

Backend Comp Admin Training Guide

Workday Merit & Incentive

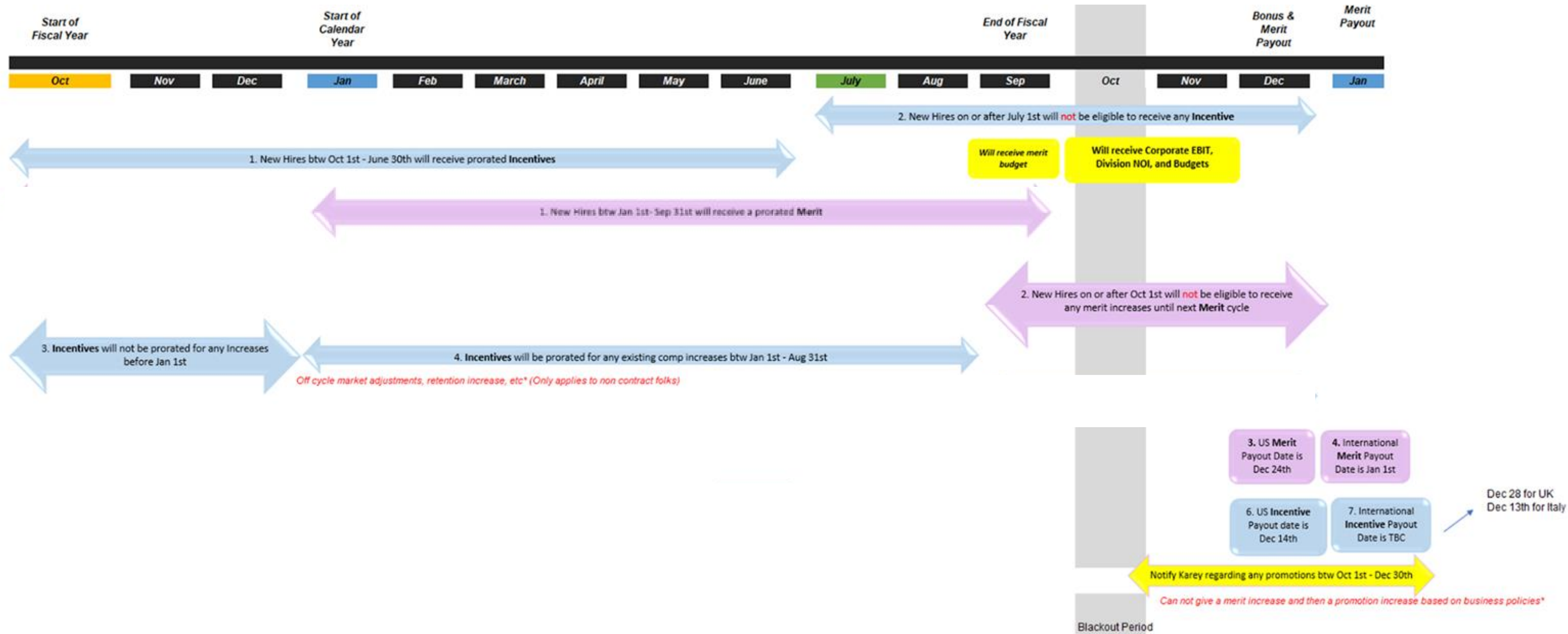
Karey Wong

Prior to Initiating the Incentive/Merit Process in Workday

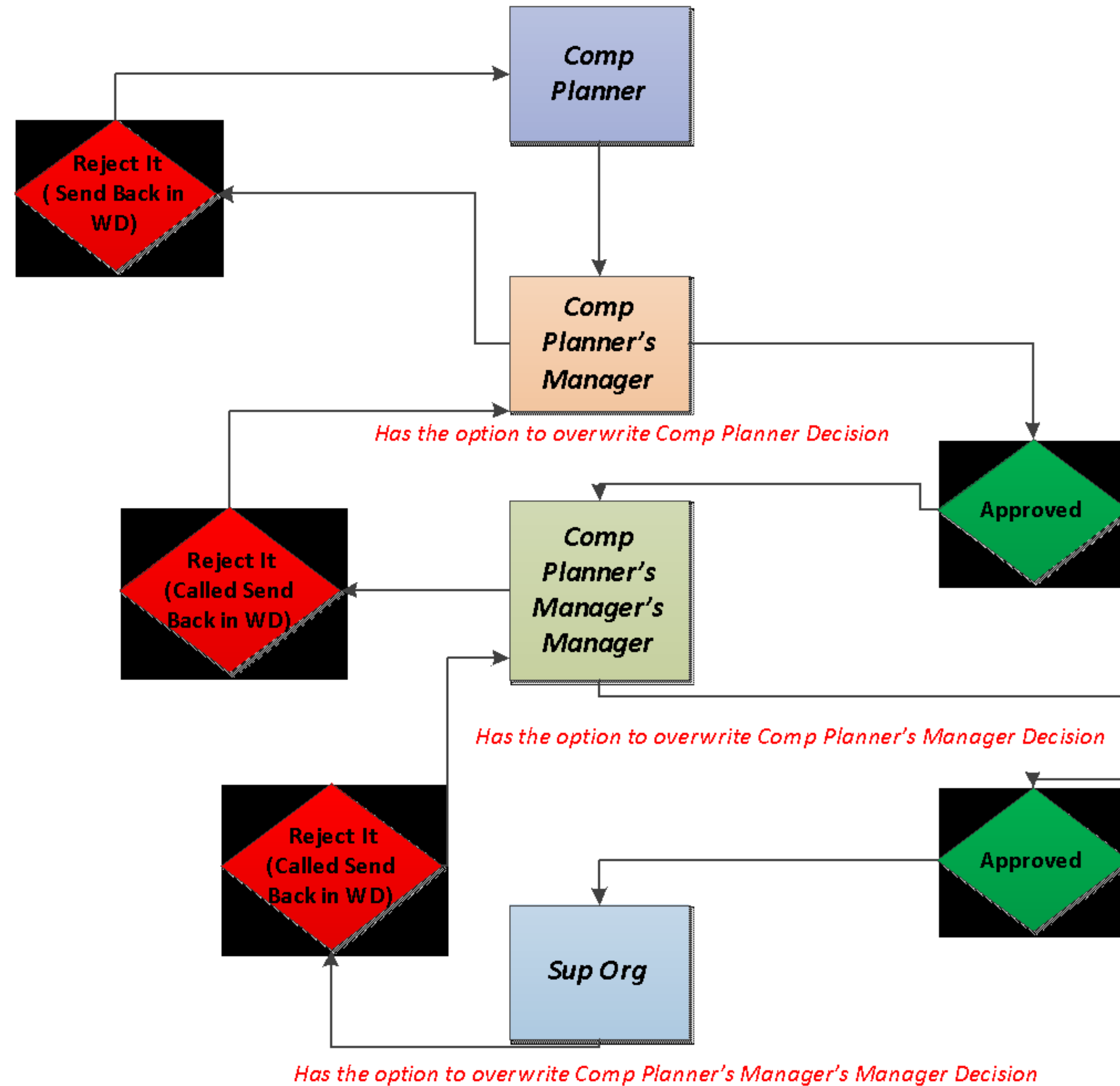


2018

1. Understand the Comp Timeline



2. Understand the Workflow Notifications in WD



3. Create Eligible Earnings Period in WD

Create Eligible Earnings Override Period

Eligible Earnings Override Period Name *

Fiscal Year (

Description

From Date *

To Date *

Step 1: Obtain the **Eligible Earnings Report** from Payroll
Step 2: Create the **Eligible Earnings Period** in WD

When you initiate the incentive process, it will ask you to tie an "Eligible Earnings Period to the Non-Exempt bonus plan. You must build this yourself first*

3. Create Eligible Earnings Period & EIB in WD

Create Eligible Earnings Override Period

Eligible Earnings Override Period Name *

Fiscal Year

Give your Eligibility Period a Name

Description

From Date *

Enter fiscal start date .

To Date *

Enter fiscal end date

Create EIB

Start creating your EIB by giving it a name and selecting its direction. Outbound EIBs export data from Workday to external systems. Inbound EIBs import data from external systems to Workday.

Name *

Eligible Earning Override

☒ Inbound

☐ Outbound

Click Inboud (meaning you will load in the file)

- Step 3: Fill in all highlighted fields above
- Step 4: Create an EIB template and then click **Ok** and then **Next**

3. Create Eligible Earnings Period & EIB in WD

Get Data

Data Source

Retrieval Method *

Attach File at Launch

Retrieval Details

(Attachment)

File Name

Add

Data Format

File Type *

Web Service Spreadsheet Template

Web Service Operation

Put Eligible Earnings (Web Service)

Custom Object

Predefined Template

Click here



View Integration System

Eligible Earning Override

Actions

Basic Details

System Name Eligible Earning Override

> System ID

Configuration Security

Get Data 1 item

Retrieval

Retrieval Method Attach File at Launch

Transform

Transformation Type Web Service Template Model

Transformation Put Eligible Earnings

Deliver

Delivery Method Workday Web Service Operation

Workday Endpoint Put Eligible Earnings (Web Service)

Integration System Eligible Earning Override

System ID EligibleEarningOverride

Integration Template Enterprise Interface Builder

Integration Services 4 items

Integration Template Service

Enterprise Interface Builder / Launch Enterprise Interface Builder as Background Process Resume Events

Enterprise Interface Builder / Document Retrieval Service

Enterprise Interface Builder / Transformation

Enterprise Interface Builder / Document Delivery Service

View

Edit

Generate Spreadsheet Template

Follow the steps above to create an EIB

- Step 5: Click on the **pencil icon** to edit the data format section
- Step 6: Create an **EIB** and then click **Ok**, then **Next**, then **Next**, then **Next**, then **Okay** and then **Submit**

3. Create Eligible Earnings Period & EIB in WD



Export the EIB template

AutoSave ON Put_Eligible_Earnings.xml - Protected View - Excel Wong, Karey

File Karey's Casa <(^.^)> Graph Life Is Your Canvas Draw <(^.^)< Logic (>(^.^)> Text Spell Freeze VBA Coder <(^.^)> Help Power Pivot Tell me

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

C12

	A	B	C	D	E	F	G	H
1	Eligible Earnings							
2	Area	All			Eligible Earnings Data (All)			
3	Restrictions	Required	Optional	Optional	Optional	Required	Optional	Required
4	Format	Text	Y/N	Eligible_Earnings_ID	Text	Contingent_Worker_ID	Position_ID	Eligible_Earnings_Period_ID
5	Fields	Spreadsheet Key*	Add Only	Eligible Earnings	Eligible Earnings ID	Employee*	Position	Period*
6								
7								
8								
9								
10								
11								
12								

Click "Enable" in excel and then fill out

Fill in the columns you want to load. Refer to the EIB folder under Karey's folder to see sample templates with fake data for reference

Step 7: Click **Done**

Step 8: Prepare the file for the **EIB** load

Always practice in Workday Test environment (sandbox) first before loading EIB in Production

4. Audit Data in WD



Step 4: Run reports from Workday to audit data against our **Merit and Annual Incentive Policy**

Logic on the backend is pulling from certain fields in WD such as job profiles, cost center, Pay Type, FLSA, and other business rules/logic**

Initiating Incentive Process in WD

Comp Admin Job Aid



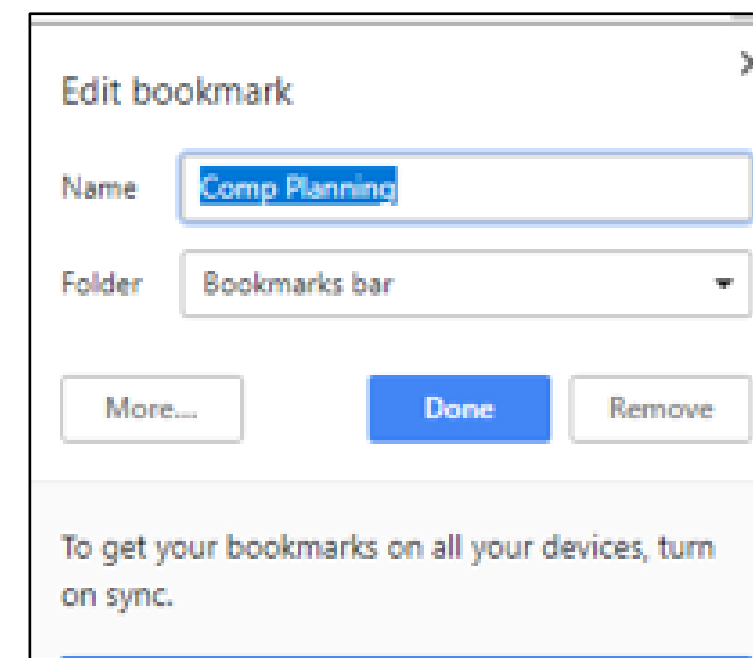
2018

Workday Sign On Instruction



1

2



3

Step 1: Download Google Chrome if you haven't done so already. Workday is not compatible with other internet browsers

Step 2: Copy/ paste link to browser to access Workday

Step 3: Save link as favorite for future access

Initiating the Annual Bonus Plan

Initiate Bonus Process

4

Effective Date *

Enter Payout Date

Employee Visibility Date

don't put anything in this field

Process Period End Date *

Enter Fiscal End date

Organization Snapshot Date *

Type in a date close to the end of fiscal year date

Bonus Review Template

don't put anything in this field

Please select an appropriate grid configuration. Shared Participation processes must use the Shared Participation Compensation Review grid category.

Grid Configuration *

Select Incentive Planning

Bonus Plans

Select all 4 bonus plans

6

OK

- Step 4: Type in the task “Initiate Bonus Process”
- Step 5: Enter all highlighted fields above
- Step 6: Click Ok

Initiating the Annual Bonus Plan

[← Initiate Bonus Process](#)

Bonus Process Details

Grid Configuration Incentive Planning

Default Effective as of

Employee Visibility Date (empty)

Process Period End Date

Organization Snapshot Date

Name

*

Type in Annual Bonus

Description

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Bonus Reason

*

Select One-Time Payment Incentive -->Year End Incentive Payment

Currency Rate Type

*

Reference Currency

*

Select USD

Organization Details

Organization Type

*

Select Sup Org (Division Head)

Top Level Organization

+ Everyone underneath those
Sup Orgs, :

8

Process Top Level Organization(s)

Submit

Step 7: Enter all highlighted fields above

Step 8: Please note that the logic on the backend is pulling from these two reports. You might want to run these two reports on a different tab to audit that the data is correct in the system.

Initiating the Annual Bonus Plan

Manage Impacted Employees

Bonus: Annual Bonus

Effective Date

Workday displays employees with in-progress competing events on the *Manage Impacted Employees* step Date and before the Effective Date of the compensation review process.

Important

Upon submitting this step the employee population will be finalized and the process will continue to the next step defined in your business process. Any employee

Bonus Participation Rules

Termination (empty)

Eligible Earnings Override (empty)

You have submitted

Bonus: Annual Bonus

Up Next

Compensation Administrator

[Manage Impacted Employees](#)

Due Date

> Details and Process

17

Submit

Cancel



Configure Bonus Pools

Actions

Reference Currency USD

Pool Controls

Allow Pool Holdbacks

☒

Allow Pool Overages

☐

Uncheck this box

Display Remaining Pools

☒

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Default Bonus Calculation

Calculation

☐ Top-Down

☒ Bottom-Up

Pool Amount

Percent of Eligible Earnings

Total Eligible Earnings

Estimated Cost

Prefill Employee Bonus Awards

☒

Check this box

Finalize

19

Click “**Submit**”

Go into your inbox to open up the bonus message (Wait a min if it doesn’t pop up right away). Follow instructions above.

Click “**Finalize**”