

LYNN
UNIVERSITY

End User Training Workday Faculty

Instructor



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Agenda

- Welcome and introductions
- Project Timelines
- Applications and forms replaced
- Important Concepts – Academics
- Workday Self-Service for Faculty
- Questions

Welcome and Introductions

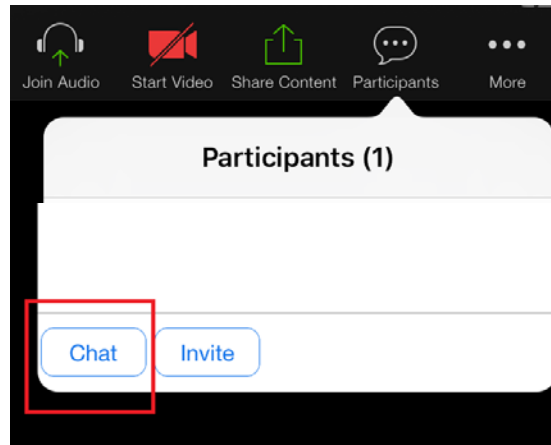
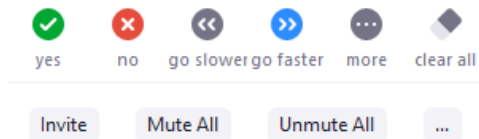
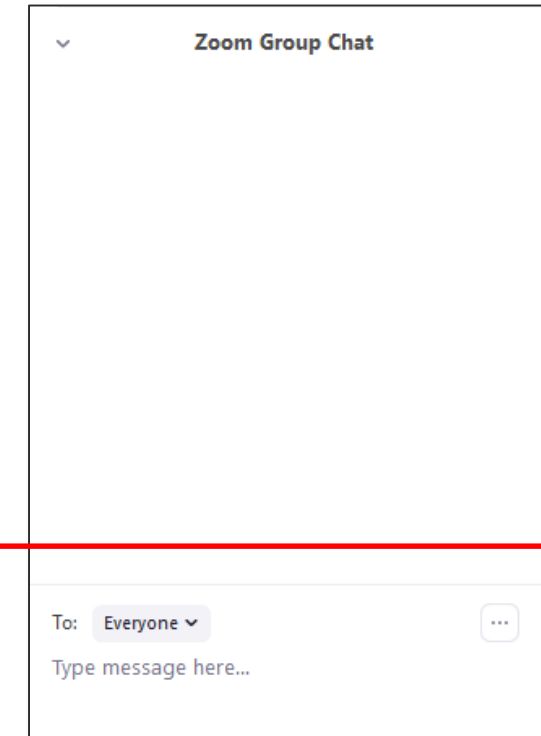
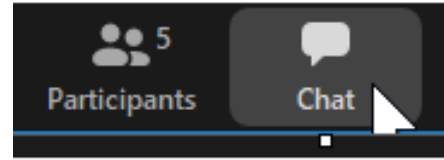
- Training prerequisites: None
- Attendees: All Lynn University faculty and academic staff

Housekeeping and Classroom etiquette

- Training length: 1 hour
- Mute your connection
- Refrain from e-mail and web surfing

Welcome and Introductions

- Zoom meeting:
 - Video not required
 - Everyone muted by default during training
 - Use chat to ask questions during the training



Learning Objectives

Upon completion of this training, faculty and academic staff should be able to:

1. Identify project stages and estimated timeline
2. Locate self service tools within Workday to change personal information, view pay slips, change benefits.
3. Identify proper use of Expense Reports and Spend Authorizations to replace older travel and reimbursement forms
4. Understand “Academic Appointment” concept in Workday
5. Understand “Period Activity Pay” concept in Workday
6. Locate the Activity Pay Schedule report

What is Workday replacing?

- Jenzabar (payments)
- MyLynn benefits info, pay slips.
- Ceridian (2010 W2, pay slips)
- Travel form
- Expenditure Request form
- Perceptive Content approvals
- Payment Net (Lynn card)
- Trackstar (employee evaluations)

A screenshot of the Lynn University Expenditure Request Form. It includes fields for "Enter for pickup or mailing", "Department #", "Account Code", and "Amount". There are checkboxes for "Check Request Invoice Attached", "Purchase Order Request", "Reimbursement Request", "Fifty Cash Request", and "RF Payment". It also has fields for "Name", "Address", "City", "State", "Zip Code", and "Phone #".A screenshot of an "Employee Travel Expense Report" form. It includes fields for "Employee Name", "Division", "Dept #", "Dept Name", and "Report Date". The main part of the form is a table with columns for "Date", "Description", "Amount", and "Total". The table contains several rows of data, including "Hotel Expenses", "Air Fare", "Registration", "Car Rental", "Taxi", "Lunch", "Transportation", "Parking", "Tolls", and "Lodging". The "Total Travel" is listed as 1,447. There is also a "Total Total Expense" of 1,210.

What is Workday replacing?

- Current functionality in Workday is only HR/Financial related.
- Workday will not replace any academic functionality yet (course schedules, enrollment, final grades, advising, etc). Workday Student implementation is in the planning stages.
- W2 and Pay slips prior to July 2020 will live in Ceridian.



Project Timelines



Processes Available to Faculty and Academic Staff

- Personal Information Updates
- Pay slips, W2, Direct Deposit bank account updates
- Benefits (Open Enrollment Fall 2020)
- Expense Reports
 - Travel and hospitality reimbursements
 - Spend authorizations: For cash advances
- Faculty Evaluations (Summer 2021)
- Employee Evaluations (Fall 2020)

Processes Available to Faculty and Academic Staff

- Expense Reports

- Employee as self
- Delegates on behalf of other Lynn employees.
- Do not submit third party vendor invoices using Expense Report. To procure goods and services we encourage departments to create requisitions. Please visit our documentation page for [training recordings](#).



New Academic Related Concepts in Workday

- Academic Units
- Academic Appointments
- Period Activity Pay

Academic Units

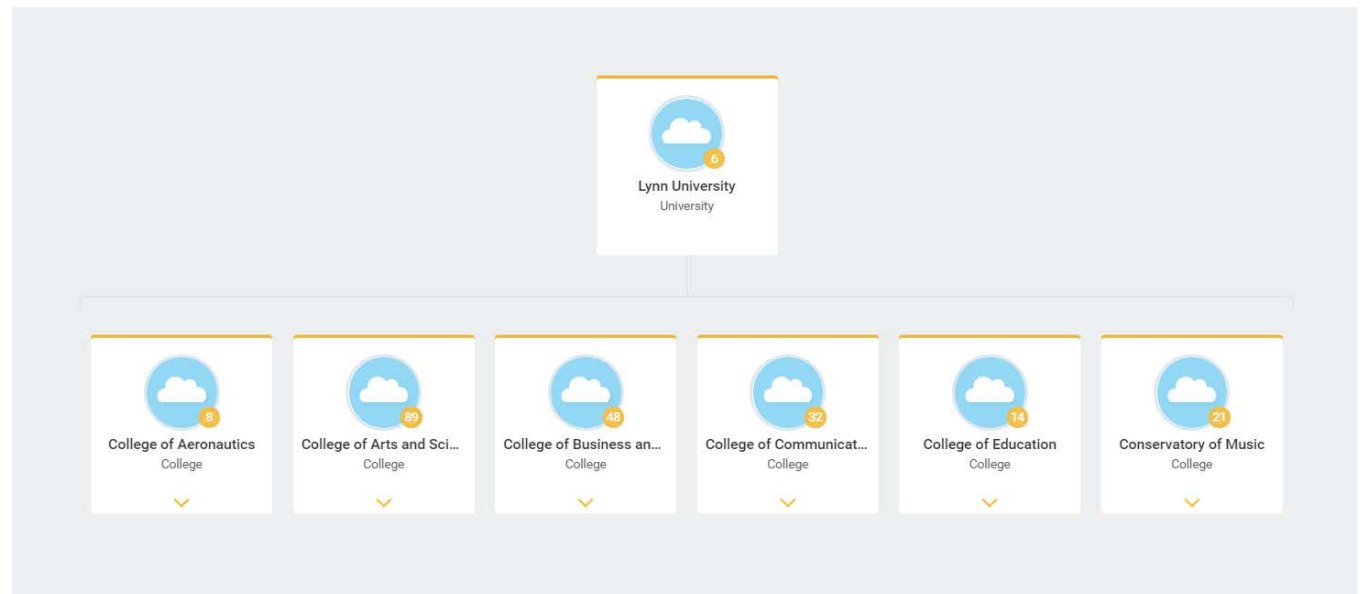
- Type of organization that provides an independent parallel structure that is related to the Supervisory Organization structure.
- Academic Units tract academic information with Academic Appointments

LYNN UNIVERSITY

Q au: arts

College of Arts and Sciences [Actions](#)

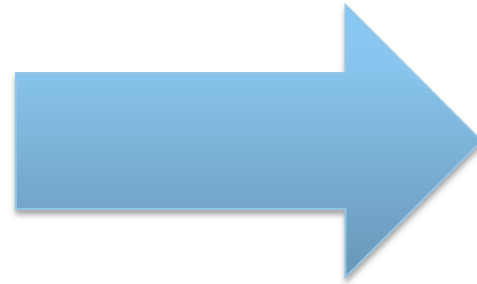
Type Academic Unit Superior Academic Unit Lynn University
Subtype College



Supervisory Organizations and Academic Units

Supervisory Organizations

- Managed by Departments
- Positions
- Job Details
- Compensation
 - Salary
 - Allowance
 - Funding
- Academic HR Roles



Academic Units

- Managed by Academic Affairs
 - Title
 - Identifier
 - Rank
 - Start/End dates
- Name Professorship
- Academic Units

Academic Appointments

- Academic Appointments track an individual academic relationship with the University: start/end dates, rank, title, academic unit.
- Include named professorships, endowments.
- Academic Appointments DO NOT drive pay or benefits
- All academics (paid or unpaid) will have an 'Academic Appointment' in Workday
- Academics can have multiple Academic Appointments in Workday: Joint, Dual, Administrative, Affiliate, etc.

Academic Appointments

- Appointments are distinct from 'Positions' in Workday
 - Academics will have BOTH an Appointment in an Academic Unit AND a Position/Job in a Supervisory Organization. Non academic staff with adjunct positions will have also an appointment in an Academic Unit.
- Academic Appointments are updated corresponding with actions, such as 'Reappointment' or 'Promotions'
- Academic Appointments can be ended independent of a 'Termination'. Example: ending of an administrative appointment.

Period Activity Pay

Period Activity Pay (PAP) is used when an employee will be paid a flat amount over a specified time period. Examples include adjunct pay, overload, or stipends.

Position: College of Arts and Sciences

Period Activity Assignments 3 items

Academic Period	Organization	Total Scheduled Amount	Currency		
Summer 2 Term 2020	College of Arts and Science	8,000.00	USD	View Assignment Details	View with Payment Deta...
Summer Session 2020	College of Arts and Science	3,000.00	USD	View Assignment Details	View with Payment Deta...
Summer Semester 2020	College of Arts and Science	2,500.00	USD	View Assignment Details	View with Payment Deta...

Demo

Payment Elections, Payslips

On your Home page, select Pay application



Pay

To change/add Direct Deposit accounts,
click on Payment Elections:

View/Update Elections

Withholding Elections

Payment Elections

To view your payslips, click “Payslips”:

My Statements

Payslips

Tax Documents

On your payslip, click the view or print button:

LYNN UNIVERSITY Search 🔔 📄 👤

My Payslips

[Actions](#)

Payslip Printing Details 1 item 🔍 📄 ☰ 🖨️ 🔗

Company	Payslip Printing Details
Lynn University	You do not receive a paper copy of payslips.

[Print Multiple Payslips](#)

Payslips 2 items 🔍 📄 ☰ 🔊 🖨️ 🔗

Company	Period Start Date	Period End Date	Payment Date	Gross Amount	Net Amount		
Lynn University	06/29/2020	07/12/2020	07/17/2020	██████	██████	View	Print
Lynn University	06/15/2020	06/28/2020	07/03/2020	██████	██████	View	Print

Payslip

07/12/2020 (Regular) - Complete Actions



Previous Payslip

Return to My Payslips

Print Payslip Image

Print Multiple Payslips

Company Information 1 item



Name	Address
Lynn University	3601 N. Military Trail Boca Raton, FL 33431 United States of America

Payslip Information 1 item



Name	Employee ID	Pay Period Begin	Pay Period End	Check Date	Check Number
		06/29/2020	07/12/2020	07/17/2020	

Current and YTD Totals 2 items



Balance Period	Gross Pay	Employee Pre Tax Deductions	Employee Taxes	Employee Post Tax Deductions	Net Pay
Current					
YTD					

Earnings 4 items



Description	Dates	Hours	Rate	Amount	YTD Hours	YTD Amount
Academic Pay Base					0.00	
Activity Pay History Load					0.00	
GR 5+	06/29/2020 - 07/12/2020	0.00	0.00		0.00	
UG 5-7	06/29/2020 - 07/12/2020	0.00	0.00		0.00	
Total:						

Employee Taxes 3 items



Description	Amount	YTD
OASDI		
Medicare		
Federal Withholding		
Total:		

View Activity Pay Schedule

On your Profile Page,
select Compensation

The screenshot shows a user profile for Henry Jones, Professor, with the 'Compensation' menu item highlighted in the left sidebar. The main content area displays the 'Compensation' section with the following details:

Compensation

Compensation Package: Lynn Compensation Package
Grade: Salary Grade
Company: Lynn University

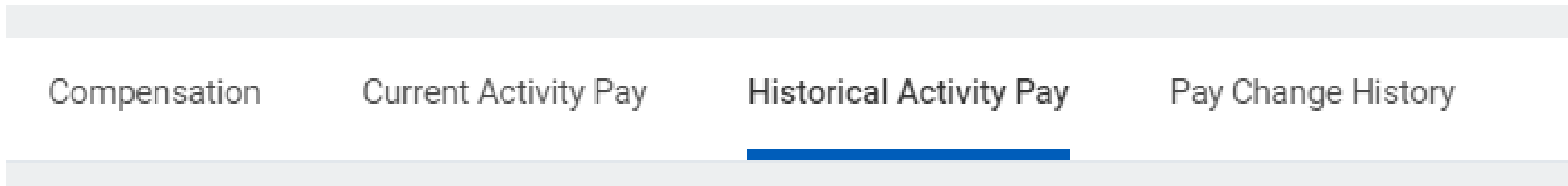
Plan Assignments 1 item

Effective Date	Plan Type	Compensation Plan	Assignment
07/01/2020	Salary	Academic Salary Plan	85,000.00 USD Annual

Totals 1 item

Total Salary & Allowances	Total Base Pay	Currency	Frequency
85,000.00	85,000.00	USD	Annual

Then select “Historical Activity Pay” tab

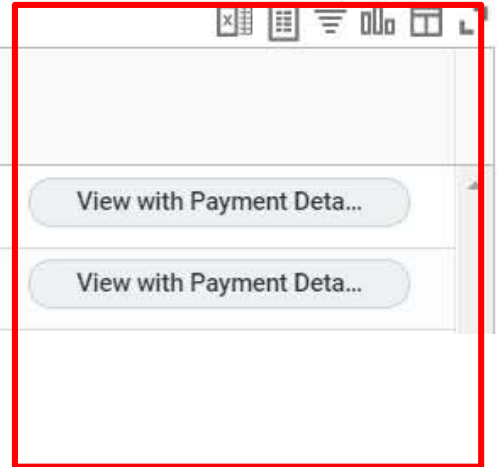


Click “View with Payment Deta...” button on the Academic Period (Term):

Position College of Arts and Sciences

Period Activity Assignments 3 items

Academic Period	Organization	Total Scheduled Amount	Currency		
Summer 2 Term 2020	College of Arts and Science	8,000.00	USD	View Assignment Details	View with Payment Deta...
Summer Session 2020	College of Arts and Science	3,000.00	USD	View Assignment Details	View with Payment Deta...



Your scheduled dates and payment amounts will be displayed:

7 items



Activity	Activity Start	Activity End	Unit	Qty	Unit Rate	Scheduled Amount	Paid to Date	Payment Amount	Scheduled Date	Paid Date
GR 5+ - GR 5+	05/11/2020	08/01/2020	Course	1.111111	2,700.00027	\$3,000.00	\$1,714.32	\$428.58	05/17/2020	Before Workday Payroll
								\$428.58	05/31/2020	Before Workday Payroll
								\$428.58	06/14/2020	Before Workday Payroll
								\$428.58	06/28/2020	
								\$428.58	07/12/2020	07/17/2020
								\$428.58	07/26/2020	
								\$428.52	08/01/2020	
Total:						\$3,000.00	\$1,714.32			

Job Aids

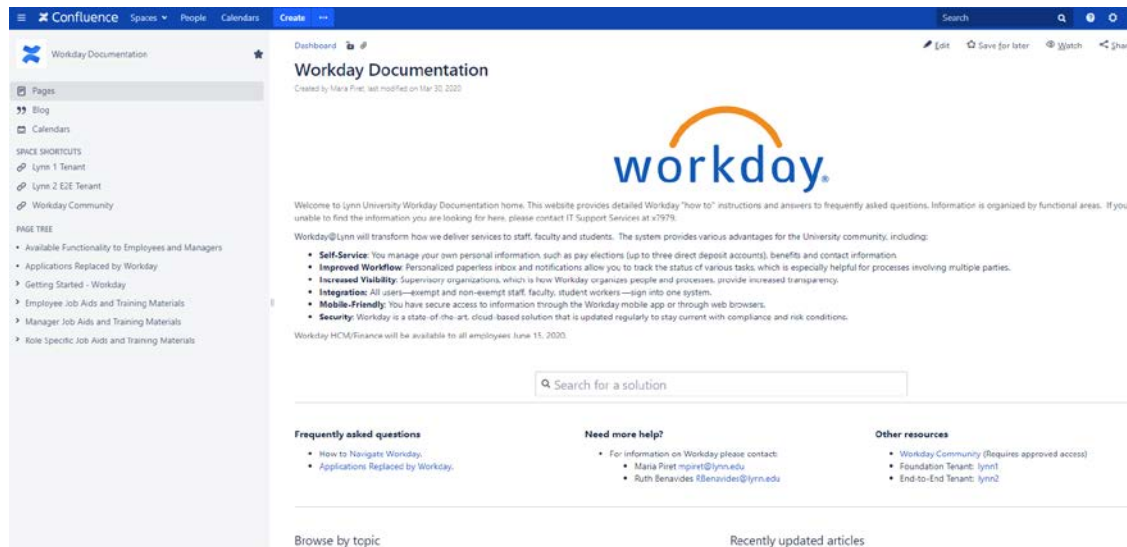
- Workday Basics
 - [Log into Workday](#)
 - [Tools and Navigation](#)
 - [Use Your Inbox and Delegations](#)
 - [Access Your Worker Profile Page](#)
- Benefits and Payroll
 - [Manage Your Benefits](#)
 - [Making 403b Changes in Workday](#)
 - [Manage Your Pay Options](#)
 - [View Activity Pay Schedule](#)

Job Aids

- Reimbursements and Cash Advances
 - [Create Expense Reports and Spend Authorizations](#)
- Career Information and Performance
 - [Manage Career Information](#)

Resources

Documentation site



- Training Recordings
 - Employee (basics)
 - Manager (basics)
 - Expense Reports
 - Cost Center Managers part 1
 - Procurement (Requisitions, Invoices)

Thank you for attending End User Training Workday Faculty

Email your questions to: workday@lynn.edu