



City of Dallas

Workday Department Support Weekly Chat

August 4th

11am via Microsoft Teams

Workday Production Link

<https://wd5.myworkday.com/dallascityhall/login.html>

Welcome to Workday Website

<http://bit.ly/DallasWorkday>





Agenda

- Updates – IAP timeline
- Sup Org Review
- Sup Org Process Changes
- Q&A



Update - IAP Process

- Compensation Team has changed the IAP timeline
- 30 day waiting period for IAP has been eliminated
- Request Compensation Change processed when IAP begins



Sup Orgs 101

- Supervisory Organization Hierarchy is the management structure in Workday
- Determines all business process routing and security role assignment
- Each sup org is a team with a name and an assigned manager
- Each team has a superior organization or “boss”
- Each sup org has at least 1 member or position assigned and may have subordinate organizations
- Top organization is City of Dallas
- Each department’s director’s org is the department’s name and org is DDD_0001 except DPD_3001
- Search for sup orgs by org name, manager or org id



Sup Orgs 101

- Sup Orgs are separate from cost centers/units
- Management Services “departments” are separated into their hierarchy in Workday
 - Uses each departments code instead of MGT such as 311, OHS, OEM, FHO, etc
 - Codes correspond to what’s used in the Financial System to be consistent across systems
- Some managers have multiple sup orgs to denote separate teams they manage



SDM-Stormwater Operations (Sarah Fichtenbaum)
Actions

Type	Supervisory	Superior Organization	Dallas Water Utilities (Terry Lowery)
Organization ID	DWU_0008	Subordinates	NH - Sr Program Manager (Sarah Fichtenbaum (Inherited)) SDM/TRC - Business Manager (Gehan Asaad) SDM-FO - Sr Program Mgr (Ricky McRay) SDM-FP-Sr Program Mgr (Steve Parker) SDM-ND -Sr Program Mgr (Sergio Munoz)

Manager – name in parenthesis

Superior – selected org reports to

Subordinates – teams that report to the selected org

Inherited – manager position is not assigned or is vacant – likely vacant

Organization ID – also called reference id – unique id for the sup org – use in Move Workers when manager name not found





Supervisory Org Actions

- **Create Subordinate** – adds a new sup org below the current manager
- **Assign Superior** – process takes one organization and moves it to report to a new superior org. (note assign superior does not change the who the org manager reports to. A separate Move Worker task needs to be kicked off in order to change who the org manager reports to, if that's needed.)
- **Divide Organization** - takes one organization and splits it into two orgs, reporting to the same superior



Supervisory Org Actions

- **Edit Sup Org** – change name, code, default location
- **Activation** - process can activate an inactive organization or inactivate an active organization—org is no longer available after effective date
- **Assign Manager** – assigns the PM number to be the manager of the org
- **Allowed Organization/Default Organization Changes** – update the allowed/defaults for a sup org/ sup org hierarchy.



Supervisory Org Actions

Action	Department Responsibility	HR Responsibility
Create Subordinate	WDDS kicks off task in WD	Review and Approve – Comp Team
Assign Superior	WDDS kicks off task in WD	Review and Approve – Comp Team
Divide Organization	WDDS kicks off task in WD	Review and Approve – Comp Team
Edit Sup Org	WDDS requests via using template – email to Compensation Team hrcompensation@dallascityhall.com	Review and Update - Comp Team
Activate/Inactivate	WDDS requests via using template – email to Compensation Team hrcompensation@dallascityhall.com	Review and Update - Comp Team
Assign Manager	WDDS requests via 1234 Ticket/ Security Role Form	Review and Update – HRIS Team
Assign/Update Allowed Organization(s) for Sup Orgs	Department Request to Office of Budget; Office of Budget reviews and forwards to HR	Review and Update – HRIS Team

Process Changes effective 8-10-2020





Sup Org Changes by WDDS

The screenshot shows the Workday interface for 'Dallas Water Utilities (Terry Lowery)'. The 'Actions' menu is expanded, showing options like Audits, Compensation, Favorite, Hierarchy, Hire, Job Application, Job Change, Organization, and Reorganization. The 'Reorganization' option is highlighted with a red box, and its sub-menu items (Assign Superior, Create Subordinate, Divide Organization, Move Workers (By Organization)) are also highlighted with a red box.

Type	Supervisory	Superior Organization	Mobility, Infrastr
Organization ID	DWU_0001	Subordinates (first 5)	Business Opera Capital Improve Customer Opera Stormwater Ope Stormwater Tra

Members Roles Security Groups

Members 7 items

From the sup org you are updating – 4 actions





Sup Org Changes by WDDDS

You have submitted
Create Subordinate: on 08/05/2020 [Actions](#)

Up Next

Compensation Administrator
Approval by Compensation Administrator
Due Date 08/07/2020

> **Details and Process**

[Done](#)

Sup Org Tasks will be approved by Compensation Team





Sup Org Reports

Informational

- Supervisory Organizations OCWG
- Positions by Sup Org

Troubleshooting/Review

- Supervisory Organizations without Assigned Manager Role
- HRIS Audit Superior Differences
- Supervisory Organizations Without A Superior



Allowed & Default Organizations

- Supervisory Organizations can be set to default and/or restrict the usage of specific organizations for its members
 - For example, members of a supervisory organization in Dallas Water Utilities can be restricted to an Advantage Fund or a cost center or set of cost centers.
 - Sup orgs can also be assigned a default organization that could be changed.
 - Assignments cascade down to subordinate organizations unless assignments are made on subordinates



Allowed & Default Organizations

- Allowed Organizations Set Up
 - All cost centers and funds available to department using current expense budgets with payroll costs in FY20 from Advantage
- Allowed organizations set up for director's sup org and "cascade down" to or received by subordinates
- New cost centers added during year would need to be added as Allowed Organizations
- HR will maintain Allowed and Default Organizations – assigned to Sup Org at the request of the Office of Budget



Allowed/ Default Organization

The screenshot shows a list of organizations in a Workday interface. The list includes:

- Other
- Fire Equipment
- HIPAA/EMS Compliance
- Advantage Fund
- 0001 General Fund
- Kronos
- IDS Users
- Kronos Time Approver

A dropdown menu is open for the '0001 General Fund' entry, showing the following options:

- 0001 General Fund
- 0278 Emp. Health Benefit Oper
- 0286 Wellness Program

The dropdown menu also includes a search bar and a search result: and

In this Change Job example for a position in Human Resources, only funds allowed for the Human Resources Department will be available as selection options



Sup Org Update - Template

- Manager Changes along with the signed Workday System Access Request Form
- Activate/Inactivate Sup Orgs
- Edit Sup Org – Name, Department, Default Location
- Move Workers – use template for large numbers of moves



Q & A