

***Workday@Yale***  
**ISR Forum - Hierarchies**

February 20, 2017



1. Terminology & Definitions
2. Hierarchies – General Info & Use Case Examples
3. Cost Center Hierarchy and Demo
4. Supervisory Org Hierarchy and Demo
5. Academic Unit Hierarchy and Demo
6. Q & A

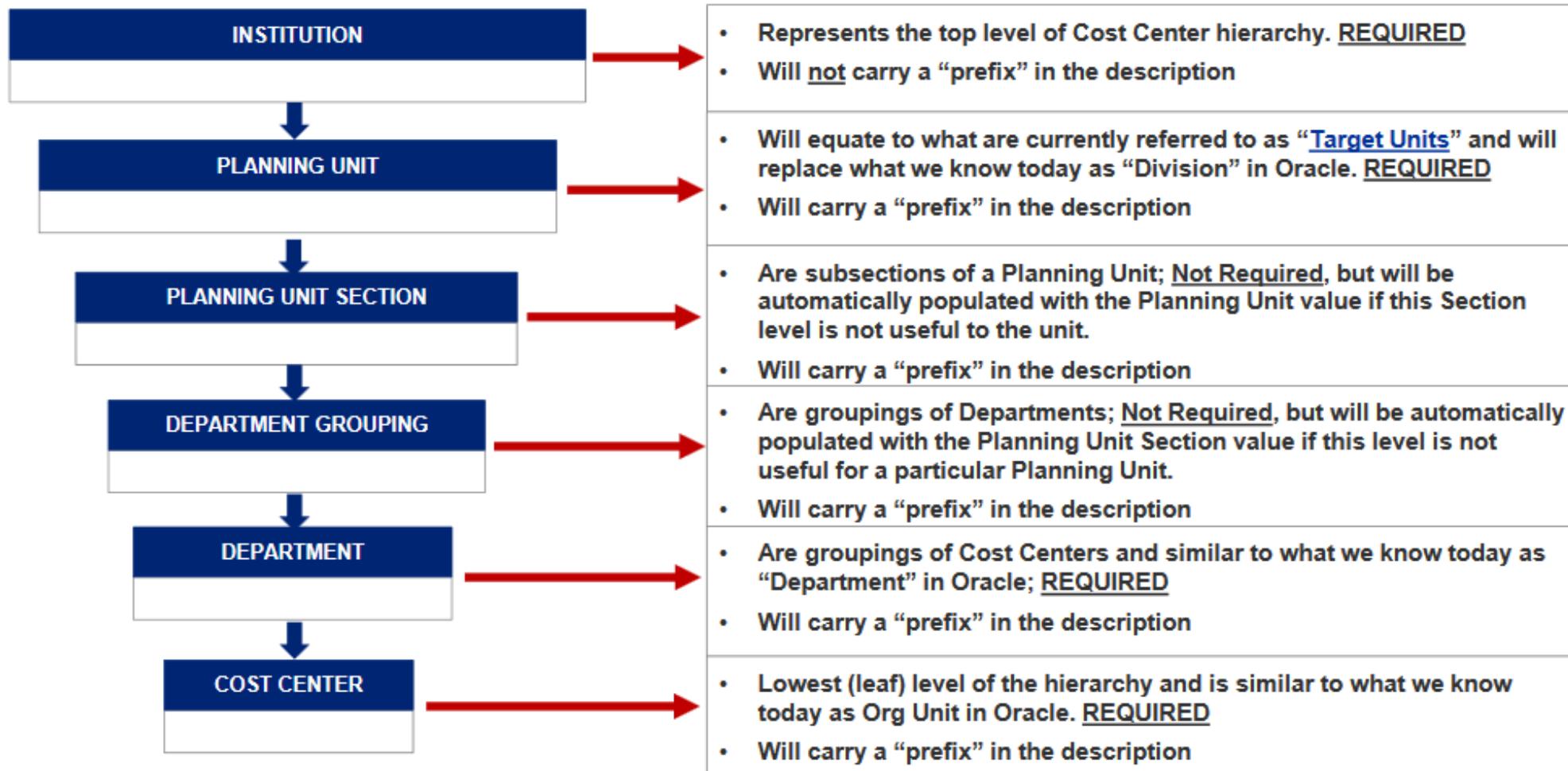
<i>Terminology</i>	<i>Definition</i>
Organization	In Workday, the term organization is a <b>basic building block</b> for managing information that is both financial and non-financial. Organizations can be organized into hierarchies and enable reporting at different levels in the hierarchy. Roles and security can also be assigned to any level in the organizational hierarchies. Examples of Workday delivered organizations include Cost Center and Supervisory Organization. In Workday, Organizations are used to group employees based on memberships, associations and/or characteristics.
Cost Center	The <b>unit responsible</b> . It identifies financial responsibility and management for officially acknowledged business units (departments, sections, etc.) for both local and University-level management reporting. Cost Center represents the lowest (leaf) level of the hierarchy and is similar to what we know today as Org Unit in Oracle.
Cost Center Hierarchy	<b>Organized cost centers</b> by Planning Unit (fka Target Unit) and Department with intervening levels for local management
Supervisory Org	<b>Who reports to whom.</b> Supervisory Organizations group employees into a management hierarchy and are a required foundation for Workday HCM (Human Capital Management). They 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. Supervisory Organizations are not used to manage finances and financial responsibilities; these are addressed primarily through Cost Centers.
Supervisory Org Hierarchy	<b>Foundational, hierarchical position-to-position structure.</b> Departments can have multiple supervisory organizations (one per unique manager). Related to the Workday concept of "Cost Center"--Supervisory Organizations will help Yale more accurately reflect the way they operate in the Workday system.
Academic Unit	Academic units provide <b>the basis to manage faculty appointments</b> in education. These units represent "Appointing Bodies" within the Academic population.
Academic Unit	Academic units such as departments can roll up to academic unit hierarchies that reflect the <b>overall structure of the</b>

- Today's Home Organization and its Hierarchy (Department, Division, etc.) will be retired with Workday.
- Replacements for Home Org:
  - The Workday **Cost Center** is most similar to the current Home Organization
    - Assigned to most people who have been in Oracle EBS (*not to unpaid students*)
    - Hierarchy includes levels similar to Department and Division
    - Also part of the Workday Charging Instruction on financial transactions
  - Other options that might be better for some systems:
    - Workday **Supervisory Organization** - who reports to whom from an HR perspective
    - Workday **Academic Unit** - available for Faculty, Postdocs, and others with Workday Academic Appointments, but not available for staff and other types of people

# Hierarchies - Use Case Examples

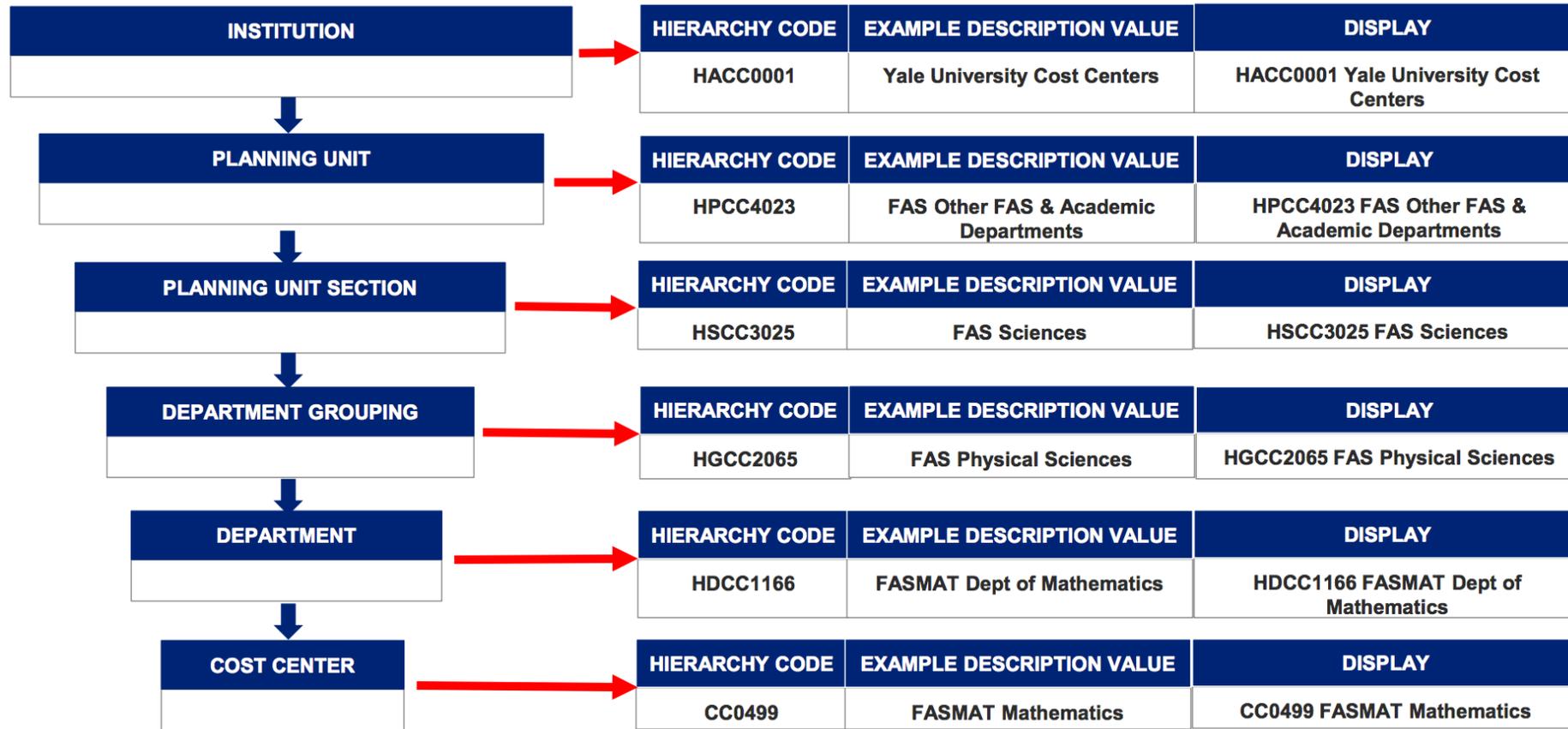
<i>If you need to do this:</i>	<i>Use Cost Center Hierarchy to:</i>	<i>Use Supervisory Org Hierarchy to:</i>	<i>Use Academic Unit Hierarchy to:</i>
Select all faculty within the School of Management	Identify those Faculty who are charged to SOM Planning Unit	Identify those Faculty whose primary assignment is in SOM	Identify those Faculty using full appointment details whose primary or secondary appointment is in SOM
Identify People who are located at 25SP	Can be used to identify all people who are organized into the FB&O Planning Unit (HPCC4004 FBO Finance and Business Operations)	Can be used to identify all people who report up through Jack Callahan; alternatively use Location Science Park Bldg 25	N/A
Determine who is working in a specific department	Show where charges hit. Examine COA segments, e.g. Cost Center: CC1201 FESOTH Other Units Department: HDCC1387 FESOTH Other Planning Unit: HPCC4040 FES School of Forestry and Environmental Studies	Show reporting relationship. e.g., School of Forestry & Environmental Studies - Research (Graedel, Thomas E)	Show the appointing body. e.g., Forestry and Environmental Studies
Show where financial responsibility differs from reporting responsibility	To find charges - e.g., CC1022 MEDINT Cardiology	To find reporting relationship. e.g. Human Resources - Employee Relations (Sullivan, Geraldine)	N/A

# Cost Center and Cost Center Hierarchy



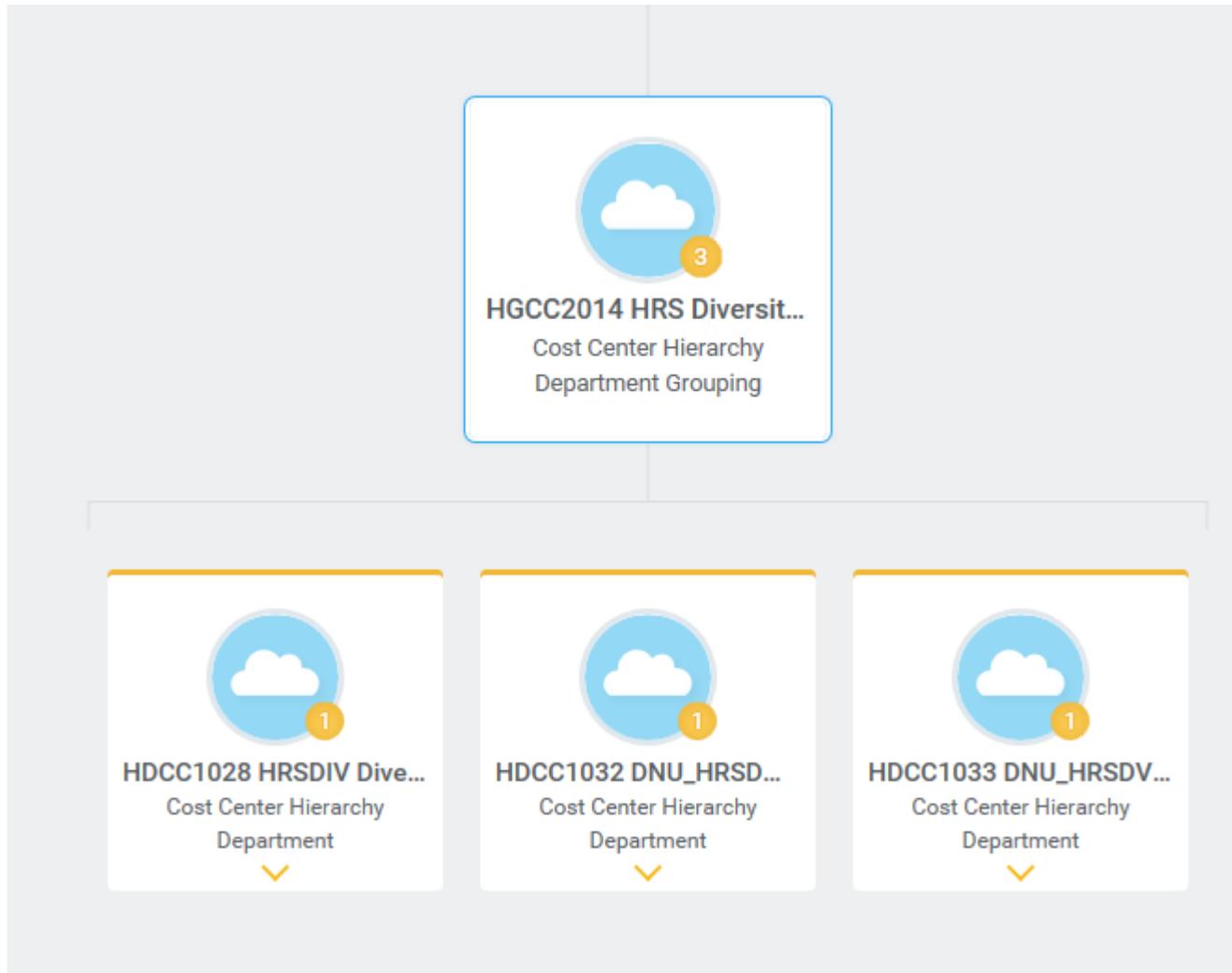
## See the following on COA Website:

- Cost Center Hierarchy presentation (12/2016) : <http://your.yale.edu/policies-procedures/other/cost-center-hierarchy>
- Cost Centers in hierarchy view (2/2017): [cost-centers-hierarchy-view](#)



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Supervisory Organization	Supervisory Organization - Level	Cost Center	Cost Center -	CC Hierarchy - Level 5 - Department	CC Hierarchy - Level 4 - Department Grouping	CC Hierarchy - Level 3 - Planning Unit Section	CC Hierarchy - Level 2 - Planning Unit
Endpoint Engineering - Endpoint Engineering Ops (Rinehart, Philip A)	Finance and Business Operations - Senior Vice President (Callahan Jr., John F.)	CC0140 ITSISD EndPoint Engineering	CC0140	HDCC1048 ITSISD Infrastructure Svcs Director	HGCC2028 ITS Infrastructure Services	HSCC3008 ITS Information Technology Services	HPCC4008 ITS Information Technology Services
Service Centers - Help Desk (Haig, Bob)	Finance and Business Operations - Senior Vice President (Callahan Jr., John F.)	CC0153 ITSSUP ITS Help Desk	CC0153	HDCC1052 ITSSUP ITS Support Center	HGCC2029 ITS Campus Tech Services	HSCC3008 ITS Information Technology Services	HPCC4008 ITS Information Technology Services
Infrastructure Services - Database Administration (Sobel, Jon)	Finance and Business Operations - Senior Vice President (Callahan Jr., John F.)	CC0138 ITSISD Infrastructure Services Director	CC0138	HDCC1048 ITSISD Infrastructure Svcs Director	HGCC2028 ITS Infrastructure Services	HSCC3008 ITS Information Technology Services	HPCC4008 ITS Information Technology Services
Agency Accounts - Human Relations Area Files (Hentz, Marilyn)	Finance and Business Operations - Senior Vice President (Callahan Jr., John F.)	CC0376 UUGUUG Agency Accounts - UG Managed	CC0376	HDCC1130 UUGUUG University General	HGCC2053 UUG University General	HSCC3019 UUG University General	HPCC4018 UUG University General
Business Systems Group - Solution Analysis Design (Blomberg, A. Michael)	Finance and Business Operations - Senior Vice President (Callahan Jr., John F.)	CC0138 ITSISD Infrastructure Services Director	CC0138	HDCC1048 ITSISD Infrastructure Svcs Director	HGCC2028 ITS Infrastructure Services	HSCC3008 ITS Information Technology Services	HPCC4008 ITS Information Technology Services

# Supervisory Org and Supervisory Org Hierarchy



## What is a Supervisory Organization?

- *Supervisory Organizations group employees into a **management hierarchy** and are **required**.*
- ***All faculty and staff** are hired into a Supervisory Organization.*
- *There is only **one manager role** per Supervisory Organization in WDR1*
- *Supervisory Organizations are **not** used to manage finances and financial responsibilities; these are addressed through Cost Centers and other data elements.*

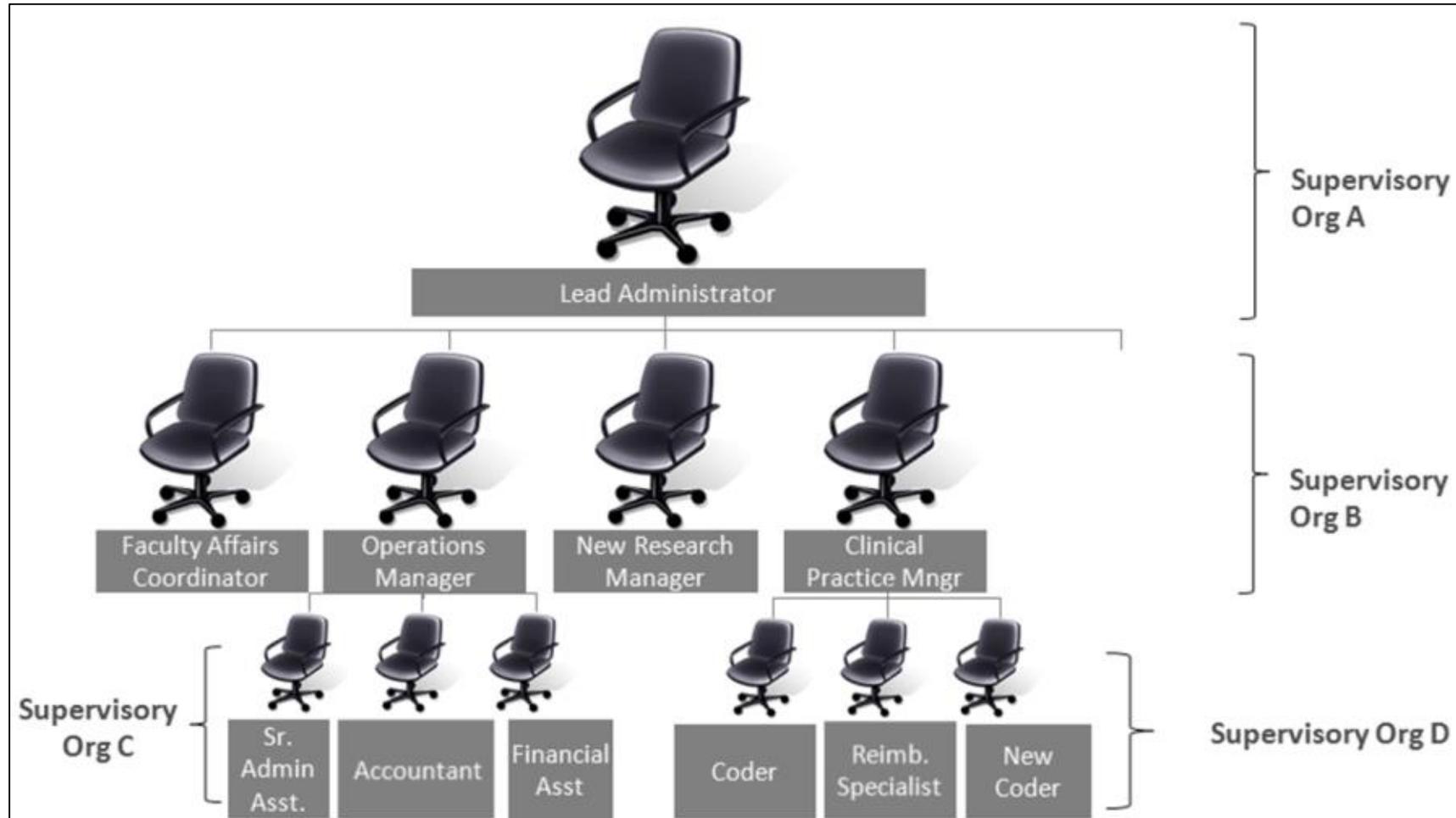
## How are Supervisory Organizations created?



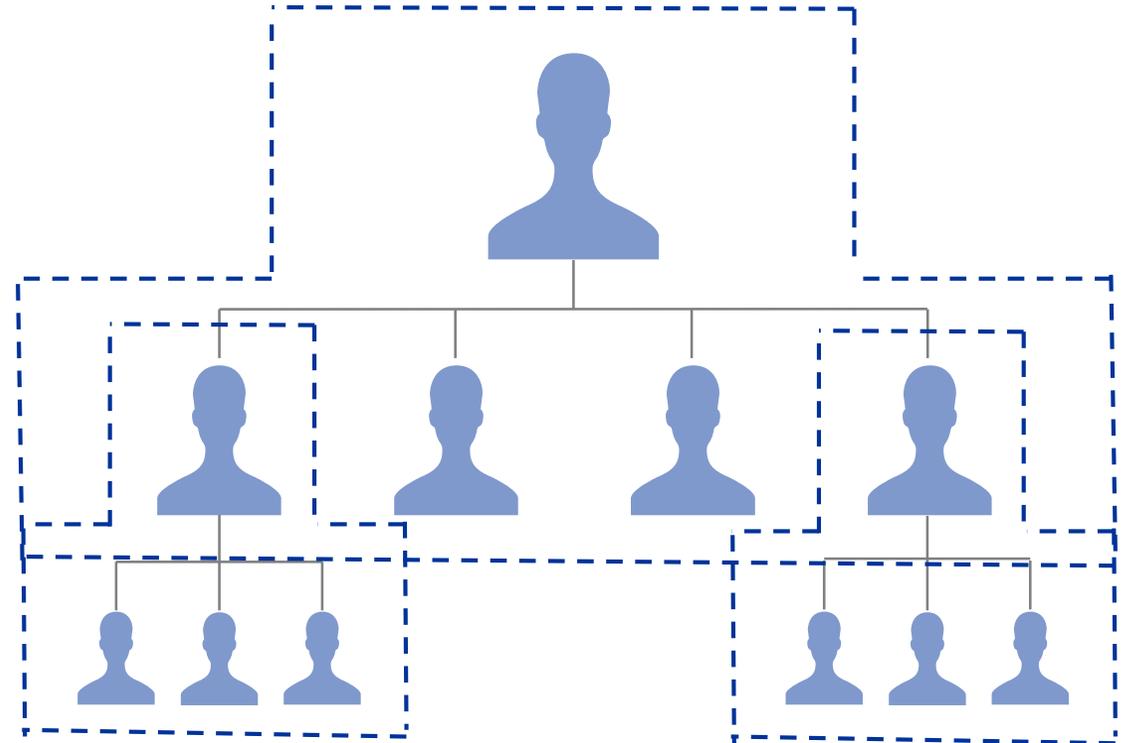
*Supervisory Organizations are established by:*

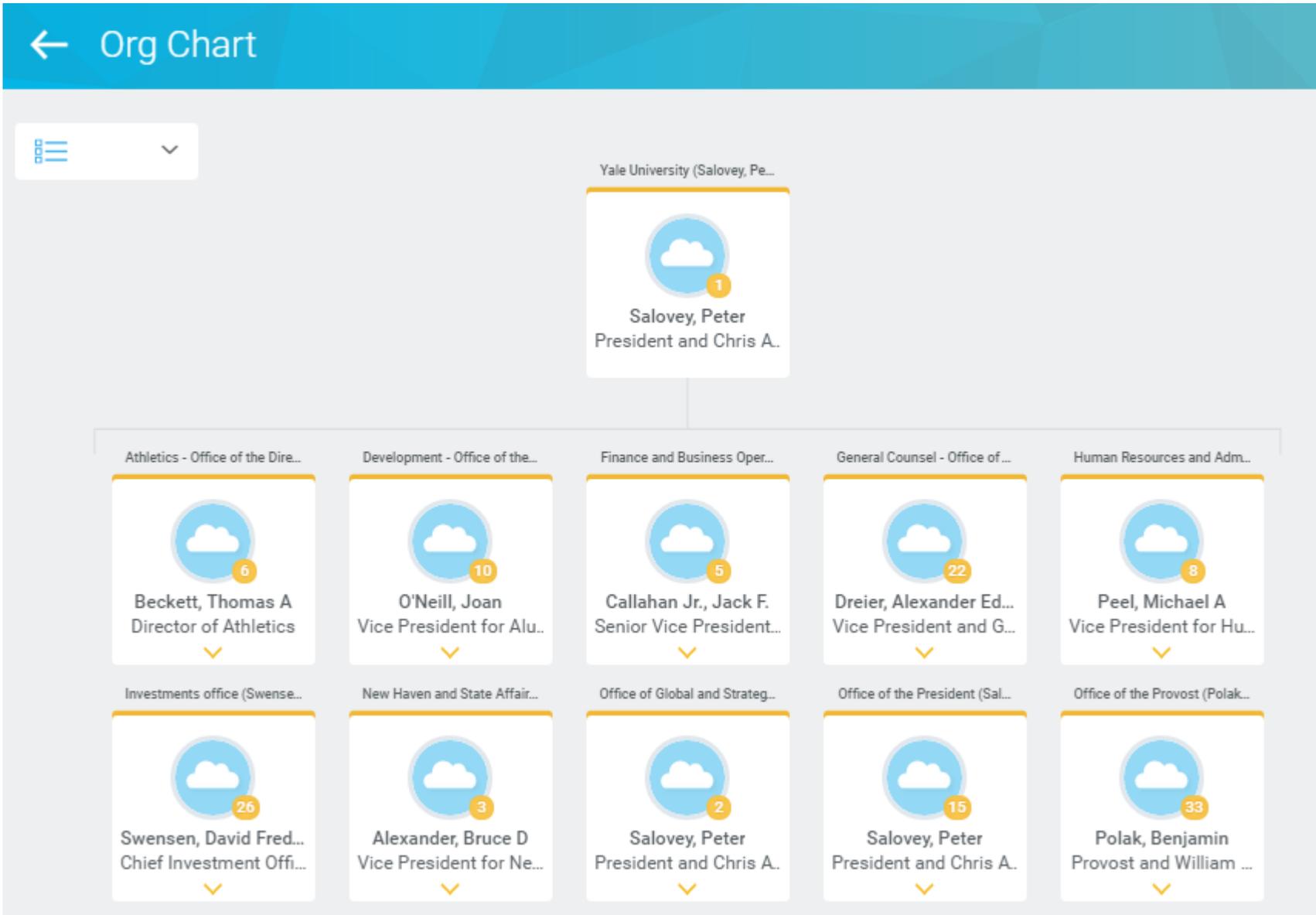
- 1. Naming the organization*
- 2. Designating the owner: the employee who supervises and manages the people in the organization*
- 3. Assign members to the organization*

## Supervisory Organization Example



- Supervisory Organizations provide the foundation of the hierarchy structure
- Each Supervisory Organization consists of:
  - A unique org name
  - A manager
  - Employees that report to the manager
- Supervisory Orgs provides structure for how:
  - Staff is organized
  - Business processes are routed
  - Data is connected





C	D	E	F	CB	CC	CD	CE	CF	CG
Supervisory Organization	Supervisory Org - Level 4 from the Top	Supervisory Org - Level 3 from the Top	Supervisory Org - Level 2 from the Top	Org Officer	Org Division	Org Sub Divi	Org Sub Divi	Org Department	Org Name
Human Resources - HCM Innovation and Strategic Support (Lipkins, Ronald)	Human Resources - HCM Innovation and Strategic Support (Lipkins, Ronald)	Human Resources Operations (Creel-Gross, Nancy T)	Human Resources and Administration - Office of the Vice President (Peel, Michael A)	Vice President for Human Resources and Administration	Human Resources			HRIS Human Resources Information Systems	HRIS Human Resources Information Systems 974306
Human Resources - HCM Innovation and Strategic Support (Lipkins, Ronald)	Human Resources - HCM Innovation and Strategic Support (Lipkins, Ronald)	Human Resources Operations (Creel-Gross, Nancy T)	Human Resources and Administration - Office of the Vice President (Peel, Michael A)	Vice President for Human Resources and Administration	Human Resources			HRIS Human Resources Information Systems	HRIS Human Resources Information Systems 974306

# Academic Unit and Academic Unit Hierarchy



## What is the purpose of an Academic Unit?

- *Academic Units (AU's) are used to manage Academic Appointments, allowing for a different structure from Supervisory Organization*
- *Academic Units reflect Yale's Academic Structure*

## How do Supervisory Organizations and AU's interact?

- *Each Academic Unit must have **at least one** Supervisory Organization*
- *While an Academic Unit can be associated with multiple Supervisory Organizations,  
**a Supervisory Organization can only be assigned to one Academic Unit***
- *The related Supervisory Organization **controls the routing (workflow)** of Academic Appointment actions during staffing processes*



Polak, Benjamin Provost and William C. Brainard Professor of Economics

P9236 University Officer



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View Team



Whitney Grove Square

Academic	Job	Compensation	Benefits	Pay	Time Off	Contact	Personal	F
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At A Glance | **Current Appointments** | Appointment History | Period Work Status

5 items

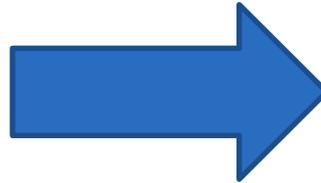
Appointment	Identifier	Track Type	Academic Unit	Academic Rank	Title	Roster %	Track Start	Appointment Start	Appointment End
	<a href="#">FJ - Fully Joint</a>	Ladder >> Ladder	<a href="#">Economics</a>	<a href="#">Professor</a>	Professor	0.00%	07/01/1994	07/01/2001	
	<a href="#">FJ - Fully Joint</a>	Ladder >> Ladder	<a href="#">Management</a>	<a href="#">Professor</a>	Professor, Management	0.00%	07/01/2001	07/01/2001	
	<a href="#">S - Secondary</a>	Ladder >> Ladder	<a href="#">Institution for Social and Policy Studies</a>	<a href="#">Professor</a>	Professor, ISPS	0.00%	07/01/2004	07/01/2014	06/30/2017
	<a href="#">NP - Named Professor</a>	Academic Administration >> Named Professorship	<a href="#">Economics</a>	<a href="#">Professor</a>	William C. Brainard	0.00%	12/11/2008	12/11/2008	
	<a href="#">D - Dual</a>	Academic Administration >> Academic Administrative	<a href="#">Office of the Provost</a>	<a href="#">Provost</a>	Provost	0.00%	01/01/2013	01/01/2013	

- *An academic employee is **hired** into a Supervisory Organization*
- *Academic Appointments are assigned / managed by Academic Unit*

## **Supervisory Organization:**

School of Medicine

Position: Chair,  
Diagnostic  
Radiology



## **Academic Unit:**

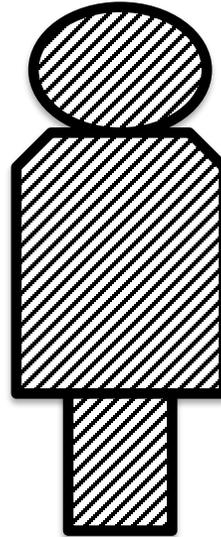
Diagnostic Radiology

Appointment:  
Chair

- An academic employee is **hired** into a position in a Supervisory Organization
- Academic Appointments are assigned / managed by Academic Unit

## Supervisory Organization Roles

- Section Academic HR Support Specialist
- Academic HR Support Specialist
- Business Partner
- Postdoc Office (Supervisory)
- Faculty Affairs Coordinator (Supervisory)
- Dean's Office (Medical)
- Provost Office (Supervisory)
- Provost Office Compensation Partner
- HCM View Only—with compensation
- HCM View Only—without compensation

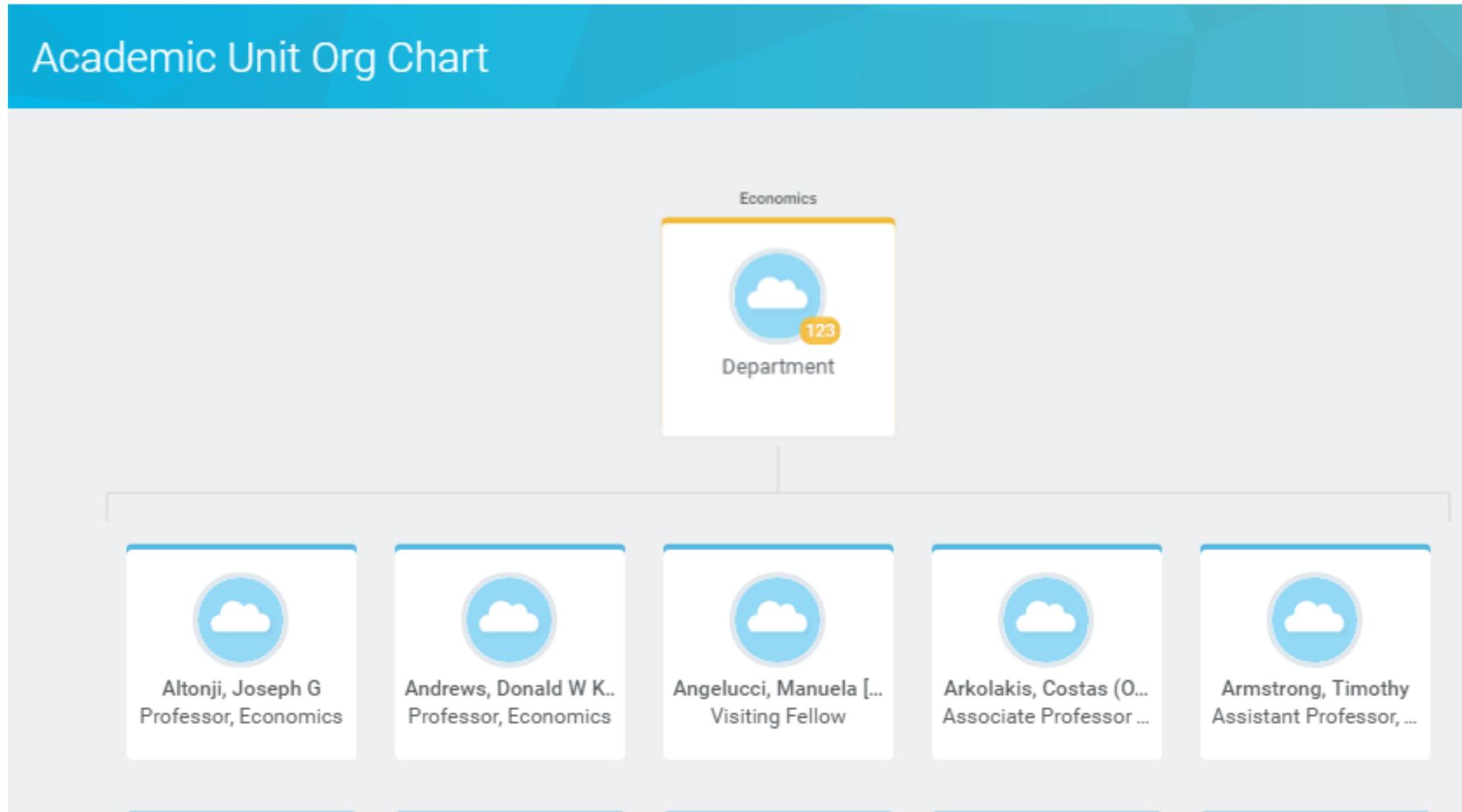


## Academic Unit Hierarchy Roles

- Section Appointment and Promotions Specialist
- Appointment and Promotions Specialist
- Academic Business Partner
- Postdoc Office (Academic)
- Faculty Affairs Coordinator (Academic)
- Provost Office (Academic)
- HCM View Only—Academic

Job  
FTE  
Compensation  
Supervisory Org

Rank  
Appointment  
Term  
Track Type  
Academic Unit



	B	C	D	E	F	G	H	I	J	
	100 AUH Name	100 AU	200 AUH Name	200 AU	300 AUH Name	300 AU	400 AUH Name	400 AU	500 AUH Name	500 AU
	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼
5	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Anthropology		
6	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Economics		
7	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Linguistics		
8	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Office of the Director (SOC)		
9	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Political Science		
0	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Psychology		
1	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Sociology		
2	Office of the President	NA	Office of the Provost	NA	Faculty of Arts and Science	NA	Division of Social Sciences	Statistics		

# Hierarchies - Use Case Examples

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