



City of Dallas

Workday Department Support Introduction

May – June 2020

Presented by

Workday Change Management Team

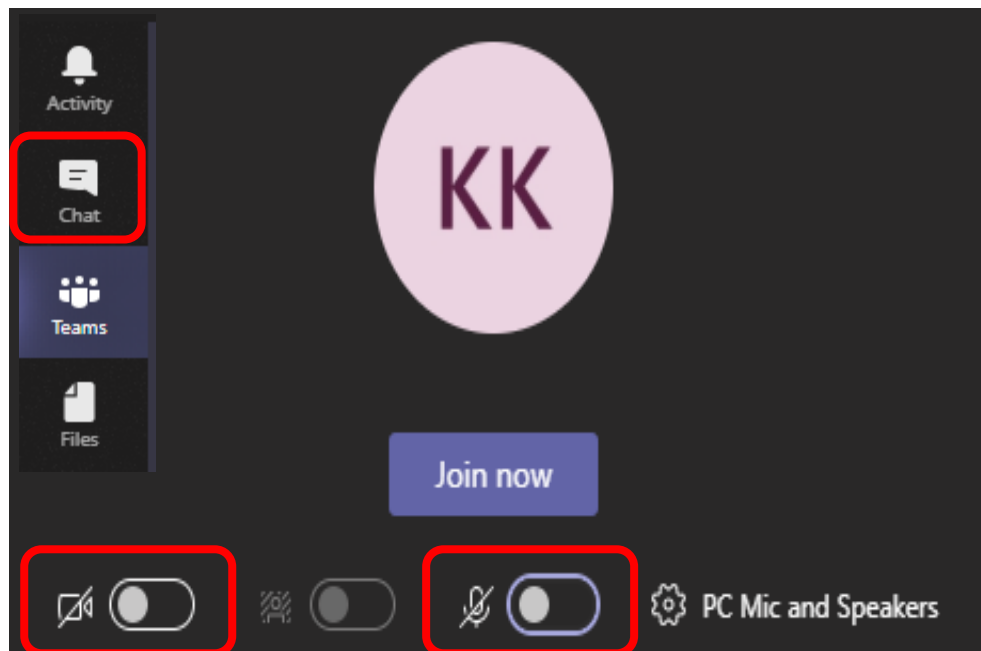




Working Remote

Reminder:

- Put phone and/or computer speaker on mute to eliminate background noise
- You may also disable the video feed
- Use Chat to communicate



Purpose of Class

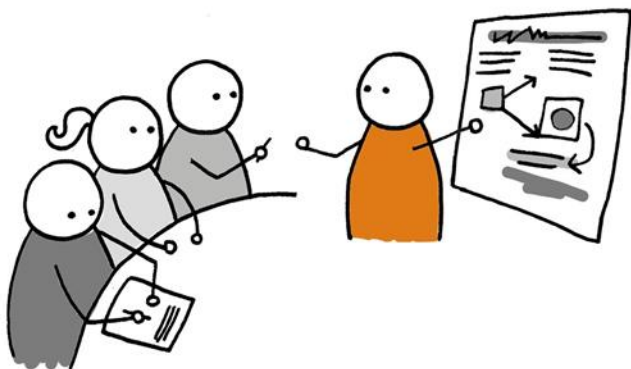
- Share information about the Workday Department Support (WDDS) role
- Share information about the WDDS courses
- Plan next steps for training





Agenda

- Why Workday?
- Organizations
- Roles
- Business Processes
- Key Changes
- Q & A





Why Workday?



- Provides real-time reporting and dashboards for **better decision making**.



- Improves process and workflows with **a lot less paper!**



- Simplifies the manager, employee, and HR experience providing you **the tools you need to be successful** at the City.



- Improves **transparency**.



Workday Key Concepts



- **Organizations** – used to organize employees or resources into meaningful groupings
 - Cost Centers
 - Funds
 - Supervisory
- **Hierarchies** – creates reporting relationships for organizations
- **Security Roles**
- **Business Processes**



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Organizations



Organizations

In Workday, the term organization is a basic building block for managing information that is both financial and non-financial.

- Organizations can be organized into hierarchies and enable reporting at different levels in the hierarchy.
- Roles and security can also be assigned to any level in the organizational hierarchies.
 - Examples of Workday delivered organizations - include Cost Center and Supervisory Organization.



Organization Groupings

Some key organizations you should be aware of:

- Cost Centers
 - Hierarchy grouping to define which cost centers belong to which department
 - Cost Center = Lawson Department = Advantage Unit
- Advantage Funds
 - Such as General Fund, Water Utilities Fund, various Grant Funds
- Pay Groups
 - Civilian
 - Sworn
- Supervisory Organizations



Supervisory Organizations

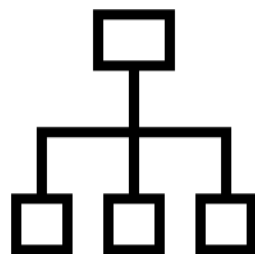




Supervisory Organizations

“Sup Orgs”

A Sup Org is a type of Organization. In Workday, it is an organizational unit in which a Manager supervises Positions/Jobs. Sup Orgs are arranged in a hierarchy.



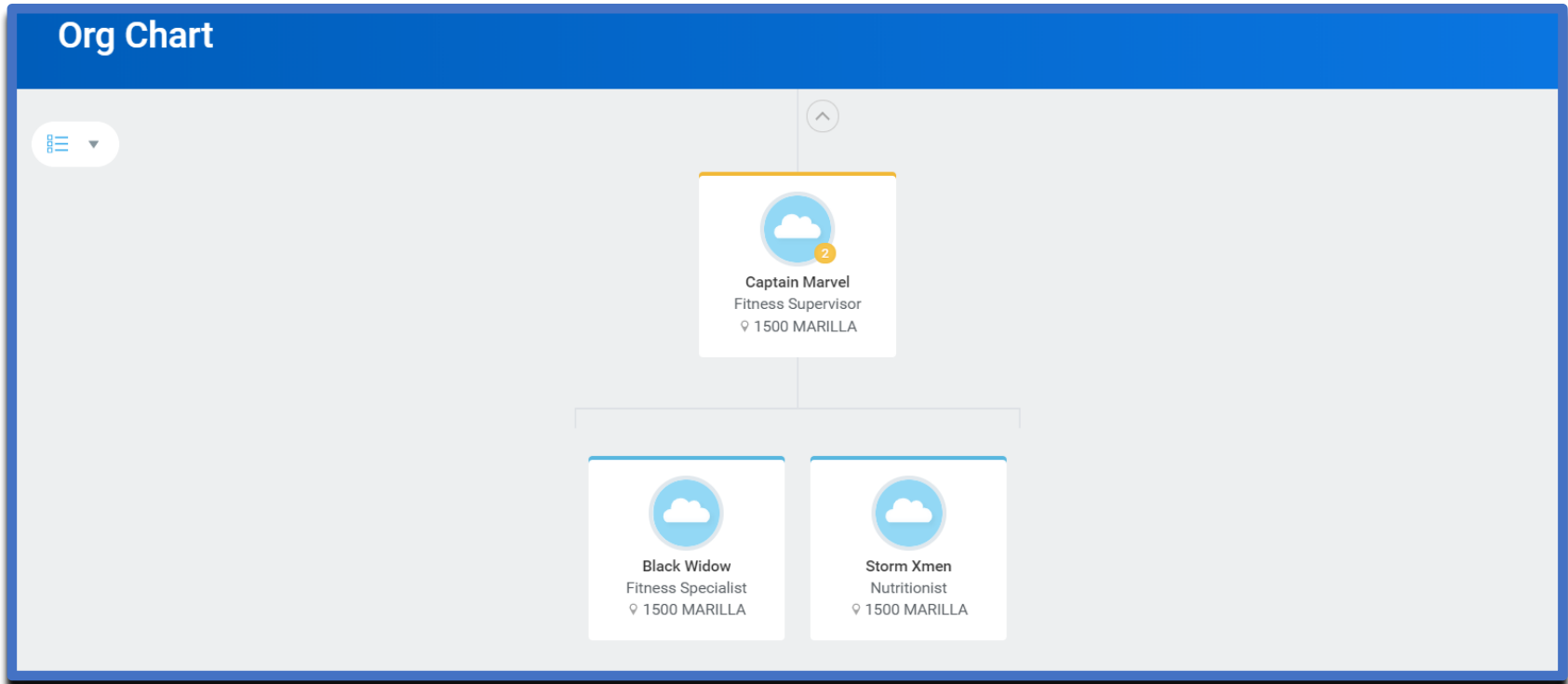


Sup Orgs (continued)

- City's organizational structure of displayed through the Workday Org Chart
- Fundamental building blocks of the Workday system – hierarchy used to route business processes and time sheet approvals
- Every position is assigned to a Sup Org
- Employees are hired into jobs or positions associated with a Sup Org
- WDDS are assigned to sup orgs – top level sup org for the department
- Does not exist in Lawson – each department created its own org chart in Workday



Sup Org Example





Workday Roles



Workday Roles: Who Does What

Workday ROLES:

- Are assigned to Position
- Determine function in a business process(i.e. initiate, approve, etc.)
- Determine what information you can see and do in Workday
- Provide access to data within the Sup Org



Positions:

- A position is the "seat" that a specific Worker occupies
- A Position does not refer to a job title
- May be assigned one or many Workday roles



Workers are hired into Positions and inherit the Workday role(s) previously assigned the Position





Workday Roles by Area

Primary Roles



Managers

Initiate and approve actions for members of their team.



Employees

View and maintain their personal information.

Department Support Roles



Department Workday Support

Perform HR management functions such as set up, initiation, and approvals for Business Processes in support of department's Managers.



Department Budget Analyst/Manager

Perform budget-related actions for department. Have oversight and approval where necessary.



Workday Projects Manager

Establishes, manages and reports on Workday Projects for the department's employees to use for time allocation.



Timekeeper

Supports the bi-weekly approval of department's Workday timecards.



Department HR Partner

(DFR/DPD/PKR only)
Perform HR Partner actions in support of department's Managers.



Department Recruiter

(DFR/DPD/PKR only)
Create, qualify, and evaluate candidates for job requisitions for assigned organizations within the department and in support of Managers.

Centralized Support Roles

(HR, CCO, Civil Svc, & Budget)



HR Partner

Create, maintain, view, and report on all HR operational data for assigned departments.



Compensation Partner

Establishes new positions; reviews/approves position related changes, certain pay changes; maintains job catalog.



Benefits Partner

Perform benefits management tasks for assigned organizations.



Budget Office

Approve departmental requests which have an impact on the department's budget.



Payroll Operations

Perform payroll review functions and time entry; produce City's payroll.



Civil Service

Perform Recruiting related actions and review certain personnel actions for Civil Service Departments.



Workday Department Support



- Support department's managers or act on behalf of manager
- Responsible for initiating business processes and tasks; such as, promotion/demotion and job data changes on behalf of manager
- Initiate compensation related changes such as equity adjustments, adding/deleting an allowance and one-time payments
- Understand reports, what they say and mean and how to communicate that information to managers
- Have a higher level of Workday proficiency at go-live in order to help support the department as managers continue learning and training.
- Understand related processes that are external to Workday such as the recruiting process that begins in Workday and then in NeoGov





WDDS Data Visibility

Organization Data	Organization Details (manager, headcount, location, superior and subordinate orgs), Members, Staffing (open positions), Roles, complete organization chart
Employee Data	Employee ID, Location, Employee type, FTE, hire date/length of service/time in position, compensation, work address, email, phone, job history, organizations, service dates



Access to Confidential Information

WDDS Role assignees may need to access to confidential and sensitive information. You may only share information with authorized employees.



Access to Confidential Information

Confidentiality of Records

Workday system access is provided for official business of the City of Dallas. Any other use of this information may violate one of the following: AD 2-33 E-Mail and Internet Policy; Information Systems Acceptable Use; Personnel Rule Sec. 34-36 Rules of Conduct; Federal Privacy Act of 1974; Computer Fraud and Abuse Act of 1986; Computer Privacy Act of 1986; Computer Security Act 1987; Freedom of Information Act, 5 U.S.C. Sec 552; Electronic Freedom of Information Act Amendments of 1996; Telecommunications Act of 1996; Consumer Internet Privacy Protection Act of 1999. Unauthorized distribution, reproduction, modification or deletion of any, employee information outside the intended and approved use is strictly prohibited. Illegal access or misuse of this account is punishable up to including termination. Further, the City of Dallas computer systems are for the use of authorized users only. If one is suspected of unauthorized activities, Human Resources (HR) may monitor and record any activities associated with account in use. Anyone using the system expressly consents to such monitoring. It is understood that this is an individual access account and may not be given or shared with anyone, unless the account was set-up to be and controlled for that purpose.





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Security

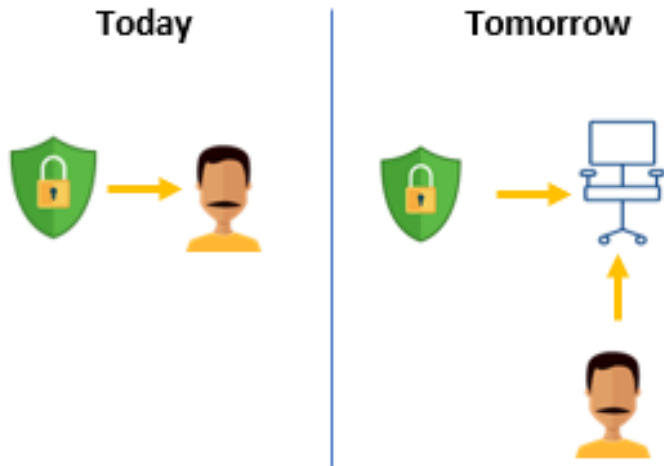




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Role-Based Security

Security roles are a collection of **permissions** that determines what you can **see** and **do**. Security Roles are assigned to the position.



Security Roles:

- **WDDS** – Initiate, view, and approve business processes/tasks for department
- **Manager** – Initiate, view, and approve business processes/tasks for their sup org



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Business Processes





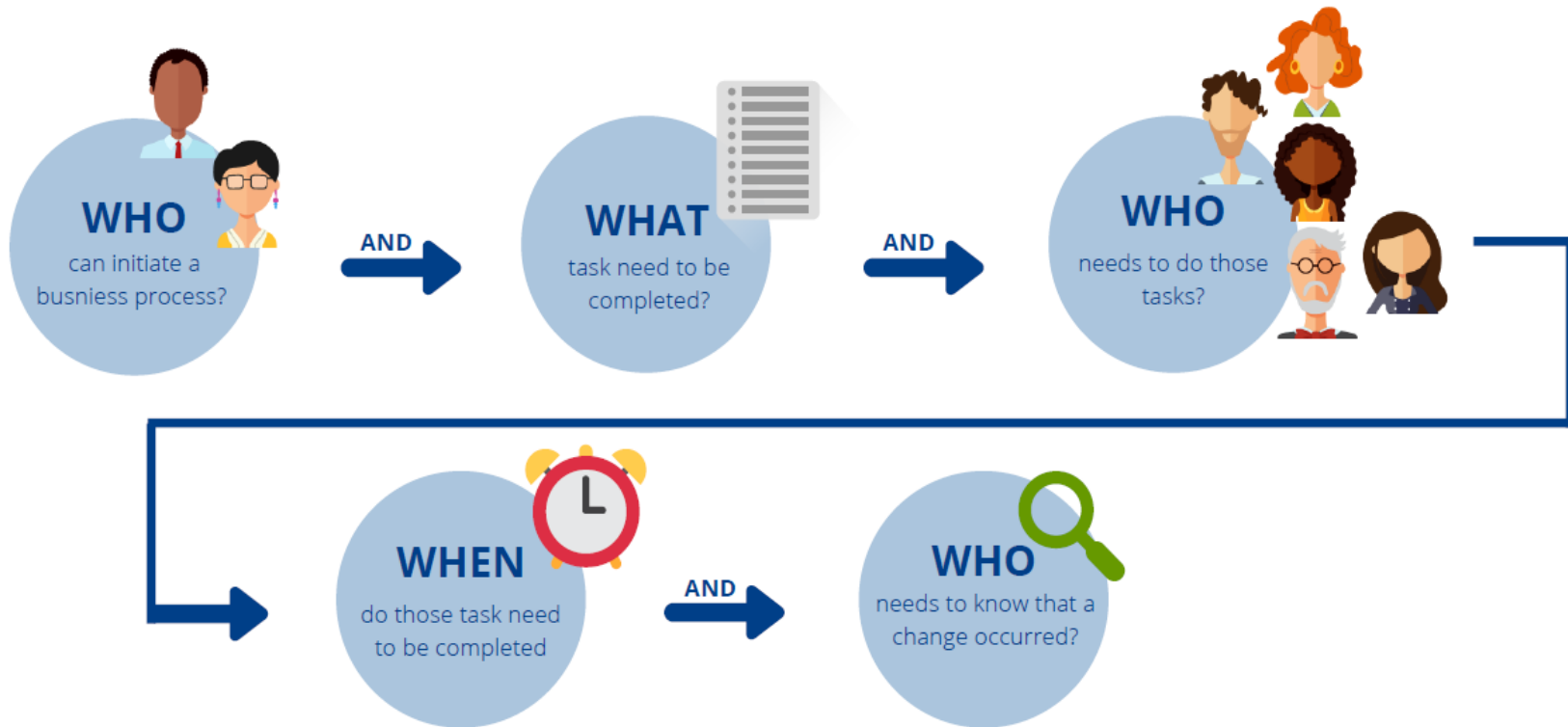
Business Processes



- A business process is a set of tasks that employees initiate, act upon and complete in order to accomplish a desired business objective.
 - *Examples: create a job requisition, hire, terminate, change job, request time off, compensation change*
- Once a business process is initiated, Workday
 - routes the tasks to the responsible roles (users who are capable of completing the tasks based on their security permissions)
 - enforces security and business rules throughout the business process.



A Business Process Defines, WHO, WHAT and WHEN





Notifications vs. Inbox

Notifications



You will receive notifications for events related to you and employees in your sup org. Items in this list do not require action

Inbox



Your inbox lists events and tasks related to you or your associates and items routed to you for approval



Actions, Approvals, To Do's

- Business processes are created using a combination of Actions, Approvals, Approval Chains, To Do's and/or Checklist
- The difference between Actions, Approvals and To Dos:
 - Action – Tasks or Events within Workday
 - Approvals – Approval of a Task or event within Workday
 - To Do – Remember to do something inside or outside of Workday





What's Changing

- Workday does not allow for double fills
 - Job overlap for future termination or long-term leave
- Some processes have different approvals such as exceptional pay increases and hiring above the mid-point – no City Manager approval in Workday
- Managers can kick off business processes in Workday for their team with visibility into who approves and whose approval is pending
- Funds tied to position – General Fund, Water & Sewer Fund, etc
- Every employee has CoD email address



What's Not Changing

- PM numbers, employee numbers and job titles
- Time off accruals, City holidays
- Manager assignments will stay the same
- Continue to use NeoGov for recruiting and performance management; LearningZen for training
 - Workday recruiting, performance/talent, and learning management scheduled for implementation in a future phase



Information Transfer



What is transferring



- Balances



- Personal Data



- Payment Elections



What is Not transferring*



- Pay Slips



- Timesheets



- Previous Job History



- Pay Rate Changes

*After go-live Lawson will have read-only access, users will be able to log-in and view their data but not change it or make inputs





WDDS Classes

- Be sure to sign up for the both WDDS classes in Learning Zen
- Review the job aids and videos ahead of time – hands on exercises during class
- Class will be delivered via Teams – use 2 screens if possible.



WDDS Resources

- Manager & Employee Job Aids – with companion video on website
- Practice, Practice, Practice - tenant available
- Attend Pop In sessions to ask questions
- HR Partners will also be able to answer questions and assist



Next Steps

- Login to Workday practice tenant
<https://wd5-impl.workday.com/wday/authgwy/dallascityhall4/login.html>
 - Use your City network id and password
- Review all the navigation and job aids and videos on the Manager Resources Page
<http://bit.ly/DallasWorkday>
- Attend WDDS classes in Teams
- Take the WDDS quiz in Learning Zen to take after you complete the classes prior to June 12th
- Understand your department's approach to WDDS – are you supporting managers when needed or will you be acting on their behalf?



Schedule

- Workday civilian employee Workday access and time entry begins on Monday June 22nd for civilian pay period ending Tuesday June 30th
- First Workday civilian paycheck Friday July 3rd
- Workday sworn employee Workday access and time entry begins on Monday June 29th for sworn pay period ending on Tuesday July 7th
- First Workday sworn paycheck Friday July 10th



Submit Questions to:
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Workday Change Management Team

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Q&A