



Workday Manager Self- Service

Training for Managers & Supervisors

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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Organizational Change & Training
Consultant with Collaborative
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Chicago, IL



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Organizational Change & Training
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Collaborative Solutions

Tampa, FL

Agenda

- Workday Project Overview
- General Manager Navigation
- Manager Self-Service Tasks
 - Onboarding
 - Team Time and Time Off
 - Job Changes
 - Add Additional Job
 - Request Framework
 - Team Expenses
 - Separation
- Support Resources

Our Objectives

What we will accomplish by the end of this training

- Understand Workday Manager Self-Service functionality
- View demonstrations of Workday Manager navigation and other helpful processes
- Know where to locate resources and support

Our Training Path



- Candidate Management*
- Onboarding

**Separate training is available for candidate management*

- Team Time & Absence
- Job Changes
- Additional Jobs
- Request Framework (TSI Begin/End, Equity Review, etc.)
- Team Expenses (Approval)

- Separation

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.



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



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

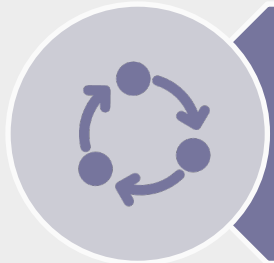
Benefits for Montgomery College



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



Access and update your own data using applications



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



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



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



(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 for Managers

Benefits for Managers



Initiate Tasks

- Initiate self-service tasks for yourself and your team
- Automatic routing to the next step



View Data

- Managers can locate and view data/information
- View process history



Access in Real-Time

- Secure information updated in real-time

Familiar Self-Service Tasks

- Approve Time Entry and Time Off
- Request to Reclassify Position
- Complete Manager Tasks for Recruiting
- View Team information and related reports
- Proxy Set Up
- EPAF Approval for FLAC (will be replaced with Workday)

New Self-Service Tasks

- Approve Time Entry and Time Off
- Add/End Additional Jobs (AA and WDCE Partner 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)

Workday Demo

- Manager Navigation



Business Process Review vs. Approve

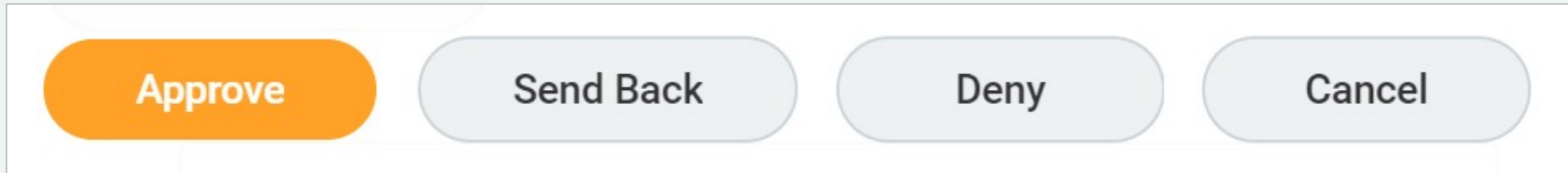
Review

- A request to provide input on a transaction
- May edit prior to approving
- Can also Send Back

Approve

- A request to approve a transaction
- View Only – cannot edit data
- However, may Approve or Send Back

Business Process Actions



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

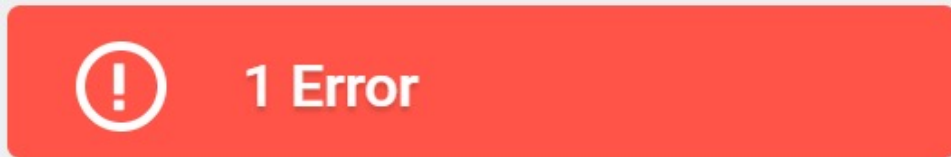
Use with caution

Exits the task but it remains in your Inbox (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*

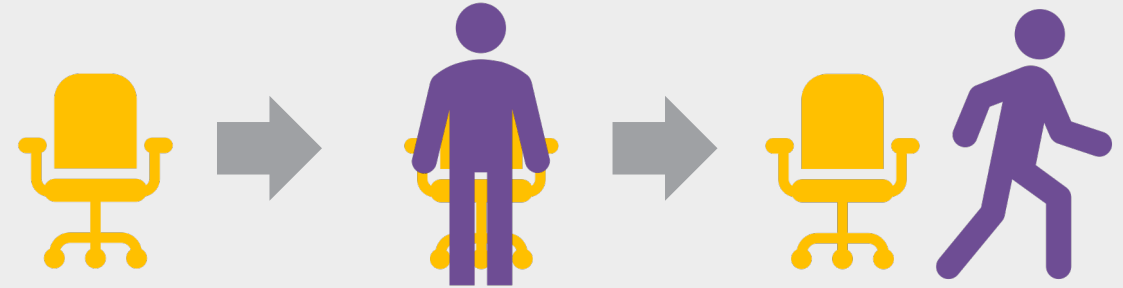
Staffing Models

Position Management vs. Job Management

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”

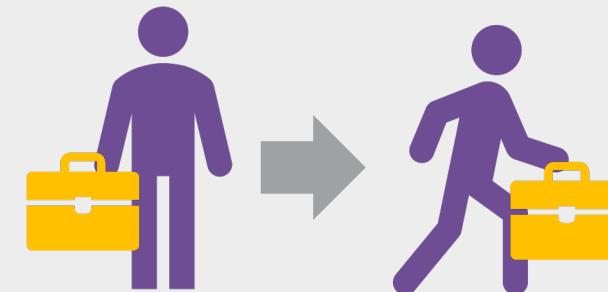
Example:
Staff
FT Faculty



Job Management

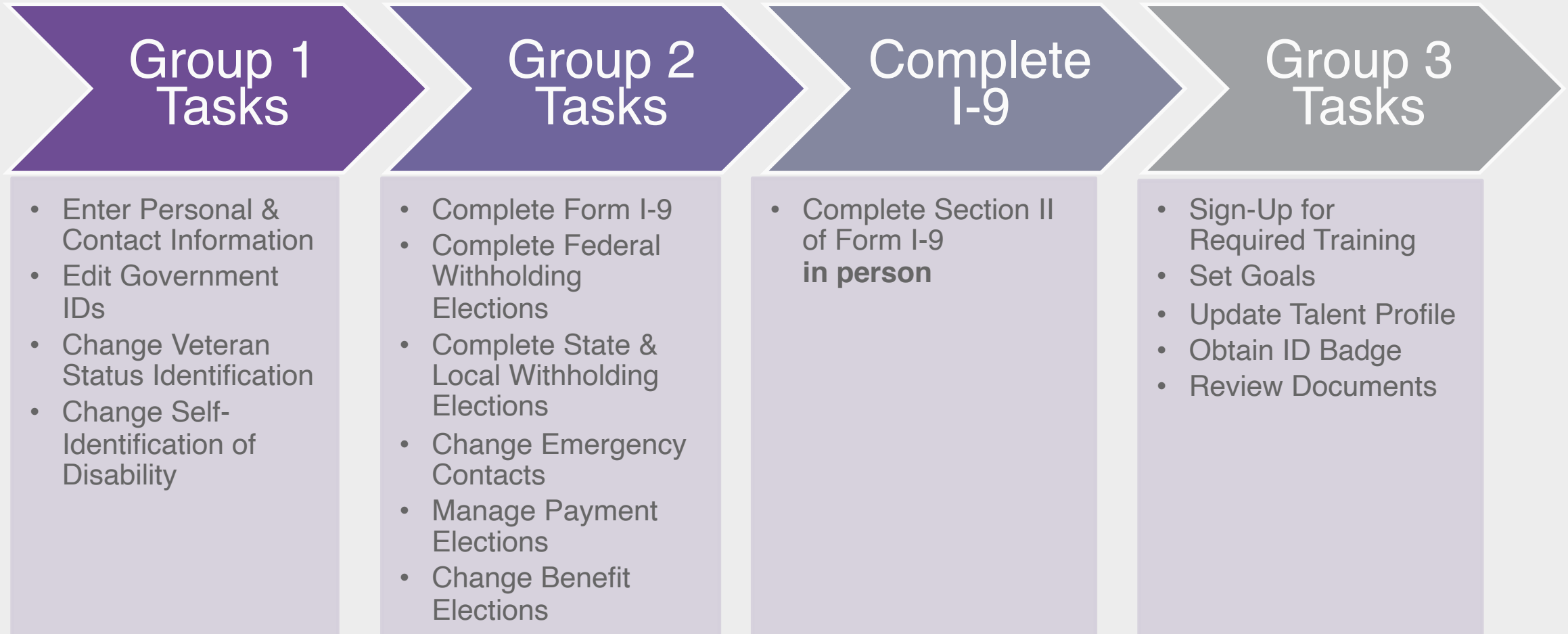
- Flexible and fast hiring; the job does not exist before the hire and is removed if the person leaves (unless they move with the same job to another JM organization)
- No job history tracking
- Orgs display with “JM” in the title; for example, “JM – Admissions Services”

Example:
Adjunct Faculty
WDCE
Temp
Student
Contractor



Onboarding

Onboarding for New Hires



Onboarding for Internal Job Changes

- If an internal job change affects benefits, an MC employee will get the Workday Inbox task: **Change Benefit Elections**
 - Refer to the *Internal Job Change Onboarding Overview* job aid for guidance

Team Time & Time Off

Exempt

- An exempt employee is not required to be paid overtime pay and is excluded from hourly minimum wage requirements. They receive fixed compensation or a salary for the work they perform.

Non-Exempt

- A non-exempt employee is eligible for overtime pay and hourly wages. They earn an hourly wage and are paid for hours worked.

Overview of Key Changes

Previously	Workday Starting 1/3/2022
Time was tracked in a different system. Hourly exempt employees entered time.	Only non-exempt employees enter and submit time in Workday, the calendar shows one (1) week at a time and is submitted bi-weekly. Exempt employees do not have timesheets to submit.
Time Off was entered in the timesheet in Banner.	All Time Off and Leave requests are made in Workday and are both referred to as an "Absence". Managers approve Time Off and Timesheets separately. Timesheet approval only applies to non-exempt employees.
Schedules were not required for time entry and leave purposes.	Managers must enter work schedules for Employees to enter time correctly and be paid accurately. The default schedule is Mon-Fri 8:30am to 5pm. It is especially critical that PT, AWS, and weekend workers have the correct work schedule.

Per the FSLA, any time entered >40 hours (e.g., 44) by a FT non-exempt employee will be paid as overtime. This applies even if the next week the employee works <40 hours (e.g., 36).

Assign Work Schedule



- You can assign work schedules ad hoc, or if you have a direct report that is a new hire or has a job change you may receive a Workday Inbox task.



- **Critical:** Part-Time Employees will receive default 8 hours HOLIDAY. Manager **MUST** change the worker's Work Schedule before the worker submits his/her time in order to avoid overpayment.

Workday Demo

- Assign Work Schedule



Process Flow

Time Entry for Non-Exempt Employees



Enter Time

Non-Exempt Employee Steps

- Using the Calendar within the Time application, Employee enters time and additional details weekly (see screenshots below)
- Then, Employee reviews and submits for manager approval bi-weekly

Enter Time Kai Staff

Today < > Jan 15 – 21, 2022 Week Actions

Sat, 1/15	Sun, 1/16	Mon, 1/17	Tue, 1/18	Wed, 1/19	Thu, 1/20	Fri, 1/21
Hours: 0	Hours: 0	Hours: 0	Hours: 0	Hours: 0	Hours: 0	Hours: 0

Summary
Jan 15 – 21, 2022

Regular	0
Overtime Regular	0
Overtime Straight	0
Overtime	0
Paid Time Off	0
Unpaid Time Off	0
Holiday	0
Total Hours	0

Enter Time

Time Type *

Hours *

Details

Location

Comment

OK Cancel

Need to Know

Approve Timesheets

- Manager's approve timesheets for non-exempt employees only (they do not apply to exempt employees)
- Applicable unit administrators and/or Senior Vice Presidents will be notified when timesheets are not approved in a timely manner by managers, and when timesheets are approved without correction of errors.
- If you have time off or leave and no interim/acting backup has been identified for you, then you will need to delegate approval tasks in Workday. Please refer to the *Delegate Task* job aid.

Workday Demo

- Manager Approval



- Process for Staff and Full-Time Faculty requesting time off or Part-Time Faculty if not Day Before Sick Unpaid time off request



Note: Part-Time Faculty requesting day before sick or unpaid time off types have additional steps: to complete required forms and to receive approval from the ELR Leave Partner

Request Time Off

Employee Steps

- Using the Request Absence feature within the Absence application, Employee selects the day(s), absence type, and uploads attachment (if applicable)
- Then, Employee reviews and submits for manager approval

The screenshot displays the 'Absence Calendar' interface for 'Kai Staff'. A modal dialog titled 'Select Absence Type' is open, showing the following details:

- When:** Tuesday, November 9, 2021
- Type:** Annual Time Off - Staff/Administrator

The dialog includes 'Next' and 'Cancel' buttons. The background interface shows a calendar grid with a 'Select Date Range' button and a 'Balances' section for the 'Annual Time Off Plan - Staff/Administrator' with a balance as of 11/08/2021. A '1 Day - Request Absence' button is visible at the bottom.

Workday Demo

- Manager Approval



**Time for
a 5-Minute
Break**



Job Changes

Overview of Key Changes

Previously	Workday Starting 1/3/2022
Administrators and Managers requested or recommended via email/paper form job changes for Employees based on the type of change.	Administrators and Managers initiate changes for the same reasons they previously did, but now in Workday.
When applicable, Union Membership was updated when a job change takes place.	When applicable, Union Membership is updated in Workday by the ELR Partner.

No Manager Change vs. Manager Change

★ Initiated by Supervisory Org Administrator in Workday

◆ Initiated by Manager in Workday

No Manager Change	Manager Change
Request to Reclassify Position ★ ◆	Move to New Manager ★
Extend or Modify End Date ★ ◆	Start Interim/Acting Position ★
Change Essential Designation ★	End Interim/Acting Position ★
Change Location ★	

Process Flow

Job Change: Request to Reclassify Position
& Extend or Modify End Date

- Request to Reclassify Position job change is for Staff only



See Job Change – Managers job aid for additional details

Workday Demo

- Job Changes
 - Extend or Modify End Date



Additional Jobs

What are Additional Jobs?

- An additional job is when an Employee with a primary job or position is placed into an additional job or position, resulting in the Employee having multiple jobs/positions.
- This is primarily applicable for PT Faculty and WDCE Instructors and will be completed by Academic Aides and WDCE Partners.

Add Additional Job

Adds one or more jobs for an employee. For Job Management organizations, you can create the job as part of the Add Additional Job process. For Position Management organizations, only HR manages positions.

End Additional Job

When ending an Additional Job, the Additional Job is removed from the worker, but the worker is not terminated (separated). If they have multiple jobs, you will need to use End Job and their Primary Job will need to be changed.

Overview of Key Changes

Previously	Workday Starting 1/3/2022
WDCE Partner and Academic Aides did this through FLAC and ePAF. Managers did not do this.	Managers, WDCE Partners, and Academic Aides can add and end Additional Jobs for Employees within Job Management Organizations.

Eligible for Additional Jobs

Approved Secondary Jobs for Exempt Employees

Secondary Job(s)

Primary Job		WDCE Instructor	Administrator	Associate/Support Staff	Short-term Temporary	PT Faculty	FT Faculty
	Full-time Faculty	✓					
	Part-time Faculty	✓				✓	
	Administrator	✓				✓	
	Chair (12 months, FT)	✓				✓	
	Associate/Support Staff (12 month FT)	✓				✓	
	Associate/Support Staff (12 month PT)	✓				✓	
	Associate/Support Staff (10 month FT/PT)	✓				✓	

Eligible for Additional Jobs

Approved Secondary Jobs for Non-Exempt Employees

		Secondary Job(s)						
		WDCE Instructor	Administrator	Associate/Support Staff	Short-term Temporary	Faculty	Student Assistant	Federal Work Study Student
Primary Job	Associate/Support Staff (12 month FT/PT)							
	Associate/Support Staff (10 month FT/PT)							
	Short-term Temporary (not to exceed a total or combined total of 40 hrs per week.)				✓ With HR approval			
	Student Assistant (not to exceed a total or combined total of 20 hrs per week.)						✓ With HR approval	
	Federal Work Study (not to exceed a total or combined total of 12 hrs per week.)							✓ With HR approval

Process Flow

Add Additional Job



Approvals:

- HR Partner reviews if they were not the initiator, the additional job was not triggered from Recruiting
- Federal Work Study Partner approves if they were not the initiator, and the Job Family is Work-study Student Aide

Additional Steps:

- If not initiated by Recruiting, HR Partner Switches Primary Job
- If not initiated by Recruiting, HR Partner Adds Academic Appointment
- For Part-Time Faculty, ELR Manages Union Membership

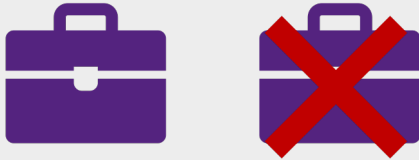
Workday Demo

- Add Additional Job
- Change Org Assignments



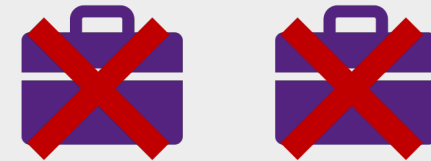
End Job vs. Separation

End Job



- The Additional Job is removed from the worker, but the worker is not terminated (separated).
- It simply means that job has ended, and that position number will cease to exist. The employee can have multiple jobs.

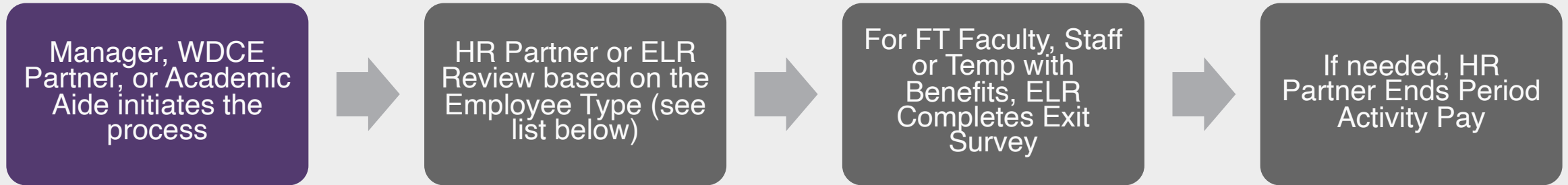
Separation



- Terminates the worker fully.
- If they only have one Job you will need to use the Separation process.
- If they have multiple jobs, you will need to use End Job and their Primary Job will need to be changed.
- Retirees must contact HR.

Process Flow

End Additional Job



Reviews:

- HR Partner reviews if the Employee Type is Part-time Faculty, Student, or Short-term Temporary
- Employee & Labor Relations (ELR) reviews if the Employee Type is Full-time Faculty, Staff, or Temporary with Benefits

Additional Steps:

- If applicable, HR Partner End Academic Appointment Track
- (Optional) Employee Completes Exit Survey
- If applicable, Security Administrator Assigned Roles
- If applicable Benefits Partner Reviews Benefit Change

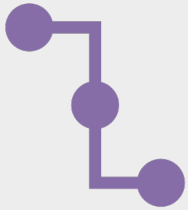
Workday Demo

- End Additional Job



Request Framework

What is the Request Framework?



Custom request processes that users can initiate, and system administrators can track



Different request processes define who makes, approves, and completes the requests



A request does not update/change information on its own, it is a request for action to be taken

Request Types

Type	Description
Equity Review	Completion of this information indicates your request for a worker to receive an equity review. Please attach the equity review request form. The form can be accessed on the HRSTM webpage. The guidelines for an equity review can be referenced in P&P 35001CP.
Special Project Pay	Completion of this information indicates your request for an exempt worker to receive special project pay. Please attach the special project pay request form. The form can be accessed on the HRSTM webpage. The guidelines for special project pay can be referenced in P&P 35001CP.
TSI-Begin	Completion of this information indicates your request to award a temporary salary increase (TSI) for a worker assuming higher level duties. The guidelines for a TSI can be referenced in P&P 35001CP.
TSI-End	Completion of this information indicates your notification to end a temporary salary increase (TSI) for a worker.
<i>Degree Attainment</i>	<i>Please request an official transcript from your accredited educational institution or the National Student Clearing House and have them email it to the Classification and Compensation inbox. Guidelines can be referenced in P&P 35001CP, Section X.</i>

Overview of Key Changes

Previously	Workday Starting 1/3/2022
Equity Review was requested via request form emailed to Classification and Compensation.	Requests are made in Workday using the Request Framework (Application).
TSI Begin / End Date memo was emailed to Classification and Compensation.	Requests are made in Workday using the Request Framework (Application).
Special Project Pay was requested via request form emailed to Classification and Compensation.	Requests are made in Workday using the Request Framework (Application).
Degree Attainment was requested via request form emailed to Classification and Compensation.	Requests are made in Workday using the Request Framework (Application).

- Each request type follows a similar process

Manager
Initiates a
Request



Compensation
Partner Reviews
the Request

Workday Demo

- Request Framework:
Request Special
Project Pay



Team Expenses

Overview of Key Changes

Previously	Workday Starting 1/3/2022
Expense reports were stored on excel spreadsheets and accessible on the AP department website; employees attached expense information in an email (or via physical receipts) to AP.	Expense reports are entered, and receipts are attached in Workday.
For some instances, employees gained expense approval from their manager/supervisor and AP before incurring expenses.	For certain reason types, employees will submit a Spend Authorization in Workday prior to incurring expenses (e.g., exceeds \$500+, airfare and travel related expenses, etc.)
In Banner, an employee could be pre-paid (Cash Advance).	In Workday, a cash advance can be requested as part of Travel related expenses approved via a spend authorization. (Athletics Dept Travel).
For EAP items, employees were reimbursed for certain additional benefits (e.g., tuition outside of MC, gym membership, etc.).	In Workday, EAP items are requested as follows: <ul style="list-style-type: none">• Expense Report- Reimbursement for any amount and/or EAP Travel or Wellness (EAP Travel and Wellness also require a Spend Authorization)• EAP Requisition- Prepayment for external tuition/fees• Supplier Invoice Request- Prepayment to a vender over \$25

Note: Please refer to employee training materials for additional guidance.

Spend Authorization Use Cases

When Employees Should Create a Spend Authorization Before Creating an Expense Report

- Employees should create a Spend Authorization prior to Long Distance Travel to Conferences, to include Airfare, Hotels, and other Travel related Expenses.
- Non-EAP Conference and Meeting Expenses
- EAP Travel and Non-MC Courses, Seminars, Conferences, and Workshops
- Conferences and Meetings & Trips for Athletics
 - Expense Reports uses:
 - Employee Reimbursement for Local Travel mileage Reimbursement.
 - Employee Reimbursement of supply expenses, for college related activities
 - Employee Reimbursement for other college related expenses.

- The Spend Authorization must be approved before incurring expenses



Employee Steps: Spend Authorization

Using the Create Spend Authorization task, Employee enters a Description and selects a Reimbursement Payment Type

Then they enter required information, attach all receipts and invoices associated with the spent authorization, and submit

Spend Authorization Lines Attachments

+ Add

0.00

Spend Authorization Line

Expense Item *

Quantity * 1

Per Unit Amount * 0.00

Total Amount * 0.00

Budget Date * 10/21/2021

Memo

Cash Advance Requested

Worktags

Grant

Gift

Project

*Cost Center

*Fund

*Program

Additional Worktags

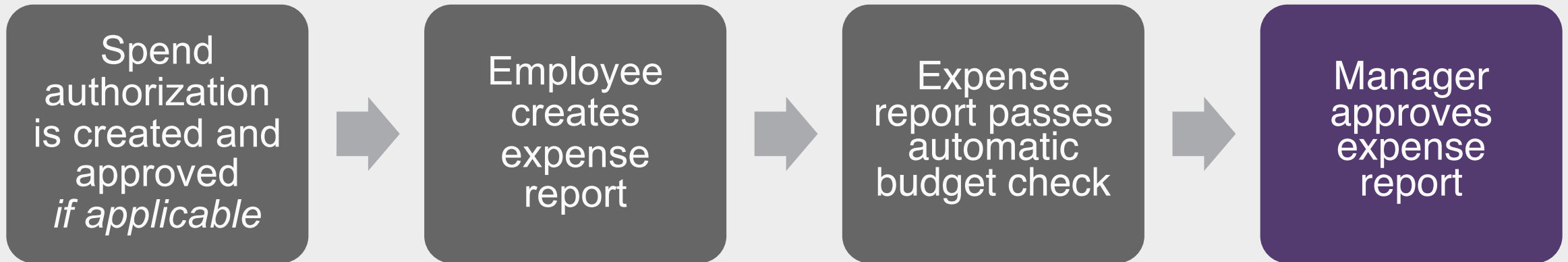
Submit Save for Later Cancel

Workday Demo

- Approve Spend Authorization



- Some expense reports require a spend authorization to be created and approved before initiating



See *Create Expense Report* job aid for use cases

Employee Steps: Expense Report

Using the Create Expense Report task, Employee fills out preliminary information (e.g., Business Purpose) and can Create, Copy, or use a Spend Authorization to initiate

Then they enter expense item information, itemization (if applicable), attach all receipts associated with the expenses, and submit

Expense Report Information

Expense Report For * Employee: Mason Chen

Creation Options * Create New Expense Report
 Copy Previous Expense Report
 Create New Expense Report from Spend

Memo

Company *

Expense Report Date *

Business Purpose

Grant

Project

Cost Center *

Fund *

Program *

Additional Worktags

Expense Line

Drop files here
or

Itemization

Remaining Amount to Itemize

Receipt Included

Date *

Expense Item *

Total Amount *

Currency * USD

Workday Demo

- Approve Expense Report



Separation

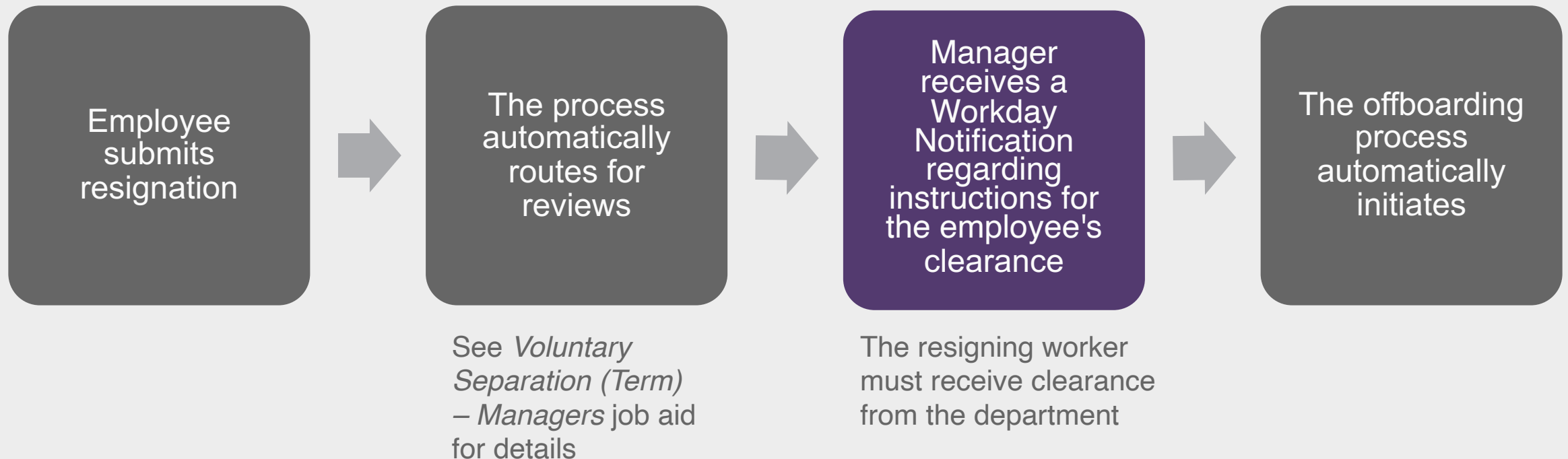
Overview of Key Changes

Previously	Workday Starting 1/3/2022
No self-service to submit resignation.	Certain Employee types can submit resignations in Workday.
Managers initiated certain types of separations.	Managers can initiate the same types of separations within Workday.
HRSTM/ELR handled involuntary separations.	HRSTM/ELR handle involuntary separations in Workday.

Employee vs. Manager-Initiated Separation

Employee Initiates Resignation	Manager Initiates Separation
Staff	WDCE Faculty
Full-Time Faculty	Part-Time Faculty
Temp with Benefits	Short-Term Temps
Administrators	Students

- Staff, FT Faculty, and Temp with Benefits can submit their own resignations in Workday




Employee Self-Service: Resignation

From their Employee Profile, they select Job Change > Resign, enter separation date and reason, attach resignation email/letter and submit

Submit Resignation Mason Chen

For Retirement option please contact Benefits Department in HRSTM to start the retirement process.

Proposed Separation Date * 

Primary Reason *

Secondary Reasons



enter your comment

Attachments

Drop files here

or

Select files

Submit

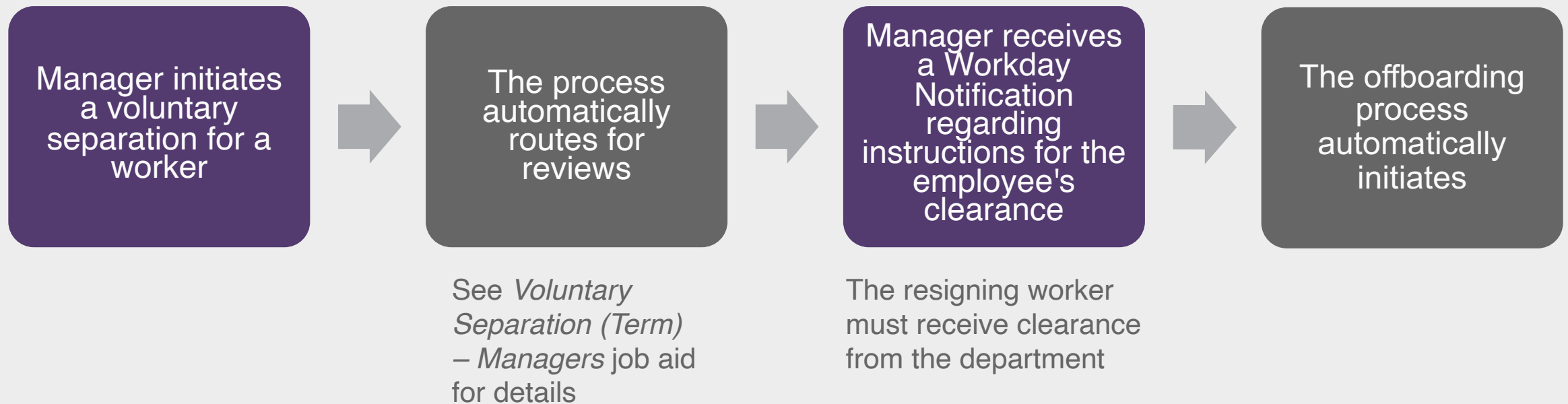
Save for Later

Cancel

Process Flow

Voluntary Separation

- WDCE Faculty, PT Faculty, Short Term Temp, and Student employees must contact their manager directly to resign



Workday Demo

- Voluntary
Separation



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

Other Training Sessions

On-demand recordings
will be available
in Workday Learns

Session	Audience	2022
Workday Core Concepts	Employees	Jan 18 3:00-4:00
Period Activity Pay	Academic Aides WDCE Partner	Jan 20 2:00-4:00
Candidate Management	Managers Recruiters	Jan 24 2:00-4:00
Employee Self-Service for Procurement and 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

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

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finance.obs@montgomerycollege.edu

Technical Support

IT Service Desk

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itservicedesk@montgomerycollege.edu



Thank You

Enjoy your Workday!

**Time for
a 5-Minute
Break**

