SUMMARY OF WORKDAY KEY CONCEPTS

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INTRODUCTION TO WORKDAY KEY CONCEPTS

Workday offers a new way to view and organize workers in an organization. Workday is a cloud-based system that streamlines processes and information across the entire University, allowing for organizational transparency and providing a number of benefits.

This diagram depicts how information is organized in Workday.

The sections that follow go into more detail about this organization structure and describe the key concepts central to understanding and working in Workday.
SUPERVISORY ORGANIZATIONS

KEY CONCEPT DESCRIPTION

Supervisory Organizations

- A Supervisory Organization is a logical grouping of employees who report to the same Manager.
- A Workday Manager is defined as the person who is ultimately accountable for the completion of performance reviews.
- To be assigned the Manager role, a worker must be a member of the superior Supervisory Organization.
- Supervisory Organizations do not:
  - Track finances.
  - Include unpaid faculty appointments; these are tracked via the Academic Unit Hierarchy.

The Supervisory Organization Hierarchy

- Supervisory Organizations are arranged in a University-wide hierarchy, which is essential to how data is organized within Workday, and it provides the structure to:
  - Create reports within and external to Workday.
  - Provide access to worker data to workers as well as to their supervisors.
  - Route actions through business processes to the appropriate reviewers and approvers.
  - Ensure only the appropriate people have access to employee data (through assigned security roles).
  - Provide the framework for assigning security roles to workers.

WHAT THIS MEANS TO UW

- There is currently no single source of data on the UW “reports to” structure in existing systems. Instead, we are using a number of limited organizational definitions (PUC, home department, org code, etc.) to segment workers in reports and integrations.
- The Supervisory Organization provides a singular, complete, and accurate representation of worker “reports to” relationships.

Anticipated Benefits

- Provides a “reports to” view of workers.
- Produces greater clarity on how workers are functionally organized.
- Provides a flexible and scalable system of record and the ability to see changes in workforce over time.
- Allows access to systems or physical locations based on membership to a Supervisory Organization or through the relationship of one Supervisory Organization to another.
Anticipated Challenges

- Departments will have to make a conceptual shift in how they talk about and organize their workers.
- “Supervisory Organization Manager” has a specific meaning in Workday as it relates to a role.
- Departments must understand that regardless of a business title, such as Director, Supervisor, Assistant Dean, they will have a role of “Manager” in the Workday Supervisory Organization.
- Departments may have situations where they have multiple supervisors involved in decision-making for their workers. In these instances, they will have to choose who the “Manager” is for that supervisory organization and develop processes outside of Workday to ensure they are meeting their departmental business needs.

NAMING CONVENTIONS

Example A: Naming Conventions for Supervisory Organizations

There is a governed naming convention for each Supervisory Organization, which represents the existing administrative description of what those organizations do and represent. Organizations in Workday appear with a code representing the unit, followed by the descriptive name for the Supervisory Org, followed by the person currently occupying the Manager position:

The Supervisory Org Display Name will be formatted as follows:

**Code: Supervisory Org Name (Manager’s Name)**

Ex. UW Med: UWMC - Administration (Geoff Austin)

UW-IT: Learning Technologies (Nathan McKee)
SUPPLEMENTAL INFORMATION

Illustration A: Basic Example of a Supervisory Organization Hierarchy

- UW Educational Outreach (Manager: Ashley)
  - Position 1: Bernard

- Academic Programs (Manager: Bernard)
  - Position 2: Carol
  - Position 3: Derek
  - Position 4: Evan

- Writing Certificate Programs (Manager: Carol)
  - Position 5: Falacha
  - Position 6: Greg

- Art Education Project (Manager: Derek)
  - Position 7: Helen
  - Position 8: Irene
  - Position 9: Josh

- Program Operations (Manager: Evan)
  - Position 10: Karen
STAFFING MODELS AND POSITIONS

KEY CONCEPT DESCRIPTION

Staffing Model

- Staffing Models determine how jobs are defined and filled; they provide different levels of control over staffing and they support different staffing goals.
- In Workday, every Supervisory Organization must be associated with a Staffing Model.
- Like many universities, the UW has opted to use two staffing models in Workday: Position Management and Job Management.
- The Position Management and Job Management models provide units with the option to choose the hiring method that most closely matches their needs, the flexibility of budgeting for positions, and the ability to reflect how workers are managed within an organization’s structure. To see a diagram of Position Management versus Job Management, see Diagram A, below.

Position Management

- Position Management is the primary, default staffing model used by the UW.
- With Position Management, organizations are staffed by creating, defining, and filling positions. A position is described as the “chair” that a worker fills when he or she is hired. That “chair” remains, even when the worker leaves, for example, through a job change or separation.
- With Position Management, units can:
  - Track and report on filled and unfilled positions (vacancy reporting).
  - Plan and budget for vacancies and filled positions.
  - Track position history.
  - Simplify security role assignments by attaching a role to a position rather than to an employee.
- Position Management is required for the following employee types and subtypes:
  - Multiyear and indefinite Academic faculty
  - Research Associates
  - Staff – Regular, Fixed Term, Temporary, Fixed Duration LOA and Project
  - Contingent workers that require a security role in Workday
Job Management

- Job Management provides greater flexibility of position planning and the management of positions in Workday.
- Job Management does not track worker history. When a worker in a Job Management organization leaves, his or her “seat” disappears.
- Job Management allows units to do the following:
  - Set hiring restrictions equally to all jobs in a Supervisory Organization based on job family, job profile, worker type, location, and full- or part-time status, or set no hiring restrictions for the jobs in the organization.
  - Track and report on filled jobs only.
  - Use a single requisition to hire multiple workers (requisition fulfillment is not tied to a specific position).
- Job Management is **required** for the following employee types and subtypes:
  - Academic faculty who have one-year appointments or less
  - Senior Fellows
  - All students
  - Contingent Workers (except for those who will manage other workers; those individual contingent workers must be in a position)

Diagram A: Position Management versus Job Management
WHAT THIS MEANS TO THE UW

Anticipated Benefits

- The implementation of two staffing models in Workday provides the following benefits:
  - Ability to match a hiring method to the particular needs of a unit.
  - Flexibility between budgeting for long term positions and immediate/high-turnover staffing needs.
  - Ability to reflect the way workers are managed in the Supervisory Organization structure.
- Position Management provides greater control over hiring, headcount reporting, vacancy reporting, and maintenance of role assignments. It also gives the necessary information to conduct a centralized and standardized process for position planning, enabling units to plan and budget for vacancies and filled position.
- Job Management provides greater flexibility in hiring, easy adjustment of staffing levels in order to respond to emerging or cyclic business needs, and removes the administrative burden for organizations with consistent staffing changes.

Anticipated Challenges

- Implementing two staffing models, while necessary to meet the needs of the University’s broad variety of organizations, also introduces the following challenges:
  - More complex Supervisory Organization Hierarchy
  - More complicated reporting for units that use both Staffing Models
JOB PROFILE, JOB FAMILY, AND JOB FAMILY GROUP

KEY CONCEPT DESCRIPTION

- Once you have determined whether a new position you are creating belongs in a Position Management or Job Management Organization, the next step is to determine the Job Profile.
- A Job Profile is a record of information about a job and includes a summary, description, and the job’s key characteristics, such as exempt status, pay rate type, job classification groups, and compensation grade.
- The Job Profile is a key component to developing an effective workforce management system.
- Workday organizes all Job Profiles into Job Families, a grouping of Job Profiles, and a Job Family Group, a collection of Job Families.
- In Workday, when you create job openings or fill jobs and positions in a Supervisory Organization, you will select from a collection of job profiles. Once the Job Profile is selected, the Job Family will default.
- Workday allows for a Job Profile to belong to one or more Job Families.

Table A: Job Family Groups and their Associated Job Families

<table>
<thead>
<tr>
<th>JOB FAMILY GROUP</th>
<th>JOB FAMILIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>STAFF</td>
<td>Classified Non Union</td>
</tr>
<tr>
<td></td>
<td>Contract Classified</td>
</tr>
<tr>
<td></td>
<td>Other Staff</td>
</tr>
<tr>
<td></td>
<td>Professional Staff</td>
</tr>
<tr>
<td>ACADEMIC PERSONNEL</td>
<td>Academic Staff</td>
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<tr>
<td></td>
<td>Educator</td>
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<td></td>
<td>Extension Lecturers</td>
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<tr>
<td></td>
<td>Faculty - Annual or Shorter</td>
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<td></td>
<td>Faculty-Indefinite and Multi-Year</td>
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<tr>
<td></td>
<td>Librarian</td>
</tr>
<tr>
<td></td>
<td>Medical Residents/Fellows</td>
</tr>
<tr>
<td></td>
<td>Senior Fellows/Trainees</td>
</tr>
</tbody>
</table>
WHAT THIS MEANS TO UW

- Certain historical job codes from HEPPS are being converted to Job Profiles in Workday.
- While HEPPS allowed for the same job code to have a monthly or hourly paid designation, Workday does not. Therefore, some job codes will become more than one Job Profile to delineate between pay type (e.g., hourly, monthly, stipend) and FLSA exemption (exempt or nonexempt).

Anticipated Benefits

- Workday maintains a standardized skeleton containing a summary, description, and qualifications of each Job Profile, which streamline the creation of new positions.
- A naming convention will be used to make Job Profiles easily identifiable.
- More than one Employee Subtype may use the same Job Profile.
- Job Profiles will be in no more than two Job Families. Doing this makes Job Profiles more searchable and enables reporting (EEO, federal and state reporting, workers comp, etc.) when querying on specific job classifications.

Anticipated Challenges

- Job Profiles require careful maintenance to stay up to date. This includes but is not limited to: activating or deactivating, organizing Job Families and Job Family Groups, and ensuring correct FLSA designations similar to the maintenance in HEPPS.
- If any attributes of the Job Profile change, for example, in terms of union status or FLSA exemption, other values need to be kept in sync, like job classifications.
- As units create new positions, there will be a need for an in-depth knowledge of Job Profiles to identify the appropriate one. The ISC, which is responsible for maintaining the Job Catalog, will provide the resources necessary to help departments choose Job Profiles.
ACADEMIC APPOINTMENTS AND HIERARCHY

KEY CONCEPT DESCRIPTION

Academic Appointments
- Appointments in Workday are separate from positions. Academic Appointments track a person’s academic relationships and the characteristics of those relationships, such as start dates, end dates, appointing unit, rank, etc.
- Academic Appointments can be updated in the event of a reappointment or promotion.
- Academic Appointments can be ended independent of a separation, such as in the case of non-reappointment of someone’s adjunct appointment.
- A person can have multiple Academic Appointments in Workday.
- The following are Academic Appointment operating rules, as defined by Workday:
  - Academic Appointments can be held by workers or by unpaid academic affiliates. All academics have an Academic Appointment in Workday.
  - Academic Appointments are situated within the Academic Hierarchy, which is different from the Supervisory Organization Hierarchy.

Academic Hierarchy
- Academic appointments are situated within the Academic Hierarchy, which is different from the Supervisory Org Hierarchy.
- The academic hierarchy configuration is designed to be flexible. It can accommodate various structures for different units by assigning each unit to an appropriate “Level.” For example, some schools are under colleges, and the academic administrator of the school is a director, whereas other schools have a dean.
- Both units are called a “school” but they are assigned different Levels in Workday. A school with a director is assigned to the same level as a department with a chair. A school with a dean is assigned to the same level as a college with a dean.
- Structures do not need to have units assigned to all Levels.
- Academic units in the academic hierarchy must be linked to appropriate supervisory organizations. In general, the two structures are similar. One noticeable difference is that positions belong in the supervisor’s organization, so a Dean’s position will be in the Provost’s Supervisory Organization, but the Dean’s academic appointment will be in their college.

Anticipated Benefits
- Accurate information about a person’s academic relationship, including end dates where appropriate. Workday minimizes opportunities for mistakes.
- Better reporting due to better information.
• The ability to track endowment appointments and tenure percent in the same system that tracks titles.
• The ability to distinguish between paid and unpaid relationships.
• Academic appointments will only be made in academic units.
• Simplified reporting and a more complete picture than is currently available. There will not be a need to compare two different systems.

Anticipated Challenges
• The concept of academic appointments being different from positions is a new one. It may be difficult to understand that not every title will be a position.
• Enforcement of academic relationship policies and practices in the system new for some units.
• Some processes for paid and unpaid academics will be different in Workday.

Policy Implications
• Only approved academic appointing units will be part of the Workday academic hierarchy.
• If updates are needed for the academic track types/categories/groups/ranks, Academic Personnel will contact the ISC and the ISC will make the updates.
SUPPLEMENTAL INFORMATION

Illustration A: Academic Unit Hierarchy with Units Assigned to Appropriate Levels
Illustration B: Comparison of the Supervisory Organization Hierarchy to the Academic Unit Hierarchy
EMPLOYEE TYPES and SUBTYPES

KEY CONCEPT DESCRIPTION

Employee Types
Employee Type differentiates between two major categories of workers in Workday: Employees and Contingent Workers.

- Employees: Workers who may be paid wages (W2) and include paid faculty, student employees, staff, retirees, and stipends. Unpaid Academic Affiliates are also considered employees because they may sometimes be paid.
- Contingent Workers: Individuals who are neither paid employees (W2 wages from the UW) nor Academic Affiliates in Workday. These include contractors, vendors, consulting agency employees, the attorneys general, and others.
- Both worker types are placed in Supervisory Organizations through either the Position or Job Management Staffing model. This enables the tracking of Workday business processes that include review, approve, and notification steps.
- Like employees, Contingent Workers may have a job profile specific to their body of work, function, or relationship with the University.
- Campus will place contingent workers in a general Job Profile. Those in Medical Centers will be placed into a more specific profile to reflect the work being performed.

Employee Subtypes

- Employee Subtypes delineate between workers in each Employee Type.
- For employees, it is at the subtype level that decisions between whether a worker should be in or out of a position should be evaluated.
- Employee sub-types are assigned per position of the worker, not per worker, for those individuals holding more than one position.

WHAT THIS MEANS TO UW

- Employee Types and Subtypes enable the University to determine which workers will be included in Workday (see Illustration A in the Supplemental Information section, below).
- Though Contingent Workers are distinct from paid employees, Workday enables the University to maintain data on these Workers to support Identity and Access Management, as well as other Workday integrations.
- When they are included in Workday, Contingent Workers may be assigned Security Roles to perform tasks and actions and view data when necessary.

Anticipated Benefits

- The two high-level groups of Employee Types delineate who is or is not paid in Workday.
• Employee Types enable staffing models for organization structures, position management, requisitions, reports and inquiries, etc.
• Employee subtypes help designate between permanent employees and those with limited-term relationships that anticipated have end dates.

Anticipated Challenges
• Workers must be placed in the appropriate Type/Subtype to be useful to the enterprise for reporting and regulation requirements.
• Because multiple job profiles can belong to multiple employee subtypes, there is potential for inaccurate employee subtype selection when creating a position or job (e.g., select a fixed duration LOA Teamsters 117 job profile, which is an inaccurate combination).
• Fixed Duration Appointments (FDA) have undergone significant transformation from current state, so departments will need to be trained on FDA changes. These are single job profiles and now are any number of job profile with the FDA as a subtype.
SUPPLEMENTAL INFORMATION

Illustration A: Worker Type Decision Tree

- **Is paid by UW Payroll (W2)?**
  - **Yes:** Employee in Workday
  - **No:** Potentially Contingent Worker

- **Is potentially paid by UW Payroll?** (e.g., BOR, Pension payments, stipends)
  - **Yes:** Employee in Workday
  - **No:** Potentially Contingent Worker

- **Is PDR Faculty, working at UW but is paid PDR by other areas (e.g., Children’s hospital and UW Physicians)? Have primary physician relationship with UW and often move between REG and PDR pay.**
  - **Yes:** Employee in Workday
  - **No:** Potentially Contingent Worker

- **Is unpaid but has an academic appointment with the UW?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Need to approve time in WD or Kronos?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Need to schedule or track time in Kronos?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Need to identify skills for scheduling?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Require system access that requires EDP?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Need to be included in org reporting?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Duration of association with UW is less than 1 week?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Length of association on an ongoing basis is greater than three days per week?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

- **Individual volunteers time worked?**
  - **Yes:** Employee in Workday
  - **No:** Not in Workday

**Not in Workday**

**Contingent Worker in Workday**

**Academic Affiliate in Workday**
<table>
<thead>
<tr>
<th>Employee Subtype</th>
<th>Description</th>
<th>Legacy Description</th>
</tr>
</thead>
</table>
| Regular          | Describes permanent employees whose positions do not have end dates (e.g., 99-99-9999) and are 50% FTE or greater. These include:  
  - Print Plant Hourly (ECS P)  
  - ICA contract employees (ECS I)  
  - Hall Health Physicians (ECS D)  
  - Professional staff employees (ECS E, which excludes 11850 and PSTAs)  
  - Classified staff (ECS C)  
  - Bargaining contract classified staff (ECS B, which exclude FDAs)  
  - Faculty (ECS F) indefinite faculty and librarians  
  These also include regular cyclic employees who have service periods of less than 12 months. | Described as “regular” or “permanent” relationships |
| Regular PDR      | ECS F, indefinite but comp grade is Paid Direct | |
| Fixed Term       | Describes employees whose positions have anticipated end dates to their employment relationship. These include:  
  - Professional Staff Temporary Appointments (11655, 19650, 11650)  
  - Graduate students paid a salary (ECS G)  
  - Exempt (ECS T) Job Profiles:  
    - Fee Based Professional Staff Assignment (11861)  
    - Limited Term Prostaff (11850)  
    - Post Bac (11819)  
  - Doctoral Psychology Intern (ECS E, 11657) | Currently described as “limited term” relationships |
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Term PDR (Fixed Term)</td>
<td>ECS F, indefinite but comp grade is Paid Direct</td>
<td>ECS F, term appointment</td>
</tr>
<tr>
<td>Fixed Duration Leave of Absence</td>
<td>Describes employees whose positions are contract classified Fixed Duration Appointments (FDA) for Leave of Absence.</td>
<td>Currently WFSE and SEIU 925 Fixed Duration Appointments (FDA) Job Profiles 8888 and 8601</td>
</tr>
<tr>
<td>Fixed Duration Project</td>
<td>Describes employees whose positions are contract classified Fixed Duration Appointments (FDA) for Project.</td>
<td>Currently WFSE and SEIU 925 Fixed Duration Appointments (FDA) Job Profiles 7777 and 8600</td>
</tr>
<tr>
<td>Temporary</td>
<td>Describes hourly temporary employees whose positions have end dates.</td>
<td>Currently described as “temporary” relationships</td>
</tr>
<tr>
<td>Temporary Hourly Staff</td>
<td>These include:</td>
<td></td>
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<tr>
<td></td>
<td>· Classified non-union staff (ECS C)</td>
<td></td>
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<tr>
<td></td>
<td>· Bargaining contract classified staff (ECS B (for SEIU 925 and WFSE, SEIU 1199 - 21034, 21035, 21038, 21039), excluding FDAs)</td>
<td></td>
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<tr>
<td></td>
<td>· “Exempt” staff (ECS T) Job Profiles:</td>
<td></td>
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<tr>
<td></td>
<td>- Temporary Staff Helper (11863)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Temporary Staff Helper A (11822)</td>
<td></td>
</tr>
<tr>
<td>Nine-Month Summer</td>
<td></td>
<td></td>
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<tr>
<td>-------------------</td>
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</tr>
<tr>
<td>ECS F, nine-month summer positions</td>
<td>Academic Personnel Family – Faculty- Multi-Year/Indefinite</td>
<td></td>
</tr>
</tbody>
</table>

- Nursing Tech Non UW Student (11835) subject to 1050 monitoring
- Assistant Non UW Student - Work study (11836)
- Print Plant Temporary Assignment (11899)

- Undergraduate students (ECS U), excluding ASUW Appointee
- Graduate students paid hourly (ECS G)
CUSTOM ORGANIZATIONS

KEY CONCEPT DESCRIPTION

Custom Organizations

- In Workday, a Custom Organization captures a service period, and every employee must be assigned a value for this organization.
- When a new position is created the service period defaults to “9”, representing a 9-month faculty position, and to “12” for everyone else.
- The Create Position business process calls the Change Organization Assignments subprocess, where the service period can be updated to one of the following, if necessary: 9, 9.5, 10, 10.5, 11, 11.5, or 12.

Service Periods

- A service period represents the number of months an employee is scheduled to work each year.
- Most staff employees have a service period of 12 months, indicating they are scheduled to work 12 months each year.
- Some staff work cyclic year schedules that include a scheduled period of leave without pay each year due to known, recurring periods in the annual cycle where they are not scheduled to work. These positions are called Cyclic Year positions.
- Faculty are not typically considered “cyclic year” positions in Workday. The only exception is Educators who are academic staff and have service periods of more than 9 months and fewer than 12 months.
- Faculty may have a service period of 9 months or 12 months, depending on the school or college.
- For faculty who are hired to work short-term, such as a part-time lecturer who is hired to work only one quarter, they should be assigned the service period associated with their school.

Work Study

- A Custom Organization has been identified as a solution for maintaining the identification of Work Study. This Custom Organization applies only to individuals covered by the Job Family Group “Student Employees.” The available custom organizations:
  - Federal Work Study – UW
  - Federal Work Study – Outside Agency
  - State Work Study
  - America Counts
  - America Reads
  - Jumpstart
- Only those with the role of Work Study Office Coordinator or the Payroll Office Partner can add a Work Study Goal Amount.
- In the Work Study office, a separate database is maintained to monitor the award amounts for each student as they work hours.
• The staff in the Work Study Office must work with departments to ensure a student does not receive more money than has been awarded to them.
• State and Federal Work Study awards will use earn codes (WSS and WSF) that have a costing allocation assigned to them for 60% of the student workers gross pay. The additional 40% will be paid by the Default Cost Center assigned to the Work Study position.
• Jump Start, America Reads, and America Counts awards will be paid 100% based on the costing allocation assigned to the WSL earn code.

Service Periods and Absence
The assignment of the correct service period in Workday is critical as this value, in combination with the job profile, is used by Absence to drive worker eligibility for the Leave Type of “Cyclic Yearly Leave.” Specifically, only workers with a Service Period of less than 12 months will be allowed to use this leave type. Once a worker has been placed on a Cyclic Yearly Leave, Benefits, Compensation, Time, and Payroll use that leave status as an indicator to apply alternative processes and/or rules for that worker. See below for a summary of how Service Period and Cyclic Yearly Leave impacts each functional area.

Cyclic Yearly Leave and Cyclic Yearly Time Off
• Cyclic Yearly Leave and Cyclic Yearly Time Off are available only to workers with a service period less than 12 months. Additionally, workers must be in a job profile that is eligible for cyclic yearly leave (configured on the job profile as a job classification). Cyclic Yearly Time Off is only available once a worker is placed on a LOA – Cyclic Yearly Leave of Absence.
• It is intended that employees in cyclic year positions accrue vacation time off and sick time off for the overall number of months worked. Entire months designated as a cyclic yearly leave period would not normally accrue time off, whereas partial months would accrue at the beginning of the cyclic period, but not at the end of the leave.

Payroll
• When a worker is on a Leave of Absence (LOA) with a leave type of LOA - Cyclic Yearly Leave, Payroll uses the calculated field in order to drive the appropriate LTD deduction.
• By default, Workday is paying on a 12-month basis unless otherwise specified by a pay schedule, such as one-time payment or academic pay. Pay schedule is not affected by the Service Period for Staff.

Compensation
• Faculty who work a 9-month service period will need to be placed on Summer Hiatus Leave of Absence for the months they do not work in order to stop pay.
• Educators who work less than 12 months will put in “School Break” time offs to stop pay during the time they are not scheduled to work.

Time
• When worker is on a Leave of Absence (LOA) with a leave type of LOA - Cyclic Yearly Leave, Cyclic Time Off is an option for time entry.
COSTING ELEMENTS

KEY CONCEPT DESCRIPTION

Costing Allocations

- Currently, UW budget numbers are the costing element for all UW financial transactions. In Workday, UW budget numbers are referred to as “Cost Centers.”
- Costing Allocations are the mechanism through which payroll results are expensed and payroll encumbrances are distributed to the appropriate cost centers and/or project cost accounting codes (PCA codes).
- Costing Allocations are the method for determining the percentage of labor that is costed when an employee is paid on more than one UW budget, and are only assigned to positions that meet that criteria. The allocation of costing happens at many levels (see Illustration A, below):
  - Worker/Position (Job)
  - Worker/Position/Earning
  - Earning (Tenant-wide)
  - Payroll Input Overrides
  - Payroll Input using a specific cost center
  - Time Tracking time block overrides
- Costing Allocations most commonly happen at the Worker/Position (Job) level. This determines the primary costing for the worker’s compensation.
- For salaried employees, the position FTE determines what percentage of the monthly salary they receive, and then the costing allocation is applied to total pay amount.
- When a specific part of an employee’s compensation has a separate costing requirement, a costing allocation can be assigned to that earning directly at the Worker/Position/Earning level.
- The UW has several earnings that have costing applied to them for all workers. Those earnings have costing allocations assigned at the Earning level and will not be impacted by other costing elements.
- The final costing level is the Payroll Input level. This level is a complete override of other costing levels associated with the worker. This level is used when the costing (cost center and/or PCA code) is applied as an override directly to time blocks in Time Tracking and when the Payroll Office applies a costing override to any payroll input transactions.
- When assigning a grant-related costing allocation, the grant worktag related to the corresponding cost center is automatically assigned as a costing worktag. The grant worktag is used by the payroll encumbrance processes, which need to distinguish between grant- and non-grant-related payroll encumbrance transactions.
Anticipated Benefits

- Allows departments to split payroll transactions to charge and encumber the appropriate UW budgets at the appropriate level.
- Integration between Workday and FAS will ensure that paid FTE/hours/amounts will be accurate and consistent with current reporting requirements.

Anticipated Challenges

- “New math” for labor distributions. Departments will need to learn how to allocate their costing based on how Workday pays salary (FTE applied to compensation directly before costing is applied).
- Costing distribution within the costing allocation must always equal 100%, which is a new concept for Costing Allocation Coordinators to understand.
- Time-off hour blocks do not allow for cost center and PCA overrides in Time Tracking and Absence modules.
- The Shared Leave process has a separate method for charging costs for shared leaves.
- The donation request from the leave donor will route from the Absence Partner to the department Costing Allocation Coordinator. The Costing Allocation Coordinator will be responsible for ensuring the donated time is charged to the correct departmental budgets.
SUPPLEMENTAL INFORMATION

Illustration A: Positions and Cost Centers, including Costing Allocations
COST CENTERS AND COST CENTER HIERARCHY

KEY CONCEPT DESCRIPTION

Cost Center

- **Workday Cost Centers** are features of Human Capital Management (HCM) and Payroll transactions that have a financial impact.
- Each position in Workday is assigned a Cost Center, currently referred to as a *budget*, and workers are assigned to positions through staffing transactions.
- Cost Centers provide HEPPS-equivalent costing data to downstream dependent systems because they represent specific UW budgets and are sourced from FAS.
- Workday Cost Centers must be assigned to a *Cost Center Hierarchy*.

Cost Center Hierarchy

- Workday Cost Centers must be assigned to a *Cost Center Hierarchy*, which provides a way to view groups of workers separate from the Supervisory Organization and enables reporting and integrations to meet business requirements.
- The Cost Center Hierarchy enables users to segment workers by the levels in the Cost Center Hierarchy through the following attributes:
  - Cost Center on position
  - Costing Allocation Cost Center(s) on position or on an earning itself
  - Cost Center on Supervisory Org assigned to position

Anticipated Benefits

- Allows segregation of HR and financial transactions in Workday for routing or reporting purposes. (e.g. routing of costing changes differently than job title changes)
- Supports reporting of workers associated with cost centers owned and/or managed, as well as reporting on who owns or manages which cost centers.
- Increases quality of financial data in Workday by providing a strictly financial view of worker activities to specific individuals charged with financial management, reducing likelihood of corrections being needed in FAS and reducing likelihood of bad data in downstream systems.
APPROACHES TO SECURITY

KEY CONCEPT DESCRIPTION

- Role-based security groups are a key facet of the Workday design and can be summarized as follows:
  - Assigned to a position
  - Based on responsibility/role in an organization
  - Inherited from the superior organization if not filled
  - Access is “constrained” or limited to the Supervisory Organization

- All Administrator responsibilities will reside with the Integrated Services Center (ISC). These roles will also act as the initiators on certain business processes related to system setup and maintenance. User-based security groups, such as Payroll Administrator, will exclusively be assigned by the Security Administrator in the ISC.

- The Manager role will not have any business process initiation functionality built in. In the Medical Centers, Managers will be able to create positions and job requisitions. They are also involved in Performance Management business processes.

- The following is a list of the primary departmental roles:
  - Academic Partner
  - Academic Dean/Dean’s Delegate
  - Academic Chair/Chair’s Delegate
  - Additional Approver 1
  - Additional Approver 2
  - Costing Allocations Coordinator
  - HCM Initiate 1
  - HCM Initiate 2
  - HR Partner
  - I-9 Coordinator
  - Medical Centers Performance Roles
  - Time and Absence Initiate
  - Time and Absence Approver

- The Academic Partner or HR Partner will be the primary departmental or unit approver for most business processes. However, a second approver role, called “Additional Approver 1” will also be available in certain business processes.

- One does not need to be a member of a supervisory organization in order to have a security role which supports that supervisory organization.

- A description of responsibilities covered by the Initiator roles is outlined below:
Table A: Initiator Roles and Descriptions

<table>
<thead>
<tr>
<th>Initiator Role Name</th>
<th>Initiator Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>As-Self Initiate</td>
<td>This role is built into Employee-As-Self and Contingent Worker-As-Self which allows the employee to perform tasks like updating their contact information, emergency contacts, legal name, etc.</td>
</tr>
<tr>
<td>Costing Allocations Coordinator</td>
<td>This role initiates the Assign Costing Allocation business process.</td>
</tr>
<tr>
<td>I-9 Coordinator</td>
<td>This role initiates the Complete Form I-9 business process.</td>
</tr>
<tr>
<td>HCM Initiate 1</td>
<td>This role initiates most of the less complex business processes and can initiate all of the processes that the As-Self Initiator can initiate on behalf of the employees that they support, as well as some additional business process, such as Change Emergency Contacts.</td>
</tr>
<tr>
<td>HCM Initiate 2</td>
<td>This role can initiate all of the business processes that the HCM Initiate 1 role can initiate, as well as the more complex business processes that are distributed to the departmental level. This initiator role can initiate business processes such as Create Position, Hire, Change Job, Add Job, Contract Contingent Worker, Termination, End Contingent Worker Contract, etc.</td>
</tr>
<tr>
<td>Performance Initiate</td>
<td>This role can initiate all of the business processes related to performance management, such as Start Performance Review.</td>
</tr>
<tr>
<td>Time and Absence Initiate</td>
<td>This role can initiate all business processes related to Time and Absence functionality, such as Enter Time, Correct Time Off, and Assign Work Schedule.</td>
</tr>
</tbody>
</table>

- Both initiator and approver roles have view access to all of the nonsensitive data elements in Workday related to the employees in the Supervisory Organizations to which they are assigned.
- Unconstrained view-only roles, allowing view access to nonsensitive data across all Supervisory Organizations, are available and either allow or grant view access.
- There are multiple view-only roles to serve various data access needs.
- The view-only roles are automatically included with certain departmental roles.
● The view-only roles may also be requested for employees who have no other role in Workday but who have a business need to see information about other workers.
● Changes to role-based security groups can be requested by departments or units via an ISC intake process.
● For those units with shared services support models, visibility into transaction routing will need to be accommodated through reports.

WHAT THIS MEANS TO THE UW

Anticipated Benefits
● Security roles have been rationalized according to initiation and approval of business processes. They are also focused by functional area, such as staffing or time tracking.
● This design reduces the possibility of bad data in Workday caused by mistakes and incorrectly initiated business process transactions by limiting the number of users who can initiate business processes in Workday.
● This design consolidates initiation to employees who have the required skillset to perform transactions in Workday, which can potentially cut down on errors.
● This design allows for a tiered training approach and flexibility for departments to divide and assign work to the appropriate staff based on complexity, volume, and frequency of transactions.
● This design helps ensure that users are trained and prepared to perform the range of processes they are permitted to initiate as part of their role assignments.
● This design allows departments to add additional business process reviewers of their choosing.
● Academic Personnel and Medical Centers still retain unique roles to support their use of Workday.

Anticipated Challenges
● A role is assigned to a position. If a role is not assigned in a supervisory organization, and it is a needed role, that role is filled by the holder of that position in the superior organization. If there is no one in that role in the superior organization, that role will go unassigned, and the associated business process task will route to the ISC.