Transition to Workday
Increase Efficiency • Improve Operations
Human Resources • Payroll • Finance

Managers
Workday Training

Agenda

Welcome and Introductions

Topics of Discussion

Job Aid

Workday Trainer

HCM
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Topics of Discussion

- Mobile County Personnel Board and Neogov
- HCM definition and Elements of HCM
- Workday Terminology
- Job Aid and Resources

Mobile County Personnel Board and Neogov

No change to paper processes for the Mobile County Personnel Board. For example, termination, transfer, retirement letters, etc. These tasks will continue to be completed outside of Workday.

For those departments that utilize the Neogov website there will be no change to posting positions and processing of hires. These tasks will continue to be completed outside of Workday.

HCM (Human Capital Management)

Human Capital Management (HCM) refers to a set of activities that convert traditional HR functions into opportunities that lead to increased efficiency, interest and revenue for the organization.

Elements of Human Capital Management (HCM)

All roads begin in HCM…

Workforce planning   Payroll
Compensation planning   Training
Recruiting and hiring   Time and attendance
Onboarding   Performance management

Workday Terminology
Supervisory Organizations

- Supervisory organizations make up the organizational chart by grouping employees into a management hierarchy to define "who reports to whom."
- A supervisory organization can be a business unit, department, group, or project.
- Each supervisory organization is assigned a manager and contains his/her workers.
- The supervisory organization is not used to manage finances and financial responsibilities.
- One example of a supervisory organization would be Public Works Director/Chief (Richard Mitchell).

Workday Terminology Continued

1. Inherited Supervisory Org: An "inherited" supervisory org means the former manager of that supervisory org is no longer in the position tied to that supervisory org, so the next leader above has inherited the supervisory org.

2. **Business process:** A set of tasks that need to be completed for an event to occur, the order in which they must be done, and who must do them to accomplish the desired business objective. Business processes are created using a combination of actions, approvals, approval chains, To-Dos, or checklists. Some examples are Hire, Change Job requests, Compensation Change requests and Terminate Employee.

3. **Compensation:** Umbrella term for Compensation packages, Grades, Grade profiles and plans.

4. **Job profile:** Characteristics of job and position that is built off that profile.

Workday Terms

- **Related Actions:** A clickable icon that enables the user to perform additional actions for an object. Also known as the "Twinkie".

- Tenant: Currently using tenant 5 for testing scenarios; separate tenant from the "live" Financial Tenant

- Cost Center: The actual budget to which payroll is allocated. Each supervisory organization will be assigned a cost center number which will replace current department number. Cost Centers are not used to manage jobs and employees non financial tasks.

Security

- **Unconstrained Security Group:** Users based out of this group will have access to all the data that is allowed without any restrictions or conditions.

- **Constrained Security Group:** Users based out of this group will have access to the data that is allowed based on the condition, if the person satisfies that restriction/condition then they will be able to access.

Core
HCM (Human Capital Management)
Security Groups

Manager
Performs actions on members of assigned supervisory organizations. Approval authority for HCM, expense, and procurement business processes.

HR Administrator
Unconstrained access to create, maintain, view, and report on all HR operational data. Examples include compensation, compliance, hires, job changes, organizational assignments, personal data, positions and headcount. Approval authority for HCM business processes.

HR Compensation Partner
Approval authority for HCM compensation processes.

HR Partner
Support the HR Team by initiating HR functions for assigned organization. For example, Create Position, Hire, Compensation, Promote, Demote, Transfer, Terminations, etc.

Job Aid and Resources

Job Aid: Workday Basic Navigation for Managers

Website for additional information:
https://www.mobilecountyal.gov/workday-communication-materials

Website for Tenant 5 Testing and Scenarios:
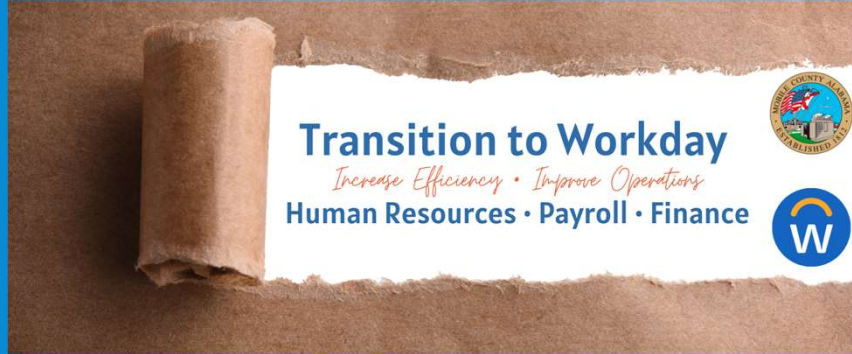https://impl.workday.com/wday/authgwy/mobilecountyal5/login.htmld

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Thank you for attending Workday Manager Training!

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Questions?

Time Tracking, Absence

Trainer

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Course Outline

Welcome and Introductions

Topics of Discussion

Demo of Job Aids

Topics of Discussion

- Securities

- Core Concept

- Workday Glossary

Securities

- **Payroll Clerk**
  - This security group can perform payroll functions for assigned cost center to ensure time is flowing correctly from time tracking and absence
- **Timekeeper**
  - Performs timesheet management functions for the assigned cost center
- **Absence Partner**
  - Constrained role based security group used to handle absence related approvals and tasks. This security group is able to access worker level time off and leave of absence date and modify balances/accrual rates via overrides
- **Manager**
  - Constrained role based security group assigned to supervisory organizations. This security group is able to and approve workers time off and leave requests/data. Most heavily used for time off approvals.

Core Concepts

- **Time Entry**
  - All time types that will add to your pay
- **Absence Entry**
  - Absence types that can add to your pay and will subtract from your accruals
- **Leave of Absence**
  - Leave types that will be in days, not hours like sick pay or vacation pay

- **Retroactive Processing**
  - Retro Pay functionality enables you to react to past payroll activity in worker's current payroll by: recalculating pay results for impacted prior periods, back to a specific date.
  - Reporting differences between the original and the recalculated pay results.
  - Paying the differences in the current period.

Workday Glossary

Time Block
- A time block carries information about a portion of time, such as number of hours worked or in/out times

Time Clock Event
- A time clock event describes a worker's actions, such as a check in or check out, on the web time clock or external time clock.

Reported Time
- A worker's time that has been entered, but had not had any time calculations applied

Time Entry Code
- A time entry code describes the type of time a worker enters, such as worked time or meal allowance.

Workday Leave Plans
- A subset of Workday absence that is used to calculate and track leave of absence eligibility and time taken

Workday Time Off Plans
- A subset of Workday absence that is used to calculate and track paid time off plans and time used.

Job Aids

- Review and Approve Time for an Employee
- Enter time on Behalf of an Employee
- Correct Time for an Employee
- Approve Employee Time off Request
- Enter Time Off on Behalf Employee
- Reports to Run

Thank you for attending Workday Training!

Questions?