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VANDERBILT V UNIVERSITY
MEDICAL CENTER

myworkday

**Go-Live Readiness Session
Managers (People Leaders)**

Agenda

- MyWorkday
- Manager Role
- Supervisory Organization
- Inbox & Notifications
- PTO
- Demo – Initiations in Workday
- Approvals in Workday
- Reporting
- Demo – Manager Hub Dashboard
- Delegation

MyWorkday

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Replacing 40 systems used for 40 years

Human Resources

Taleo
PeopleSoft
ePac
C2HR
Performance Central
Learning Exchange *
Kronos*

Benefits Express
Onboarding Portal
Waldo
BI Launch Pad

Supply Chain/ Procurement

eProcurement
Concur*
Check Requests*
Onmicell & PMM (Tecsys)
USBank
Pcard
BI Launch pad

Budgeting/ Planning

eBudget
BudgetPro
Budget Forecasting Tool
BI launch pad

Research & Grants

Dept Mgt System (DMS)
Center Management
BI launch pad
Effort Certification
Cost Transfer (Admin Justification)
COEUS*
IRIS
iLab*

Finance

General Ledger/ eDog
Hyperion
Narrative Chart of Accounts (NCOA)
eStar/ Epic (cost center)*
Privilege Mgt
Journal Entries
BI launch pad

Denotes system/ process impact. A current list of systems impacted can be found at vumc.org/myworkday

Terminology in Workday: Visit the Glossary on the Training Hub

Workday Term	Current Term	Definition
Business Process		Set of tasks that need to be completed for an even to occur, the order in which they must be done, and who must do them.
Inbox		To-do's or task action items in a business process that require a follow-up step (approval, etc.) appear in your Workday inbox.
Notification		A "for your information" (FYI) of an activity in Workday driven by a business process; you do not have to respond or complete an activity as a result of receiving a notification.
Supervisory Organization	Org Chart/Home Department	The management hierarchy (i.e. who reports to whom). Positions are associated with supervisory organizations, and workers are hired into positions associated with a supervisory organization
Worker Profile	People Finder	A worker profile contains employee information such as contact information, job information and work anniversary information. Only limited information, such as contact information (e.g. telephone number; email address), team or organization is available to other employees. This information acts as a directory for all employees.

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Manager Role

Manager
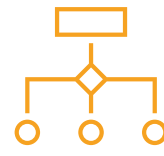
The Manager role in Workday is determined by where you sit in the Supervisory Organization. If you have people reporting to you, you are a Manager in Workday. This role is the initiator and the approver for the following business processes* for your team:

Initiator

Job Changes

Job Requisitions

Return from FMLA

Onboarding New Employees

Performance Reviews

Performance Improvement

Approver

Time Off Requests

Supplier Requests

Expense Reports

Credentials

Additional one-up approvals for managers on your team

*Not a complete list

Manager Role in Workday

What's changing?

- Managers will **initiate, own & complete** administrative supervisory tasks within Workday

- Limited/temporary delegation to others

Workday Manager Role Scope *(not all-inclusive list):*

- Viewing position information of direct reports
- Reviewing and approving time off requests*****
- Initiating job requisitions
- Assessing candidates

- Initiating job changes
- Expense report approval
- Performance management

* Those currently approving time off requests in **VandyWorks**

will continue the current process.

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Manager Role in Workday

Why is this role beneficial?

- Managers have better control of the tasks & data that they "own"

  - Provides greater visibility into process & data
  - Can better help their team members
  - Better management of work & tasks in their areas

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How may some individual contributor roles change?

What's changing?

- Some support roles & responsibilities **may** evolve

- Fewer administrative tasks with Workday (e.g., less paper for routing, fewer transcriptions of data between systems, etc.)

Why is this beneficial?

Opportunity to tap into these individuals' professional potential (e.g., grow skills, engage them in new ways, align them to VUMC's growth)

How will we support affected employees & their managers?

Post-cutover, consult with HR Business Partners as needed (e.g., ensure job titles/descriptions align with the work, determine professional development)

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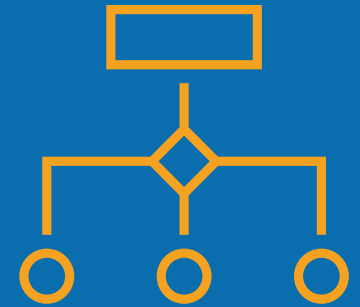
Supervisory Organization

Organizations & Hierarchies

Organization within Workday refers to a fundamental building block for managing information (financial and non-financial).
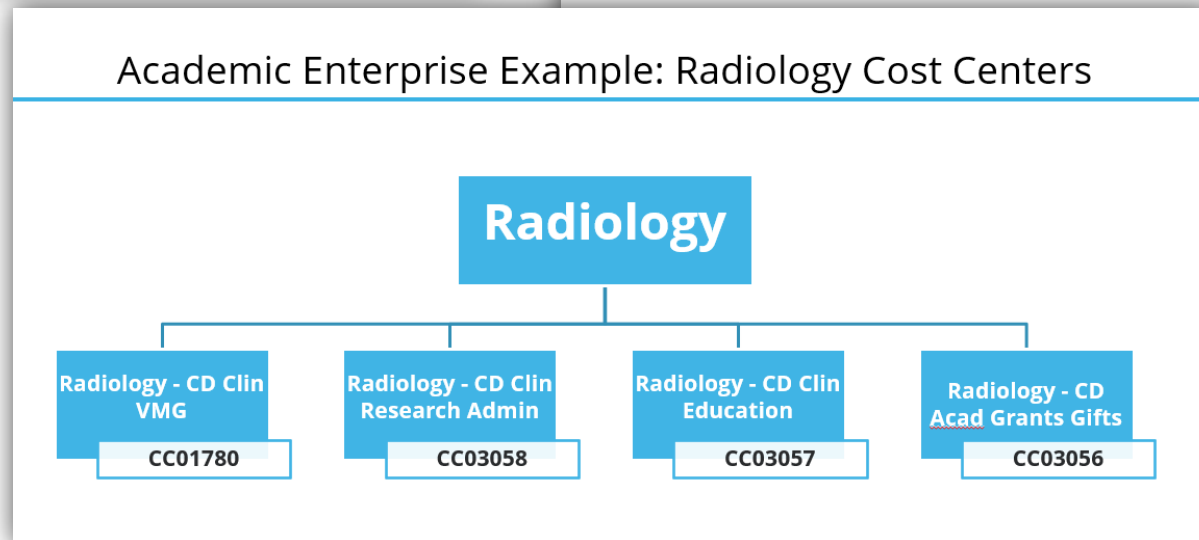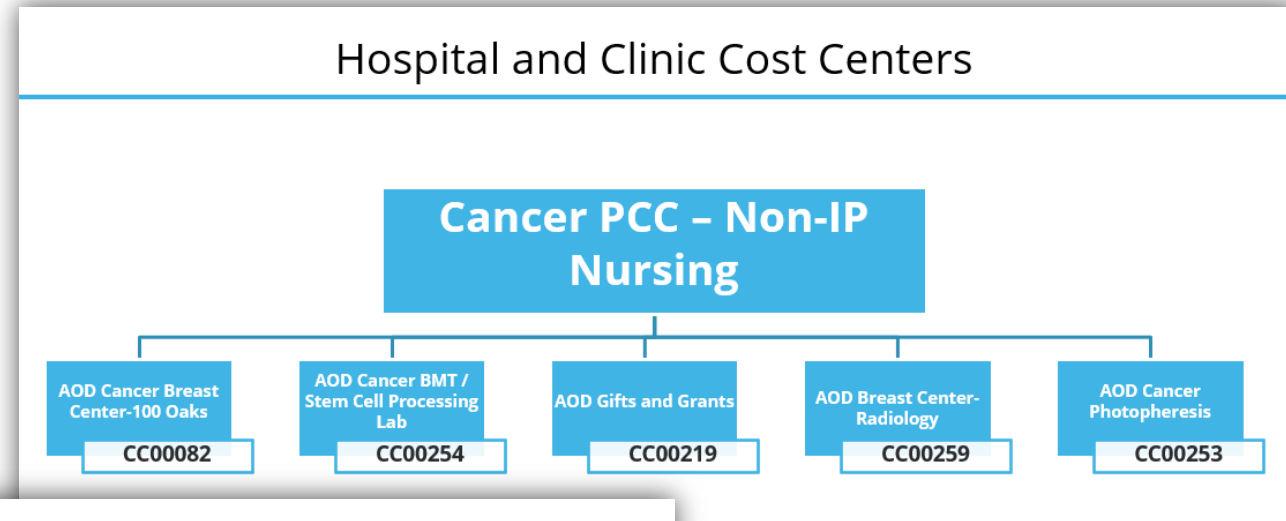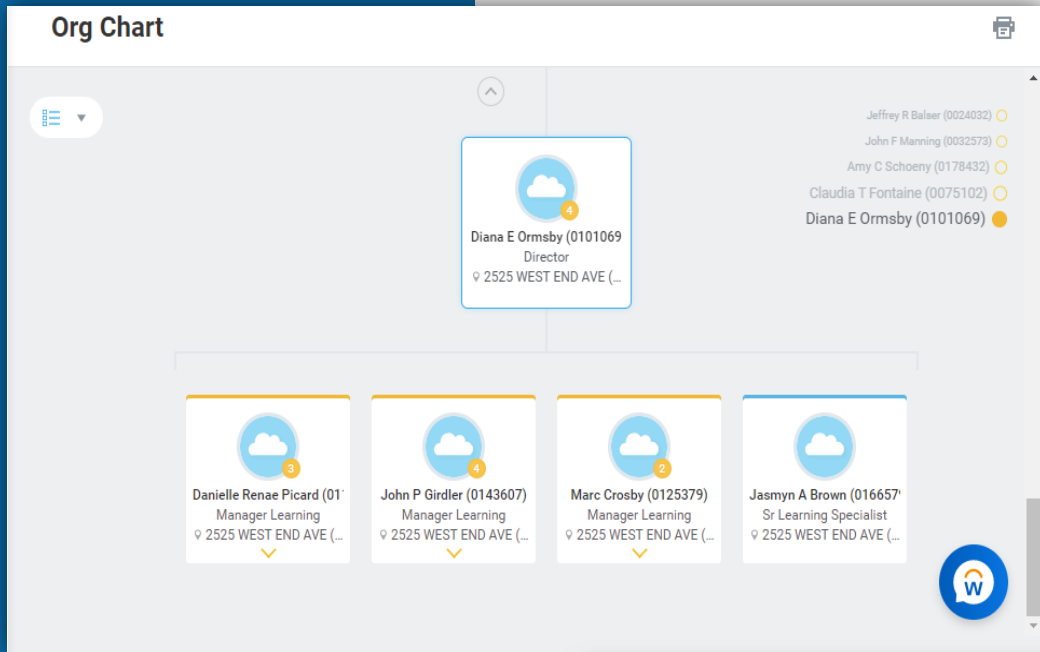
Supervisory and Cost Center organizations are examples of Workday delivered organizations.

Organizations are often arranged in **hierarchies** and enable reporting at various levels within the hierarchy.

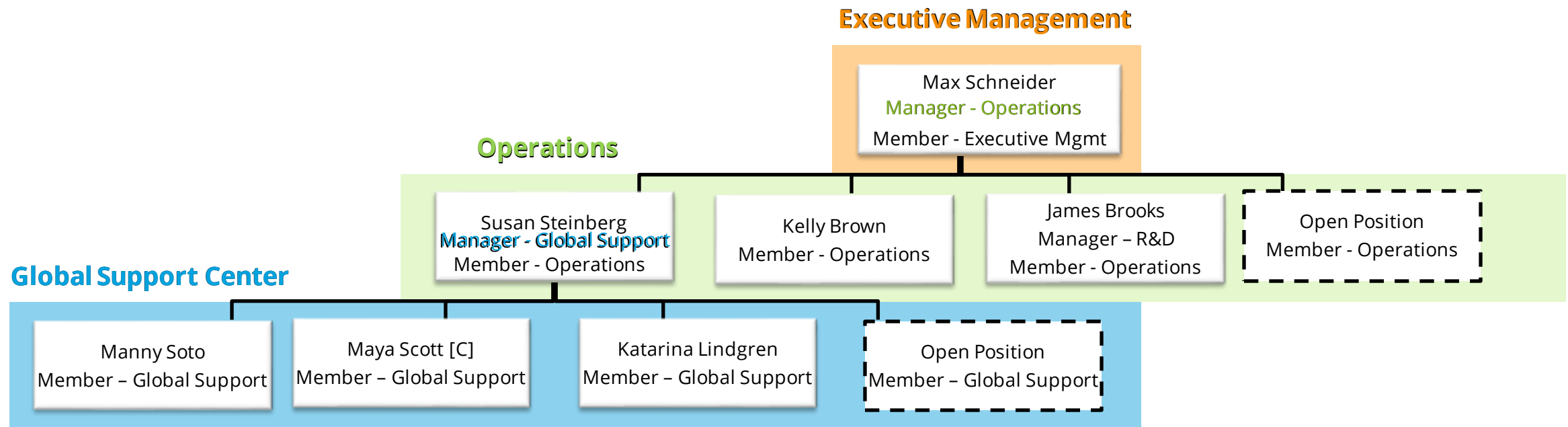Within organizational hierarchies, the **roles and security** are also allotted to any level.

Organizations & Hierarchies

Org Chart

Jeffrey R Balser (0024032)
John F Manning (0032573)
Amy C Schoeny (0178432)
Claudia T Fontaine (0075102)
Diana E Ormsby (0101069)

Diana E Ormsby (0101069)
Director
2525 WEST END AVE (...

Danielle Renae Picard (01...
Manager Learning
2525 WEST END AVE (...

John P Girdler (0143607)
Manager Learning
2525 WEST END AVE (...

Marc Crosby (0125379)
Manager Learning
2525 WEST END AVE (...

Jasmyn A Brown (016657...
Sr Learning Specialist
2525 WEST END AVE (...

Hospital and Clinic Cost Centers

Cancer PCC – Non-IP Nursing

AOD Cancer Breast Center-100 Oaks	AOD Cancer BMT / Stem Cell Processing Lab	AOD Gifts and Grants	AOD Breast Center-Radiology	AOD Cancer Photopheresis
CC00082	CC00254	CC00219	CC00259	CC00253

Academic Enterprise Example: Radiology Cost Centers

Radiology

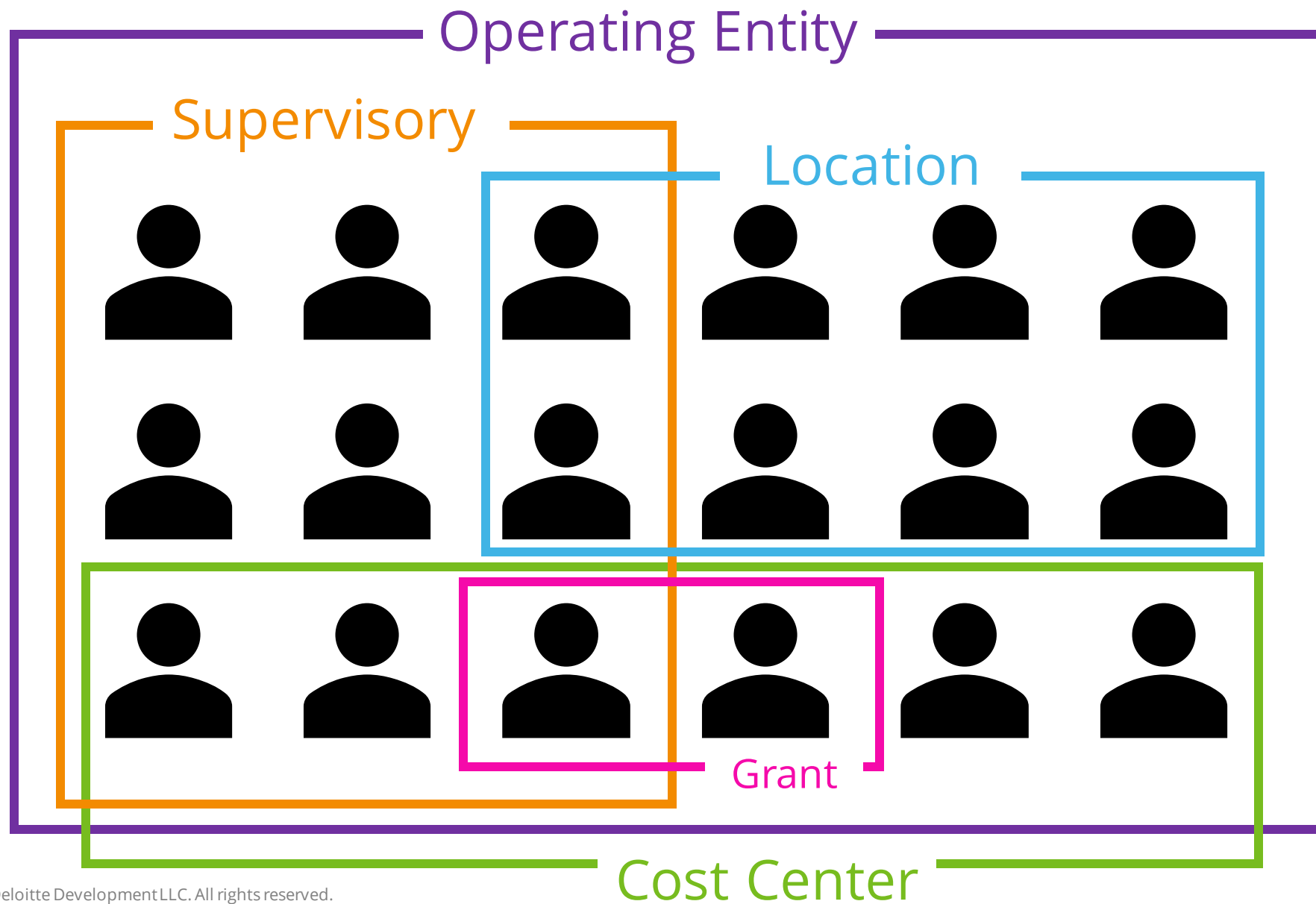| Radiology - CD Clin VMG	Radiology - CD Clin Research Admin	Radiology - CD Clin Education	Radiology - CD Acad Grants Gifts
CC01780	CC03058	CC03057	CC03056

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Supervisory Organizations

- Each worker is a **Member** of a Supervisory Organization

- A **Manager** (role) is assigned to a Supervisory Organization

- A Manager is not a member of the organization(s) they manage

Executive Management

Max Schneider
Manager - Operations
Member - Executive Mgmt

Operations

Susan Steinberg
Manager - Global Support
Member - Operations

Kelly Brown
Member - Operations

James Brooks
Manager – R&D
Member - Operations

Open Position
Member - Operations

Global Support Center

Manny Soto
Member – Global Support

Maya Scott [C]
Member – Global Support

Katarina Lindgren
Member – Global Support

Open Position
Member – Global Support

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Organizations & Hierarchies – Example

Workday Role Examples

Roles	Description	Typical Access in Workday	Workday Delivered?	Typical Organizational Restriction
Manager	Role assigned to workers that are designated as Manager of a Supervisory Organization	• Access to worker data that report up to Manager • Ability to initiate Manager Self-Service (MSS) transactions	Yes	• Supervisory Organization
Cost Center Manager	Role assigned to primary manager for assigned cost centers. Approval authority for financial business processes.	• View cost center analytics and approve financial transactions	Yes	• Cost Center
Grant Manager	Role assigned to the primary manager for assigned grants.	• View and manage assigned grants along with spend analytics. Approval authority for financial business processes	Yes	• Grant/ • Grant Hierarchy
VUMC Requestor	Role assigned to a position which can initiate purchase requisitions	• Initiates purchase transactions in Workday	Yes	• Cost Center
VUMC Receiver	Role assigned to a position which acknowledges receipt of goods	• Acknowledges receipt of goods purchased	Yes	• Cost Center

Inbox & Notifications

Workday Inbox and Notifications

Action Alert Notifications

Informational Notifications
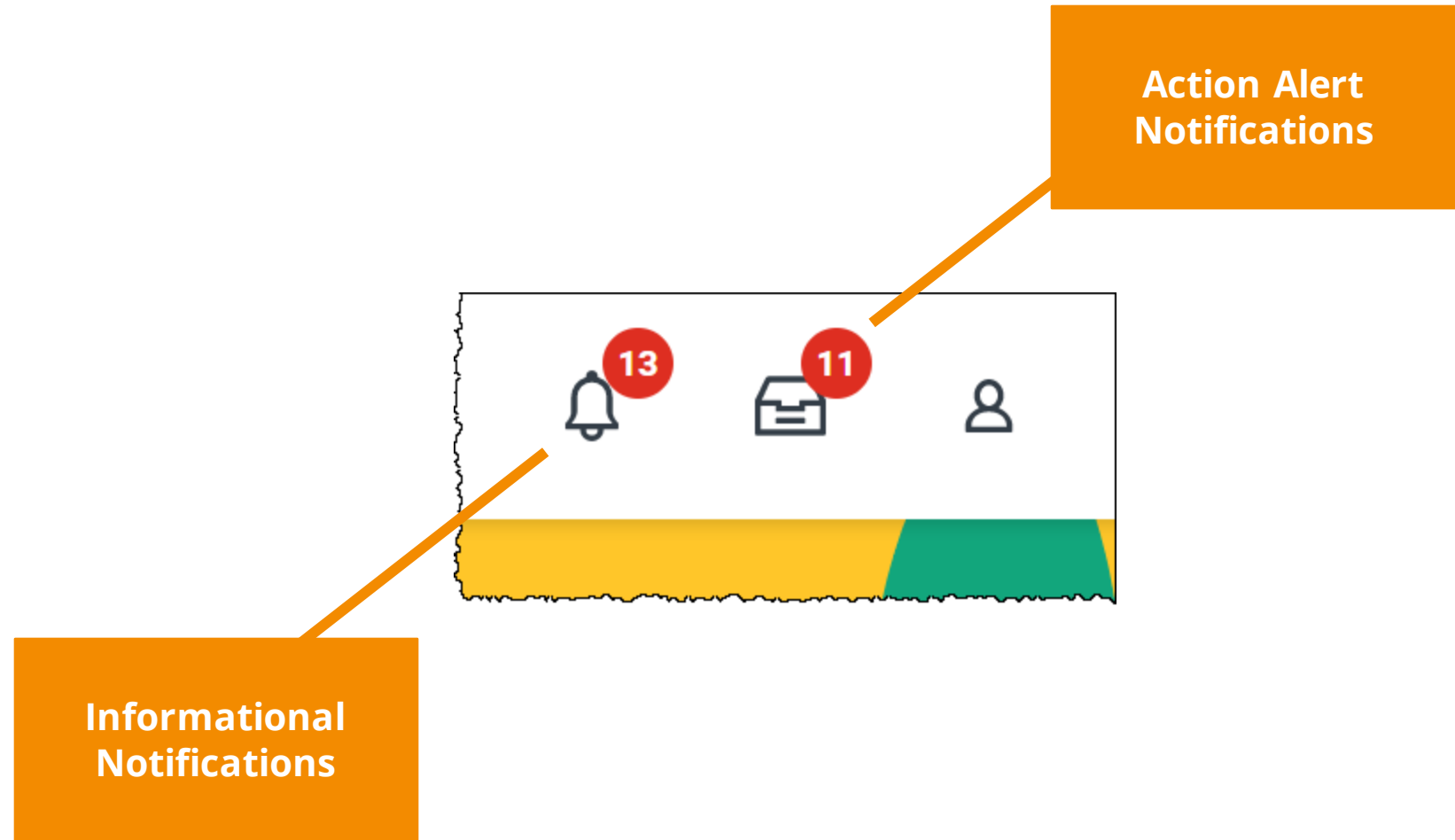
Workday Notification Types

There are three types of Workday-generated email notifications:

Informational Notifications	Informational in nature; do not require the user to perform an action
Action Alert Notifications	Generated when an action item appears for a user; requires the user to log into Workday to perform an action
Overdue Reminders	Generated when an action item has passed its due date; reminds the user to log into Workday to perform the action

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VUMC Workday Notifications

Default setting for email delivery of Workday notifications will be a **Daily Batch** *(Delivery time TBD)*

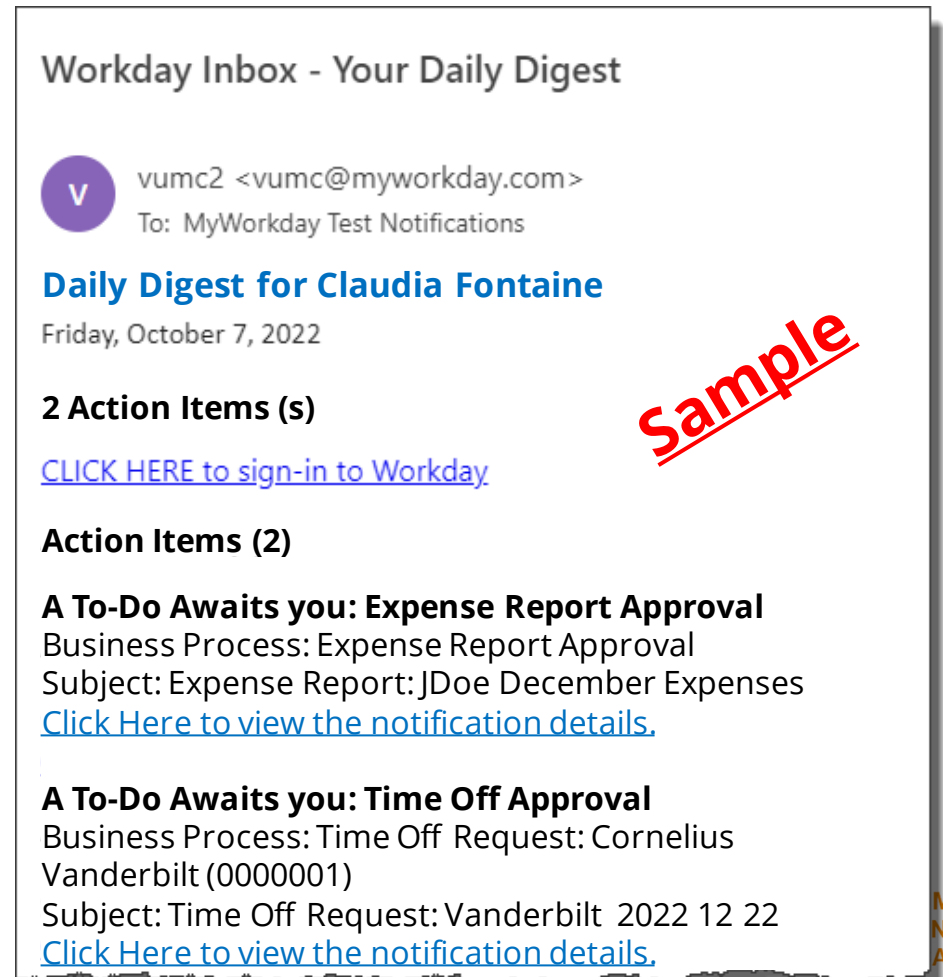Users will be able to update preferences to **'Immediate'** for Action Items

Users will be able to update preferences to **'Immediate'** or **'Mute'** for Informational Items

Workday Notifications

Workday Inbox
(real time):
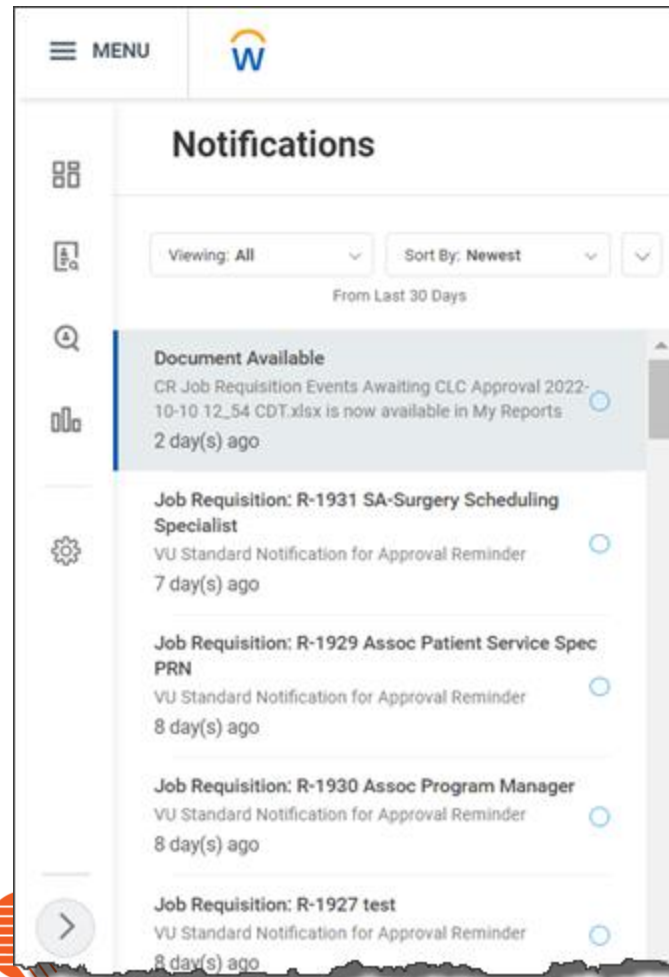
Outlook email
(Default, Daily Digest):

PTO

Absence Management – Time Off

- Primary way to adjust PTO balances

- Work with VandyWorks and Kronos

- Employees using VandyWorks for PTO requests will continue to do so

- Exempt staff:

  ➢ Will no longer use Kronos to report PTO taken

  ➢ Will enter requests within Workday

Team PTO

Initiations in Workday

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Demo

Approvals in Workday

Approving an Inbox Item

1. Log into Workday

2. Click the Inbox Icon in the upper right corner

3. Your inbox will display Actions on the left

4. Click the item to view the approval

5. Ensure the transaction is valid, appropriately documented, and contains the correct worktags

6. Add comments if necessary and click Approve. If not, click Send Back and explain what needs correction. Note that Deny cancels the transaction.

Inbox Approval Example

Pcards and T&E Cards in Workday

- Card charges will be processed in the Workday expense reporting module

- PCard Managers will now be the Cardholder's Manager

- Training is required for Cardholders and Managers

- All charges must be expensed within 30 days

Payment Cards: Key Changes

- All purchases made with a VUMC payment card will be listed within the Expense Report module as Credit Card Transactions, usually within three (3) business days

- Cardholders will be required to submit all card charges monthly, uploading receipts as necessary per policy

- Electronic approvals and receipts within Workday will replace current-state 'PCard Binders'

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Payment Cards: Workflow

- Expense report transactions will be routed automatically in Workday, based on the attributes of each expense

- After Manager approval, payment card transactions will be routed as applicable to a Cost Center Manager, Grant Manager, or for any additional approvals such as dollar amount

- This approval functionality means that with Workday, payment cards will be an approved form of payment for grant purchases after Workday go-live

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Reporting

HR Reports

Current/Legacy Report Name	Report Description	Where in Workday?
Employee Job Detail	Report displays details by employee including • Name • Hire Date, Continuous Service Date • Job code information • Organization information (company, location, cost centers, worktags, etc.) • Manager information • Compensation information	Current Worker Detail Report
Leave Accrual Report	The Manager Hub dashboard is available from the Menu>Apps for Managers. In the View section, you can view "My Team's Upcoming Time Off"	Manager Hub—Overview Tab
Employee Compensation Report	Click the Compensation tab of the Manager Hub to view your Team. Report displays Employee, Job profile, Management Level, FTE, Frequency, Total Base Pay, and Pay Range (Min, Mid, Max).	Manager Hub—Compensation Tab
Department Turnover (Retention)	This dashboard will display Current Fiscal Year data, Terminations, and Annual Trend.	Retention Dashboard for Managers
Employee Transactions with Compensation History	Report displays: • Employee ID • Legal Name • Effective Date • Business Process Type & Reason • Current position • Proposed Position • Job Code (current & proposed) • Organizational Information (current & proposed) • Base Pay amounts and changes	Worker Change History Report

Reporting Crosswalk – Available in **WDHR-102 HR Reports in Workday**

Reporting Demo – Manager Hub

Demo

Organization   VUMC Business Education Department (Diana Ormsby (0101069))   **Include Subordinate Organizations**

Compensation Summary ⚙

Employee	Job Profile	Management Level	FTE	Frequency	Total Base Pay	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Danielle Picard (0110056)	1662 - Manager Learning	Manager	1	Annual				
Jasmyn Brown (0166579)	6056 - Learning Analyst	Professional	1	Annual				
John Girdler (0143607)	1662 - Manager Learning	Manager	1	Annual				
Marc Crosby (0125379)	1662 - Manager Learning	Manager	1	Annual				

View More ...

▭ View

Compare My Team CR   ›

✕

Compensation Summary CR

Organizations   * | ✕ VUMC Business Education Department (Diana Ormsby (0101069)) ... | ≣

Include Subordinate Organizations   ☑

OK   Cancel
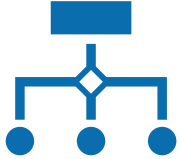
Delegation

What is Delegation in Workday?

Delegation is the temporary assignment of another person to act on your behalf to carry out specific activities.

*Delegation does not remove accountability (ownership) for the task from the user it was initially assigned to

Delegation does not provide reporting access to the delegated user

Delegation Approach for VUMC

Delegation occurs within a **supervisory organization** and is not a permanent transfer of responsibilities

Delegation is **temporary (16 weeks)**

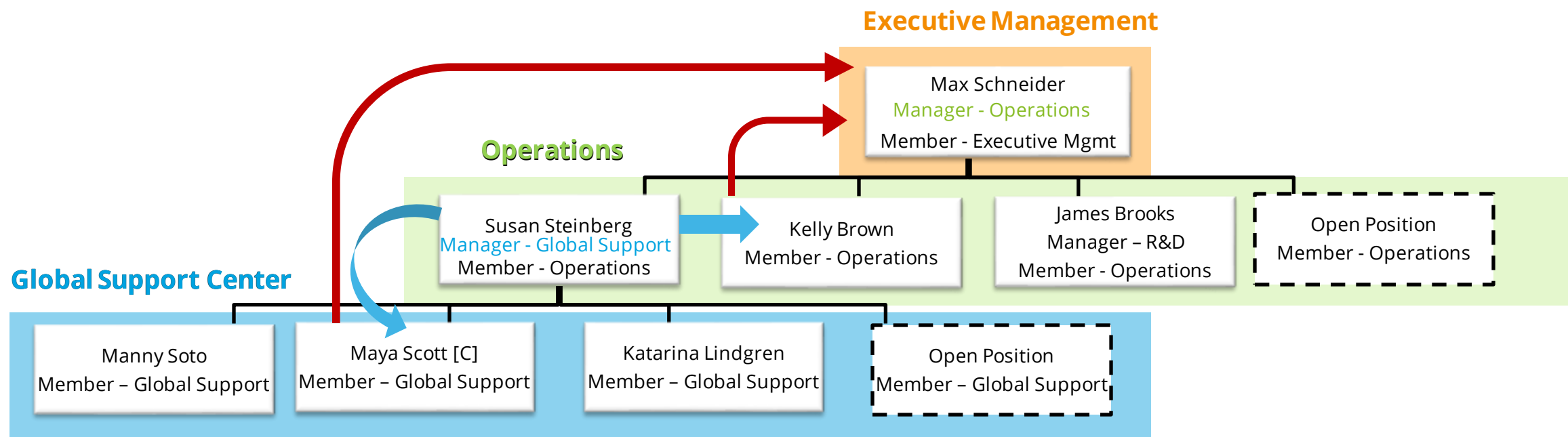Employees may delegate to **peers or superiors** with *no approval required*

Delegation to **subordinates** will require an *approval process* within Workday

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Delegation example

If Susan **delegates** a task/business process to Kelly (peer) or Maya (subordinate):

- Susan will be notified of their actions on her behalf in her inbox, Susan will not approve the delegated actions

- If a transaction initiated by a delegate requires 1-up approval, the approval will go to Max, because the task was performed on Susan's behalf

Questions?

Thank You