To: Nancy Creel-Gross, Assistant Vice President, HR Operations & Workday@Yale

From: Position and Compensation Management Service Group
Denny Kalenzaga, Jack Beecher, Co-Leads

Date: October 27, 2014

Re: Position and Compensation Management Service Group Workday Recommendations Set 1

This memo outlines the recommendations from the Position and Compensation Management Service Group on Workday Business Processes functionality anticipated in Release 1.

These recommendations are based on the review of the Prototype 1 Workday for the following business processes:

- 110-020 Create Job Req
- 110-030 Manage Recruitment, Manage Hire and Onboarding

As these are our first set of recommendations, we will likely make additional recommendations once we review other Workday business processes and reporting, and as we collaborate with other service groups on areas with overlapping responsibility.

Key Recommendations for Release 1:

1. Create a lower level financial custom role (e.g., accountant) to enable financial approval at the beginning of the process for job requisitions and one time payments.
2. Department chairs, deans and directors should not inherit Workday manager responsibilities when a lead administrator leaves a position; responsibility should route to BOLT member or their designee.
3. Name prefix (e.g., Mr., Ms.) should not appear with a person's name in Workday.
4. Develop guidelines for using job management or head count staffing models where position management will not work (e.g., visiting faculty).
5. Include a training worklet icon on every employee's Workday home page that links to TMS.
6. Workday should be able to mask people from public view under special circumstances.
7. As a general recommendation, Workday's design framework for dropdown lists (and equivalents) should be short and conditional instead of long and all-inclusive.
8. For most instances, job requisitions should not route to BOLT or the Medical School's Position Review Committee (PRC) for approval. We should build the functionality to route to BOLT/PRC nominees for the rare instances where their approval is required (Deputy Provost approval is required; budget deficit exists; new GA position requested).

Notification, Code and Help Text Recommendations for Release 1:

9. Initiators and reviewers should receive notification once a job requisition is approved.
10. When "contact Human Resources" is stated in help text, provide complete contact information (i.e., who should the employee contact, what is their phone number or email address).

11. Onboarding items that need an action in Workday should be called an action item and not a notification, or new employee offer letter should guide new employees through the process.
12. For all onboarding items, help text for new employees should be different from help text for current employees.
13. Prior to new job requisition approval, help text should make clear that Lead Administrator approval means the LA has the budget and any needed PRC/BOLT/Provost approval.
14. Notifications to HR partners to initiate delayed hiring bonus should include charging instructions.

Post Release 1 Recommendations:

15. Integrate YBT, STARS, and Workday to eliminate redundant data entry.
16. Department specific job descriptions should reside in Workday so there is only one repository for this information and new responsibilities can be added as needed so that job description will always be up to date.
17. Workday should allow attachments as soon as practicable. A common repository for information is critical to work efficiency. The service group is willing to assist in development of an appropriate document list.
18. Employees should be able to upload photos of themselves, or departments on their behalf.
19. Since Workday's directory will be behind the CAS login, create a public version of the Workday directory with name, title, department and contact information.

Attached you will find a spreadsheet that provides details of the identified capabilities, related business processes, Workday functionality and corresponding recommendations.

Please let us know when we can discuss the implementation of these recommendations in further detail, as well as the team's rationale for our recommendations.

Thank you for your anticipated support.

cc: BOLT, Sandy Stein

Position and Compenation Management Service Group Business Process P2 Review - Log of Questions, Functionality and Recommendations

ID#	Business Process/Topic	Questions/Concerns Raised	Workday Functionality/Business Process	Service Group Recommendations	Cross with items in memo
1	110-020 Create Job Req	For positions where we do not want counted towards our FTE, is the head count staffing model available for use in Workday (e.g., management of transient faculty positions such visiting professorships)? Also, why are there no job requisitions for the headcount staffing model?	Position management staffing model has been chosen for Yale Workday. Once a staffing model is decided, it is difficult to change in Workday. Workday made the decision to not further develop this feature because few Workday clients use the headcount management staffing model. That is why there is no job requisition option.	Creating a job requisition for each visiting professorship position is onerous. Guidelines need to be developed for using job management or head count as the staffing model for positions such as visiting professors.	4
2	110-020 Create Job Req	Can a person be the head of two supervisory organizations?	Yes.	No recommendation.	
3	110-020 Create Job Req	How many years of position history will reside in Workday?	Position history will begin tracking once Workday is live. Historical position history data created prior to the Workday implementation will be available as static reports. You can only search by person's name and not by position.	No recommendation.	
4	110-020 Create Job Req	When you are loading bulk job requisitions, how is the integration structured between Yale Budget Tool and Workday? We are concerned with redundant data entry.	This is still being worked out. The current process is to load bulk job requisitions into YBT and then the bulk data will be transferred to Workday.	Integrate YBT, STARS, and Workday in a way that will eliminate redundant data entry.	15
5	110-020 Create Job Req	Who inherits Workday managerial responsibilities when a manager leaves a position?	The manager in the next supervisory organization up the chain of command will inherit the role until a new manager is hired. For example, when a Lead Administrator position becomes vacant the Chair will inherit the position until the next Lead Administrator is hired. Workday also has a process where a manager can delegate responsibility to another person who will act as an interim.	Because chairs will not manage an inherited Lead Administrator position, we need a clear process for delegation of managerial responsibility to persons other than the manager's supervisor (in the case of lead administrators: interim manager from BOLT, the department or elsewhere at the University).	2
6	110-020 Create Job Req	When there is a change in a generic job description (job summary), where does the update take place and where is the data maintained?	Changes to generic job descriptions are currently updated and stored in STARS. Workstream team is looking at how changes to generic job descriptions can be initiated in Workday.	Department specific job details should be available in Workday so there is only one repository for this information and new responsibilities can be added as needed so that job description will always be up to date. A common repository for information is critical to work efficiency.	16
7	110-020 Create Job Req	When a job profile is not the appropriate profile (due to job audit), how easy is it to change this?	This is a change management issue. Process for a job audit will remain the same.	If a job description is updated due to a job audit, the department specific job details should be available in Workday. See ID# 6 for the recommendation.	16
8	110-020 Create Job Req	Why is name prefix displayed (e.g., Mr., Mrs.)? And what about faculty? Will MDs and PhDs be called "Dr." in Workday?	This is a Workday limitation. We can't have middle initials without displaying prefixes. Workstream will check into this.	Name prefix should not appear in a person's name in Workday.	3

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ID#	Business Process/Topic	Questions/Concerns Raised	Workday Functionality/Business Process	Service Group Recommendations	Cross with items in memo
9	110-020 Create Job Req	Can we review the create job requisition reason codes and provide input? There are too many options listed at once which are too similar to each other. This will lead to high error rates.	Workstream provided list of job requisition codes, and provided a revised list that reflected some of our concerns.	Workstream accepted our recommendations and revised the job requisition reason codes. As a general recommendation, Workday design framework for dropdown lists (and equivalents) should be short and conditional instead of long and all-inclusive.	7
10	110-020 Create Job Req	What if a generic job description is not available in the job library? How can a new generic job description be created and loaded into Workday?	You will follow the current process of submitting to Comp and Class	No recommendation.	
11	110-020 Create Job Req	Should PRC/ BOLT approve job requisitions in workday? If we know that there is budget for a new/ existing job requisition, what value does this added approval step provide? PRC/BOLT approval slows down the job requisition process.		For most instances, job requisitions should not route to BOLT/PRC/Provost for approval. Help text should make clear that Lead Administrator approval means the LA has the budget and any needed PRC/BOLT/Provost approval. For the instances where Deputy Provost approval is required, a budget deficit exists, or a new GA position is requested, job requisition should route to BOLT member or PRC nominee for approval.	8, 13
12	110-020 Create Job Req	How are notifications structured once a job requisition is approved?	We can configure Workday notifications by business process (e.g., job requisition approval will trigger notifications to the roles we select) but not by user (e.g., an initiator in one department will not be able to opt out of notifications if all equivalent initiators get them).	Initiators and reviewers should receive notification once a job requisition is approved.	9
13	110-020 Create Job Req	Can we attach documents into Workday?	This function will be available at a future release date.	Document loading should commence as soon as the security of the system is verified. A common repository for information is critical to work efficiency. Service Group is willing to help create list of position and compensation documents that should be attached into Workday.	17
14	110-030 Manage Recruitment, Manage Hire and Onboarding	If we have an employee hired with a visa, will the process remain the same (i.e., will this happen in STARS)?	The process for those hired with a visa that exists today will not change with the implementation of Workday.	No recommendation.	
15	110-030 Manage Recruitment, Manage Hire and Onboarding	What framework is used to determine which "getting started" tasks are categorized as an action or notification item? For example, most people will need to making parking/transit arrangements. Why are parking and transit notifications rather than action tasks?		Anything that needs an action should be called an action item and not a notification. If that is not possible, the New Employee Packet in the offer letter should step new employees through the process. We also recommend that the Getting Started at Yale service group evaluate this issue.	11

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ID#	Business Process/Topic	Questions/Concerns Raised	Workday Functionality/Business Process	Service Group Recommendations	Cross with items in memo
16	110-030 Manage Recruitment, Manage Hire and Onboarding	New employees will not know how to contact HR. In the help text where "contact Human Resources" is stated, complete contact information should be provided (e.g., organization name such as Employee Services, phone number, email).		When "contact Human Resources" is stated in help text, complete contact information should always be provided (i.e., who should the employee contact, what is their phone number or email address).	10
17	110-030 Manage Recruitment, Manage Hire and Onboarding	For tasks listed as under the action item of "review of documents," will tracking of completed training be captured in Workday or TMS (e.g., Sexual Harassment training).	As yet unclear, likely to be tracked through TMS.	TMS should be integrated with Workday. Include a training worklet icon standard on every employee's home page that links to TMS.	5
18	110-030 Manage Recruitment, Manage Hire and Onboarding	Workday naming conventions such as "Change Emergency Contacts" is confusing because new employees are adding emergency contacts and not changing them. "Update payment elections" in fact is an action item to set up payroll direct deposit; this is a confusing naming convention - can we add help text? And is it possible for help text to be different for new hired versus existing employee?	This is a Workday limitation. This is how Workday names the process. Offer letters to new employees will step them through the workday onboarding process, outlining exactly that they need to do in the system.	For all onboarding items, help text for new employees should be different from help text for current employees. This will ensure new hires are clear about the action they need to take.	12
19	110-030 Manage Recruitment, Manage Hire and Onboarding	Will the Yale directory be in place when Workday goes live?	Workday will replace the current Yale directory, and will be behind the CAS login. Yale community members can look up a person in Workday and find their name, work location, phone, email address and supervisor.	Create a public version of the Workday directory with name, title, department and contact information.	19
20	110-030 Manage Recruitment, Manage Hire and Onboarding	Is it possible to "mask" persons who do not want to be identified by their real name? Sometimes we have VIPs or court orders that request or require us to do this.	Unclear if Workday has this functionality. Workday will only be accessible to Yale community members, so it will be more secure than current Yale directory site.	Require an ability to mask people from public view under special circumstances.	6
21	110-030 Manage Recruitment, Manage Hire and Onboarding	Will up to date employee pictures be loaded into Workday?	Workday has the capability to maintain photos of employees, but the workstream team is not planning on securing and loading photos.	Employees should be able to upload photos of themselves, or departments on their behalf; guidelines need to be developed to ensure appropriateness of photos.	18
22	110-030 Manage Recruitment, Manage Hire and Onboarding	How will sign-on bonuses work? And what about charging instructions,which can differ from where the base salary is charged? If HR processes a bonus payment for the first or second part of extra compensation, there can be a disconnect with charging instructions. Need to ensure that business process addresses charging instructions.	Workday will only allow bonus to be paid at time of hire. If there are special situations where another or a delayed bonus is needed, for example after probationary period expires, workstream team is working out a process to apply bonus at a future date. When the second/delayed bonus is ready for disbursement, a notification is sent to an HR person to request future payment.	Notification to HR person for delayed bonus should include charging instructions. Until the finance model is loaded into Workday, a lower level financial custom role is needed (e.g., accountant) to enable financial approval for job requisitions and extra payments.	1, 14