AGENDA

• Welcome and Introductions
• Current State
• Key Discussion Items
  – Recruiting, Hiring
  – Time, Absence, Benefits
  – Security Roles
  – Business Process Routing / Approval
  – Payroll
  – Faculty Partner Role and Expectations
  – Tips and Tricks

• Q&A
Dr. Barbara Abercrombie, Executive Sponsor
Brandy Kosh, Change Champion (A&M)
Barbara Bayer, Project Coordinator (faculty)
Laura Dohnalik, Project Coordinator (staff)
Jim Nachlinger, Project Coordinator (HSC)

Scott Bauer | Tara Gray | Mary Schubert | Elizabeth Schwartz | Danny Grimes | Laura Quirino | Maria Murphy
Current State
Enterprise Resource Planning (ERP)

Around for decades – SAP, Oracle, PeopleSoft

- Integrates business processes across different functions of an organization
- Helps standardize business processes – consistency across an organization
- Helps optimize business processes
As with any **CHANGE**...

We are all **ADJUSTING** and **LEARNING**

Takes some **TIME**
Frustrating when...

- Something does not work for department
- Don’t understand something
- Lack of quick enough response time
- Cannot get answers or help
- Look to HR for help who may not have the answer…
Current State

22 days in operation

51,844 business processes completed
~ 2,356.5 per day

~150 emails / day into Workday@tamu.edu
~ 500 escalated to project team / system office
Current State

Learnings

- High level Workday education and documentation not specific to system members (e.g., TAMU)
- Recognizing how siloed we are
- Departments who previously thought not impacted are impacting other processes and practices
- Enabling communication, learning, and optimizing processes between silos

EXAMPLE:
HROE, Finance, Accounting, Payroll, DOF; Student Employment & Graduate Studies
Current State

How We Are Responding

Centralizing inquiries through Workday@tamu.edu email box

- Get a handle on inquiries (e.g., number, type, track resolution)
- Avoid multiple people receiving and potentially addressing (or assuming someone else is addressing) same inquiry
- Automated response
- Implement a ticket system
- Working on having someone reach out to you once ticket is assigned

Getting more support from project team and Deloitte

- Addressing issues and fixes, especially cross-system
- Educating us on TAMU specific processes and procedures
- Coordinating cross-functional meetings to learn and optimize interfaces between HROE, Finance, Accounting, Payroll, DOF
- Pushing for a Training Tenant to develop and deliver TAMU specific learning content
Automated response…

“…We will respond within 2 business days. If we do not respond to your inquiry within 2 business days, we are working with the TAMU System office to address your issue…”

Frequent inquiries
- Duplicate pre-hire records in Workday
- Entering time and time sheets
- Time entry for wintry weather day
- Payment for worked holidays
- SSO/Workday login issues
- Security roles

Approximately 150 emails coming in per day

Technical training team addressing ~ half without forwarding to SME groups… helps expedite response time

Workday feedback and improvement opportunities
Key Discussion Items

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- Payroll
- Faculty Partner
- Tips & Tricks
Recruiting, Hiring
Recruiting, Hiring

• Recruiting
  – Working with Applicants
    • Move Applicants Using Workday Inbox
    • Do Not Use The Recruiting Grid To Move Applicants
      – Can cause some steps/processes not to trigger
      – Can lead to duplicate pre-hire records if Find Duplicates Step isn’t triggered
  – Before Hiring An Employee
    • Use Search Bar To Find Name or UIN
    • Search For Existing Pre-Hire Record When Initiating Hire Process

• Hire/Onboarding
  – SSO Logon
  – Workday Link On SSO Menu
• **Hire/Onboarding (cont’d)**
  – New Hire (no UIN)
    • Search & Verify No UIN in UIN Manager.
      – DOB & Last Name, DOB & First Name, etc.
    • Create UIN in UIN Manager
      – Check box to add Workday Link
      – Enter email address of new hire
    • Worker account created in Workday ties to SSO
  – Former Employee or Student Hire (Existing UIN)
    • Use existing UIN
      – If duplicate UIN exists, email UINSupport@tamus.edu for fix.
      – Always use oldest UIN
    • Search Workday for Name or UIN…could have come over with conversion.
    • Worker account created in Workday (put UIN in the comments in Hire Process)
    • Email workday@tamu.edu to put Workday link on SSO menu prior to hire date
Time, Absence, Benefits
Time, Absence, Benefits

- **Timekeeping and Absence Issues**
  - Inclement weather closure for 1/16 loaded to Workday on 1/22
  - Federal Comp Time & State Comp Time
    - Other ID called “Comp Time Banked” has indicator of N or No for the additional time to be paid
    - Recent change to allow payment for work on a holiday rather than required to bank the time

- **Benefits – Correction Transactions Ongoing**
  - Continuing corrections from Workday transition, following up on deduction issues, dependent change inquiries, benefit changes, new employee enrollment, wellness and tobacco premiums, January retirements and more.
Security Roles
Security Roles

• HR Contact can assign role-based security roles to a position in Workday
  ✓ Assign Roles job aid available in Workday Help
  ✓ Routes to Security Partner for approval

• Submit security role requests to hrnetwork@tamu.edu
  ✓ The ugly truth…expect delays

• New HR Liaison Designation Statement of Responsibility Form available at employees.tamu.edu/liaisons

• Ensure business continuity within departments

• Partner Roles
Business Process Routing / Approval
Business Process Routing/Approvals

Altering business process routing (approvals)
  • Department-specific vs. campus-wide concern
  
  • Short-term solution vs. long-term impacts
    o Research and evaluate impact of change on other business processes
  
  • Submit change requests to System Project Team
    o Research and evaluate impact of change across other System members
  
  • Implementation of requested change by Project Team
Payroll
Payroll

• Useful Reports for Payroll Processing
  – Timekeeper’s Reports
  – Pay Calculation Results for a Period
• Lump Sum Vacation Payout, Death Benefits & FLSA Comp time Payout
• Tax Withholding on Non-Salary Compensation
  – Terminated employees
  – Gross Up: when department pays taxes instead of the employee
• Retroactive Process
  – Picks up changes to data that happened before current period
  – Manual correct unsupported retro processes
• Process (Audit & Validate) Bi-Weekly/Monthly Payroll
Faculty Partner
Faculty Partner

Business process involving faculty type configured to route to DOF for Faculty Partner action

- DOF Faculty Partner Responsibility
  - ensuring proper documentation is on file
  - process and approve faculty business process actions
  - create job requisitions
Tips & Tricks
Tips & Tricks

- Set account preferences to search “All of Workday”
- Right click to open in a new tab
- Use at least first 3 letters of first and last name in search
- Hit “enter” after entering text in search bar to get most options
- Go to Worker History to view processes
Questions?

workday@tamu.edu