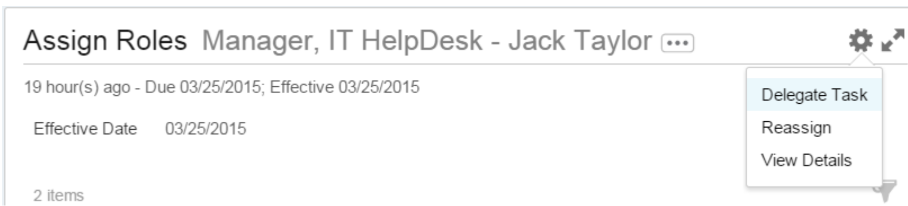




REASSIGN TASK AS EMPLOYEE SELF

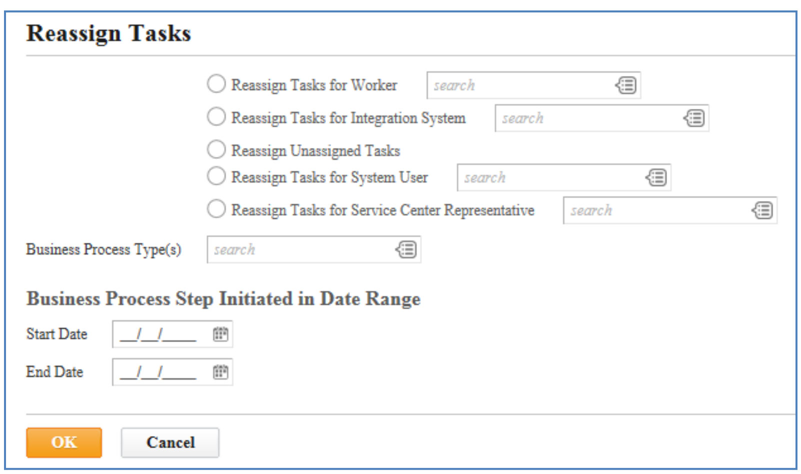
Workday allows the ability to reassign tasks. This is a task called Reassign Tasks. You might use this when a task in your Inbox is no longer your responsibility and we need to move it to the correct person's Inbox. For example, as a manager I might have a number of tasks in my Inbox I need to complete for my direct reports. If I am moved to a new position, with new direct reports, the tasks can be reassigned to the person who will be filling my previous position.

Tasks that have been assigned to someone's Inbox will remain there unless they are completed, reassigned or delegated. To reassign a task, use the gear icon associated with the task from the Inbox.



REASSIGN TASK AS BUSINESS PROCESS ADMINISTRATOR

Another option is for the Business Process Administrator to reassign tasks from one Inbox to another. Use the Reassign Task to select a worker and review their Inbox. Optional filters can be added such as a specific business process, or a start or end date.



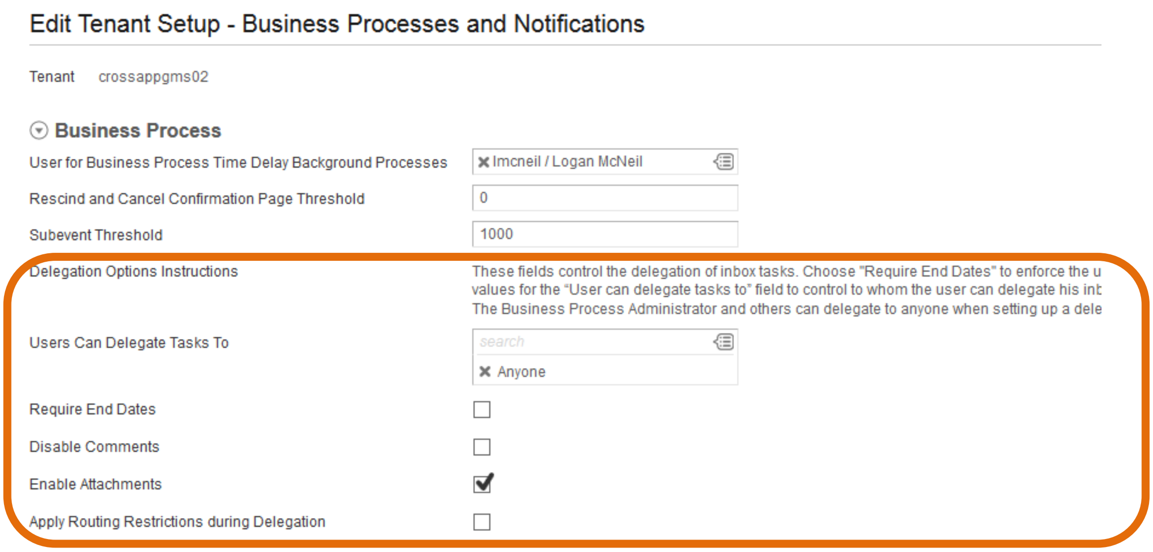
Click OK to run the report and see a list of current Inbox tasks for the worker. Enter to whom who the task should be reassigned, and a reason for the reassignment. The task will then be permanently removed from one Inbox and moved to the other. **Note: you can only reassign tasks to those in permitted security groups per the BP security policy**.

REQUEST DELEGATION CHANGE

Request Delegation Change allows you to request that all business process tasks that are assigned to you be delegated to someone else's Inbox for a designated period of time. The request could also be open ended. Requesting a delegation change is a business process that may require approvals.

Delegation of one worker's Inbox 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 Business Process Security Policy you have the option to specify which security groups can delegate the initiation of the business process, and whether inbox task delegation is allowed.

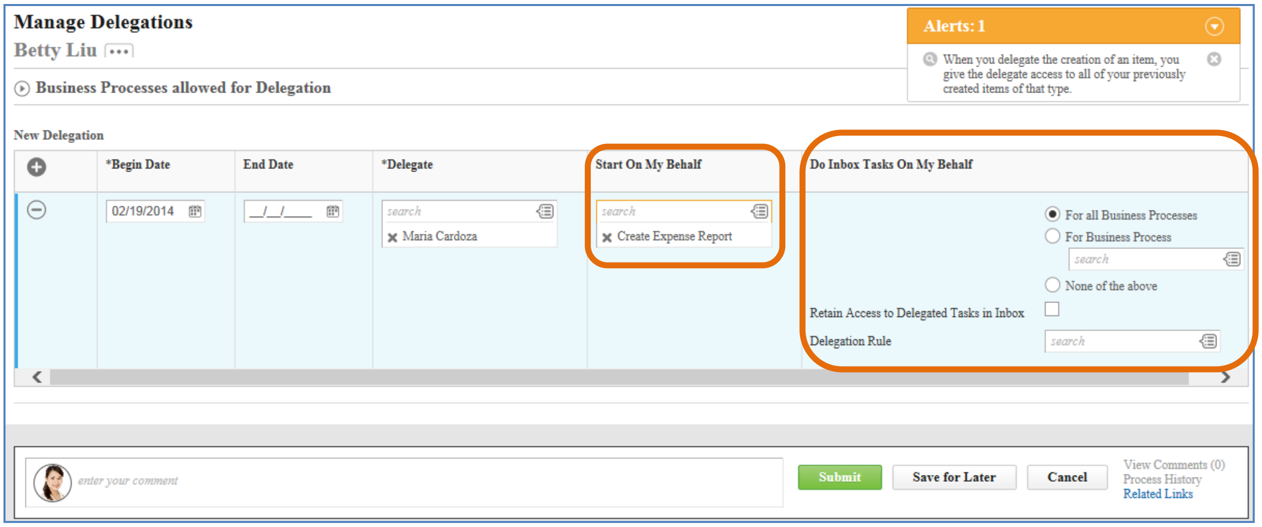
Edit Tenant Setup – Business Processes and Notifications is where you can determine to whom you can delegate a task, as well as if an end date is required for all delegations.



When you delegate your Inbox you can select to delegate particular business processes or all business processes. You can specify:

- 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).
- Delegation Rules

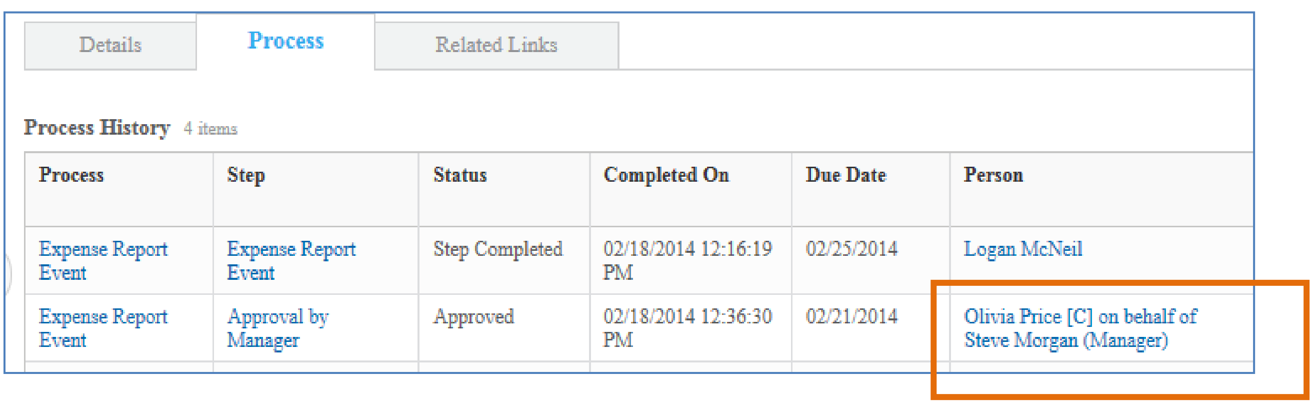
As of WD24, you can also **Apply Routing Restrictions during Delegation** using tenant-level settings. If you select this option, Workday applies business process routing restrictions to delegates. When routing restrictions prevent Workday from routing a business process to a delegate, Workday routes the business process to an Alternate Delegate that you select when you manage delegation settings. If the Use Default Alternate check box is selected, Workday populates the Alternate Delegate field with the Primary Manager of each delegate.



In addition to a worker being able to delegate their Inbox 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.



Process	Step	Status	Completed On	Due Date	Person
Expense Report Event	Expense Report Event	Step Completed	02/18/2014 12:16:19 PM	02/25/2014	Logan McNeil
Expense Report Event	Approval by Manager	Approved	02/18/2014 12:36:30 PM	02/21/2014	Olivia Price [C] on behalf of Steve Morgan (Manager)

DELEGATION BUSINESS PROCESS INITIATION "START ON MY BEHALF"

At many organizations, especially larger organizations, certain types of workers delegate the ability to initiate actions on the worker's behalf. Often the worker delegates self-service tasks to administrative assistant or other support personnel. The following are examples of three business process that have this enhancement.

- Expense Reports
- Request Compensation Change
- Request One-Time Payment

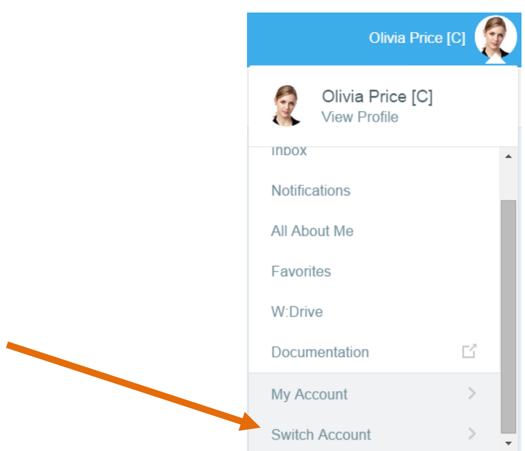
Security Configuration is required to the Business Process Security Policy in order to enable this functionality. The below screen shot is a sample of Business Process Security Policy for Expense Report.

Who Can Start the Business Process

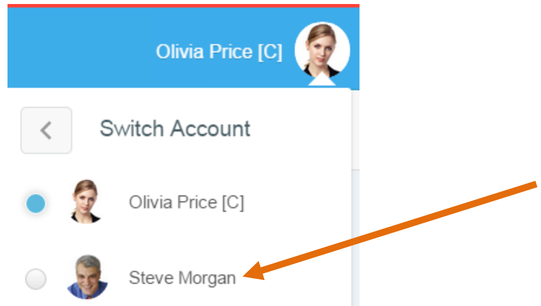
Initiating Action	Create Expense Report
Description	Create Expense Report
Security Groups	Contingent Worker As Self Employee As Self
Security Groups who can delegate this action to others	Contingent Worker As Self Employee As Self

ACTING AS DELEGATE

If you are an active delegate, you have access to **Switch Account** to act on behalf of another worker



Workday also displays a **Switch Account** icon associated with Inbox tasks.



Clicking this icon presents you with a list of users you can act for, both to initiate business processes and to perform Inbox tasks.

Delegated Actions

Category	Reports & Tasks
Expenses	Create Expense Report
	Edit My Expense Transactions
	My Expense Reports
	My Expense Transactions
	View My Guests

ACTIVITY 26 – INITIATE DELEGATION BUSINESS PROCESS

Business Case: In this activity, we will configure the Expense Report Event for Global Modern Services Companies to allow the user to delegate this action to others. We will configure the business process security policy, and then test the changes made to the business process.

TASK 1: VERIFY BUSINESS PROCESS SECURITY POLICY (OPTIONAL)

Sign in as Logan McNeil (lmcneil)

1. Search for the string *bp: expense*.
2. Click on the **Expense Report Event for Global Modern Services Companies** link.
3. Use the related action icon and initiate the **Business Process Policy** > **View.**
4. Locate the **Security Groups who can delegate this action to others** and notice it is populated with the *Employee As Self* security group.

Who Can Start the Business Process

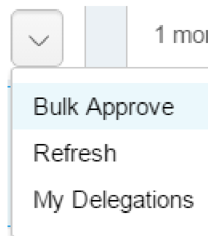
Initiating Action	Create Expense Report
Description	Create Expense Report
Security Groups	Contingent Worker As Self Employee As Self
Security Groups who can delegate this action to others	Contingent Worker As Self Employee As Self

5. Search for the string: bp: Req Deleg
6. Click on the link for **Request Delegation Change for Global Modern Services**
7. Notice that a Manager must approve a Delegation request. This business process can be configured to meet the requirements at your enterprise.
8. Sign Out if not using proxy sessions.

Sign in as Betty Liu (bliu) (or start proxy session)

TASK 2: REQUEST DELEGATION

1. Click on Betty's photo to access her **Inbox.**
2. Within the Actions panel, click on the gear icon and select **My Delegations**.



3. Click on **Manage Delegations**.
4. Enter the following information:

Field Name	***Entry Value***
Begin Date	Today's Date
End Date	Leave blank
Delegate	Maria Cardoza
Start On My Behalf	Expense Report Event > Create Expense Report
Do Inbox Tasks On My Behalf	Select the radio button ***For All Business Processes***.
Retain access to Delegated Tasks in Inbox	Check the box

5. Click the **Submit** button.
6. Click the **Done** button.
7. Sign Out if not using proxy sessions; else stop proxy session.

Sign in as Logan McNeil (lmcneil)

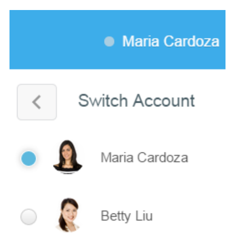
TASK 3: APPROVE DELEGATION REQUEST

1. Click on Logan's photo to access Logan's **Inbox** .
2. Click on the **Delegation for Betty Liu** task. Review the entire approval page.
3. Click **Approve** to save.
4. Click **Done** on the confirmation page.
5. **Sign Out**

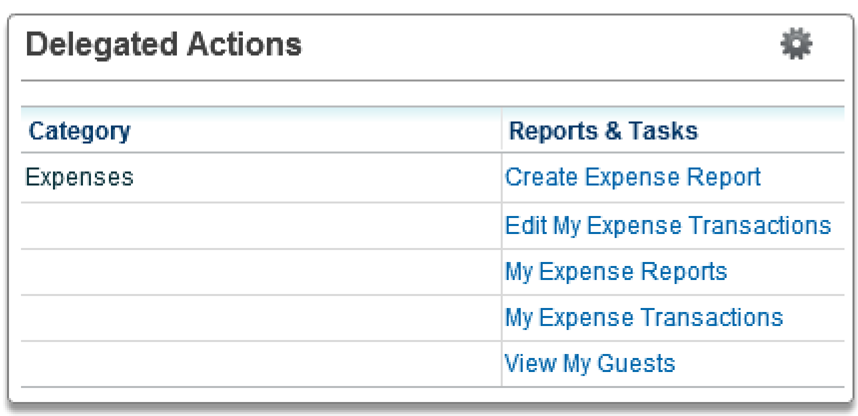
Sign in as Maria Cardoza (mcardoza) You cannot act as a delegate within a proxy session

TASK 4: ACT ON BEHALF OF ANOTHER

1. Click Maria's picture and select **Switch Account.**
2. Select **Betty Liu**'s account



3. The page now show's that you're working on behalf another worker and the Delegation Dashboard is displayed.
4. In the Delegated Actions click the option to **Create Expense Report.**



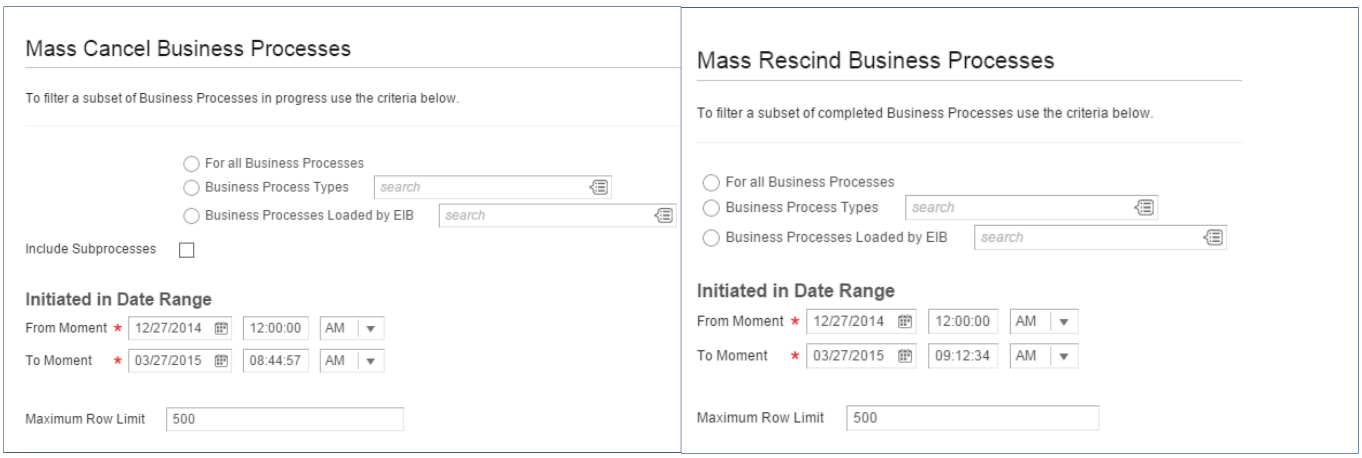
5. Notice the expense report is being created for Employee: Betty Liu.
6. Click **Cancel.** And **Sign Out**.

MASS CANCEL, RESCIND AND ADVANCE FOR BUSINESS PROCESSES

Mass Cancel Business Processes allows the cancellation of business processes that are in progress. For business processes that are past the completion step, use the **Mass Rescind Business Processes** task to roll back changes. Additionally, **Mass Advance Business Process** allows the advancement of the multiple business process events.

As delivered, this administrative process can be run by workers assigned to the Business Process Administrator user-based security group.

Once a business process event is cancelled or rescinded, the event would need to be initiated again manually.



In WD 24, the date range for Mass Cancel and Mass Rescind Business Process will default to 90 days and the row limit will default to 500 rows.

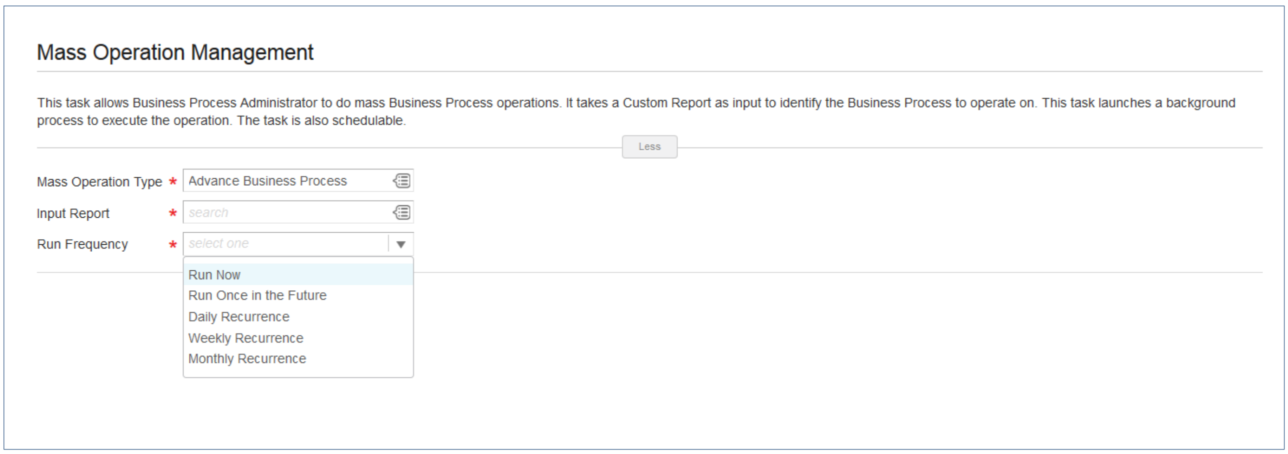
When you rescind a business process that includes subprocesses, all actions in the business process configuration are rescinded. For example, if you rescind a termination that includes a one-time payment, both the termination and the one-time payment are rescinded. You cannot rescind sub-processes individually.

MASS OPERATION MANAGEMENT (MOM)

The Mass Operation Management task enables Business Process Administrators to perform mass actions on business processes as a scheduled background process. In order to use this feature, a requirement is to create a custom report that returns the business process instances on which to perform the mass action, and then use this report as input.

Currently, MOM allows the manual advancement of a business process to the next step, or to completion. The advancement can be run now or scheduled. Options include: once in the future, daily, weekly or monthly. Notifications can be suppressed when using MOM.

For more information, access Workday Community.



CANCEL, RESCIND, CORRECT

Many business processes can be cancelled or rescinded or corrected. 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 didn't happen. Business Process Administrators can rescind a business process by accessing the related action menu on the business process and selecting **Rescind**. Workday creates an audit trail documenting the cancel or rescind action.

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

The Process Status report is a custom report configured for Global Modern Services.

Rescind

- Use when process is Successfully Complete.
- Can be done by security groups with appropriate permission.

Cancel

- Use when process is In Progress.
- Can be done by security groups with appropriate permission as well as the worker who initiated the business process.

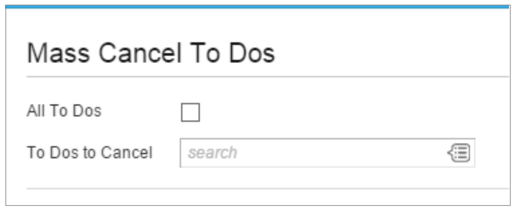
Correct

- Use for both Complete and In Progress instances.
- The security policy for each business process type specifies which security group can correct a business process instance.
- Changes that create problems are flagged with an error message and must be fixed before you can Submit.

Note: Not all Business Process Types are cancelable, rescindable, or correctable. See **Business Process Configuration Options** report to determine available actions for a given Business Process Type.

MASS CANCEL TO DOS

The task **Mass Cancel To Dos** can be used to quickly reduce the volume of To Do items in the security group's Inbox.   All To Dos can be cancelled, or the Business Process Administrator can select specific To Dos to cancel.



ACTIVITY 27 – RESCIND A TERMINATION EVENT

Business Case: In this activity, we will rescind the previous termination event and discuss the outcome. Jack Taylor has decided not to leave his position in the IT HelpDesk Department supervisory organization. So, the termination event needs to be rescinded.

Sign in as Logan McNeil (lmcneil)

RESCIND THE TERMINATION

1. Search for the **Jack Taylor**.
2. Use the Related Action icon off of the employee row, select the **Worker History** > **View Worker History**.
3. Find the **Terminate: Jack Taylor** event.
4. Use the Related Action icon off of the Terminate event, select **Business Process** > **Rescind**.
5. Enter a Reason to Rescind in the comment box.
6. Click **Submit** to save.
7. Review the overall termination event details and select the **Process** tab to view all the steps.
8. Search for **Jack Taylor** again
9. From Jack's related action, navigate to **Organization > View Roles for Worker**. Note that Jack has been reassigned to the roles that were removed in the Termination process.

NOTIFICATIONS OF BUSINESS PROCESSES

You can trigger business process notifications to be sent when the status of a business process changes, or upon entry or exit from a specified business process step. You can also schedule notifications to be sent when a task or process is overdue by some interval. If you translate the notification messages, users can view the notifications in their preferred language. If a translation is not available, users see the notification in the base language of the tenant.

Notifications appear on the Notifications tab of your Workday Inbox. The **Edit Tenant Setup - Business Processes and Notifications** task includes a General Email Notification Settings section that contains options for disabling and redirecting all email notifications in each of your Workday tenants, as well as the following configuration options. For a more detailed description of these options, please consult: https://community.workday.com/doc/core/dan1370796487589.

Notification Delivery Settings can be configured for the following notification types:

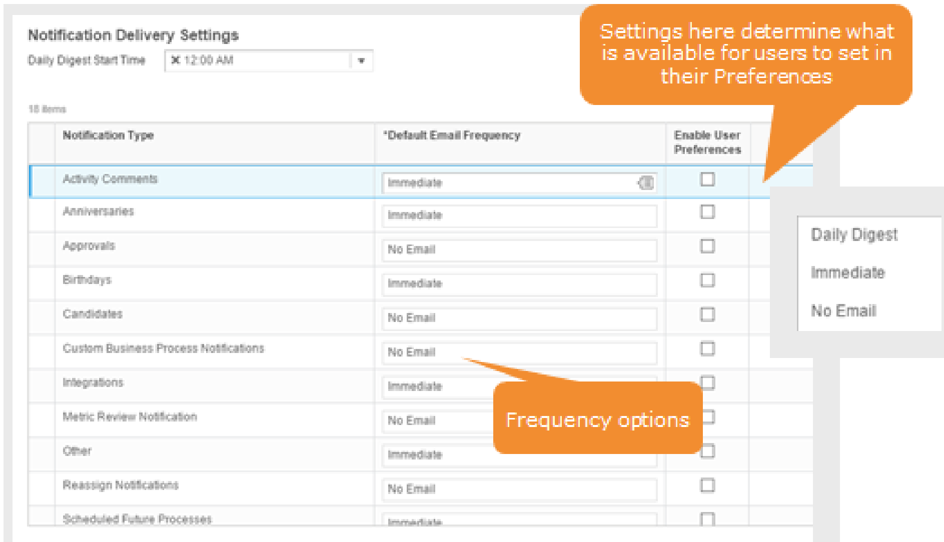
- Activity Comments
- Anniversaries
- Approvals
- Birthdays
- Candidates
- Custom Business Process Notifications
- Goal Notes
- Integrations
- Other
- Reassign Notification
- Scheduled Future Processes
- Scheduled Report Completion
- Supplier Contract Expiration
- Supplier Contract Renewals
- Tasks.
- Time Off
- To-Dos
- Voluntary Self-Identification of Disability

NOTIFICATION DELIVERY PREFERENCES

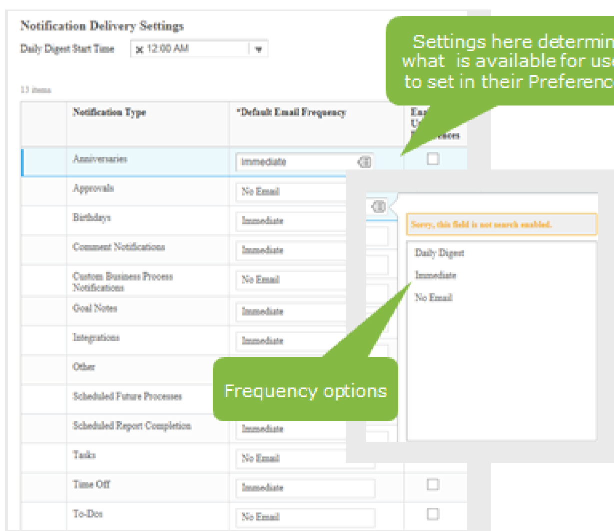
If your administrator has selected **Enable User Preferences** for at least one notification type in the Notification Delivery Settings section of the Edit Tenant Setup – Business Processes and Notifications task, users can access the **Change Preferences** task to set delivery preferences to one of the following options:

- Daily Digest: Only available if Administrator has set a Daily Digest Start Time. With this selection the user receives one email a day that lists your new notifications of this type. All notification types are combined into one email that is generated at the time of day specified by your administrator.
- Immediate: receive one email for each new notification of this type.

- No Email: do not receive email for this type of notification. This is not an option if email notifications are required by your administrator.

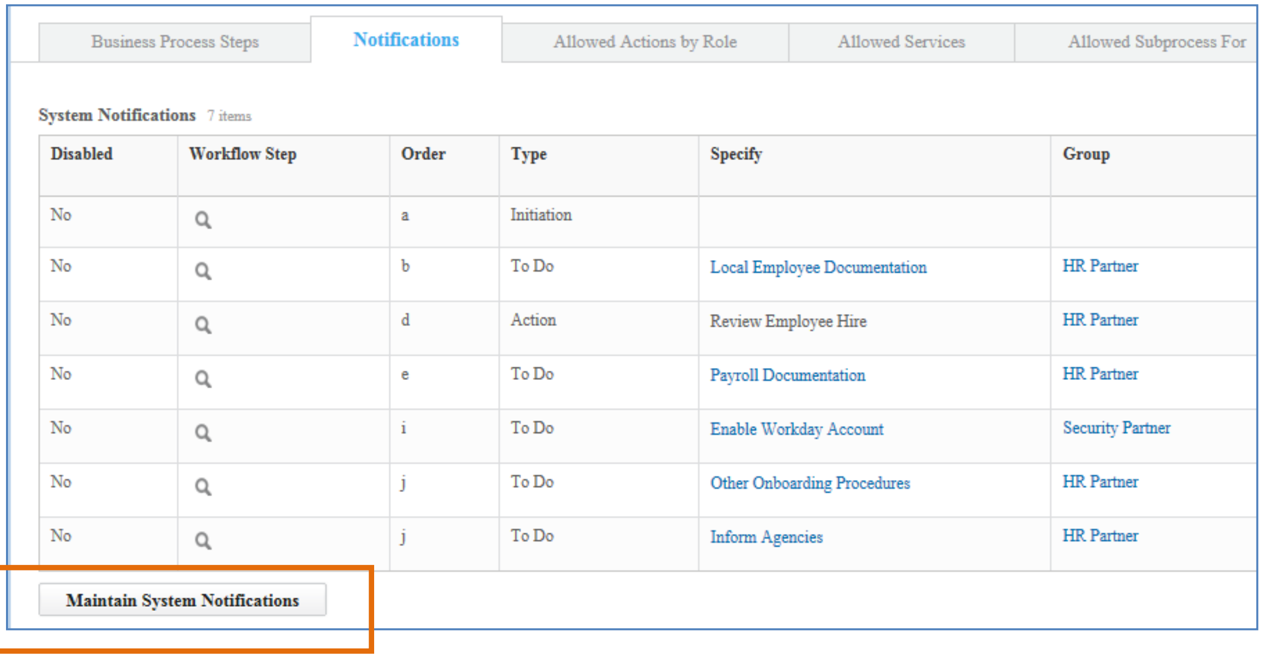


In addition to the tenant settings, a user can specify their own notification preferences:



SYSTEM NOTIFICATIONS & CUSTOM NOTIFICATIONS

You can create custom notifications or use the system-generated ones. Using custom notifications does not automatically disable system-generated notifications. To disable system notifications, edit the business process definition, click **Maintain System Notifications** on the **Notifications tab** of the business process definition, and then select the Disable check box.


Business Process Steps | Notifications | Allowed Actions by Role | Allowed Services | Allowed Subprocess For

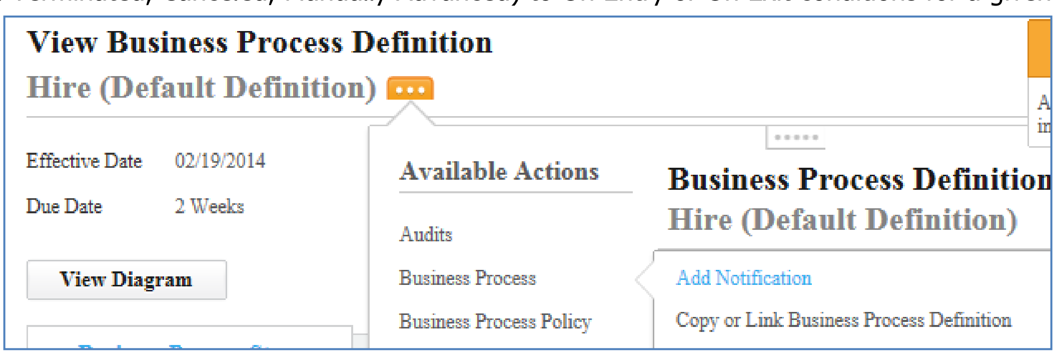
System Notifications 7 items

Disabled	Workflow Step	Order	Type	Specify	Group
No		a	Initiation		
No		b	To Do	Local Employee Documentation	HR Partner
No		d	Action	Review Employee Hire	HR Partner
No		e	To Do	Payroll Documentation	HR Partner
No		i	To Do	Enable Workday Account	Security Partner
No		j	To Do	Other Onboarding Procedures	HR Partner
No		j	To Do	Inform Agencies	HR Partner

Maintain System Notifications

CREATE AND MAINTAIN NOTIFICATIONS

When creating notifications you can select **Trigger** conditions from triggering on the overall business (e.g. Terminated, Canceled, Manually Advanced) to On Entry or On Exit conditions for a given step.



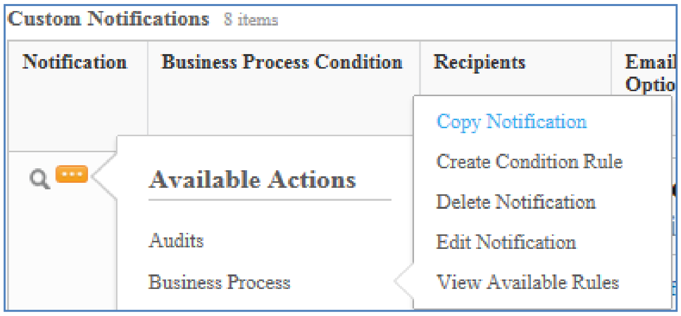
You can also define condition and rules for the notification, e.g. when expenses of more than $50,000 are approved, notify the CFO.

The Message Content section can be configured to include entered text or use fields including instance-specific data, such as a given Expense item description. You can use any report field to create business process notifications. Workday evaluates your security permissions to determine if you have access to the report field both in selecting it for your notification and for the recipient. For the recipient:, if you have access to the report field, you see the report field value. If you do not have access to the report field, you see the message [not available].

SPECIAL CONSIDERATIONS WHEN USING AN APPROVAL CHAIN

When you use an APPROVAL CHAIN step type, it is common to select MANAGER in the security Group for that step. However, if you then create a custom notification for the Approval Chain step, you should set the Recipient(s) to AWAITING PERSONS in the notification definition. At the Recipient(s) prompt in the notification, select By Category > Business Process > Awaiting Persons. Note that if you select MANAGER as the Recipient(s), then a notification is sent to the employee's manager for every approval chain level. By selecting AWAITING PERSONS instead of MANAGER, you force the notification to move up the approval chain as expected to notify the next 'awaiting' manager in the chain.

COPY NOTIFICATIONS



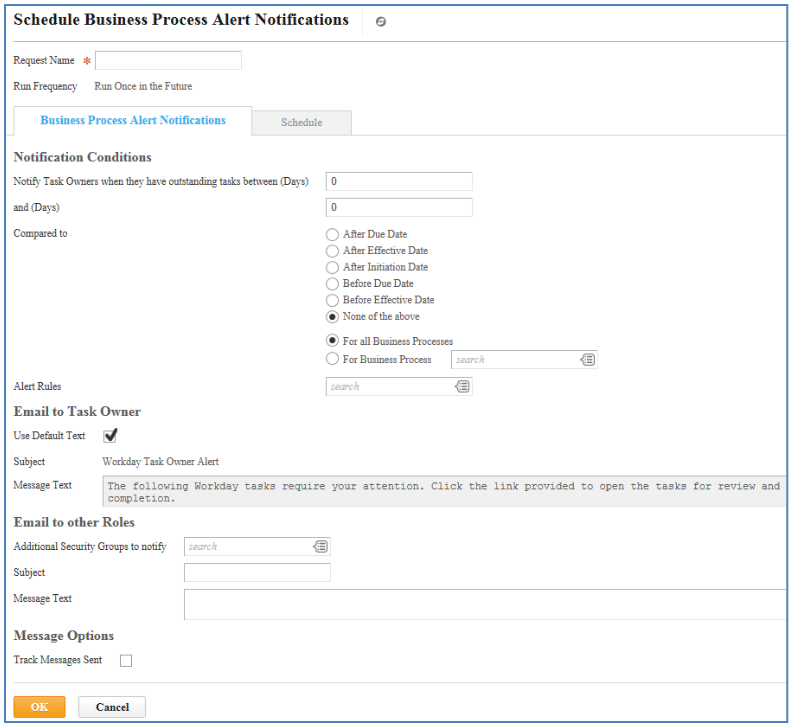
Within the same Business Process, we have the ability to copy a notification. This is very helpful when optimizing your business process. Select the desired notification and use the Related Action icon to navigate to Business Process > Copy Notification. Once copied, you are able to manipulate from the NEW copied notification.

TRANSLATE NOTIFICATIONS

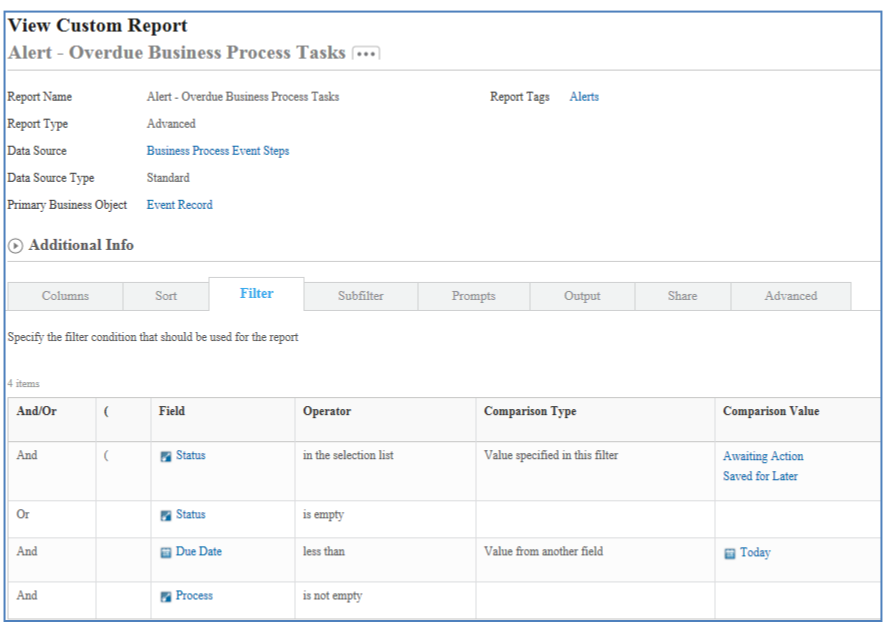
With access rights to the *Data Translations* domain, users can easily create or edit translations for workflow notifications. Run the **Translate Workflow Notification** task and choose a business process definition. Here you select the Target Language. Locate the notification and select **Translate** and enter translated text.

SCHEDULING BUSINESS PROCESS ALERT NOTIFICATIONS

The **Schedule Business Process Alert Notifications** task allows you to send reminders to business process recipients that a task they are responsible for is coming due, due now, or overdue.



Important: Because the *Business Process Alert Notifications* background process can take a long time to run, Workday recommends that you use the **Alert Notifications framework** (based on a Custom Report) to schedule and send business process alert notifications. Below is a screenshot of an example:



EMAIL TEMPLATES

An email template is a collection of content elements such as text, images, and variables that enable Workday to generate an appropriate email when a business process or other use requires it. You can define separate templates for alert notifications, benefit open enrollment, password reset, integration events, and other email notification uses. The content elements you can use in a template can be static (unchanging, like data constants) or dynamic, in which the value is supplied by the business process at run time. In addition, you can specify that one or more templates are Active.

When Workday uses a template, it constructs the email message from the specified elements in order. The static elements are supplied as is, and the value of the dynamic items is supplied by the business process at run time.

MAINTAIN EMAIL TEMPLATES

Use the Maintain Email Templates task to designate which template is active for each given behavior, and which template to use as the default template:

- **Active**: If an email template for a given behavior is active, Workday uses that template when generating notification emails for that behavior. You can create multiple templates for a given behavior, but usually only one may be active at a time. The only exception is the Business Process behavior; multiple Business Process templates may be Active, but only one may be Default.

- **Default**: Workday uses the active Default template for any behavior that does not itself have an active template. You can create more than one Default template, but only one may be active.

Note: The default template for a given behavior is used for custom notifications, unless you override it with another active template when creating the notification.

STATIC CONTENT

Static content options are identical for each email template behavior. When selecting static content from the prompt, your choices are:

- **Static Email Content**: This is the same as selecting All. It shows all the static content elements that are defined.
- **Static Email Text**: This shows just the static content that is text.
- **Static Email URL**: This shows URLs that will appear in emails as links to the web.
- **Static Embedded Email Image**: This shows images imported into the email.
- **Static External Email Image**: This shows an image from a link to an external source such as the web.

To create your own static content element:

- Select the Static Content option.
- Click the prompt.
- Select Create from the prompt menu.
- Select the type of content you want to create.

To edit an existing static content element:

- Select the Static Content option.
- Click the prompt and find the content element you want to edit.
- Click the magnifying glass to the right of the content element name to display the View page.
- Select Static Content > Edit from the related actions menu.

DYNAMIC CONTENT

When you select Dynamic Content in the email template, you can choose from the dynamic content element variables that are available for the email behavior you selected. (Some of these do not apply to certain behaviors.) The dynamic content variables are defined by Workday.

TEST AN EMAIL TEMPLATE

Access the Test Email Templates task. You can test your email template layout with dummy values by sending it to a specified email address as a related task on the email template. You can also copy an email template from the same menu for use in any behavior area.

TROUBLESHOOTING

If the email body is empty when the email arrives, there is probably no active template for the particular use AND there is no active default template. Either activate or create a template for this usage, or activate the default. You should have a Workday Standard template that works for most usages.

ACTIVITY 28 – EDIT EMAIL TEMPLATE AND DEFINE A CUSTOM NOTIFICATION

Business Case: In this activity, we will edit the default email template. Then we create a custom notification to let the manager know that an Ad Hoc Approval was added to the process. We will also disable system notifications that are not needed as part of the business process.

Sign in as Logan McNeil (lmcneil)

TASK 1: EDIT EMAIL TEMPLATE

1. Find the task by searching for ***email temp***.
2. Click the **Edit Email Template** task link.
3. Select **Notification Template** from the prompt as the Email Template Name.
4. Click **OK** to continue.
5. Notice that this is the default template.
6. Click on the plus sign to insert a row.
7. Under the Order column, indicate **h**.
8. Select the **Static Content** option.
9. Click the Prompt and select **By Subclass > Static Embedded Email Image > workday_logo.gif**.
10. Click **OK** to save.
11. Click **Done** on the confirmation page.

TASK 2: TEST EMAIL TEMPLATE

1. Find the task by searching for ***email temp***.
2. Click on the **Test Email Template** link.
3. Select the Email Template: **Notification Template.**
4. Click **OK** to continue.
5. Select **To Internet Email Address**

6. Enter your *email address*.

7. Click **OK**.

8. Click **Done** on the confirmation page.

9. Check your email!! ☺

TASK 3: CREATE WORKFLOW NOTIFICATION

1. Find the business process by searching for *bp: hire*.

2. Click the link to display the Business Process definition **Hire for IT HelpDesk Department.**

3. From the related action and select **Business Process** > **Add Notification**.

4. Effective as of **Today's Date** and click **OK** to continue.

5. Enter the following information:

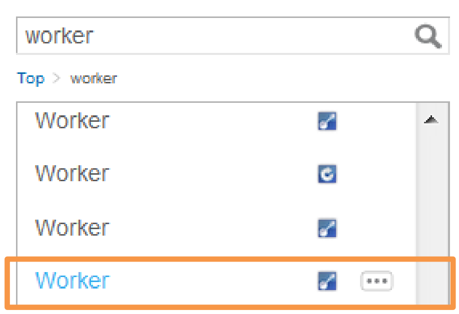
Field Name	***Entry Value***
Trigger(s)	**Trigger On Ad Hoc Approve** > c Review Employee Hire
Recipient(s)	Group(s) > Manager

TASK 4: CONFIGURE MESSAGE CONTENT

1. Click on the  icon to insert a row under Subject.

2. Select the **External Field** radio button.

3. Use the prompt icon to choose the **Worker** field for the business process event (4th worker field).



4. Click on the ⊕ icon to insert a row under Body.

5. Select the **Text** radio button.

6. Enter '*An ad hoc approval has been added to this hire process.'*

7. Save the changes by clicking the **OK** button.

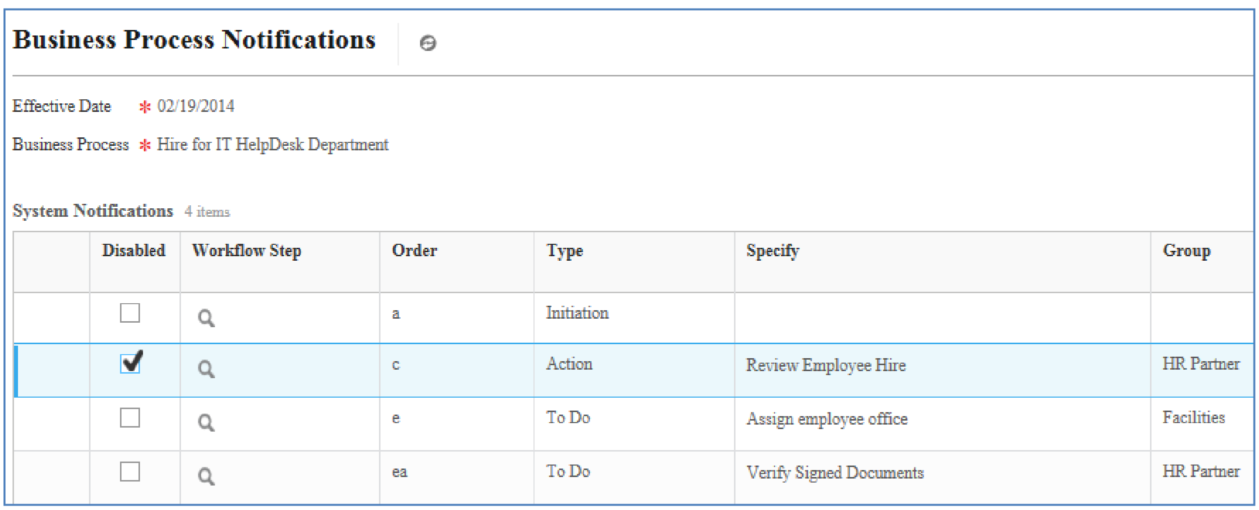
8. Click **Done** on the confirmation page.

TASK 5: MAINTAIN SYSTEM NOTIFICATIONS

1. Click on the **Notifications** tab (found when looking at the Business Process definition)

2. Click on the **Maintain System Notifications** button.

3. Under the System Notifications section, in the Disabled column select *c*.



Business Process Notifications

Effective Date * 02/19/2014

Business Process * Hire for IT HelpDesk Department

System Notifications 4 items

	Disabled	Workflow Step	Order	Type	Specify	Group
	☐		a	Initiation		
	☑		c	Action	Review Employee Hire	HR Partner
	☐		e	To Do	Assign employee office	Facilities
	☐		ea	To Do	Verify Signed Documents	HR Partner

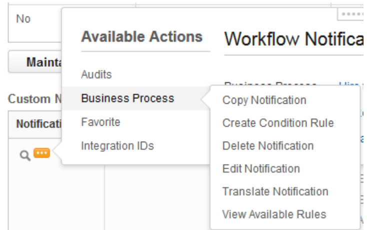
4. Click **OK.**

5. Click **Done**.

TASK 6 (OPTIONAL): TRANSLATE NOTIFICATION TEXT

1. Select the Notifications tab again.

2. Find the custom notification you just configured. Use the related action to select **Business Process>Translate Notification**. Notice the different actions that can be taken on a notification.



3. Select **French (Canada)** as the Target Language

4. Click **OK**

5. Enter the translated text: *Une approbation ad hoc a été ajouté à ce processus*

6. Click **OK** to save

7. Click **Done**

TASK 7: TEST NOTIFICATION (ADVANCED OPTIONAL TASK-MINIMAL INSTRUCTIONS)

1. As Logan, Locate Jackie Wilson's Hire event and use related action to select **Cancel**

2. Search for Jackie Wilson Pre-Hire and start the Hire process again – Be sure to hire into the **IT HelpDesk** supervisory organization

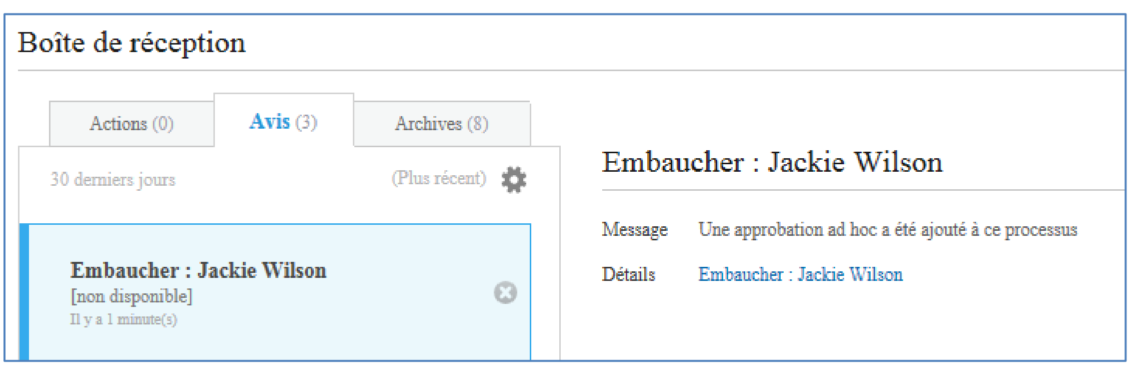
3. Log in as Jack Taylor (jtaylor) to propose compensation – keep under $70,000

4. Log in as Steve Morgan (smorgan) to approve Review step and **add Ad Hoc approver** Payroll Interface Partner (Betty Liu)

5. Log in as either Betty (bliu) to complete Ad Hoc Approval

6. Log in as Jack (jtaylor) to see notification that ad hoc approver was added to hire process

If you had configured Jack's preferred language as French (Canada) prior to the process, you could see the notification in the target language:

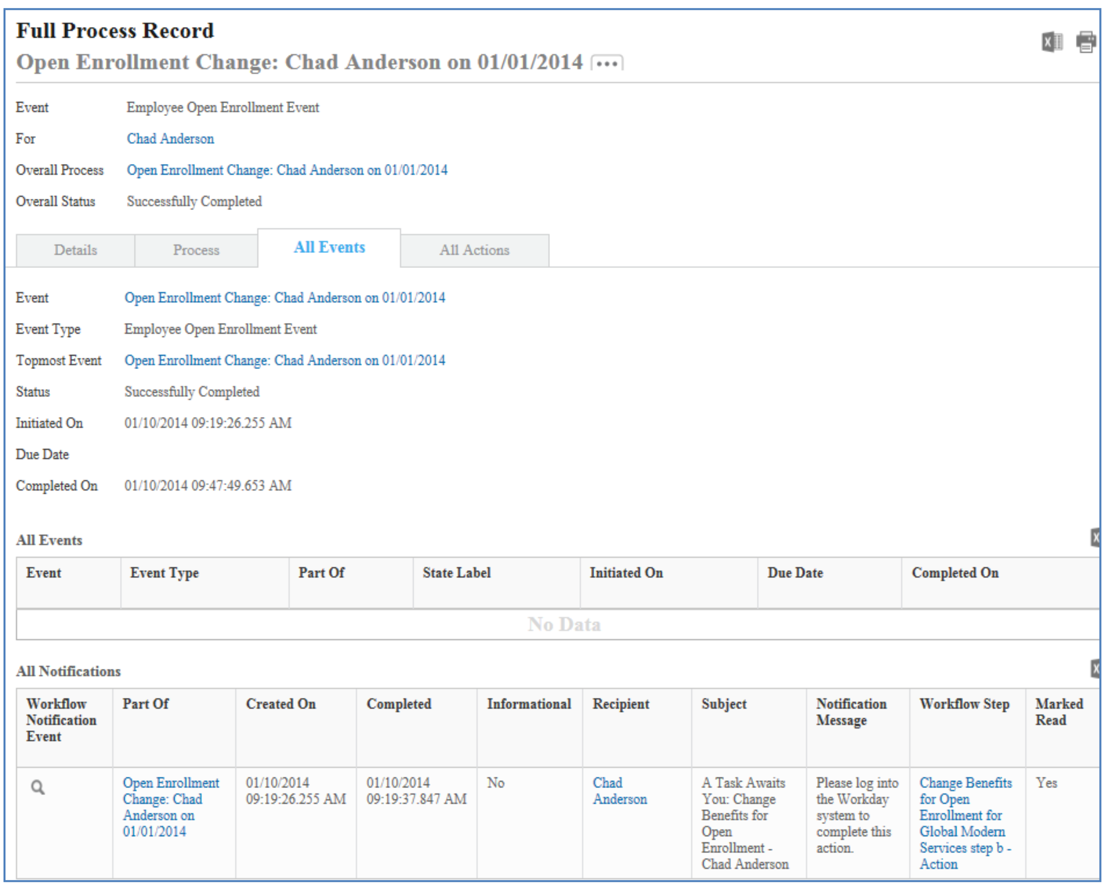


TIPS AND TROUBLESHOOTING CUSTOM NOTIFICATIONS

Consider these points when configuring custom notifications:

- Initiator should receive Completed and Terminated notifications
- Rescinded notifications should go to everyone who touched the process and/or received a Completed notification
- Canceled notifications should go to everyone who touched the process
- Generate an "on your behalf" notification if anyone other than owner (i.e. Delegator) initiates the BP
- Omit notifications to frequent users of the application; only infrequent users need email notifications otherwise it turns into spam

When notifications are not working as you expect, run the Business Process and Integration Notifications report. Also, take a look at the business process **Full Process Record**. On the All Events tab, you can review the details of notifications that were generated as a result of this business process, as well as action status.



Full Process Record

Open Enrollment Change: Chad Anderson on 01/01/2014

Event	Employee Open Enrollment Event
For	Chad Anderson
Overall Process	Open Enrollment Change: Chad Anderson on 01/01/2014
Overall Status	Successfully Completed

Details | Process | All Events | All Actions

Event	Open Enrollment Change: Chad Anderson on 01/01/2014
Event Type	Employee Open Enrollment Event
Topmost Event	Open Enrollment Change: Chad Anderson on 01/01/2014
Status	Successfully Completed
Initiated On	01/10/2014 09:19:26.255 AM
Due Date	
Completed On	01/10/2014 09:47:49.653 AM

All Events

Event	Event Type	Part Of	State Label	Initiated On	Due Date	Completed On
No Data						

All Notifications

Workflow Notification Event	Part Of	Created On	Completed	Informational	Recipient	Subject	Notification Message	Workflow Step	Marked Read
	Open Enrollment Change: Chad Anderson on 01/01/2014	01/10/2014 09:19:26.255 AM	01/10/2014 09:19:37.847 AM	No	Chad Anderson	A Task Awaits You: Change Benefits for Open Enrollment - Chad Anderson	Please log into the Workday system to complete this action.	Change Benefits for Open Enrollment for Global Modern Services step b - Action	Yes

When emails are not received, you should troubleshoot by checking these configurations:

- Tenant Settings: Business Processes and Notifications
- Email Preferences on Workday Account
- White list IP Addresses: https://community.workday.com/node/538
- Check spam folders on mail server and client
- Check folder rules on recipient's mail client

KEY BUSINESS PROCESS REPORTS

Listed here are examples of delivered reports that will help you to manage business processes in your environment.

- All Business Process Definitions for Business Objects
- All Condition Rules
- Business Process Configuration Options
- Business Process Cycle Times
- Business Process Exception Audit
- Business Process Transactions Awaiting Action
- Business Process Steps Enabled for Worklets
- Unassigned Tasks
    - **Reassign Events for Business Process Types** report data source is available. Customers can create custom reports on Unassigned Tasks.

BUSINESS PROCESS TIPS

GENERAL TIPS

- ✓ Use bp: search prefix to find definitions (for example, bp: termination)
- ✓ Use event: search prefix to find worker events (for example, event: john)
- ✓ Use event related action, Business Process > View Definition to view business process definition at time of initiation
- ✓ Report Fields and Values: Use filters and consider exporting to Excel for text search
- ✓ Create Condition Rule: Use intra-task create from Maintain Step Conditions
- ✓ Access the security policy as a related action from the definition
- ✓ Use Business Process Full Process Record to view notifications
- ✓ View Security for Securable Item report: Security's best tool
- ✓ Add the Manage Business Processes for Worker sub-process to the Termination business process definition
- ✓ Additional Resources
    - FAQ: Business Processes
      https://community.workday.com/doc/core/25913
    - On Demand Education
    - Support Hot Topics: Business Process
    - Documentation User Guide

OPTIONAL WORKSHOP

Business Case: During this workshop, you will use Standard Workday Reports to answer questions on Business Process.

Sign in as Logan McNeil (lmcneil)

TASK 1: HOW CAN A BUSINESS PROCESS BE USED?

1. Search for Bus Proc Config.
2. Click the **Business Process Configuration Options** report.
3. For the Filter by Business Process Type, enter or use the prompt to select Hire.
4. For this activity, do not select the checkbox for Return Business Processes for which the selected are allowed Sub processes.
5. Click the **OK** button.
6. What is the valid type of Organization for the Hire Business Process?

   ____

7. How many action steps are possible to configure into the Hire process?

   ____

8. What are the APPROVAL options?

   ____

9. What is the prerequisite action(s) for the Assign Pay Group action step? -

   ____

10. What are the restrictions for the Create Change Benefit Event?

    ____

TASK 2: WHERE CAN YOU FIND A LIST OF ALL BUSINESS PROCESS DEFAULT DEFINITIONS AND ANY ORGANIZATION SPECIFIC DEFINITIONS THAT HAVE BEEN CREATED?

1. Search for *Bus Proc Def*.
2. Click the **Business Process Definitions** report.
3. Use **today's date** as the View as of.

4. Click the **OK** button.

5. How many Business Process Definitions are owned by Financials? -
   ____

6. How many Definitions for Business Objects of Expense Report Event business process exist?
   ____

7. How many Business Process Definitions are owned by Payroll?
   ____

8. How many Business Process Definitions are owned by Human Resources?
   ____

9. How many Definitions for Business Objects of Hire business process exist?
   ____

TASK 3: WHERE CAN YOU FIND THE SECURITY GROUPS THAT ARE AUTHORIZED TO INITIATE A PARTICULAR BUSINESS PROCESS?

1. Search for Bus Proc Types.

2. Click the **Business Process Types and Initiating Security Groups** report.

3. Can the Manager Security Group initiate the Hire business process?
   ____

4. How many Security Groups can hire employees?
   ____

5. Who can initiate the Terminate Employee business process?
   ____

6. Who can initiate the Expense Report Event?
   ____

TASK 4: WHERE CAN I FIND A LIST OF THE BUSINESS PROCESSES FOR ONE PARTICULAR ORGANIZATION?

1. Search for Bus Proc Def.

2. Click the **Business Process Definitions for Business Object** report.

3. Use **today's date** as the View as of date.

4. In the Business Object field, enter the organization: IT HelpDesk Department.

5. Click the **OK** button.

6. Does the It HelpDesk Department supervisory organization use the Hire default business process definition?

7. What are some of the actions and sub-processes allowed?

8. Click the **Change Icon** 

and use **today's date** in the View as of field.

9. In the Business Object field, enter the organization. For this activity, enter Global Modern Services, Inc. (USA).

10. Click the **OK** button.

11. Does the Global Modern Services, Inc. (USA) company organization use the Assign Costing Allocation default business process definition?

12. What are some of the actions and sub-processes allowed?

TASK 5: WHERE CAN I FIND IF THERE ANY BUSINESS PROCESS TRANSACTION AWAITING ACTION?

1. Search for Bus Proc Action.

2. Click the **Business Process Transactions Awaiting Action** report.

3. Review any or all of the listed Business Processes.

4. Are there any business processes that are Past Due?

SOLUTION

5. What is the valid type of Organization for the Hire Business Process? ___supervisory____
6. How many action steps are possible to configure into the Hire process? _____36____
7. What are the APPROVAL options? _approve, deny, send back________________
8. What is the prerequisite action(s) for the Assign Pay Group action step? - ____Change Organization Assignments______________________________
9. What are the restrictions for the Create Change Benefit Event? _______after completion only, and after remove retiree status_______________________

TASK 2: WHERE CAN YOU FIND A LIST OF ALL BUSINESS PROCESS DEFAULT DEFINITIONS AND ANY ORGANIZATION SPECIFIC DEFINITIONS THAT HAVE BEEN CREATED?

10. Search for *Bus Proc Def*.
11. Click the **Business Process Definitions** report.
12. Use **today's date** as the View as of.
13. Click the **OK** button.
14. How many Business Process Definitions are owned by Financials? _including all the Financials Modules, 130_______________________________________
15. How many Definitions for Business Objects of Expense Report Event business process exist? _________1____
16. How many Business Process Definitions are owned by Payroll? __________15____
17. How many Business Process Definitions are owned by Human Resources? _______191____
18. How many Definitions for Business Objects of Hire business process exist? _____4____

TASK 3: WHERE CAN YOU FIND THE SECURITY GROUPS THAT ARE AUTHORIZED TO INITIATE A PARTICULAR BUSINESS PROCESS?

1. Search for Bus Proc Types.
2. Click the **Business Process Types and Initiating Security Groups** report.
3. Can the Manager Security Group initiate the Hire business process? _____yes____
4. How many Security Groups can hire employees? __10____
5. Who can initiate the Terminate Employee business process? __ HR Administrator, HR Partner, HR Partner (By Location), HR System, Implementers, Information

   Administrator, Management Chain, Manager
6. Who can initiate the Expense Report Event? __Contingent Worker As Self, Employee As Self,Expense Data Entry Specialist,Expense Integration System,HR Partner,HR Partner (By Location),Implementers,Integration Administrator,Manager,Recruiter,Recruiting System_________________________

TASK 4: WHERE CAN I FIND A LIST OF THE BUSINESS PROCESSES FOR ONE PARTICULAR ORGANIZATION?

1. Search for Bus Proc Def.
2. Click the **Business Process Definitions for Business Object** report.
3. Use **today's date** as the View as of date.
4. In the Business Object field, enter the organization: IT HelpDesk Department.
5. Click the **OK** button.
6. Does the It HelpDesk Department supervisory organization use the Hire default business process definition? ____no____

   _
7. What are some of the actions and sub-processes allowed? __ Add Academic Appointment,Add Period Activity Pay,Add Probation Period,Assign Collective

Agreement,Assign Costing Allocation for Hire Employee,Assign Matrix Organizations,Assign Pay Group,Assign Work Schedule,Change Benefit Elections,Change Benefit Jobs

8. Click the **Change Icon** 

 and use **today's date** in the View as of field.

9. In the Business Object field, enter the organization. For this activity, enter Global Modern Services, Inc. (USA).

10. Click the **OK** button.

11. Does the Global Modern Services, Inc. (USA) company organization use the Assign Costing Allocation default business process definition? ___________no____
_

12. What are some of the actions and sub-processes allowed? __________Check Budget, Review Costing Allocation Event Review Start________________________

TASK 5: WHERE CAN I FIND IF THERE ANY BUSINESS PROCESS TRANSACTION AWAITING ACTION?

13. Search for Bus Proc Action.

14. Click the **Business Process Transactions Awaiting Action** report.

15. Review any or all of the listed Business Processes.

16. Are there any business processes that are Past Due? __yes____