Workday 101 for HR and Managers
Vision Statement

Implement a modern human resources management system (HRMS) to provide self-service tools with an intuitive and user-friendly design. The support team and new standardized processes will provide customers with the service, guidance, and partnering needed to drive success for the State of Maine. The team will anticipate, develop, and provide services to meet the evolving needs of our stakeholders, assisting them in providing excellent public service while maintaining transparency, accountability, and compliance.
Guiding Principles

• Executive Sponsorship and Engagement Throughout the Project

• Be Forward Thinking and Adapt to the Iterative Nature of Implementing New Technology

• Adopt Streamlined, Simplified, Industry-best Business Practices

• Foster an Environment of Collaboration

• Proactively Engage the agencies through Change Management and Communication
What is Workday?

A global human resources system that is used to manage and coordinate all the resources, information, and functions of an organization. System capabilities include managing resources, accessing and viewing personal, job, pay information in one centralized platform.
Workday Maine Project Scope
Benefits to Employees

Vision: Employee experience will be Simple, Intuitive and Responsive

Opportunities

• Elongated on-boarding process
• Subjective policy interpretations
• Multiple systems – multiple user names

Objectives

• 100% Reduction in Paper
• Single Source for Updates
• 1 system; 1 sign-on

Creating a simpler, better HR EXPERIENCE for the Internal Customer
Benefits to Managers

Vision: Empowering managers to see and act on their employee matters

**Opportunities**
- Multiple approval channels
- Disparate HR systems
- Inconsistent global HR processes

**Objectives**
- Single approval channel
- Single HR system of record
- Visible global and local processes

Creating a simpler, better way...for the Internal Customer
Benefits to HR

Vision: Enabling smarter and faster people decisions

Opportunities
• Stale data
• Manual/Convoluted data “pulled”
• Incomplete HR “picture”

Objectives
• Comprehensive HR picture
• Simplified real time reporting
• 100% predictive data analytics

Creating a simpler, better way...for the Internal Customer
## Key Workday Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Supervisory Organization</strong></td>
<td>Supervisory organizations group workers into a management hierarchy and are the primary organization type in Workday HCM. All workers are hired into a supervisory organization. Organization assignments such as company, cost center, and region can be configured for supervisory organizations, and unique business processes can be configured for them as well.</td>
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<tr>
<td><strong>Position</strong></td>
<td>Where a person or opening is in the organization. Most attributes are tied to the position directly (e.g. cost center and location)</td>
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<tr>
<td><strong>Job Profile</strong></td>
<td>Classifies the work/task to be done in a position.</td>
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<tr>
<td><strong>Role</strong></td>
<td>A collection of permissions in Workday that determine what can be seen and done in Workday.</td>
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</tbody>
</table>
| **Worker**            | Any person brought into the organization to do work  
  - Employee: Someone paid by payroll and can have comp data stored in Workday  
  - Contingent worker: Someone that is not an employee and not paid directly by SOM.                             |
| **Requisition**       | In Workday, job requisitions contain specific attributes about the position, as well as desired applicant characteristics and recruiting instructions. You can create a job requisition for an existing position, or create a new position. |
Supervisory Organizations
Supervisor Organizations

A Supervisory Organization is a type of Organization. In Workday, it is an organizational unit in which a Manager supervises other Positions/Jobs. Supervisory Organizations are arranged in a hierarchy.
Supervisory Organizations (continued)

- Supervisory organizations describe the organizational structure of the company
- They are a fundamental building block of the Workday system
- Workday organizes employees in supervisory organizations
- Employees are hired into jobs or positions associated with a supervisory organization
- Every position must be located in a supervisory organization
Supervisory Organization Example In Workday
Workday Business Processes
• A business process is a set of tasks that people initiate, act upon and complete in order to accomplish a desired business objective.

• Once a business process is initiated Workday
  – routes the tasks to the responsible roles (users who are capable of completing the tasks based on their membership in security groups)
  – and enforces security and business rules throughout the business process.
Business Processes Determine

Who approves or denies something that happened

Who needs to do additional tasks

Who needs to know something happened

What additional system events need to be initiated
## Business Process Terms

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<tr>
<td>Event</td>
<td>is a transaction that occurs within the application (e.g. Hire, Terminate, Create Position)</td>
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<tr>
<td>Task</td>
<td>is an activity (to do, action, approval) that the user needs to complete because it is a step in a business process</td>
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<tr>
<td>Action</td>
<td>allows either the assignee to update (enrich) the transaction or triggers a sub-process</td>
</tr>
<tr>
<td>Approval</td>
<td>allows the assignee to view information but not change it. The assignee may approve, deny, and sometimes send back for revision</td>
</tr>
<tr>
<td>Approval Chain</td>
<td>is used for approvals that travel up the organization hierarchy until a defined stopping point</td>
</tr>
<tr>
<td>To Do’s and Checklist</td>
<td>are tasks that are performed outside or inside of Workday. To Do is a manual task that can be assigned to a role. Checklist is a collection of To Dos.</td>
</tr>
</tbody>
</table>
Actions, Approvals, To Do’s

• Business processes are created using a combination of Actions, Approvals, Approval Chains, To Dos and/or Checklist

• The difference between Actions, Approvals and To Dos:
  – Action – Tasks or Events within Workday
  – Approvals – Approval of a Task or event within Workday
  – To Do – Reminder to do something inside or outside of Workday
Workday Roles: Who Does What

**Workday ROLES:**
- Are assigned to Positions
- Determine function in a business process (i.e. initiate, approve, etc.)
- Determine what you can see and do in Workday
- Provide access to data within the assigned cost center

**POSITIONS:**
- A Position is the “seat” that a specific Worker occupies
- A Position does not refer to a job title
- May be assigned one or many Workday roles

Workers are hired into Positions and inherit the Workday role(s) of the Position
HR Business Process Landscape

Recruiting to Onboarding Lifecycle

- Position
- Requisition
- Job Application
- Offer
- Hire
- Onboard

- Recruiting
- Compensation
- Recruiting
- Recruiting
- Recruiting
- Core HR
- Core HR

Employee Data

Core HR is about capturing and sharing employee data
Positions in Workday

• Positions are built within the context of a Supervisory Organization

• All staffing transactions including hires, promotions, and transfers, take place within or between supervisory organizations

• Before a supervisory organization can be staffed, an open position must be available
Position Management

Characteristics of Position Management

- Single positions are created for each job
- To hire, promote, demote, or transfer, a position must be available (approved) as of the initiation of the action
- Positions remain open after transfer, promotion, or termination (until closed)
- Positions can be frozen to retain position but not allow hiring into it
HR Processes – Recruiting to Hire
In Workday, a position is a seat in a supervisory organization, and a requisition is the permission to put an individual in that seat. Seats can be filled for new positions, editing positions (e.g., one FT to two PT) or refilling a vacating/vacated position.
Hiring in Workday

• In Workday, the Hire process becomes more seamless because most of the attributes are defaulted from the requisition.

• HR staff have the opportunity to review information for accuracy during the Hire process.

• Information needing updates may be edited prior to being sent for approval.
Workday Reports

- Access to reports in Workday is dependent upon your Security Role.
- Reports are either Workday delivered or customized to meet requirements.
Thank You for Viewing this Presentation.
Send questions or inquiries to: WorkdayTraining@maine.gov