Let’s Explore a New Workday!

TAMU Monthly HR Forum
September 18, 2017
AGENDA

- A&M Change Team
- Security Role Crosswalks
- Workday Resources
- Preparing for Go Live
  - Training
  - Deep Dives
- Q&A Review
- Change Team Contact Info
Meet the A&M Change Team

Dr. Barbara Abercrombie
Danny Grimes
Jim Nachlinger
Mary Schubert
Laura Dohnalik
Barbara Bayer
Brandy Kosh
Who am I ???
Become Familiar with New Terminology - Training is being assigned based on these roles

<table>
<thead>
<tr>
<th>Core HR</th>
<th>HR Liaisons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Partner</td>
<td>Absence Partner</td>
</tr>
<tr>
<td>Compensation Partner</td>
<td>HR Contact</td>
</tr>
<tr>
<td>HR Partner</td>
<td>I-9 Processor</td>
</tr>
<tr>
<td>Payroll Partner</td>
<td>Recruiting Coordinator</td>
</tr>
<tr>
<td>Talent Partner</td>
<td>Talent Analyst</td>
</tr>
<tr>
<td>Workers’ Compensation Partner</td>
<td>Timekeeper</td>
</tr>
</tbody>
</table>
Become Familiar with New Roles - Training is being assigned* based on these roles

Other Partners

- Faculty Partner*
- Graduate Studies Partner*

You & Me

- Employee as Self
- Retiree as Self

Manager*: Managers can see information about employees who report to them, and are involved in many HR, and payroll processes their employees need like hiring, time, time off and performance reviews.
Help is Here!
Know Who You Are

<table>
<thead>
<tr>
<th>Currently</th>
<th>Workday</th>
</tr>
</thead>
<tbody>
<tr>
<td>• LeaveTraq Dept Admin</td>
<td>• Absence Partner</td>
</tr>
<tr>
<td>• TimeTraq Dept Admin</td>
<td>• Timekeeper</td>
</tr>
<tr>
<td>• EPA Creator/HR Connect Dept Admin</td>
<td>• HR Contact</td>
</tr>
<tr>
<td>• Guardian I-9 Processor</td>
<td>• I-9 Processor</td>
</tr>
<tr>
<td>• PATH HR Liaison</td>
<td>• Recruiting Coordinator</td>
</tr>
<tr>
<td></td>
<td>• Talent Analyst</td>
</tr>
</tbody>
</table>
Welcome to Workday Help
This website is the Texas A&M System's link to training and help materials dedicated to our Workday solution. Please click around the website and check back often for new materials to help you explore your Workday!

Continue Reading...

Get Started
Learn more about Workday, terms and core concepts

Learn Workday
Watch tutorials, simulations and demonstrations

Use Workday
Job aids for your day-to-day tasks

TAMUS Community
Post and discuss Workday ideas and questions with other members in the TAMUS System

Get Answers
Answers to frequently asked questions

Need further assistance?
Please contact your HR, payroll or benefits coordinator for more information about Workday.
## Crosswalks to Workday

- BPP Screens to Workday Crosswalk
- EPA to Workday Crosswalk
- HRConnect to Workday Crosswalk
- iBenefits to Workday Crosswalk
- LeaveTraq to Workday Crosswalk
- Monthly Payroll to Workday Crosswalk
- Payslip to Workday Crosswalk
- TimeTraq to Workday Crosswalk
### EPA Crosswalk

<table>
<thead>
<tr>
<th>Description</th>
<th>Size</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA - Change of Source Funding</td>
<td>33.56 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Create Position</td>
<td>42.37 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Leave of Absence</td>
<td>34.25 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Miscellaneous</td>
<td>55.02 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - New Hire and Rehire</td>
<td>46.01 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Promote</td>
<td>12.00 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Retire</td>
<td>51.64 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Terminate</td>
<td>54.00 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
<tr>
<td>EPA - Transfer</td>
<td>143.45 KB</td>
<td><img src="#" alt="Download" /></td>
</tr>
</tbody>
</table>
Example of EPA Crosswalk Item

**EPA Crosswalk**

**Change of Source Funding**

A crosswalk from EPAs (current system) to Workday that represents the basic actions you take when processing an employee.

- **EPA Action**: what you are trying to accomplish with the EPA
- **Position or Occupant Action**: EPA commands you currently use to initiate occupant and position actions
- **EPA Path Action or Doc Type**: the EPA commands you select to perform the occupant or position action
- **Workday Business Process - Reason Code**: the Workday business process name that correlates with the EPA set of actions and reason code for that action if applicable
- **Key Concepts**: items to note and decision points

<table>
<thead>
<tr>
<th>EPA Action</th>
<th>Position or Occupant Action</th>
<th>EPA Path Action or Doc Type</th>
<th>Workday Business Process - Reason Code</th>
<th>Key Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change of Source Funding</td>
<td>Change employee cost allocation</td>
<td>New Iteration for PIN / Source of Funding Change</td>
<td>Assign Costing Allocation</td>
<td>• Change cost allocations for current period &amp; future periods = Assign Costing Allocation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Change cost allocations for a payroll already processed = Payroll Cost Transfer (FAMIS)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• You cannot use dates to stop pay. Cost allocations in Workday do not impact compensation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• To stop pay use Leave of Absence and Time Off Without Pay</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- Compensation is driven by Annual Work Period and Disbursement Plan dates</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Cost allocation can be assigned to the Worker, Position and Earning or the Worker and Position</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Always select the worktag ‘TAMUS Cost Center’ for cost allocation, not ‘Project’</td>
</tr>
</tbody>
</table>
where am i?
Business Processes (BPs) Flow Charts

http://employees.tamu.edu/workday/workday-hr-liaisons/business-processes/
Business Process Flowcharts, with Roles Specified
Workday Business Processes (BPs)

- HR- 020 Manage Recruitment
- HR-030 Manage Hire & Onboarding
- HR-040 Employee Data Changes
- HR-070 Performance Goals
- HR-090 Manage Classification & Compensation
- HR-110 Plan Workforce Jobs, Positions & Staffing
- HR-150 Manage Employee Separation & Retirement
- HR-180 Manage Payroll
- HR-190 Manage Time Off & Leave
- HR-200 Time Tracking
- HR-230 Delegation

Each of these has a list of Security Roles associated with it
Getting Everyone Ready to Use Workday
Known eLearning Issue

Flash Issue

Right click and select Allow
## Awareness Trainings - offered as eLearning

<table>
<thead>
<tr>
<th>General Awareness</th>
<th>Accommodation Courses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• GA010 TAMUS Workday Core Concepts</td>
<td>• Will be designated by “-A”</td>
</tr>
<tr>
<td>• GA020 Navigating Workday</td>
<td>- e.g. GA010 – A TAMUS Workday Core Concepts</td>
</tr>
<tr>
<td>• GA030 Workday’s Core HCM Concepts (Core)</td>
<td>- Currently under development</td>
</tr>
<tr>
<td>• GA040 Workday’s Approach to HR Business Processes</td>
<td></td>
</tr>
<tr>
<td>• GA070 Reporting</td>
<td>• Direct those needing accommodations to these courses</td>
</tr>
<tr>
<td>• SK120 Safety</td>
<td>• If someone has special accommodations, have them contact Rene at <a href="mailto:rquiroz@tamu.edu">rquiroz@tamu.edu</a></td>
</tr>
</tbody>
</table>
Sample Skills TrainTraq Registration (not available until October~ settle down eager beaver)

- SK210 Recruiting
  - Section 1: Monday Phone
  - Section 2: Monday Computer
  - Section 3: Tuesday Phone
  - Section 4: Tuesday Computer
  - Section 5: Wednesday Phone
  - Section 6: Wednesday Computer

- TrainTraq only allows one registration per person

- Registration will cut off for each section at 500 people

- Groups who attend together in a conference room will send a sign-in sheet to workday@tamus.edu

TrainTraq confirmation emails contain the log-in information for the sessions so don’t delete these!
Sample Sign In Sheet

<table>
<thead>
<tr>
<th>UIN</th>
<th>Last Name</th>
<th>First Name</th>
<th>Signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>Quiroz</td>
<td>Rene</td>
<td></td>
</tr>
</tbody>
</table>

- Required attendees (e.g. HR Partner) need to **sign** next to their name for **ALL** courses they attend
- Non Required attendees can fill out information
- Spreadsheets will be maintained by the facilitator
- Information will be added to TrainTraq transcript for documentation
Each skills week focuses on a different topic and offers a choice of three WebEx events, each focused on the same information.
# HR Liaison - General Awareness

<table>
<thead>
<tr>
<th>Security Role</th>
<th>GA010</th>
<th>GA020</th>
<th>GA030</th>
<th>GA040</th>
<th>GA070</th>
<th>SK120</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Center Approver*</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>SRS</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Absence Partner</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>HR Contact</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>I-9 Processor</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Recruiting Coordinator</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Talent Analyst</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Timekeeper</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>Immigration Services for Faculty &amp; Scholars (ISFS)</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>View Only</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International Tax View Only</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
</tbody>
</table>
HR Liaison Skills training - Training notification based on roles, all notifications will be issued by 9/28; **USERS will need to register!!** WebEx delivery

<table>
<thead>
<tr>
<th>Oct 16</th>
<th>Oct 23</th>
<th>Oct 30</th>
<th>Nov 6</th>
<th>Nov 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>Week 2</td>
<td>Week 3</td>
<td>Week 4</td>
<td>Week 5</td>
</tr>
<tr>
<td>T 10a – 12p</td>
<td>T 10a – 12p</td>
<td>T 10a – 12p</td>
<td>T 10a – 12p</td>
<td>T 10a – 12p</td>
</tr>
<tr>
<td>W 1p – 3p</td>
<td>W 1p – 3p</td>
<td>W 1p – 3p</td>
<td>W 1p – 3p</td>
<td>W 1p – 3p</td>
</tr>
</tbody>
</table>

**GA050 Workday Core HCM Concepts (HR Dept Processor / Liaison)**

**SK210 Recruiting**

**SK220 Staffing and Onboarding**

**Combined Course**
- **SK230 Goals and Performance**
- **SK240 Tracking Time**
- **SK250 Managing Time Off and Leave**

**Combined Course**
- **SK260 Answer Common EE Questions**
- **SK270 Answer Common Manager Questions**
- **Go Live Information**
Managers complete their Awareness and Skills training during the training windows; all material will be in TrainTraq
Manager Trainings- Completed thru eLearning

Awareness Training Assigned September 18

<table>
<thead>
<tr>
<th>Security Role</th>
<th>GA010</th>
<th>GA020</th>
<th>GA030</th>
<th>GA040</th>
<th>GA070</th>
<th>SK120</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>no</td>
</tr>
</tbody>
</table>

Skills Training Will Be Assigned October 23

- GA060  Workday Core HCM Concepts (Manager)
- SK410  Merit and Performance Management
- SK420  Managing Your Inbox
- SK430  Recruiting
- SK440  Staffing and Separation
- SK450  Time Off and Leave / Time Tracking

New managers, after October 23, will be assigned all courses at the same time by TrainTraq automatically.
# Data Warehouse Training - Open for registration NOW in TrainTraq for new Universe definitions

## Training Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 26, 9 am - 11 am</td>
<td>2113209</td>
<td>Workday Impact Training: Enterprise Data Warehouse</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Focus on Position, Position Source, Worker</td>
</tr>
<tr>
<td>September 28, 9 am – 11 am</td>
<td>2113210</td>
<td>Workday Impact Training: Enterprise Data Warehouse</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Focus on Pay History, Pay History FTE, Pay History Details</td>
</tr>
</tbody>
</table>

## Details

- Content delivered via WebEx
- HCM Universes and key changes are included in both events
- TrainTraq registration is required and is open now
- Formal invitations will be sent to all current Data Warehouse users
- Anyone is welcome to attend
- Sessions will be recorded
FAMIS Training Sessions - Not yet available for registration

<table>
<thead>
<tr>
<th>WebEx Sessions</th>
<th>Video Help</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>November 8, 9:00am – 11:00am</strong></td>
<td><strong>Payroll Cost Transfer (Payroll Correction)</strong></td>
</tr>
<tr>
<td>– Business Office Payroll Accounting</td>
<td>• Encumbrance Calculator</td>
</tr>
<tr>
<td><strong>November 16</strong></td>
<td></td>
</tr>
<tr>
<td>9:00am – 10:00am</td>
<td></td>
</tr>
<tr>
<td>– ADLOCs, Accounting Analysis and Overrides</td>
<td></td>
</tr>
<tr>
<td><strong>10:30am – 11:30am</strong></td>
<td></td>
</tr>
<tr>
<td>– Encumbrances, Salary Savings, and Budget Transfers</td>
<td></td>
</tr>
<tr>
<td><strong>BPP and FAMIS Users will be notified of these sessions</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Registration will be available on TrainTraq</strong></td>
<td></td>
</tr>
</tbody>
</table>
Prep Budget - Not yet available for registration

**Session 1**
November 9, 9:00am – 11:00 am
- Positions in Workday
- FAMIS Budget Module (No Change)
- Cost Allocations
- New Business Objects Universes
- Phase 1 of Budget

**Details**
- For Budget Officers and CFOs
- Registration will be available in TrainTraq
- Sessions will be recorded

**Session 2**
November 10, 9:00am – 11:00am
- Merit Roles
- Merit Module configured and key dates set
- Salary Plans for Faculty and Staff. (Grad Students not included)
- Reports for Phase 2 Process
- Cost Allocations during Merit Process
- Budget Update Process
- Merit Complete
Mark your calendar…

DEEP DIVE
The A&M System project team will be discussing inbox filters, delegation and search committees in recruiting via WebEx from 1:30-2:30 p.m. on the following dates.

- **September 21** – Managing Work with Inbox Filters and Delegation
- **September 28** – Search Committees in Recruiting

- **Join the Session**
  - Access code: 921 442 520
  - Password: helios

- HR Liaisons are invited to add the sessions to their calendar and join in to learn more!
Will the Executive Approver role be delegated from the Provost to the college Assistant Deans?

• The Provost has agreed to delegate this role to the assistant deans in the colleges, provided Mr. Pettibon is able to retain access to view records from the colleges.
• Mr. Pettibon will continue to handle the non-colleges in Academic Affairs.
• It may still be necessary to route to the Provost office via paper on select tasks, as appropriate.
• Other Vice Presidents will serve as Executive Approvers for their divisions, still to be determined.
What reports are available in Workday vs Business Objects?

- *Email sent to Project Team on 9/11/17*
- Departments may wish to cross-train their staff on the use of Business Objects so they’re prepared to pull down reports after Go Live.
I have a faculty member on LWOP until 1/16/18. How will I “end leave” in Workday?

• This is still under evaluation by the Project Team to determine the best method to handle these unique situations.

• It’s anticipated that the colleges/departments will most likely have to assist with manual entry after Go Live.
What will Recruitment & Workforce Planning require us to do with the position hiring file?

- Recruitment & Workforce Planning is aware that the documents currently uploaded for a posting in PATH will not be able to be uploaded to Workday. The documents will still be needed for compliance, record retention and review.
- Currently exploring the options for all related job requisition documents to be transmitted to Recruitment for completion of a hire and for record retention.
- Watch the HR Liaison Network News for more information about this solution.
Is there any way to extend the bi-weekly payroll due date?

- Payroll Services has a hard stop that does not allow any additional flexibility for moving the due date/time back.

- There are several factors that dictate the deadline and the time required from internal to external submittal. In order for Texas A&M University to get reimbursement from the State, payroll data must be submitted to the State of Texas Uniform Statewide Accounting System (USAS) in accordance with fixed timelines. In addition, there are timelines to ensure the Biweekly payroll direct deposit (ACH) data is routed to Wells Fargo and onto the Federal Reserve in order for the employees’ funds to be available on payday. Extending the internal submission timeline would not allow for sufficient time to complete these tasks as well as perform the processes required to ensure we release payroll data to BPP in a timely and accurate matter.

- The Wednesday 9:00am deadline from BPP to run Payroll applies to all Texas A&M University System members. Texas A&M AgriLife and the College of Engineering Payroll offices both have TimeTraq due Monday at 3:00pm as compared to Texas A&M University timeline of Monday at 4:00pm.
Will we be able to enter the exact time off, in hours of the day, in Workday?

- Currently Workday only allows you to enter the total number of hours you’re requesting time off. It doesn’t allow us to capture the actual time, such as you’re taking two hours from 3-5 pm.
- The System Project Team has voted for this enhancement on Workday’s Higher Education community brainstorm board, so it’s possible this functionality will become available with a future update.
- For now, managers can require the times to be entered in the comments (and send back if not done correctly).
Why is Classification & Compensation asking us to condense/consolidate my position descriptions?

• We needed to limit the number of duty sections in order to have the best chance of success for moving over the information with the fewest errors.
• Therefore the top 15 sections of duties will come over to Workday on the responsibilities section of the qualifications tab.
• TAMU only has a few PDs (less than 20) with more than 15 sections of duties and we will be reaching out to those departments this month about how to consolidate.
Will Workday’s Performance Management Module require each duty to be listed, and then evaluated?

- For the performance evaluation for most staff positions below the level of Director, each of the listed responsibilities in Workday can be given a rating, but Workday will not automatically require a rating on each.

- Current year’s performance goals should still be managed locally for future loading into Workday.
  - Paper form available here: [http://employees.tamu.edu/media/1318455/Performance_goals_next_review.docx](http://employees.tamu.edu/media/1318455/Performance_goals_next_review.docx)
My dept. head wants to approve bi-weekly payroll before it’s submitted. What suggestions do you have for handling this?

Here’s a possible solution:

- The bi-weekly employee submits their hours and emails their manager with a screen shot of their Workday timecard.
- The manager reviews the email and forwards the email with their OK to the department head.
- The department head is mapped to the Timekeeper role in Workday and submits the timesheet.
- The timesheet then routes directly to Payroll for processing.
- All parties need to be aware of, and adhere to, the due dates/times!

Best Practice: DH’s allow managers to handle
When can we expect a crosswalk for canned reports?

• Requested to help us understand the reports that will be available in Workday or Business Objects

• Some current-day approvals will no longer be available and will be replaced by said reports

• Expected in mid-November
Questions?

Laura Dohnalik  Ldohnalik@tamu.edu  862-3854
Barbara Bayer  bbayer@tamu.edu  862-1146
Brandy Kosh  b-kosh@tamu.edu  845-1691

workday.tamus.edu
it.tamus/projecthelios
Employees.tamu.edu/workday