Workday Core Concepts

Training for all Employees

MC
MONTGOMERY COLLEGE

Training Guidelines

- This session is recorded and will be available on Workday Learning

- Close your Email, logout of IM, and turn cell phones off or put them away

- This session includes demonstrations in a training environment and information has been staged so that no personal or sensitive data is shown

Your Instructors

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Agenda

- Workday Overview & Key Changes
- General Navigation
- Core Concepts
    - Supervisory Organizations
    - Position Management vs. Job Management
    - Business Processes
- Finance
    - Overview of Changes
    - Foundation Data Model (FDM) Overview
    - Banner to Workday Crosswalk Report
- Employee Self-Service and Manager Self-Service Examples
- Support Resources

Our Objectives

- Review key changes

- Understand Workday Core Concepts

- View demonstrations of Workday basic navigation and other helpful processes

- Know where to locate resources and support

Support Resources

On-Demand Help

Project Webpage:
FAQs
Job Aids & Reference Guides
Videos

Workday Learns:
Training Recordings

Training Questions & Workday Help

HRSTM
240-567-5353
hrstm@montgomerycollege.edu

OBS Finance
240-567-5292
procure@montgomerycollege.edu
finance.obs@montgomerycollege.edu

Technical Support

IT Service Desk
240-567-7222
itservicedesk@montgomerycollege.edu

Project Website

- Houses all project information, communications, FAQs and Training Materials

Workday

The College's use of Workday will enable us to improve administrative processes by using modern financial management, human resource, and professional development systems to support the College's mission and goals. It is designed to be mobile device friendly, helping our faculty and staff complete their business faster and get back to what's really important, our students.

workday ®
MONTGOMERY COLLEGE

PROJECT PHASES

Completed and upcoming phases of the project

WORKDAY PROJECT PHASES

TIMELINE

Where are we now?

WORKDAY PROJECT TIMELINE

TRAINING

Access live and recorded webinars, job aides, and the training schedule

WORKDAY TRAINING

WORKDAY COMMUNICATIONS

Archive of collegewide communications

WORKDAY COMMUNICATIONS

FREQUENTLY ASKED QUESTIONS

Review FAQs about Workday

WORKDAY FAQS

Sponsor Message

Welcome to Your Workday Training!

As of January 2022, Workday is officially the Human Resources and Financial Management system at Montgomery College.

By taking today's training, you will be one step closer to full self-service functionality that provides the ability to access and manage your personal HR and finance-related information. As an integral part of our institutional success, we thank you for your participation. We are confident it will ensure your personal success and allow you to take full advantage of all that Workday has to offer.

Enjoy your training session and have a good Workday!

Sherwin Collette

SVP for Administrative and Fiscal Services
Workday Executive Sponsor

What is Workday?

- Cloud-based solution for HR, Finance, and Payroll management

- One unified system

- Business processes and tasks designed for Montgomery College

- Increased Self-Service features

- Optional mobile functionality to help you view information and complete tasks "on the go"

Vision

MC's Mission, Vision, Values

MISSION STATEMENT

We empower our students to change their lives and we enrich the life of our community. We are accountable for our results.

VISION STATEMENT

With a sense of urgency for the future, Montgomery College will be a national model of educational excellence, opportunity, and student success. Our organization will be characterized by agility and relevance as it meets the dynamic challenges facing our students and community.

CORE VALUES

EXCELLENCE * INTEGRITY * INNOVATION * EQUITY & INCLUSION * STEWARDSHIP * SUSTAINABILITY
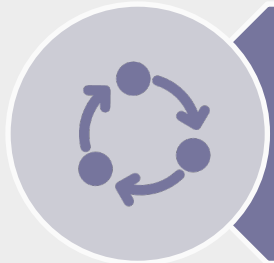
Benefits for Montgomery College

One system that integrates with many other systems and reduces time to perform work

View statuses of initiated tasks and get **notified** on completed tasks

Quickly search for and **find information** such as organizational charts and your personal information

Access and update your own data using applications

Initiate actions using search or applications and complete tasks from your Workday Inbox

(Optional) **Mobile device** access to manage information, anytime, anywhere
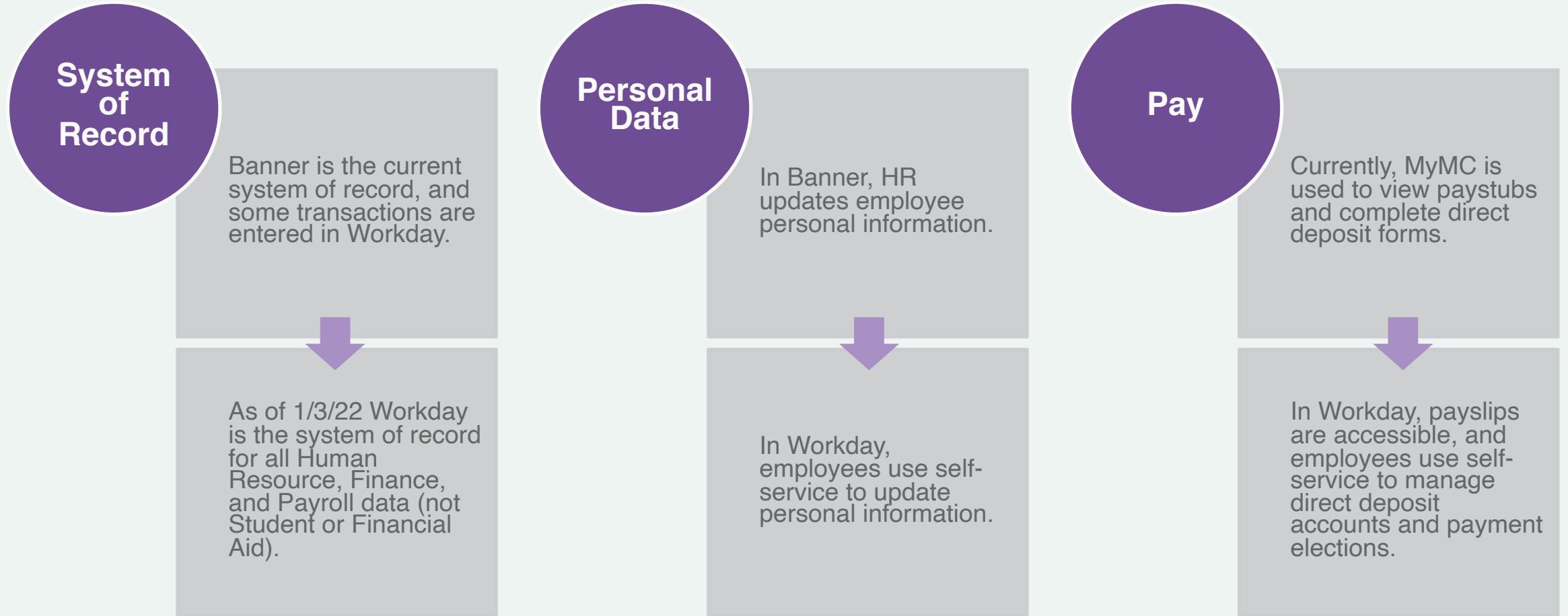
Workday Project Overview

- Workday is the system of record for all Human Resources, Finance, and Payroll data.

Workday

- Payroll
- All Tracking for Time Entry, Time Off, and Leave
- EAP
- Recruiting
- Compensation
- HCM
- Benefits
- Learning
- Talent & Performance
- Financial Accounting

- Budget (excluding Adaptive Planning)
- Procurement
- Expenses
- Projects/Capital
- Business Assets
- Banking & Settlement
- Grants Management & Contracts
- Supplier Accounts

Overview of Key Changes

System of Record

Banner is the current system of record, and some transactions are entered in Workday.

↓

As of 1/3/22 Workday is the system of record for all Human Resource, Finance, and Payroll data (not Student or Financial Aid).

Personal Data

In Banner, HR updates employee personal information.

↓

In Workday, employees use self-service to update personal information.

Pay

Currently, MyMC is used to view paystubs and complete direct deposit forms.

↓

In Workday, payslips are accessible, and employees use self-service to manage direct deposit accounts and payment elections.

Overview of Key Changes

Period Activity Pay

Currently, Academic Aides assign course in Banner to faculty and enter costing allocation. Workload is entered in SIAASGN.

In Workday, the workload is still entered in SIAASGN then integrates to Workday in Fall and Spring. Updates are entered by Academic Aides and WDCE Partners.

Time Tracking

Time, time off, and leave are tracked in a different system. Hourly exempt employees enter time.

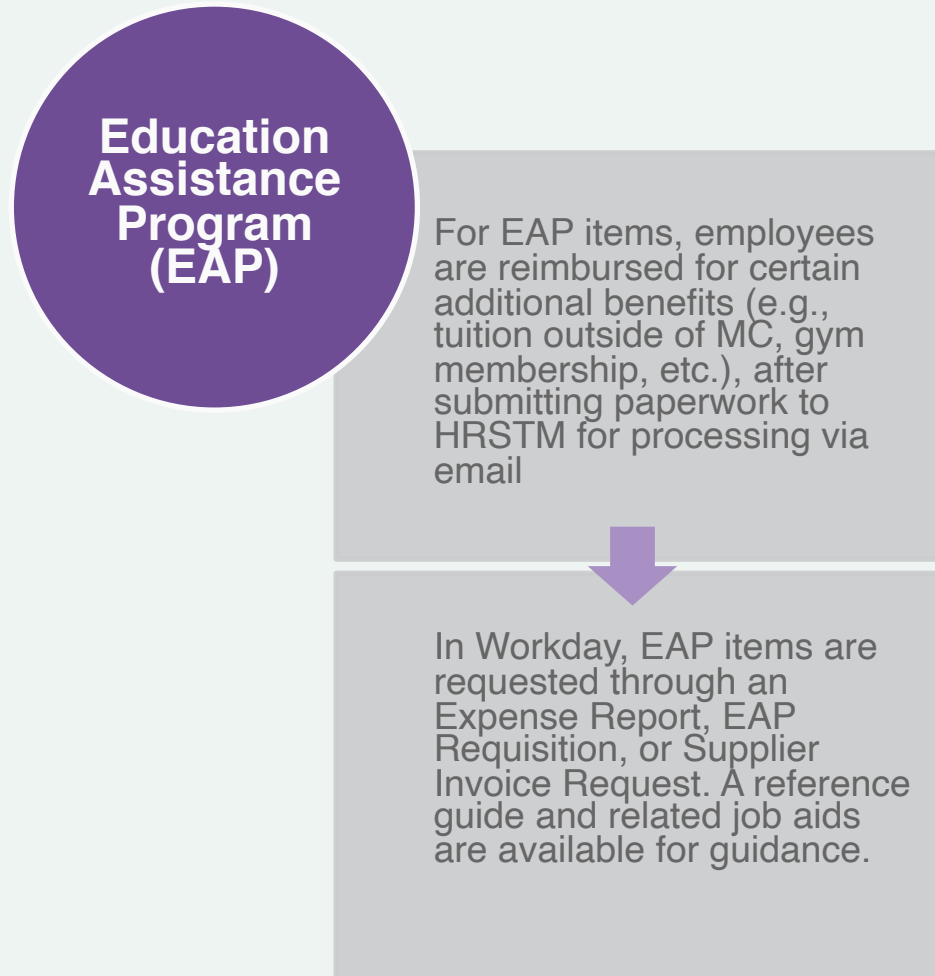Only non-exempt employees enter and submit time in Workday.

Exempt and non-exempt enter time off and leave in Workday.

Work Schedule

Schedules are not required for time entry and leave purposes.

Managers must enter work schedules in order for Employees to enter time and time off correctly and be paid accurately.

Overview of Key Changes

Education Assistance Program (EAP)

For EAP items, employees are reimbursed for certain additional benefits (e.g., tuition outside of MC, gym membership, etc.), after submitting paperwork to HRSTM for processing via email

In Workday, EAP items are requested through an Expense Report, EAP Requisition, or Supplier Invoice Request. A reference guide and related job aids are available for guidance.

Resignation

No ability for employee to submit resignation in Banner, resignations are submitted via email

Position Management organization employees can submit resignation in Workday. Job Management organization employees contact their Manager. For retirement, contact HRSTM to speak to your Benefits Partner.

Home Page

Search

Notifications

Account Options

Quick Access

Inbox

Return to Home Page

Inbox Preview

Applications

MC MONTGOMERY COLLEGE

Search

16 5

Good Morning, On Behalf of: Leslie Jackson

It's Tuesday, September 21, 2021

Awaiting Your Action

Start Additional Job: Blake Reid
Inbox - 1 day ago
DUE 01/14/22

Veteran Status Identification: Leslie Jackson
Inbox - 1 day ago
DUE 01/14/22

Absence Correction: Blake Reid
Inbox - 1 hour ago
DUE 01/14/22

Quick Tasks

My Payslips

Time Off Balance

My Goals

View All Apps

Workday Demo

- Basic Navigation

Workday Core Concepts

Workday Core Concepts

Supervisory Organizations

Position Management

Job Management

Security Roles
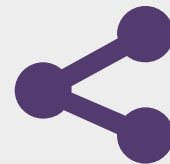
Business Processes

Supervisory Organizations

- Defines the managerial structure of who-reports-to-whom

- Drives security and transactions in Workday

- Everyone is a member of a supervisory organization owned by their manager

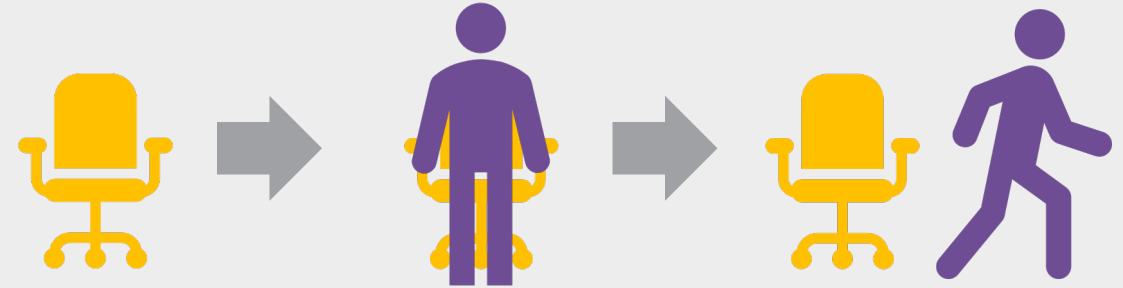- Managers do not reside in the supervisory organization as the team they manage
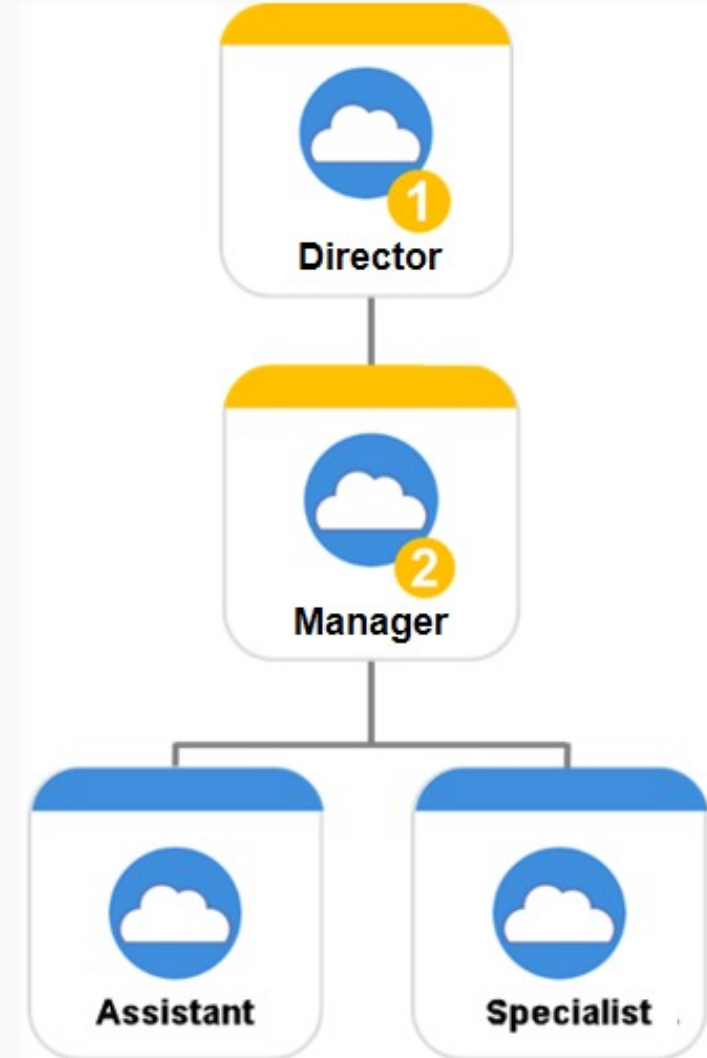
Staffing Models

Position Management

- Position exists before the hire; employee fills the "seat", and the "seat" still exists if they leave
- Position history is tracked
- Orgs do not have "JM" as part of the title; for example, "Facilities – Central Admin"
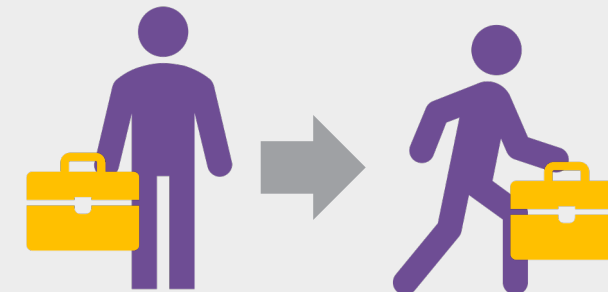
Example:
Staff
FT Faculty

Job Management

- Flexible and fast hiring; the job does not exist before the hire and is removed if the person leaves (unless they move with the same job to another JM organization)
- No job history tracking
- Orgs display with "JM" in the title; for example, "JM – Admissions Services"

Example:
Adjunct Faculty
WDCE
Temp
Student
Contractor

Job/Position Data vs. Person Data

Open Job/Position

Job/Position Data

- Job/Position Title and Job Profile
- Supervisory Hierarchy and Orgs
- Employee Type and Time Type
- Location
- Default Compensation (e.g., Pay Range)

Person Data

- Personal/Contact Info
- Compensation and Pay History
- Performance, Goals and Feedback
- Talent Profile (e.g., Experience, Skills)
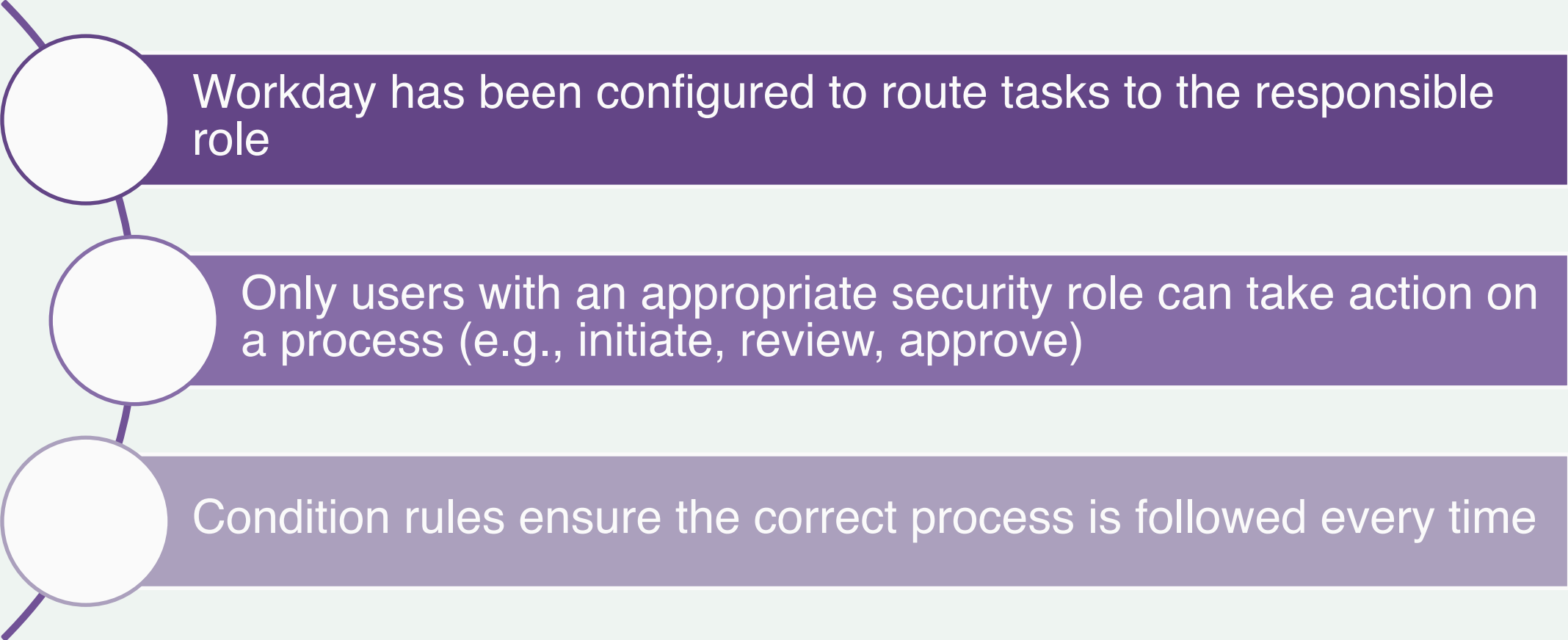- Worker History

Security

- Impacts what you can see and do in Workday

- Role-based security assigned on your position

- Business process routing

Business Process

- A sequence of one or more tasks that accomplishes a desired objective

Workday has been configured to route tasks to the responsible role

Only users with an appropriate security role can take action on a process (e.g., initiate, review, approve)

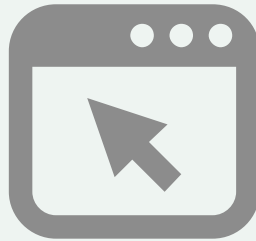Condition rules ensure the correct process is followed every time

Business Process Flow

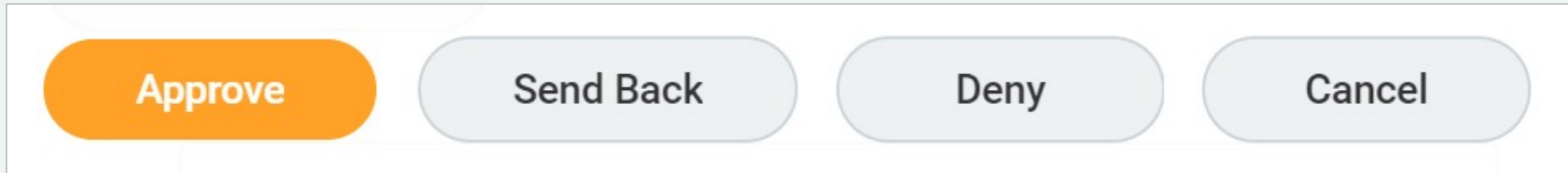|			
1	**2**	**3**	**4**
Steps outside of Workday	**Initiate in Workday**	**Review/Approval**	**Process is Complete**
• Examples: Conversations, decisions, reasoning, etc.	• Enter the transaction	• One or more people review/approve	• Initiator receives notification • Inform relevant parties (e.g., Manager speaks with their employee)

Business Process Actions

Approve	**Send Back**	**Deny**	**Cancel**

Approves the proposed task and moves the process forward

Returns the step to the Initiator and pauses the business process

(Comment required)
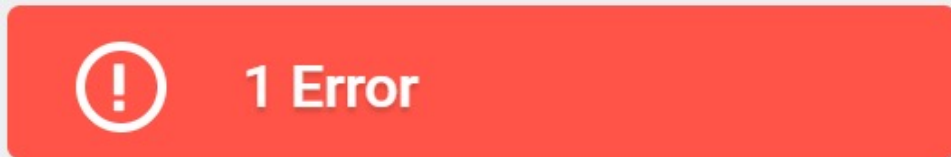
Denies the step and cancels the entire business process

Use with caution

Exits the task but it remains in your Inbox (saves the task for later and may display as **Save for Later**)

Errors vs. Alerts

Errors (Red):

Process cannot be submitted until corrected

Example: *A required field is blank*

Alerts (Orange):

Process can be submitted, but proceed with caution

Example: *Information entered is outside of the recommended range*

Example Process Flow

Employee Submits Time Off Request → Manager Reviews and Approves → Employee Receives a Notification of Approval

- *Note: Process for Staff, FT Faculty, Students, Casual Temp and PT Faculty if not Day Before Sick Unpaid time off request. PT Faculty requesting day before sick or unpaid time off types have an additional step to complete required forms and receive approval from the ELR Leave Partner.*

Core Concepts for Finance

Foundation Data Model (FDM)

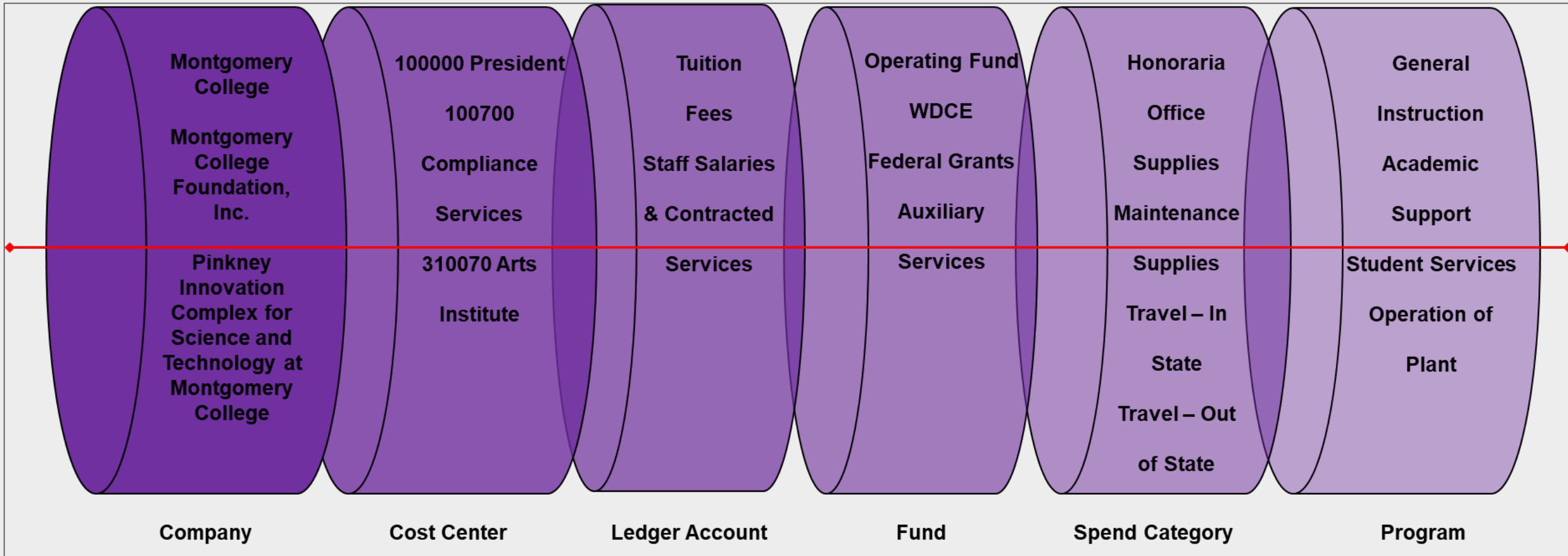| Core of Workday Financials	Multidimensional	Mark transactions and business objects	Worktags
• The Foundation Data Model (FDM) is the core of Workday Financials and impacts all financial transactions	• A multidimensional framework to support accounting and financial reporting in Workday	• A way to mark transactions and business objects to make them easier to find, make their business purpose clear, and facilitate reports and summaries	• Worktags are values, or dimensions, and are the building blocks of the COA (Chart of Accounts) in Workday • Users can tag transactions with Worktags relevant to their specific area of the organization

Foundation Data Model (FDM)

The FDM gives a multidimensional view of your business operations. Think Slot Machine.

Company	Cost Center	Ledger Account	Fund	Spend Category	Program
Montgomery College Montgomery College Foundation, Inc. Pinkney Innovation Complex for Science and Technology at Montgomery College	100000 President 100700 Compliance Services 310070 Arts Institute	Tuition Fees Staff Salaries & Contracted Services	Operating Fund WDCE Federal Grants Auxiliary Services	Honoraria Office Supplies Maintenance Supplies Travel – In State Travel – Out of State	General Instruction Academic Support Student Services Operation of Plant

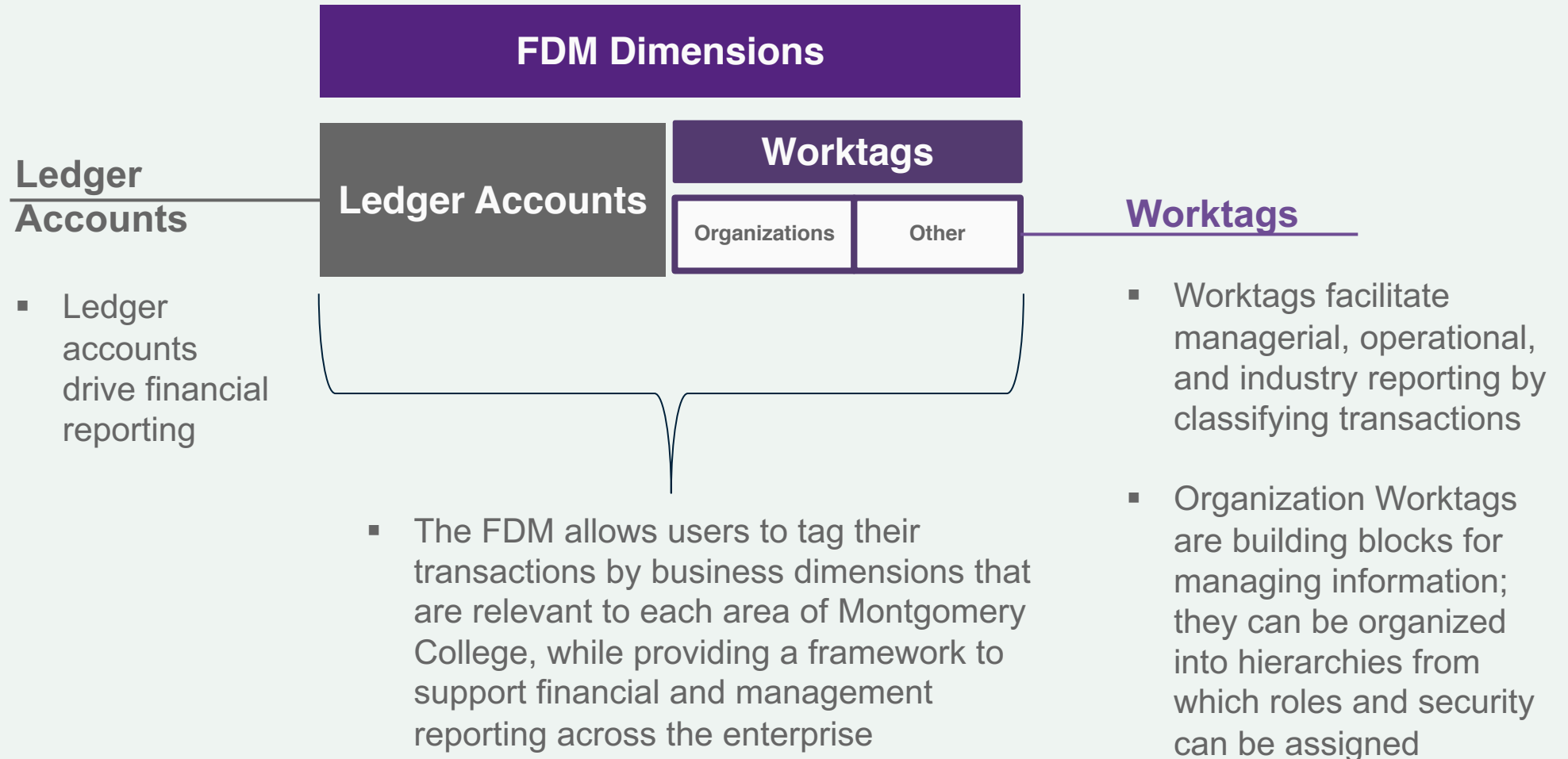# The Value of FDM

Ability to report on any/multiple Worktags

Minimize ledger accounts by using Worktags to provide detail

Flexible reporting using combinations of Worktags and dimensions

FDM Framework

FDM Dimensions

Ledger Accounts

Ledger Accounts

Worktags

Worktags

Organizations	Other

Ledger Accounts

- Ledger accounts drive financial reporting

- The FDM allows users to tag their transactions by business dimensions that are relevant to each area of Montgomery College, while providing a framework to support financial and management reporting across the enterprise

Worktags

- Worktags facilitate managerial, operational, and industry reporting by classifying transactions

- Organization Worktags are building blocks for managing information; they can be organized into hierarchies from which roles and security can be assigned

Worktag Examples

Keywords assigned to each transaction to indicate its College purpose

Used to accurately categorize, classify, and aggregate transactions

All Worktags listed on the FDM reference guide

Banner Term	Workday Term	Description
Activity Code	Activity	Used for tracking department specific revenue or expenses that are not already tracked utilizing other FDM dimensions. Examples include New Staff Orientation, Fall Musical, First Year Experience, and more.
Chart of Accounts	Company	Usually represents a legal entity and is the primary entity for recorded business transactions and financial reports. A Workday company equates to a single tax ID within an enterprise. A company is a type of Workday organization.
Organization	Cost Center/ Specialization	Represents "where" revenue or costs are being recorded. Cost Centers are generally used to identify departmental budgets and typically identify defined business segments. **Note**: A Specialization is a sub-division of a Cost Center based on department's needs.
Fund Code	Fund/Agency/Auxiliary	Defines College activities restricted, unrestricted, and fund reserved for plant projects. Funds are also used to group related activities for financial statement and budget management purposes. **Note**: Agency Funds and Auxiliary Services are sub-divisions of funds in Workday. Allowed Funds are assigned to each Cost Center, Grant and Project.

Report: Banner-to-Workday Crosswalk Query

- Enter Banner FOAPA values to retrieve the corresponding Workday Worktags

- You can enter multiple values (Fund, Org, Account, Program and Activity) at the same time, or you may enter one or more of the values and leave the other fields blank

- Read the instructions within Workday for guidance

Workday Demo

- Banner-to-Workday Crosswalk Report

Self-Service Tasks

Employee Self-Service

Human Resources, Payroll, and Finance

- View Paystubs/Payslips
- Enter Time
- Request Time Off or Leave
- Complete Open Enrollment
- View/Manage Benefit Elections
- Apply for Internal Jobs
- Submit Degree Attainment Request
- Manage Personal Information
- View Compensation, including Total Compensation Statement (Total Rewards)
- Make Payment Elections (Direct Deposit)
- Make Tax Elections

- Submit Resignation
- Create Procurement Requisition
- Create Receipts and Supplier Returns
- Create Supplier Requests and Supplier Invoice Requests
- Create EAP Requisition
- Create Expense Report
- Verify P-Card Transactions (e.g., upload documentation, Managers approve)
- Create Spend Authorization
- EAP options- Create Spend Authorizations, Expense Reports, and/or EAP Requisitions

Manager Self-Service

HR, Payroll, and Finance

- Approve Time Entry and Time Off
- Request to Reclassify Position
- Complete Manager Tasks for Recruiting
- View Team information and related reports
- EPAF Approval for FLAC (will be replaced with Workday)
- Approve Time Entry and Time Off
- Add/End Additional Jobs (AA and WDCE can also initiate)
- Assign Work Schedules
- Request Framework for Equity Review, Special Project Pay, and TSI

- Approve Spend Authorizations, Expense Reports, EAP Requisitions, and Procurement Card Transactions
- Delegation (formerly "proxy")
- Period Activity Pay replaces EPAF approval for FLAC (approved by Chair for PT Faculty and HR Partner for WDCE)

Verify your Information in Workday

- Ensure the following information is up to date
    - Time off or leave requests
    - Your address, personal information, and emergency contacts
    - Benefit Elections
    - Direct Deposit and Payment Elections
    - Tax Elections

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Other Training Sessions

On-demand recordings will be available in Workday Learns

Session	Audience	2022
Period Activity Pay for Academic Aides & WDCE Partner	Academic Aides WDCE Partner	**Jan 20** 2:00-4:00
Manager Self-Service Overview	Managers	**Jan 19** 12:00-2:00
Candidate Management	Managers and Recruiters	**Jan 24** 2:00-4:00
Employee Self-Service for Procurement & EAP Requisitions	Employees	**Jan 25** 2:00-4:00
Overview for Cost Center Managers (CCM) & Secondary Cost Center Managers (SCCM)	CCM and SCCM	**Jan 26** 1:00-2:00
Grants Overview for Principal Investigators	Principal Investigators	**Jan 27** 2:00-3:00

Thank You

Enjoy your Workday!

Time for a 5-Minute Break