Workday HCM Training

- SAURABH SHETTY

Module 3: SUPERVISORY ORGANIZATIONS

SUPERVISORY ORGANIZATIONS

As the foundation of Workday HCM, supervisory organizations group workers into a reporting structure. Supervisory organizations house all positions and job restrictions, so every worker you hire belongs to a supervisory organization. You can specify individual supervisory organizations as particular subtypes (e.g., department, division, group) to distinguish between multiple instances of that supervisory organization. You can also associate supervisory organizations with certain compensation, security, and business processes. For example, you can configure a business process definition for a supervisory organization hierarchy, with variations of that definition for particular organizations within that hierarchy.

Let's Review the management hierarchy in Global Modern Services.

Review the following key characteristics unique to supervisory organizations that you will cover in this course:

1. You can only create positions within a supervisory organization.
2. You must hire employees into a supervisory organization.
3. Assignable roles have responsibilities to lead or support workers within a supervisory organization.
4. You can design unique business processes for supervisory organizations.

CHARACTERISTICS OF A SUPERVISORY ORGANIZATION

AVAILABLE FIELDS:
Review the following available fields when creating a supervisory organization:
Subordinate organizations inherit this field value from the superior supervisory organizations.

Field	Description
Availability Date	Controls when the organization appears in prompts and is fully viewable using the View Supervisory Organization report.
Name	Name of the supervisory organization.
Code	Optional field often used for additional or short-hand identification.
Subtype	Use to distinguish between multiple instances of the same organization type, or as a unique identifier to create and enforce a hierarchical structure for reporting. Organization subtypes are tenanted data.
Visibility **	Determines who can view the organization.
External URL	Associates a web address with the supervisory organization.
Primary Location **	Used for security routing and reporting purposes. A primary location is required, and inherits from the superior supervisory organization if you do not enter a value.
Staffing Model (tab)**	Choose which Workday-delivered staffing model to use for the supervisory organization. The staffing models provide different levels of control over staffing to support staffing goals.
Assign Roles (tab)**	Identifies the manager and other support personnel. Assignable roles drive business processes.
Identifiers **	Add government identifiers.

SUBTYPES

Supervisory organizations can have organization subtypes, such as department, division, or group. Typically, you use organization subtypes to distinguish between multiple supervisory organization instances.

Organizations subtypes are tenanted data, so you can define the subtypes for your business needs. Use the Maintain Organization Subtypes task to manage your organization subtypes.

You can also use organization subtypes to set up and enforce a hierarchical structure for reporting. The subtypes define the levels of the hierarchical structure.

Example: For example, you might have three organization subtypes of department, division, and team. In your organization, departments are always superior to divisions, and divisions are always superior to teams. Using organization subtypes, you can create and enforce this hierarchical structure. As a result, no one in your organization can create a division superior to a department, or a team superior to a division.

VISIBILITY

An organization's visibility determines who can view the organization.

ASSIGNABLE ROLES

Assignable roles manage security to tasks, access to workers, and business process involvement. All organization types (e.g., supervisory, location hierarchy, cost center) have assignable roles. Role assignments and their associated security groups are critical for business process routing and notifications.

Assignable roles are either Inherited from a superior organization, Specifically assigned to an organization, or Assigned by default.
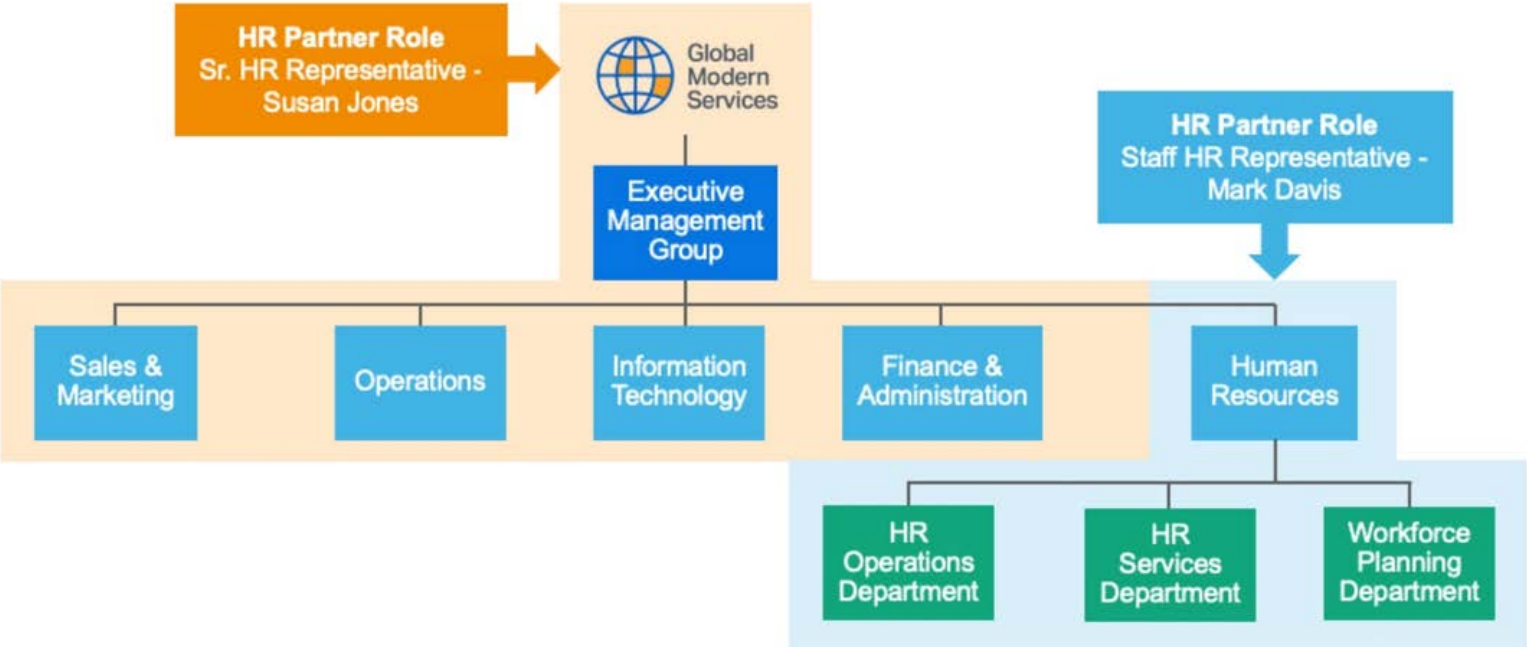
Depending on your security permissions, you can assign roles to an organization from its Related Actions > Roles > Assign Roles. You can also assign roles directly to a worker from the worker's Related Actions > Security Profile.

ROLE INHERITANCE

In supervisory organizations, you assign roles to positions (for position management) or jobs (for job management). The worker who fills that position or job takes on the assignable role, and the system displays the worker's name in the Assigned To field. You can assign a role to anylevel of a supervisory organization hierarchy. However, if you do not assign the role directly, it is inherited from the superior supervisory organization.

Position management supervisory organizations: If a position is unfilled, the Assigned To field displays the position title, indicating that the position is unfilled.

Job management supervisory organizations: The job assigned to a role is always filled by a worker. If you terminate the worker, the job becomes inactive and no longer displays as assigned to any roles. The role then inherits from its superior organization, until you reassign the role to another job.

Task #1: Explore the Assignable Roles for IT HelpDesk

1. Sign in as Logan McNeil.

2. Search for and select the IT HelpDesk Department supervisory organization.

3. Click the Roles tab.

4. Answer the following questions about the IT HelpDesk:
A. Who is the Compensation Partner?
B. Who is the HR Partner?
C. Who are the managers?
D. Who is the Recruiter?
E. Are these roles assigned to workers or to positions?
F. Review the Inherited roles. Which supervisory organization did IT HelpDesk inherit these roles from?

LOCATIONS

In the Workday system, every location has a location usage. Example location usages include business site, business asset, inventory, housing, and more. Supervisory organizations use business site locations to account for workers' physical location. Business sites also provide a time profile, time zone, and locale information.

Review the following location characteristics:

• Locations always include a physical address. You can also include additional details like an email and phone number.

• You can set up postal code validations to validate or require codes. You can also set country-specific postal code validations. Use the Maintain Localization Settings task and select Contact Information.

• A location's time profile defines the standard number of hours worked in that location each week.

• A location's locale controls the format for dates, times, and currency. If you specify a locale for a location, workers in that location inherit the locale. If you do not set a locale on the location level, workers inherit the tenant's locale. Workers can override any inherited locale using the Change Preferences task.

ACTIVITY 3.2 - CREATE A NEW LOCATION

Business Case: With a growing number of global customers, GMS needs a new location in Reading, United Kingdom.

Task #1: Create a Location

1. Sign in as Logan McNeil
2. In the Search box, enter cre loc, then select the Create Location task from the predictive search results.
3. Enter the location information:
Location Name: Reading
Location Usages: Business Site
4. Click OK.
5. On the Details tab, in the Location Type field, select Local Office.

Task #2: Enter Contact Information
1. Click the Contact Information tab.
2. In the Phone section, click the Add button.
3. Enter the following Phone information:
Country Phone Code: Frequently Used > United Kingdom (+44)
Phone Number: 01635 201 325
Phone Device: Landline
Primary: (select)

4. Scroll down to the Address section and click the Add button.

5. Enter the following Address information:
Effective Date: Today's date (default)
Country: Frequently Used > United Kingdom
Address Line 1: 204 Stephens Rd
City or Town: Reading
County: Berkshire
Postal Code: RG1 1DA
Primary: (select)

Task #3: Enter Business Site Information

1. Scroll to the top of the page and click the Business Site tab.
2. Enter the following Business Site information:
Time Profile: Standard Hours - 37.5
Locale: English (United Kingdom) - en_GB
Time Zone: GMT United Kingdom Time (London)
3. Click OK and review the location you created.