Wake Forest University

WORKDAY TRANSITION GUIDE

for faculty and staff

July 2, 2018

LAUNCH CHECKLIST

Complete the items below, which are grouped by the worklets/icons you will click. As you verify the information in Workday, support resources (outlined on page 21) are available if you have questions.

PERSONAL INFORMATION

Click the "Personal Information" worklet for the items below; then follow the additional italicized instructions and/or view the Job Aids.

REVIEW:

- ❒ **Personal Information** (Gender, Gender Identity, Sexual Orientation, Race/Ethnicity, etc.): *Click "About Me" under "View"; click "Personal"; click "Edit." (Job Aid)*
- ❒ **Home Address:** *Click "Addresses" under "View." (Job Aid)*
- ❒ **Salary** (as of July 1, 2018): *Click "About Me" under "View"; click "Compensation." (Job Aid)*
- ❒ **Title:** *Click "About Me" Under "View"; click "Job." (Job Aid)*
- ❒ **Supervisory Organization:** *Click "About Me" under "View"; click "Job." (Job Aid)*

ADD:

- ❒ **Profile Photo:** *Click "Photo" under "Change." (Job Aid)*
- ❒ **Emergency Contacts:** *Click "Emergency Contacts" under "Change." (Job Aid)*

PAY

REVIEW:

- ❒ **Banking Information:** *Click the "Pay" worklet; click "Payment Elections" under "Actions."*

DIRECTORY

REVIEW:

- ❒ **Organizational Chart:** *Click the "Directory" worklet; click "More" and "My Org Chart" under "View." (Job Aid)*

ABSENCE

REVIEW:

- ❒ **Paid Time Off (PTO) Balance:** *Click the "Absence" worklet; accrued hours are listed under "Available Balance as of Today."*

Transition Note: Historically, for exempt staff, NOVAtime showed the full PTO balance available for the year (Figure 1). Workday shows the hours accrued to date (Figure 2). The full balance is viewable by looking at your PTO calendar as of December 31.

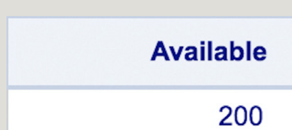


Figure 1: NOVAtime

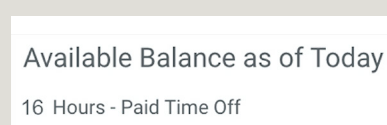


Figure 2: Workday

BENEFITS

Click the "Benefits" worklet for the items below; then follow the additional italicized instructions and/or view the Job Aids.

REVIEW:

- ❒ **Benefit Elections:** *Click 'Benefit Elections" under "View." (Job Aid)*

ADD:

- ❒ **Beneficiaries*** (if enrolled in life insurance; beneficiary elections have not carried over from paper forms): *Click "Beneficiaries" under "Change." (Job Aid)*

CAREER

Click the "Career" worklet for the items below; click the corresponding links under "View." (*Job Aid*)

ADD:

- ❒ **Education** (needed for IPEDS for faculty)
- ❒ **Other Desired Information** (Job History prior to Wake Forest, Certifications, Languages, Career Interests, etc.)

MAIN MENU

ADD:

- ❒ **Notification Preferences** for WFU Google Mail: *Click on the cloud icon (or your Profile Photo if you have added it); click "My Account"; click "Change Preferences"; scroll down and click the menu items beside "Parent Notification Type"; choose from receiving a combined daily digest, an immediate email for each transaction, or no notification. (Job Aid)*

INBOX

ADD:

- ❒ **Delegation:** *Open your inbox; click ; click "My Delegations"; click "Manage Delegations." (Job Aid)*

SEARCH

ADD:

- ❒ **Work Space – Location*** (managers should also review work locations for their teams): *Type "Change My Work Space" into the Search; select your building/room; your selection will route to your manager for approval. (Managers may indicate work locations for their team members by typing "Change Work Space" into the Search.)*

*Required

WELCOME

HOW TO USE THIS GUIDE

All faculty and staff will use Workday, and this guide has something for everyone. The steps below suggest how this resource can help you as you begin engaging with the new system. The guide provides baseline information, and additional details are available through Training (page 21).

EXPERIENCE THE SYSTEM.
Access Workday via one of several convenient methods. Reference the Launch Checklist at the beginning of this guide for important items to review and add.

EXPLORE WORKDAY PROCESSES.
Note the systems being replaced (page 09), and take a deeper dive into how related processes will function in Workday (page 10). Processes feature automatic routing to the individuals who need to review and approve. Notifications let you know when you are “up next” in a process, and you can choose to receive them ad hoc or combined as a daily digest. Additionally, delegation enables certain processes to be assigned to other individuals, who may act on your behalf. Delegation may give your delegate visibility into specific content to which they would not normally have access.

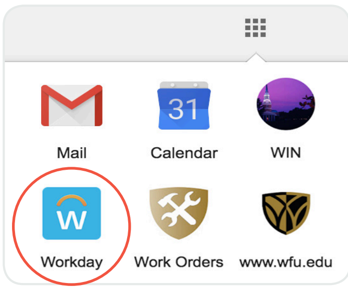
EXAMINE WHO’S WHO.
Roles determine which processes an individual may initiate and approve, as well as the types of data they can view. Individuals in these roles are organized into supervisory organizations, which are groups of departments, divisions, and teams.

*This Transition Guide is subject to change. Access it online at **learning.workday.wfu.edu/transitionguide**, as opposed to printing, to help ensure you are viewing the most up-to-date information.*

ACCESSING WORKDAY

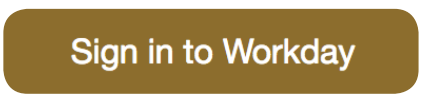
There are several ways to access Workday, and you may select the method(s) you prefer:

GMAIL



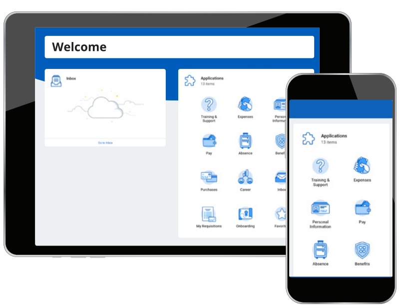
Click the Workday icon in the Google App Launcher (where you click to access Google Docs, Calendar, etc.). You may need to click "More" and/or refresh your browser.

WORKDAY@WAKE WEBSITE

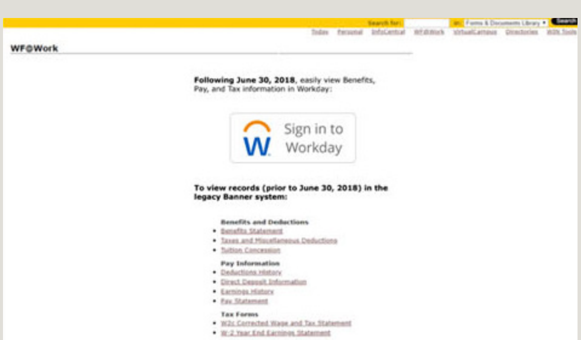


Click the button on **workday.wfu.edu**.

MOBILE APP



Search for "Workday" in the Apple App Store or Google Play. Download and open the app. Sign in using WFU as your "company ID." Enter the username and password you use to sign in to Gmail. Complete the Google Two-Step Verification. (*Job Aid*)



WORKDAY AND WIN

Historically, faculty and staff have used WF@Work through WIN to view benefits, pay, and tax information. Beginning July 2, WF@Work will include a button to view current information in Workday. Historical records will continue to be accessed through WIN, using the links on WF@Work.

SYSTEMS REPLACED

SYSTEMS REPLACED

Banner
(Human Resources and Finance modules)

WF@Work
through WIN

SilkRoad OpenHire
and RedCarpet

NOVAtime®
FEEL THE POWER

Bank of America Merrill Lynch | Works®

DEACON DEPOT

MANUAL PROCESSES REPLACED

Paper Forms

Wordpress Forms

Electronic Personnel Action Forms (EPAFs)

Microsoft Excel

Microsoft Word

PDFs

Google Drive

Email

Intercampus Mail

Telephone

Processes are not changing for: Worker's Compensation, Medical Leave Paperwork, Medical Accommodation Requests, Tuition Concession, Paid Time Off Donation, Hiring Temporary Workers not on the Wake Forest University Payroll (Coming Later).

BEFORE-AND-AFTER PROCESSES

Blue highlights indicate the role who is primarily involved in the process; orange highlights indicate additional roles who may be involved.

PROCESS	CURRENT	FUTURE
Absences		
Faculty Leaves	XLSX	**Worker (faculty)** initiates leave or return-from-leave request in Workday, which generates forms (**Manager** may also initiate).
Requesting Absence (FMLA, Short-Term Disability, Parental Leave)		**Worker** initiates leave or return-from-leave request in Workday, which generates forms (**Manager** may also initiate).
Requesting Other Time Off Plans (Civil Leave, Bereavement, etc.)		**Worker** initiates time off request in Workday and uploads supporting documentation.
Benefits and Personal Information		
Enrolling and Changing Benefits		**Worker** makes elections in Workday and uploads supporting documentation.
Affordable Care Act Compliance		**Worker** receives eligibility notification via Workday inbox, and makes elections in Workday.
Updating Personal Information	**WF@Work**	**Worker** submits updates in Workday by clicking the "Personal Information" worklet.
Compensation and Employment Changes		
Faculty/Staff Changes and Compensation Change Requests		**Manager** initiates the "Change Job" or "Request Compensation Change" process in Workday (**Talent Liaison** or **Manager's Manager** may also initiate).
Additional Compensation		**Manager** initiates the "Request One-Time Payment" process in Workday (in some cases, an allowance plan may be initiated).
Summer Research Compensation (Faculty)	PDF	**Manager** initiates the "Period Activity Pay Assignment" process in Workday.
Student Compensation (Special Jobs/Tasks Completed)	XLSX PDF	**Manager** initiates process in Workday.

Mobile Communication Device Payment		**Manager** initiates the "Mobile - Allowance Plan" process in Workday.
Gratuities Compensation (Graylyn, Campus Recreation, and Athletics)		**Manager** initiates the "Request One-Time Payment" process in Workday; completes Enterprise Interface Builder (EIB) in Workday if more than 50 at a time.
Faculty/Staff Transfers and Promotions		**Manager** initiates process in Workday (**Talent Liaison** or **Manager's Manager** may also initiate). Creates new position, if applicable, depending on the transfer or promotion.
Exits		**Worker** initiates resignation process in Workday (alternatively, **Manager** or **Talent Liaison** initiates termination process).
Finance		
Departmental Deposit	**Core** + **Banner** + **Cognos**	**Cost Center Cash Sale Specialist** uses "Cash Sale" function to enter deposit. Backup attachments are required on all payment types (excluding cash and check). Process routes to **Cashier Specialist** for approval.
Financial End User Reports	**Cognos**	**Worker** accesses real-time reporting via the "Financial End User Reports" worklet.
Submitting Expenses		**Worker** initiates expense report in Workday and submits photo of receipt. Expense report automatically routes for approval. Worker receives payment confirmation in Workday inbox.
Submitting Journal Entries	**Banner** + **Cognos**	**Worker** enters journal or accounting adjustment in Workday. Adjustment automatically routes for approval.
Submitting a Purchase Requisition	**Deacon Depot** + **Cognos**	**Worker** initiates purchase requisition in Workday. Requisition automatically routes for approval. Pre-encumbrance (commitment) and encumbrance (obligation) balances are visible throughout the process.
Performance		
Begin-Year Performance Review		**Worker** creates goals in Workday. Goals route to **Manager**, who makes changes or approves. If Manager makes changes, goals route back to Worker for review; if Manager approves, goals are saved to Worker's Workday profile.

Mid-Year Performance Review	DOCX PDF	**Manager** requests mid-year review template and completes it in Workday, using today's two-point rating scale.
End-Year Performance Review	DOCX XLSX PDF	**Manager** completes end-year performance review in Workday, using three-point rating scale. Manager and **Worker** add comments, and template routes to **Manager's Manager** for approval. **Talent Liaison** receives notification, and review is saved to Worker's Workday profile. Manager has flexibility to customize template (deciding between goals, responsibilities, or a combination), solicit feedback from colleagues in Workday, or opt solely to submit rating and have performance conversation.
Three-Month Performance Review	DOCX PDF	**Manager** completes three-month performance review, using three-point rating scale: Meets Expectations, Employment is Conditional, Does Not Meet Expectations.
Corrective Action	@ DOCX	**Manager** completes template in Workday, and it routes for approval. Manager meets with **Worker**, and template routes to Worker for acknowledgment before it is saved to their Workday profile.
Recruiting and Hiring		
Creating Job Descriptions	DOCX	**Manager** selects from pre-built, broad-based Job Profiles for more than 360 positions (**Talent Liaison** may also select).
Recruiting Faculty* (New and Backfill)	@	**Manager** creates position (to obtain funding) and Job Requisition (to begin recruiting process) in Workday.
Recruiting Adjunct Faculty*		**Manager** creates Job Requisition unless candidate has been identified, and sets up period activity pay since individual will be paid by stipend (**Talent Liaison**, **Academic Activity Pay Coordinator**, **Delegate** may also initiate). Position must be posted a minimum of three days, if benefits-eligible.

**Academic Partner sets up Academic Appointment.*

Hiring Student Workers	XLSX	**Manager** identifies and hires student worker (**Talent Liaison** or **Delegate** may also initiate).
Recruiting New Staff (Benefits-Eligible and Part-Time)	DOCX	**Manager** creates position (to obtain funding) and Job Requisition (to begin recruiting process) in Workday. Position must be posted a minimum of three days.
Backfilling Staff (Benefits-Eligible and Part-Time)	DOCX	**Manager** creates Job Requisition in Workday. Position must be posted a minimum of three days.
Hiring Faculty (Outside the College) and Staff		**Manager** enters offer in Workday, and may revise based on candidate negotiations. Inbox item confirms hire details before process routes for budget approval.
Hiring College Faculty	PDF	**Manager** initiates business process in Workday and sends welcome message through Workday (**Talent Liaison** may also send welcome message).
Pre-employment Screenings		**Manager** identifies pre-employment screenings in Workday, selecting “All Screens” for students working with minors.
Onboarding	**RedCarpet**	**Worker** (new hire) receives tasks and welcome message via Workday inbox.
	Reporting, Directories, and Organizational Charts	
Generating Reports**	**Cognos**	**Workers** across campus have access to generate reports, based on their assigned security.
Searching for Contact Information	**WF@Work**	**Worker** types individual’s name into the Workday Search.
Viewing an Organizational Chart	PDF	**Worker** navigates a dynamic view of teams in Workday.

***As data builds over time in Workday, the system will enable campus leaders to visualize trends across the organization. When the system launches, it will not include historical data, so some reports may appear incomplete. The first years with Workday are an investment in the University’s reporting future since more robust metrics will be available as campus uses the system. All faculty and staff are stewards of the data, and entering accurate information will help provide a complete reporting picture.*

ROLES

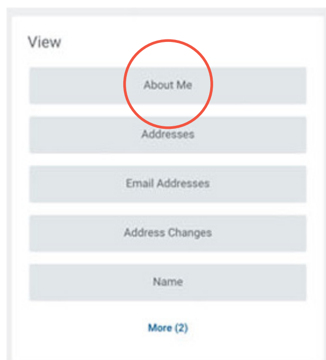
FINDING DEPARTMENTAL ROLES

Workday Roles are groupings of people with specific responsibilities and permissions.

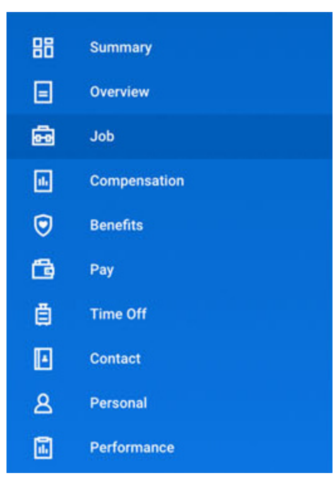
Complete the following steps to view the role assignments with whom you will interact.

1. Click the "Personal Information" worklet.

2. Click "About Me" under "View."



3. Click "Job" in the sidebar.



4. Click "Support Roles" in the header.

ROLES

Visibility

ACADEMIC ROLES (EXAMPLES)

Academic Partner: Departmental academic assignment; policy and procedure expert responsible for initiating and/or approving academic business processes, academic affiliate appointments, and HCM business processes for academic positions.

Academic appointment details, Academic Unit and Named Professorship reports, Academic Affiliate details.

Academic Dean: Provides departmental executive-level oversight of HCM business processes. Initiates and/or approves HCM and Payroll business processes for academic positions, including Academic Affiliate appointments.

Academic appointment details, Academic Unit and Named Professorship reports, Academic Affiliate details.

HUMAN CAPITAL MANAGEMENT (HCM) ROLES

Manager: Supervisory Organization leadership role, which can initiate HCM business processes and approve HCM, expense, procurement, and time and absence processes, including:

- **Recruiting and Onboarding:** Initiates the following: creating, closing, copying, and editing job requisitions and evergreen requisitions; the offer process; and job posting updates.

  Candidate information, supporting documentation, and job requisition and evergreen requisition details.

- **Position and Employee Information:** Initiates the following: creating positions and hiring Workers; organizational assignment changes; adding and ending additional jobs for existing Workers; transfers; data and business title changes; and terminations.

  Contact information, job and position details, and additional jobs for Workers.

- **Compensation:** Requests compensation changes; may request compensation for a Worker even if the work was performed for another department or division.

  Compensation information for Workers.

- **Time Entry, Time Off, and Leave of Absence:** Approves or cancels time off requests and corrections; enters and corrects Workers' time off on their behalf; places Workers on, or returns them from, leaves of absence; approves, cancels, or corrects requests to begin, or return from, leaves of absence.

  Time off requests and balances; leave requests.

- **Performance:** Initiates and facilitates Performance Improvement Plans and Disciplinary Actions; facilitates Performance Reviews.

  Performance Improvement Plans, Performance Reviews, and Disciplinary Actions.

- **Career Development:** Initiates Development Plans; adds Workers' accomplishments, awards, education, external job history, languages, and professional affiliations.

  Workers' accomplishments, awards, education, external job history, languages, professional affiliations, and career preferences.

Talent Liaison: Performs or approves HCM business processes for assigned organizations

Salary, Performance Reviews, and other employment information for all Workers in assigned organizations.

Worker: An employee (faculty, staff, student worker, or contingent worker).

Personal information and other data, based on assigned security.

Service and effective dates: The following dates are associated with Worker profiles:

- *Hire Date:* The most recent date of hire (same date that was historically in Banner).
- *Original Hire Date:* The original date of hire (same date that was historically in Banner). It matches the Hire Date for individuals who have never been rehired at Wake Forest.
- *Continuous Service Date:* The date upon which Service Awards and Paid Time Off calculations are based (same date that was historically in Banner).
- *Length of Service:* The time between today's date and the Hire Date.
- *Time in Position and Time in Job Profile:* Set to 01/01/2018 for individuals hired prior to that date. Aligns with the Hire Date for individuals hired on or after 01/01/2018.
- *Compensation Effective Date and Benefits Effective Date:* Compensation and benefits will be effective July 1 for launch, but each Worker will have a conversion record of 05/01/2018 in their compensation and benefits history.

ROLES

Visibility

PAYROLL ROLES

Timekeeper (Local): Approval authority for timesheet business processes; performs timesheet management functions (e.g., submitting, canceling, and deleting timesheets) for assigned location hierarchy organizations.

Hours not yet started, not submitted, not approved, or approved.

Payroll Summary: Custom role held in conjunction with another Finance role to review salary summary information.

Salary summary.

Payroll Detail: Custom role held in conjunction with another Finance role to review salary detail information.

Salary detail.

FINANCE ROLES

Agency Manager: Single-assignment role; primary manager for assigned Agencies; authority to approve spend for assigned Agencies, without a dollar limit.

Salary detail, spend analytics, and summary and transactional detail for assigned Agencies.

Business Manager: Single-assignment role; authority to approve spend transactions exceeding $100K.

Salary detail for assigned Agencies; summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Budget Specialist: Single-assignment custom role assigned to Cost Centers; creates budget amendments and approves budget changes; has approval steps or tasks in HCM processes (e.g., creating positions and position budgets, and requisitions/hires).

Compensation information in HCM processes, salary detail (by default), summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Cash Sale Specialist: Multiple-assignment role; processes cash sales (similar to departmental deposit today). Does not have the ability to deposit.

No salary visibility (by default). Summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Finance Specialist: Multiple-assignment custom role; creates journals and accounting adjustments on behalf of Cost Centers.

No salary visibility (by default). Summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 0 Manager: Single-assignment role; authority to approve $0-$2,500 spend transactions; reviews all spend transactions for assigned Cost Centers (except Gift/Grant/Agency spend).

No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 1 Manager: Single-assignment role; only Cost Center Manager approval authority for journals and accounting adjustments; authority to approve $2,500-$25K spend transactions.

No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 2 Manager: Single-assignment role; authority to approve $25K-$100K spend transactions.

No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 3 Manager: Single-assignment role; authority to approve $100K-$500K spend transactions.

No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 4 Manager: Authority to approve $500K-$1M spend transactions.

Salary detail visibility (by default), spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Cost Center Level 5 Manager: Single-assignment role; authority to approve spend transactions exceeding $1M.

Salary detail visibility (by default), spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

Designation Manager: Single-assignment role; primary manager for assigned Designations; authority to approve spend transactions on assigned Designations, without a dollar limit.

Salary, summary detail, and transactional detail for assigned Designations.

Gift Manager: Single-assignment role; primary manager and approval authority for assigned Gifts, without a dollar limit.

Salary, summary, and transactional detail for assigned Gifts.

Grant Manager: Single-assignment role; primary manager and approval authority for assigned Grants, without a dollar limit.

Salary, summary, and transactional detail for assigned Grants.

Grant Principal Investigator: Single-assignment role; typically assigned to faculty members; investigator and approval authority for assigned Grants, without a dollar limit.

Salary summary, summary, and transactional detail for assigned Grants.

Professorship Partner: Role held by the Senior Business Administrator for each School; initiates the creation of a Named Professorship, which is then approved by the Professorship Administrator.

Salary visibility.

Project Manager: Single-assignment role; primary manager for assigned Projects; authority to approve spend on assigned Projects, without a dollar limit.

Salary, summary, and transactional detail for assigned Projects.

"Worktag" Financial Analyst: Optional multiple-assignment custom role; may be assigned to any worktag.

No salary visibility (by default). Summary and transactional detail for assigned worktag.

TRAINING AND SUPPORT

COURSE CATALOG

Key Audience

WORKDAY ESSENTIALS

Choose the one Essentials class that is most applicable:

WD 101: Workday Essentials for Faculty and Exempt Staff
Faculty or staff members who will only use Workday for self-service tasks (i.e., managing personal information, benefits, and tax elections).

WD 102: Workday Essentials for Non-Exempt Staff
Staff members who enter time via a computer or timeclock.

WD 103: Workday Essentials for Managers
Individuals who approve Paid Time Off and/or hours worked.

WD 104: Workday Essentials for Student Workers
Students who have campus jobs while enrolled at Wake Forest.

HUMAN CAPITAL MANAGEMENT

HR 101: Posting Positions, Hiring and Onboarding
Individuals who assist with the hiring process, recruit candidates, and/or review resumes.

HR 102: Managing Performance
Individuals who conduct performance reviews.

HR 103: Initiate Employee Job Changes
Individuals who historically have submitted Change Request forms for job, title, or compensation changes.

HR 104: The Student Worker Life Cycle in Workday
Individuals who hire and/or supervise student workers.

FINANCE

FIN 101: Workday Finance Essentials
Individuals who need clarity on the Financial Data Model (FDM) at Wake Forest.

FIN 102: Procurement
Individuals who purchase items for their departments.

FIN 103: Invoicing and Receiving
Individuals who create supplier invoices.

FIN 104: Reimbursements
Faculty or staff members who use a PCard and/or submit reimbursement requests for travel, conferences, etc.

FIN 105: Workday Accounting
Individuals who create accounting journals or budget amendments.

FIN 106: Asset Management
Individuals who manage assets.

FIN 107: Capital Projects
Individuals who manage capital projects.

FIN 108: Workday Reporting
Individuals who use and run financial reports.

*Visit **learning.workday.wfu.edu** for information about registration, online classes, and prerequisites.*

TRAINING AND SUPPORT

QUESTIONS?

If you have questions as you use Workday, proceed through the following steps:

STEP 1: VIEW ON-DEMAND MATERIALS

Job Aids and videos are the first places to turn for questions since they guide you through processes in detail. You may access these resources directly in Workday by clicking the “Training & Support” worklet on your home screen.

Important: *Accessing the Job Aids online, as opposed to maintaining a print archive, will help ensure you are viewing the most up-to-date information.*

STEP 2: CONSULT A POWER USER

If the question cannot be resolved by viewing the Job Aids, consult the Power User available to support your department. These points of contact will answer your question or escalate them as needed.

STEP 3: CALL THE WORKDAY SUPPORT CENTER

As a final resort, if your question still needs attention, call the Workday Support Center at **758-5100**.

OPEN LABS

Visit any of the Open Labs for over-the-shoulder support.

ZSR Library Multimedia Lab 262
- Monday, July 2 | 8:30 a.m. – 4:30 p.m.
- Tuesday, July 3 | 8:30 – 11:00 a.m.
- Thursday, July 5 | 8:30 a.m. – 4:30 p.m.
- Friday, July 6 | 8:30 a.m. – 4:30 p.m.

University Corporate Center (UCC) Room 1018
- Tuesday, August 14 | 8:30 a.m. – 3:00 p.m.

Reynolda Hall 301
- Monday, August 20 | 8:30 a.m. – 3:00 p.m.
- Wednesday, August 22 | 8:30 a.m. – 3:00 p.m.
- Friday, August 24 | 8:30 a.m. – 3:00 p.m.

workday.wfu.edu @workdayatwake

WAKE FOREST UNIVERSITY