### **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 2) going live in October

### Data Integrity - Audit Series #1

Payroll & Time Tracking Replacement Project Update

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### Data Integrity - Audit Series #1

#### **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

#### **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**

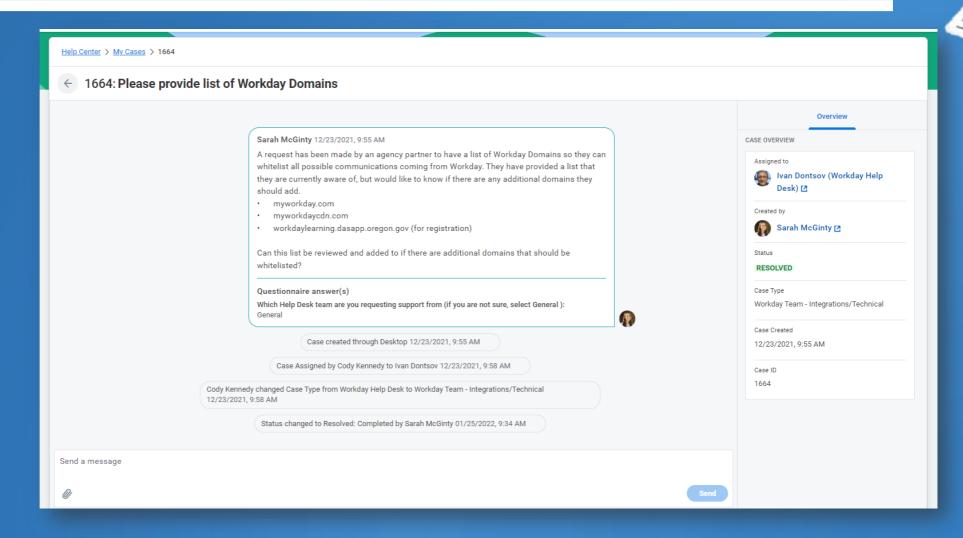
- 1. HR
- 2. Learning

#### **Linda: Payroll Tech**

1. Payroll

#### **Case Management**

What the employee will see:



#### **Case Management**

Who will see what?

#### **Employees**

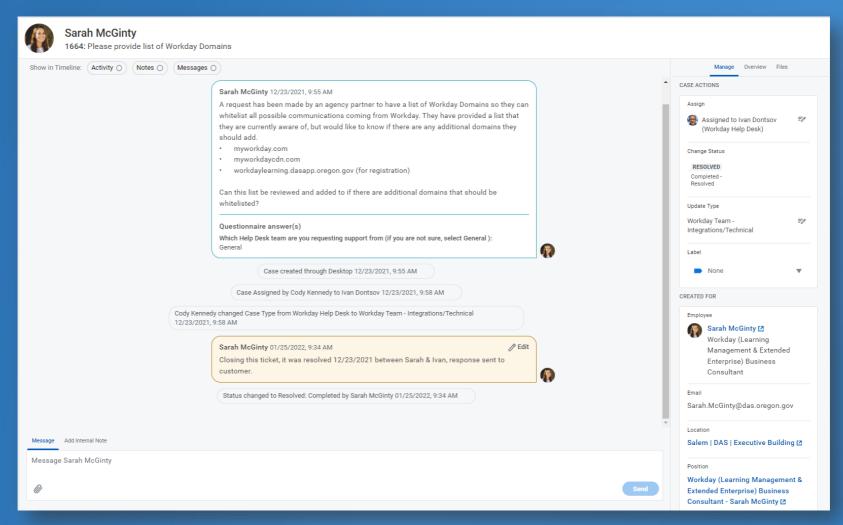
- Workspace
  - Messages between themselves and the Case Solver
  - Time & date stamps of actions taken
- Case Actions (left side of workspace)
  - Who is assigned the case
  - Who created the case
  - Case Status Category
  - Case Type
  - Case Created
  - Case ID

#### **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

#### **Case Management**

What the Case Solver will see:

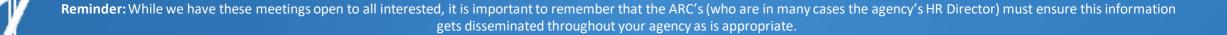


### **Case Management**

- 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

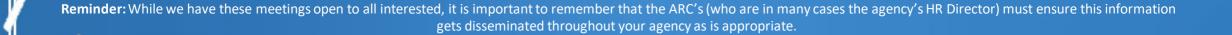
### **Case Management**

- 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



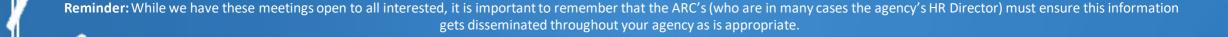
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### **Inbox Task Management**

- 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.



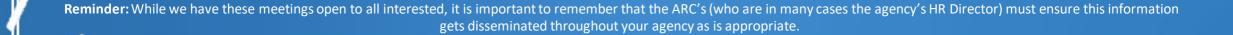
### **Inbox Task Management**

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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	Dusiness i locess Maine			
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	Rate Interview 4,154	Manage Awards and Activities	Manage Course	3
Complete Form I-9	3,301 Photo Change	112 Integration Process Event	10 Preferred Name Change	3
Screen	2,259 Request	112 Propose Compensation Offer/Employment Agreement	10 Request One-Time Payment	3
Talent Review	2,179 Job Requisition	109 Cascade Goals	9 Get Feedback on Self	2
Payment Election Enrollment Event	<sub>1,958</sub> Edit Worker Additional Data Event	106 Generate Document	g Assign Roles	1
Manage Job Interests	Offer 857	Complete Manager Evaluation for 72 Disciplinary Action	Complete Manager Plan for 8 Performance Improvement Plan	1
Correct Time Off	842 Create Position	66 Manage Languages	8 Edit Job Requisition Additional Data	1
Interview	830 Reference Check	58 Manage Career Interests	7 Edit Safety Incident	1
Manage Job History	813 Manage Work Experience	57 Manage Professional Affiliations	7 Enroll in Content	1
Submit Resignation	655 Distribute Documents or Tasks	51 Manage Publications	7 Evergreen Requisition Change	1
Request Working Remotely	564 Personal Information Change	51 Requisition Compensation	<sub>7</sub> Give Feedback	1
Complete Employee Plan for Development Plan	432 Manage Certifications	44 End Contingent Worker Contract	6 Manage Competencies	1
Complete Federal Withholding Elections	Change Organization Assignments for Worker	42 Manage Training	6 Manage Relocation Preferences	1
Report Safety Incident	289 Work Contact Change	37 Request Delegation Change	6 Passports and Visa Change	1
Legal Name Change	Manage Course Offering	33 Contract Contingent Worker	Request Compensation Change	1
Edit Position Restrictions Additional Data	Ready for Hire	33 Edit Government IDs	5 Title Change	1
Change Emergency Contacts	215 Add Additional Job	29 Evergreen Requisition	5	
Complete Manager Plan for Development Plan	213 Background Check	Manage Probation Period	5	
Complete State and Local Withholding Elections	Assign Costing Allocation	25 Termination	5	
Give Requested Feedback	182 Manage Mentorship Presented 8/29/20	22 Edit Position	4	

Complete Self Evaluation for Performance Review	8,385	Out of date request, cancled.	Cancel	
Onboarding	7,898		Manualy Advance/Cancel	
Request Time Off	7,786	Out of date request, cancled.	Cancel	
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Payment Election Enrollment Event	1,958		Cancel	Green– Mass A
Manage Job Interests	857	Out of date request, cancled.	Cancel	
Correct Time Off	842	Out of date request, cancled.	Cancel	
Manage Job History	813	Out of date request, cancled.	Cancel	
Submit Resignation	655		Rescind	
Request Working Remotely	564		Cancel	
Complete Employee Plan for Development Plan	432	Out of date request, cancled.	Cancel	
Complete Federal Withholding Elections	324		Cancel	
Report Safety Incident	289	Out of date request, cancled.	Cancel	
Legal Name Change	258		Cancel	
Change Emergency Contacts	215	Cancel	Cancel	
Complete Manager Plan for Development Plan	213	Out of date request, cancled.	Cancel	
Complete State and Local Withholding Elections	209 Presented 8	/29/2022	Cancel	
Give Requested Feedback	182	Out of date request, cancled.	Cancel	

Post Job	119	Out of date request, cancled.	Cancel
Photo Change	112		Cancel
Request	112	Out of date request, cancled.	Cancel
Job Requisition	109	Out of date request, cancled.	Cancel
Edit Worker Additional Data Event	106	Out of date request, cancled.	Cancel
Create Position	66		Cancel
Manage Work Experience	57	Out of date request, cancled.	Cancel Green – Mass Action
Cascade Goals	51	Out of date request, cancled.	Cancel can be taken
Personal Information Change	51		Cancel
Manage Certifications	44	Out of date request, cancled.	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, cancled.	Cancel
Change Job	21		Advance Manually
Manage Goals	16	Out of date request, cancled.	Cancel
Manage Internal Projects	15	Out of date request, cancled.	Cancel
Change Default Compensation	Presented 8/29 15	9/2022	15

Manage Professional Affiliations	7	Out of date request, cancled.	Cancel	
Manage Career Interests	7	Out of date request, cancled.	Cancel	
Manage Publications	7	Out of date request, cancled.	Cancel	
Requisition Compensation	7	Out of date request, cancled.	Cancel	
Manage Training	6		Cancel	
Request Delegation Change	6			
Edit Government IDs	5		Cancel	Green– Mass Action
Evergreen Requisition	5	Out of date request, cancled.	Cancel	can be taken
Manage Probation Period	5		Canel	
Termination	5		Advance Manually	
Update Job Posting	4	Out of date request, cancled.	Cancel	
Manage Course	3			
Assess My Team's Potential	3	Out of date request, cancled.	Cancel	
Edit Licenses	3		Cancel	
Home Contact Change	3		Cancel	
Preferred Name Change	3		Cancel	
Get Feedback on Self	2	Out of date request, cancled.	Cancel	
Assign Roles	1			
Complete Manager Plan for Performance Improvement	ent Plan 1	Out of date request, cancled.	Cancel	
Edit Safety Incident	Presented 8/29	Out of date request, cancled.	Cancel	
Give Feedback	1	Out of date request, cancled.	Cancel	

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

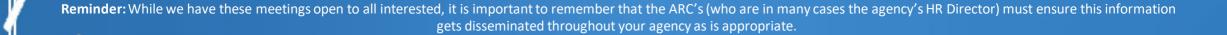
Yellow – Need to look at case by case

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Job Requisition Change	3	
Request One-Time Payment	3	
Request Compensation Change	1	
Edit Job Requisition Additional Data	1	Out of date request, cancled. Cancel
Evergreen Requisition Change	1	

Red – Agency will need to do these tasks

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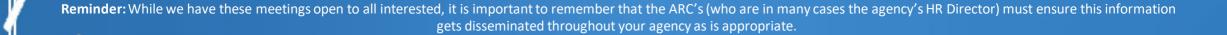
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#### **Absence**

Plan for Workday Time off Plan Implementation (moving from Position to Person based leaves 1) 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)