Workday HCM Training

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Module 2: Workday HCM Core Concepts

CORE CONCEPTS

The six core concepts essential to Workday HCM are supervisory organizations, staffing models, job profiles, compensation, security, and business processes. These concepts will equip you in setting up your Workday HCM system to effectively process HCM transactions.

SUPERVISORY ORGANIZATIONS	STAFFING MODELS	JOB PROFILES	COMPENSATION	SECURITY	BUSINESS PROCESSES
• Supervisory organizations group workers into a management hierarchy. The foundation of Workday HCM, supervisory organizations contain the jobs and positions that you hire workers into. You can also configure compensation, security, and business process workflows based on your supervisory organization structures.	• When setting up your supervisory organizations, you need to consider your staffing strategy and budgeting needs. Every supervisory organization is associated with a staffing model. Staffing models determine how jobs are defined and filled, provide various levels of control and flexibility over staffing, and support different staffing goals.	• Job profiles make up your job catalog and are the foundation of your jobs and positions. A job profile is a generic description of a job and contains all characteristics of that job, such as special skills, training, or other qualifications. Every worker in Workday must have an assigned job profile.	• The Workday compensation structure consists of compensation packages, which group together compensation grades and plans. Compensation grades provide guidance with reference to pay ranges, and compensation grade profiles allow for localization. Compensation plans provide various types of pay components such as salary, hourly, and allowance plans.	• The Workday security framework applies to your entire Workday application, securing all data. With configurable security, you can control what a given user can see and do in the system.	• A business process is a set of configurable steps that completes a larger overall task, like hiring or terminating an employee. In short, a business process controls the "what," "who," and "when" necessary to accomplish a task: • What needs to happen? (e.g., tasks, actions, subprocesses) • Who needs to do what? (e.g., security groups) • When will it happen? (e.g., defined time frame, order of steps)

ACTIVITY 2.1 - WORKDAY HCM CORE CONCEPTS

Business Case: You have been tasked with hiring a new worker into the IT HelpDesk Department supervisory organization. Before you initiate the transaction, you will review the organization to make sure it has an assigned staffing model and an open position to hire into. You will also take a moment to review the IT HelpDesk Specialist job profile. Finally, you will initiate the Hire business process which will route to the Manager security group for further action. The manager will then review the proposed compensation and complete the hire process.

Task #1: Explore Workday HCM Core Concepts

1. Sign in as Logan McNeil.

2. Search for sup: it help and select the IT HelpDesk Department supervisory organization from the search results.

3. Review the Members tab and answer the following questions:
A. How many members are included in this organization?
B. What does the [C] notation next to a worker's name represent?

4. Click the Details tab to identify different attributes of the supervisory organization, such as the superior organization and primary location.

5. Click the Staffing tab and answer the following questions:
A. Which staffing model is assigned to IT HelpDesk?
B. How many positions with an open job requisition are available in this organization?

6. Click the IT HelpDesk Specialist job profile and review the data.

Note: Every worker hired or contracted has a job profile that defines their job characteristics. You can associate one job profile with many workers. Aside from Workday HCM, other Workday applications such as Recruiting, Compensation, and Talent use job profiles.

Task #2: Initiate Hire Transaction

1. Return to the Staffing tab of the IT HelpDesk supervisory organization. Next, you will kick off a transaction and explore the three remaining core concepts of compensation, security, and business processes.

Note: To return to the Staffing tab, You can search for the IT HelpDesk supervisory organization, then click the Staffing tab.

2. Locate the Positions with Open Job Requisition table that contains the IT HelpDesk Specialist (Unfilled) positions located in San Francisco.

3. From the Position Restrictions column, from either one of the IT HelpDesk Specialist (Unfilled) positions, click the Related Actions. Hover over Hire, then select Hire Employee to initiate the Hire business process.

4. In the Search for Person section, in the First Name field, enter Kay then click Search.

5. When the page refreshes, scroll down to select the checkbox next to Kay Syrah's pre-hire record.

Note: To hire someone in Workday, they must have a pre-hire record. For now, consider the pre-hire as the active candidate who has accepted the job offer.

6. Click Start Hire.

7. On the Hire Employee page, review the data that auto-populated, then click OK.

8. On the next page, notice that the hiring restrictions set on the position have defaulted in. Enter the following information:
Hire Date: Today's date
Reason: New Hire > Fill Vacancy

9. Click Submit.

10. A pop-up displays confirming your submission. From the pop-up, click View Details.

11. The next step in the hire process routes to the Manager security group. Workday identifies the workers responsible to act on a business process step based on the workers' security group membership. Before we continue, expand the Details and Process section, and answer the following questions:

A.   What is the overall status of this process?

B.   What is the next step in the workflow? Hint: Open the Process tab.

C.   Who is the manager responsible to act on the next step?

Task #3: Approve Hire Transaction

1. Sign in as Maximilian Schneider. Note: To streamline testing in non-production environments, you can use the proxy functionality to act on behalf of another user. To proxy as another user, search for and select the Start Proxy task, select the user, then click OK.

2. Navigate to Maximilian 's Inbox to open the Propose Compensation Hire Inbox item. Answer the following questions:

A. What type of currency will Kay Syrah receive her compensation in?
B. What Compensation Package did Kay receive?
C. Did Kay receive an Hourly or Salary compensation plan?

Note: All compensation components have defaulted due to worker eligibility, default compensation on the position, and compensation component configurations which we will discuss later in this course.

3. Leave all default values and click Submit.

4. Navigate to the IT HelpDesk Department supervisory organization and review the Members and Staffing tabs from the manager's perspective.
A. Is Kay Syrah a member of IT HelpDesk?
B. How many positions with an open job requisition remain available in IT HelpDesk?

5. Sign out as Maximilian.

Module 2: Test

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

2. True or False? Security and business processes apply across applications and impact all Workday solutions.

3. What is the foundation of all jobs and positions in Workday?

4. True or False? You can configure business processes to route to security groups in order to complete a transaction.