

# Workday Wednesday 9/7/2022

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## Payroll & Time Tracking Replacement Project Update


### Workday Help Expansion (HR & Payroll Case Management) Overview

#### Security

- Reminder – The path for elevation of a security concern should always include the Security Partner, and in most, if not all cases, go through them to us.
- Reminder – Do not self assign any roles. Very important! If you don't have someone else, contact us.
- Reminder – Security Partners, use your Security Reports Worklet, especially make sure to work your AUD | Find Self Management Employees report
- MFA Rollout for Workday Update

#### Inbox Task Management

#### Absence

Plan for Workday Time off Plan Implementation (moving from Position to Person based leaves ) going live in October

#### Data Integrity – Audit Series #1

**Reminder:** While we have these meetings open to all interested, it is important to remember that the ARC's (who are in many cases the agency's HR Director) must ensure this information gets disseminated throughout your agency as is appropriate.

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## Case Management

- Who can create which types of cases?

### Employees

- Agency Support
  - General Human Resources Support
  - Human Resources – Confidential
  - Learning Support
  - Payroll Support
- DAS CHRO Support
  - Chief Human Resource Office
  - CHRO | Class Comp
  - CHRO | Investigations
  - CHRO | Policy

### Case Solvers

- Agency Support
  - **Everything employees have +**
  - Safety & Risk
  - Position Management
- DAS CHRO Support
  - **Everything employees have +**
  - CHRO | Labor Relations
  - Workday | HR Admin
  - Workday | Learning Admin
  - Workday | Payroll Admin
  - Workday Help Desk

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## Case Management

- Who are Case Solvers?
  - Managers and *some* individuals with elevated security roles in each functional area of Workday:
    - HR
    - HR - Confidential
    - Learning
    - Payroll
    - Safety & Risk
    - Position Management

### Sue: HRA 3

1. HR
2. HR Confidential
3. Learning
4. Payroll
5. Safety & Risk
6. Position Management

### Tim: Learning Partner

1. Learning

### Alex: HR Assistant

1. HR
2. Learning

### Linda: Payroll Tech

1. Payroll

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## Case Management

- What the employee will see:

The screenshot displays a Workday case management interface. At the top, the breadcrumb navigation shows 'Help Center > My Cases > 1664'. The case title is '1664: Please provide list of Workday Domains'. The main content area shows a message from Sarah McGinty dated 12/23/2021, 9:55 AM. The message text reads: 'A request has been made by an agency partner to have a list of Workday Domains so they can whitelist all possible communications coming from Workday. They have provided a list that they are currently aware of, but would like to know if there are any additional domains they should add.' Below this, a bulleted list of domains is provided: myworkday.com, myworkdaycdn.com, and workdaylearning.dasapp.oregon.gov (for registration). The message continues with the question: 'Can this list be reviewed and added to if there are additional domains that should be whitelisted?' and a 'Questionnaire answer(s)' section asking 'Which Help Desk team are you requesting support from (if you are not sure, select General):' with 'General' selected. The right sidebar shows the 'Overview' tab with 'CASE OVERVIEW' details: Assigned to Ivan Dontsov (Workday Help Desk), Created by Sarah McGinty, Status RESOLVED, Case Type Workday Team - Integrations/Technical, Case Created 12/23/2021, 9:55 AM, and Case ID 1664. The bottom of the interface features a 'Send a message' input field with a 'Send' button.

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## Case Management

- Who will see what?

### Employees

- Workspace
  - Messages between themselves and the Case Solver
  - Time & date stamps of actions taken
- Case Actions (left side of workspace)
  - Who is assigned the case
  - Who created the case
  - Case Status **Category**
  - Case Type
  - Case Created
  - Case ID

### Case Solvers

- Workspace
  - **Everything employees have +**
  - Internal Notes
- Case Actions (left side of workspace)
  - **Everything employees have +**
  - Labels
  - Information about the person was created for

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## Case Management

- What the Case Solver will see:

The screenshot displays a Workday case management interface for a case titled "1664: Please provide list of Workday Domains" assigned to Sarah McGinty. The interface includes a timeline of activities, a message from Sarah McGinty dated 12/23/2021, 9:55 AM, and a resolution message dated 01/25/2022, 9:34 AM. The right sidebar shows case actions and employee information for Sarah McGinty.

**Case Details:**  
Case ID: 1664: Please provide list of Workday Domains  
Assigned to: Sarah McGinty

**Timeline:**  
- Case created through Desktop 12/23/2021, 9:55 AM  
- Case Assigned by Cody Kennedy to Ivan Dontsov 12/23/2021, 9:58 AM  
- Cody Kennedy changed Case Type from Workday Help Desk to Workday Team - Integrations/Technical 12/23/2021, 9:58 AM  
- Status changed to Resolved: Completed by Sarah McGinty 01/25/2022, 9:34 AM

**Message from Sarah McGinty (12/23/2021, 9:55 AM):**  
A request has been made by an agency partner to have a list of Workday Domains so they can whitelist all possible communications coming from Workday. They have provided a list that they are currently aware of, but would like to know if there are any additional domains they should add.  
• myworkday.com  
• myworkdaycdn.com  
• workdaylearning.dasapp.oregon.gov (for registration)  
Can this list be reviewed and added to if there are additional domains that should be whitelisted?  
Questionnaire answer(s)  
Which Help Desk team are you requesting support from (if you are not sure, select General):  
General

**Resolution Message (01/25/2022, 9:34 AM):**  
Closing this ticket, it was resolved 12/23/2021 between Sarah & Ivan, response sent to customer.

**Employee Information:**  
Employee: Sarah McGinty  
Workday (Learning Management & Extended Enterprise) Business Consultant  
Email: Sarah.McGinty@das.oregon.gov  
Location: Salem | DAS | Executive Building  
Position: Workday (Learning Management & Extended Enterprise) Business Consultant - Sarah McGinty

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## Case Management

- What are Labels?
  - Labels will:
    - Help Case Solvers identify their cases in more detail
    - Be used in reporting
  - Labels are used to:
    - Indicate where a case is in a process
    - Identify the final resolution for the case
- Some labels are universal others are specific to a task/process
  - All Case Solvers will see all labels
- Using Labels is highly encouraged for tracking purposes
- Employees will not see the labels assigned to their case
- There can be up to 500 Labels
  - Currently there are roughly 20 Label Categories and 160 Labels

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## Case Management

- A little myth busting:
  - All Case are confidential and should be treated as such
  - Employees will NOT see the entire case as a Case Solver or have access to see the Internal Notes
  - Cases themselves do NOT become part of the employee's profile
  - Having the Case Solver role does not grant you additional security or ability to perform additional tasks
  - Case Solvers will NOT see cases that they are not a member of the Solving Team

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## Inbox Task Management

- Available options – Cancel, Manually Advance, Rescind, Delete depending on the item
- Mass Actions will be done using Business Process Administrator account & notifications will be suppressed
- Comment/Language – Comment would be used for all mass actions of a specific type
- Time off request & Correct Time Off requests for 2021 will not be canceled
- Important to note: Business Process: Submit Resignation may have an in progress task of “Exit Interview”
- Plan is to implement this after our 9/21/2022 Workday Wednesday, any concerns please submit a Help Ticket with specific details/concerns/questions/etc. ASAP.

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## Inbox Task Management

HCM Business Process Awaiting Action 2019 2021

2019 HCM Business Process Awaiting Action

2020 HCM Business Process Awaiting Action

2021 HCM Business Process Awaiting Action

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## Business Process Name & Count as of 8.24.22

Complete Self Evaluation for Performance Review	8,385	Assess Candidate	157	Change Job	21	Update Job Posting	4
Onboarding	7,898	Edit Position Restrictions	151	Manage Goals	16	Assess My Team's Potential	3
Request Time Off	7,786	Start Performance Review	142	Change Default Compensation	15	Edit Licenses	3
Review Candidate	6,731	Manage Education	141	Manage Internal Projects	15	Home Contact Change	3
Manage Internal Career Apply	6,510	Post Job	119	Hire	12	Job Requisition Change	3
Complete Manager Evaluation for Performance Review	4,154	Rate Interview	119	Manage Awards and Activities	11	Manage Course	3
Complete Form I-9 Screen	3,301	Photo Change Request	112	Integration Process Event	10	Preferred Name Change	3
Talent Review	2,259	Request	112	Propose Compensation Offer/Employment Agreement	10	Request One-Time Payment	3
Payment Election Enrollment Event	2,179	Job Requisition	109	Cascade Goals	9	Get Feedback on Self	2
Manage Job Interests	1,958	Edit Worker Additional Data Event	106	Generate Document	9	Assign Roles	1
Correct Time Off	857	Offer	72	Complete Manager Evaluation for Disciplinary Action	8	Complete Manager Plan for Performance Improvement Plan	1
Interview	842	Create Position	66	Manage Languages	8	Edit Job Requisition Additional Data	1
Manage Job History	830	Reference Check	58	Manage Career Interests	7	Edit Safety Incident	1
Submit Resignation	813	Manage Work Experience	57	Manage Professional Affiliations	7	Enroll in Content	1
Request Working Remotely	655	Distribute Documents or Tasks	51	Manage Publications	7	Evergreen Requisition Change	1
Complete Employee Plan for Development Plan	564	Personal Information Change	51	Requisition Compensation	7	Give Feedback	1
Complete Federal Withholding Elections	432	Manage Certifications	44	End Contingent Worker Contract	6	Manage Competencies	1
Report Safety Incident	324	Change Organization Assignments for Worker	42	Manage Training	6	Manage Relocation Preferences	1
Legal Name Change	289	Work Contact Change	37	Request Delegation Change	6	Passports and Visa Change	1
Edit Position Restrictions Additional Data	258	Manage Course Offering	33	Contract Contingent Worker	5	Request Compensation Change	1
Change Emergency Contacts	254	Ready for Hire	33	Edit Government IDs	5	Title Change	1
Complete Manager Plan for Development Plan	215	Add Additional Job	29	Evergreen Requisition	5		
Complete State and Local Withholding Elections	213	Background Check	27	Manage Probation Period	5		
Give Requested Feedback	209	Assign Costing Allocation	25	Termination	5		
	182	Manage Mentorship	22	Edit Position	4		

Presented 8/29/2022

# Workday Wednesday 9/7/2022

Complete Self Evaluation for Performance Review	8,385	Out of date request, canceled.	Cancel
Onboarding	7,898		Manualy Advance/Cancel
Request Time Off	7,786	Out of date request, canceled.	Cancel
Manage Internal Career Apply	6,510	Out of date request, canceled.	Cancel
Complete Manager Evaluation for Performance Review	4,154	Out of date request, canceled.	Cancel
Complete Form I-9	3,301		Cancel
Talent Review	2,179	Out of date request, canceled.	Cancel
Payment Election Enrollment Event	1,958		Cancel
Manage Job Interests	857	Out of date request, canceled.	Cancel
Correct Time Off	842	Out of date request, canceled.	Cancel
Manage Job History	813	Out of date request, canceled.	Cancel
Submit Resignation	655		Rescind
Request Working Remotely	564		Cancel
Complete Employee Plan for Development Plan	432	Out of date request, canceled.	Cancel
Complete Federal Withholding Elections	324		Cancel
Report Safety Incident	289	Out of date request, canceled.	Cancel
Legal Name Change	258		Cancel
Change Emergency Contacts	215	Cancel	Cancel
Complete Manager Plan for Development Plan	213	Out of date request, canceled.	Cancel
Complete State and Local Withholding Elections	209		Cancel
Give Requested Feedback	182	Out of date request, canceled.	Cancel

Green– Mass Action  
can be taken

# Workday Wednesday 9/7/2022

Post Job	119	Out of date request, canceled.	Cancel
Photo Change	112		Cancel
Request	112	Out of date request, canceled.	Cancel
Job Requisition	109	Out of date request, canceled.	Cancel
Edit Worker Additional Data Event	106	Out of date request, canceled.	Cancel
Create Position	66		Cancel
Manage Work Experience	57	Out of date request, canceled.	Cancel
Cascade Goals	51	Out of date request, canceled.	Cancel
Personal Information Change	51		Cancel
Manage Certifications	44	Out of date request, canceled.	Cancel
Change Organization Assignments for Worker	42		Cancel
Work Contact Change	37		Cancel
Manage Course Offering	33		
Add Additional Job	29		Cancel
Assign Costing Allocation	25		Cancel
Manage Mentorship	22	Out of date request, canceled.	Cancel
Change Job	21		Advance Manually
Manage Goals	16	Out of date request, canceled.	Cancel
Manage Internal Projects	15	Out of date request, canceled.	Cancel
Change Default Compensation	15		

Green— Mass Action can be taken



# Workday Wednesday 9/7/2022

Manage Professional Affiliations	7	Out of date request, canceled.	Cancel
Manage Career Interests	7	Out of date request, canceled.	Cancel
Manage Publications	7	Out of date request, canceled.	Cancel
Requisition Compensation	7	Out of date request, canceled.	Cancel
Manage Training	6		Cancel
Request Delegation Change	6		
Edit Government IDs	5		Cancel
Evergreen Requisition	5	Out of date request, canceled.	Cancel
Manage Probation Period	5		Cancel
Termination	5		Advance Manually
Update Job Posting	4	Out of date request, canceled.	Cancel
Manage Course	3		
Assess My Team's Potential	3	Out of date request, canceled.	Cancel
Edit Licenses	3		Cancel
Home Contact Change	3		Cancel
Preferred Name Change	3		Cancel
Get Feedback on Self	2	Out of date request, canceled.	Cancel
Assign Roles	1		
Complete Manager Plan for Performance Improvement Plan	1	Out of date request, canceled.	Cancel
Edit Safety Incident	1	Out of date request, canceled.	Cancel
Give Feedback	1	Out of date request, canceled.	Cancel

Green– Mass Action can be taken

# Workday Wednesday 9/7/2022

Edit Position Restrictions Additional Data	254	
Offer	72	
Ready for Hire	33	
Hire	12	
Integration Process Event	10	
End Contingent Worker Contract	6	
Contract Contingent Worker	5	
Edit Position	4	Cancel

Yellow – Need to look at case by case

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Review Candidate	6,731		
Screen	2,259		
Interview	830		
Assess Candidate	157		
Reference Check	58		
Background Check	27		
Propose Compensation Offer/Employment Agreement	10		
Generate Document	9		
Job Requisition Change	3		
Request One-Time Payment	3		
Request Compensation Change	1		
Edit Job Requisition Additional Data	1	Out of date request, canceled.	Cancel
Evergreen Requisition Change	1		

Red – Agency will need to do these tasks

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## Absence

Plan for Workday Time off Plan Implementation (moving from Position to Person based leaves ☒) going live in October

- October 1st there will be no noticeable changes.
- October 15th ( Saturday ) OSPA balances will run for all of the Old Time Off Plans as of October 1st. This is the last time this old OSPA integration will run.
- October 15th ( Saturday ) I will inactive all Old Time Off Plans and activate all Updated Time Off Plans.
- October 16th ( Sunday ) OSPA balances will run for all of the Updated Time Off Plans as of October 1st. This OSPA integration replaces the old one. I will be checking errors.
- Week of October 18th, the Integrations Team ( Nora ) will remove request from old plans and enter them into the new plans.
- November 15th OSPA balances will run for only the new time off plans as of November 1st.

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### Data Integrity – Audit Series #1 (Setting up special meeting for this hoping for next week, watch for your announcement in Workday)

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