

INTEGRATED RENEWAL PROGRAM

Workday Wednesday: HR – Supervisory Orgs and Security Roles

August 14, 2019

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TODAY'S OUTLINE



Supervisory Organizations in Workday



HR Security Roles Discussion



Upcoming Activities and Engagements



Q&A



WHY WORKDAY?



A **new set of tools** to replace 25 year-old institutional systems which have reached end of life.



A **better user experience** for faculty, staff and students – anywhere, anytime.



Streamlining administrative processes to make our work **easier and faster**.



Real-time data and reporting for effective decision making and more transparency.

WHY WORKDAY?

Brock
University

UNIVERSITY OF
WATERLOO




workday®

UNIVERSITÉ
McGill

Langara.

Yale

LSU

 THE OHIO STATE UNIVERSITY

ASU Arizona State
University

WHAT IS IN SCOPE?*



STUDENT

- Admissions (Undergraduate)
- Assessment Outcomes
- Curriculum Management (limited)
- Enrolment
- Graduation
- Learner Financial Management
- Learner Financial Support
- Learner Management
- Program Planning and Management
- Progression
- Registration
- Scheduling
- Transfer Credit



HUMAN RESOURCES

- Benefits
- Compensation
- Core HR Management (incl. Onboarding/Off-boarding)
- Payroll
- Talent Acquisition
- Workforce Management – Time & Attendance



FINANCE

- Budget Development (core to Workday) *
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning) *
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants Administration
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense

*Scope areas listed have budget approval. This is a multi-year program and new functionality will be introduced to meet UBC's evolving needs in subsequent years.



SUPPORTING THE CHANGE: TRANSITION NETWORK



**Building strong
relationships
between units and
IRP**



**Support
localization of the
change**



**Leading and
facilitating the
transition within
home units**



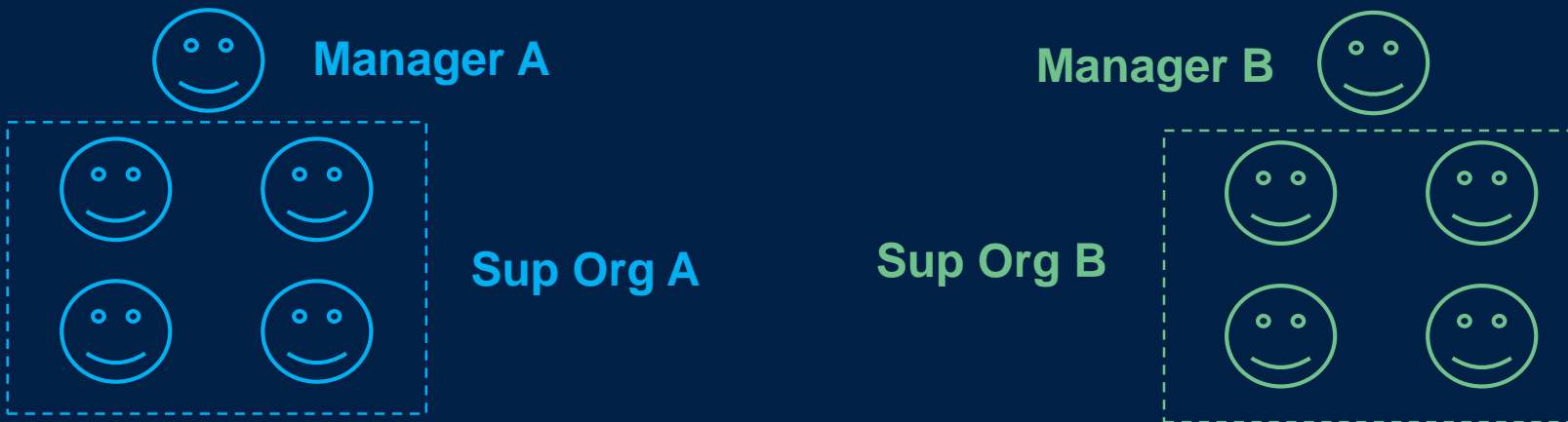
**Share learnings,
practices &
resources across
units to support
transition**

SUPERVISORY ORGANIZATIONS (SUP ORGS)

Supervisory Organizations, or “Sup Orgs”, are the **foundation** of Workday Human Capital Management (**HCM**).

A Sup Org is a logical grouping of employees who **report to the same manager**.

Each manager is associated with a Sup Org that contains the workers and positions they manage.



WHAT ARE SUP ORGS USED FOR?



Sup Orgs provide the structure for **how faculty and staff are organized**, how HR **business processes are enabled**, and how HR **data is connected** in the system.

Sup Orgs **are** used to drive one over one approval for reimbursements to employees and travel expenses.

MATRIX ORGANIZATION

A Matrix Organization is a type of Sup Org used to group worker(s) who report to **more than one manager**.

These can be created in situations when an **employee has two managers** who they report to.

Both managers of a Matrix Organization can **initiate, approve, or view employee information** (vacation and sick balance, hours worked, etc.) and **job changes** (salary increase, FTE changes, etc.)



MANAGER – DEFINITION IN WORKDAY

A manager is the person responsible for **hiring, managing and terminating employees** in their Sup Org.

Unionized Supervisors are **not considered to be managers** based on this Workday definition.

A manager of a Sup Org is responsible for **initiating and approving** HR transactions for the positions that report to them (or delegate).

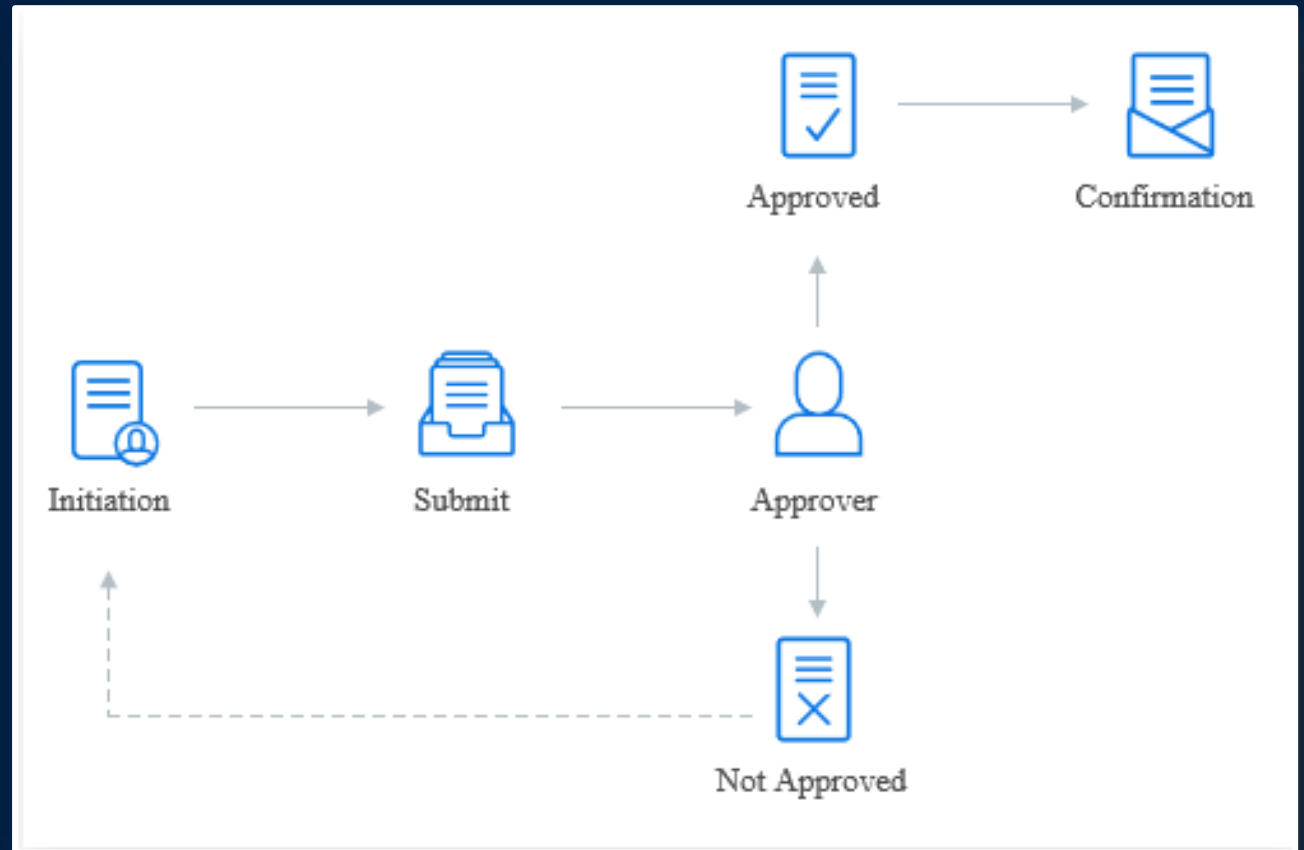


WORKDAY DEMO: SUPERVISORY ORGANIZATIONS



WORKDAY BUSINESS PROCESSES AND SECURITY ROLES

- All transactions will be executed through the completion of **“business processes”**.
- Business processes (BP) are a set of tasks that people initiate, act upon and complete in order to accomplish a desired business objective.
- These business processes are built based on **“security roles”**.
- Security roles determine who can initiate approve and act on all business processes
- Can be assigned to positions or in some cases directly to the user.



WORKDAY SECURITY ROLES: HCM

Security Role Name in Workday	Can they initiate, action, and/or review?	Some examples of what can they do in Workday
<p>HR Analyst</p>	<ul style="list-style-type: none"> • Initiate • Review • Approve some BPs 	<ul style="list-style-type: none"> • View job details, compensation, time off balances, contact details • Initiate absence requests, compensation changes, change job (transfer, FTE, etc.), termination
<p>Manager</p>	<ul style="list-style-type: none"> • Initiate • Review • Approve BPs 	<ul style="list-style-type: none"> • Create, review, and approve positions and job requisitions (job postings) • Initiate, review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees • Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.)



WORKDAY SECURITY ROLES: HCM

Security Role in Workday	Can they initiate, action, and/or review?	Examples of what can they do in Workday
Recruiter	<ul style="list-style-type: none">• Initiate• Review• Approve	<ul style="list-style-type: none">• Create Job Requisitions• Post jobs• Manage the Recruitment Process through Workday's Recruitment Hub• Act on BPs that relate to Recruitment in the Sup Orgs they support
Time Keeper	<ul style="list-style-type: none">• Initiate• Review	<ul style="list-style-type: none">• Initiate, Review time entry related tasks for Supervisory Organizations which they support Time Tracking functions.• Manager and/or HR Partner will be required to 'Approve' time entries



WORKDAY SECURITY ROLES: HCM

Security Role in Workday	Can they initiate, action, and/or review?	Examples of what can they do in Workday
<p>Central HR Role - Compensation Partner</p>	<ul style="list-style-type: none"> • Review • Approve 	<ul style="list-style-type: none"> • Review and approve HCM Business Process related to job classification and compensation • Can 'add approver' to HR Executive if further review/approval is required • Full Workday access
<p>Central HR Role - HR Partner</p>	<ul style="list-style-type: none"> • Review • Approve 	<ul style="list-style-type: none"> • Review and approve HCM Business Process at the Central HR Level • Can 'add approver' to HR Executive if further review/approval is required • Full Workday access



WORKDAY SECURITY ROLES: HCM

Security Role in Workday	Can they initiate, action, and/or review?	Examples of what can they do in Workday
Central HR Role - HR Executive	<ul style="list-style-type: none">• Review• Approve	<ul style="list-style-type: none">• Review and approve Staff/Student HCM related tasks• Full Workday access
Central HR Role - FR Executive	<ul style="list-style-type: none">• Review• Approve• Initiates some processes	<ul style="list-style-type: none">• Review and approve HCM related tasks and information• Initiate processes such as Promotions and Terminations• Full Workday access

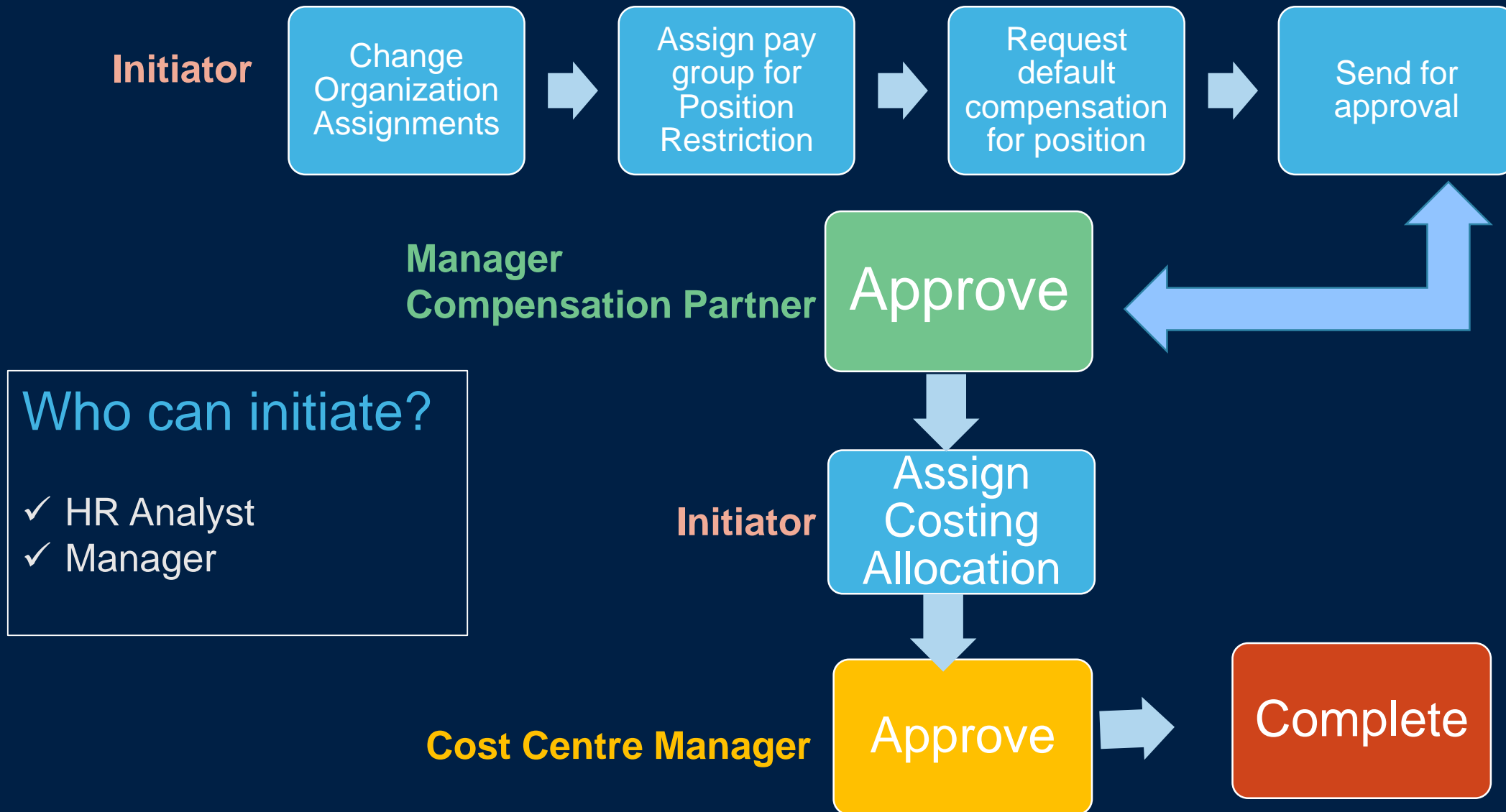


WORKDAY SECURITY ROLES: HCM

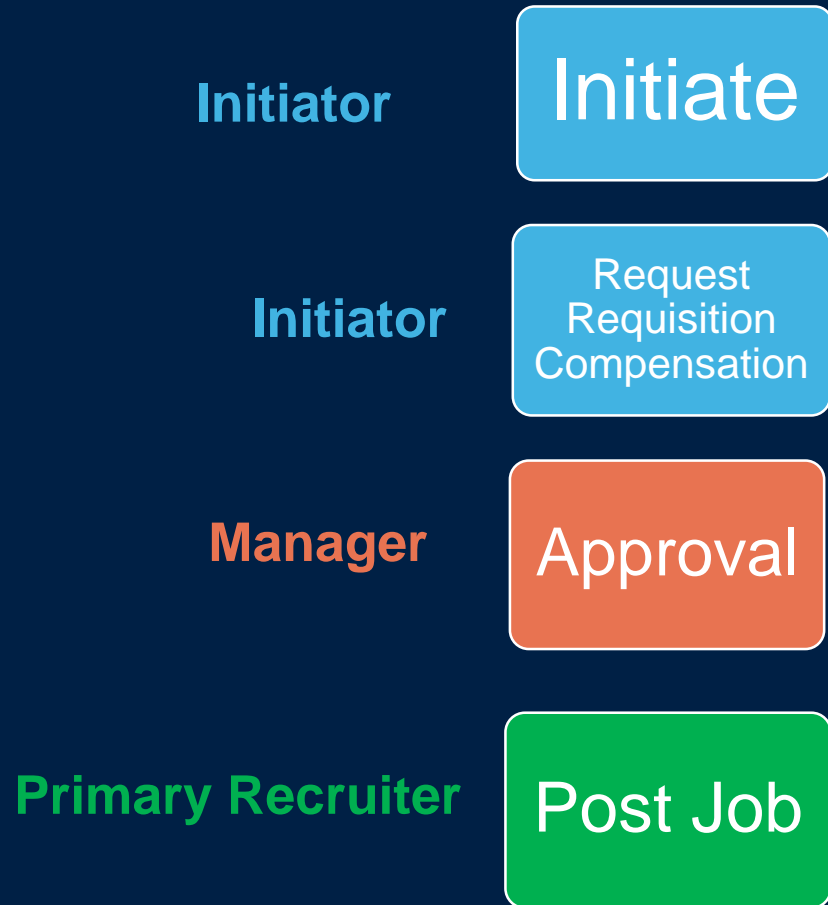
Security Role in Workday	Can they initiate, action, and/or review?	Examples of what can they do in Workday
Central Payroll - Payroll Representative	<ul style="list-style-type: none">• Review• Approve	<ul style="list-style-type: none">• Run payroll
Retiree Partner	<ul style="list-style-type: none">• Initiate• Approve	<ul style="list-style-type: none">• Enroll retiree's and survivor's in RSB benefits• Make administrative changes on behalf of retiree/survivor



BUSINESS PROCESS: CREATE POSITION



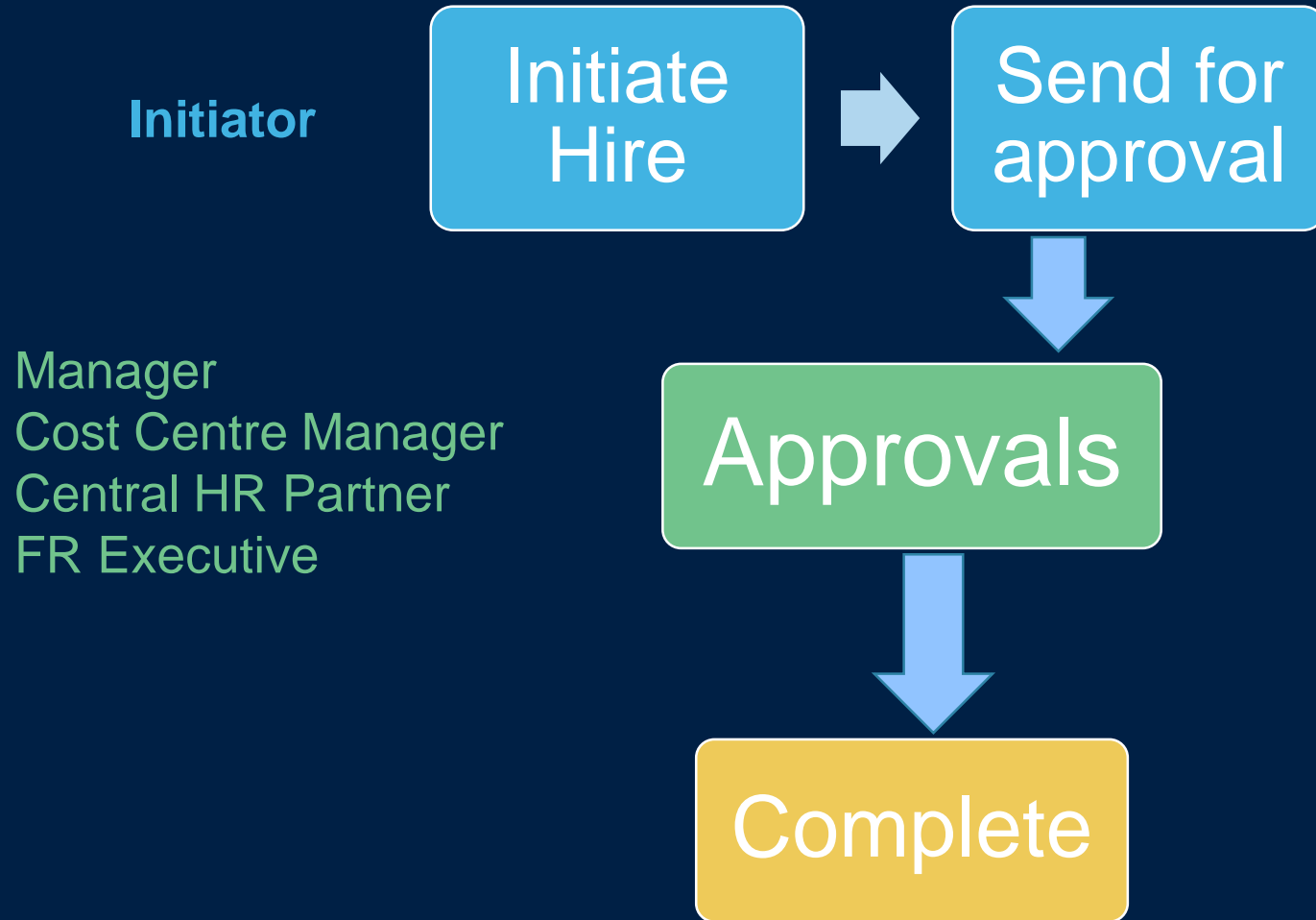
BUSINESS PROCESS: JOB REQUISITION (JOB POSTING)



Who can initiate?

- ✓ Recruiter
- ✓ Manager
- ✓ HR Analyst

BUSINESS PROCESS: HIRE



Manager
Cost Centre Manager
Central HR Partner
FR Executive

Who can initiate?

- ✓ HR Analyst
- ✓ Manager

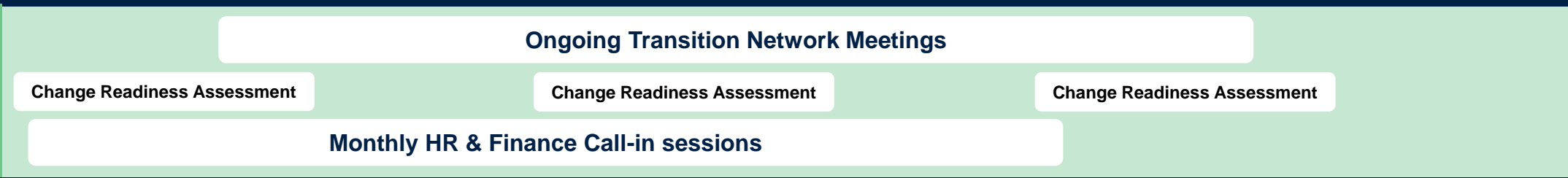


UPCOMING ACTIVITIES AND ENGAGEMENTS

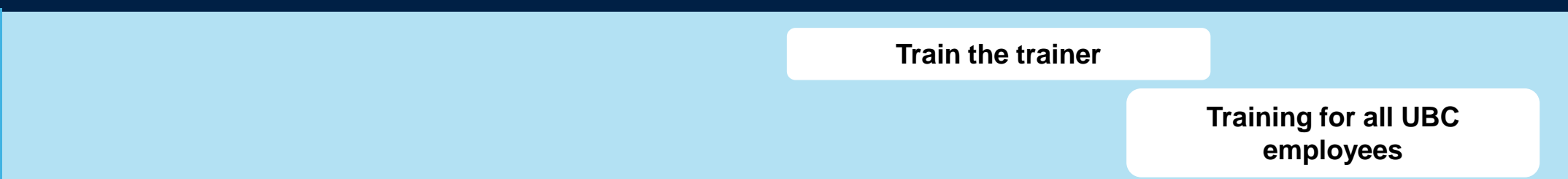
HR/FIN
Go Live



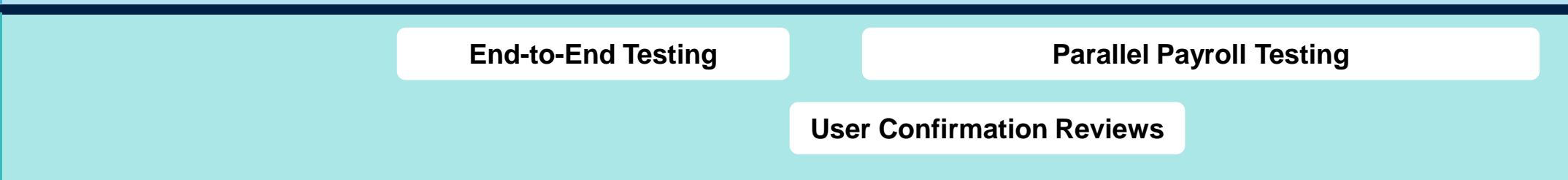
Adoption & Sustainment



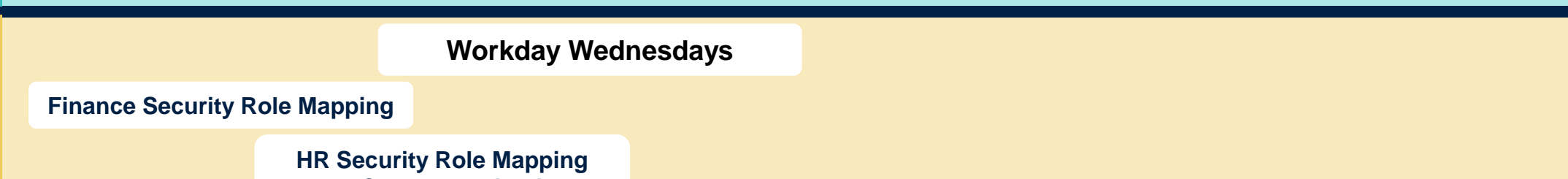
Training



Testing



Additional Activities



Timelines on this slide are subject to change.

QUESTIONS?



Next Workday Wednesday: [Change Readiness Survey Results and Open Demo](#)
Wednesday, August 21 | COM 201 | 12:00 – 1:00pm



IRP OKANAGAN TEAM

Want to **request** an IRP presentation for your unit? Have **questions**?

Get in touch with us!

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