LYNN UNIVERSITY







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

Invite

- Everyone muted by default during training

go slower go faster more

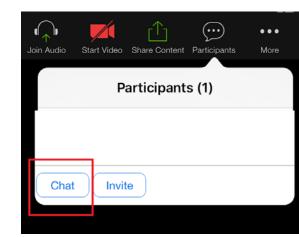
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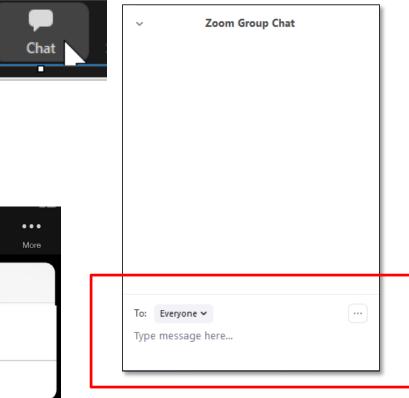
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- Use chat to ask questions during the training



35

Participants





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

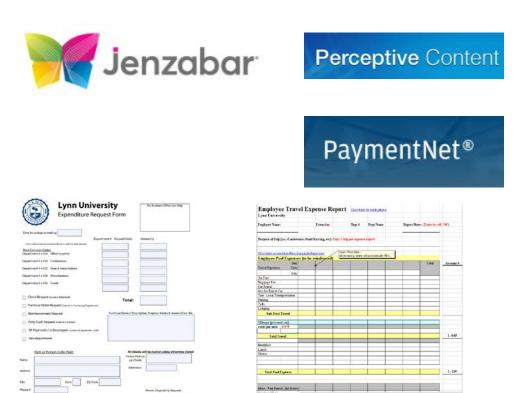


What is Workday replacing?

- Jenzabar (payments)
- MyLynn benefits info, pay slips.
- Ceridian (2010 W2, pay slips)
- Travel form

UNIVERSITY

- Expenditure Request form
- Perceptive Content approvals
- Payment Net (Lynn card)
- Trackstar (employee evaluations)



What is Workday replacing?

- Current functionality in Workday is <u>only</u> HR/Financial related.
- Workday will not replace any academic functionality <u>yet</u> (course schedules, enrollment, final grades, advising, etc).
 Workday Student implementation is in the planning stages.

workday

• W2 and Pay slips prior to July 2020 will live in Ceridian.





Project Timelines

Sept 2019 – July 2020: Implementation HCM / Finance

June 2020 – July 2020: Go Live HCM / Finance

Aug 2020 – Dec 2020 Stabilization Period

Spring 2021 – Summer 2021 Preparation Workday Student

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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 <u>training recordings</u>.





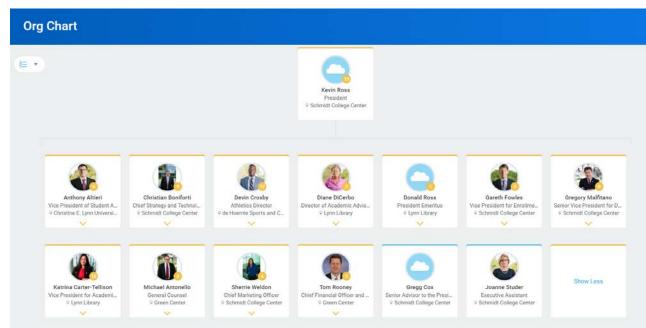
New Academic Related Concepts in Workday

- Academic Units
- Academic Appointments
- Period Activity Pay



Supervisory Organization

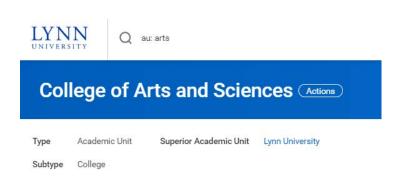
Supervisory Organizations provide a management structure and hierarchy for University workers. Each Supervisory Organization is assigned one manager and contains his/her workers.

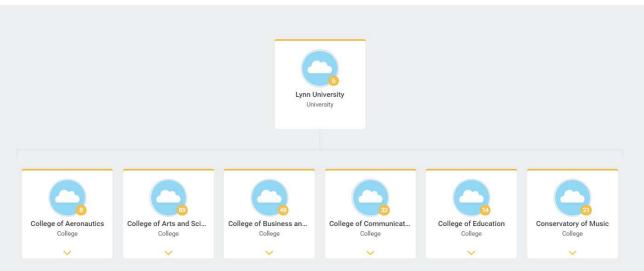




Academic Units

- 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







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.

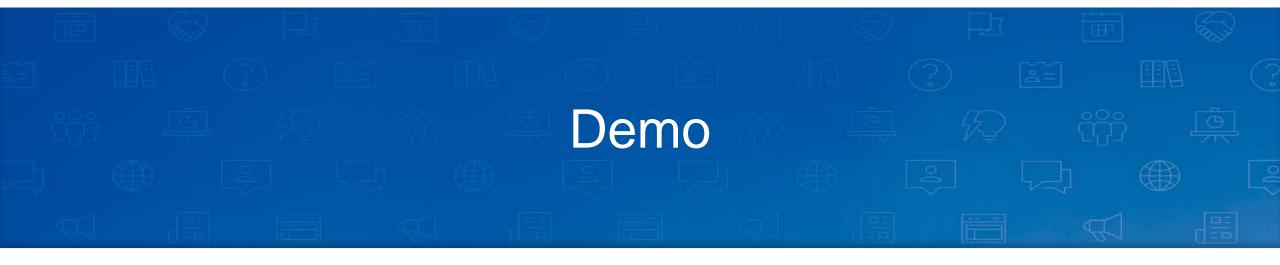


Period Activity Pay

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.

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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









Payment Elections, Payslips

On your Home page, select Pay application



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

To view your payslips, click "Payslips":

View/Update Elections
Withholding Elections
Payment Elections

My Statements
 Payslips

Tax Documents



On your payslip, click the view or print button:

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My Payslips									
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Payslip

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Previous Payslip Return to My Payslips Print Payslip Image Print Multiple Payslips Company Information 1 item Address Name 3601 N. Military Trail Boca Raton, FL 33431 Lynn University United States of America

Payslip Information 1 item

1

Payslip Information 1 item					
Name	Employee ID	Pay Period Begin	Pay Period End	Check Date	Check Number
	[10000] I	06/29/2020	07/12/2020	07/17/2020	Å
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Current and YTD Totals 2 items					
Balance Period	Gross Pay	Employee Pre Tax Deductions	Employee Taxes	Employee Post Tax Deductions	Net Pay
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YTD					· · ·
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Description	Dates	Hours	Rate	Amount	YTD Hours	YTD Amount	
Academic Pay Base					0.00	1	<u></u>
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			▥៑=┉๓	Ľ
Description		Amount	YTD	
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Medicare				
Federal Withholding				
	Total:			i.e
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View Activity Pay Schedule

On your Profile Page, select Compensation

		Compensation Current Activity	Pay Pay Change His	tory				
		Totals 1 item						幸 ┉ ☶ ."
			Total Salary & Allowances	Total Base Pay	Currency		Frequency	
	Henry Jones Professor		85,000.00	85,000.00	USD		Annual	*
	(Actions)	4						•
	역 전 문 Phone Email Team	Compensation Compensation Package Lynn Comp Grade Salary Grad	vensation Package Je					
88	Summary	Company Lynn Unive	rsity					
	Overview	Plan Assignments 1 item						M 🖩 = 🗖 🖓
÷	Job	Effective Date	Plan Type	Compensation Plan		Assignment		
a	Academic	07/01/2020	Salary	Academic Salary Plan		85,000.00 USD An	nual	*
	Compensation	4						
⋓	Benefits							
ß	Pay							
ē	Time Off							
E	Contact							
ඵ	Personal							



Then select "Historical Activity Pay" tab

Compensation Current Activity Pay Historical Activity Pay Pay Change History





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

Position College of Arts and Sciences

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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	7 items										◙▯≡┉г
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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				-
4											►



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
 - <u>View Activity Pay Schedule</u>



Job Aids

- Reimbursements and Cash Advances
 - <u>Create Expense Reports and Spend Authorizations</u>
- Career Information and Performance
 - Manage Career Information



Resources

Documentation site

Konfluence Spaces • People Calendars	Create		Search Q, O O
X Workday Documentation	Deshboord in a Workday Documentation		✔[dit 12 Save for later @ Watch < Sha
B Pages	Created by Maria Firet, last modified on Mar 30, 2020		
9 Blog			
2 Calendars			
NCE SHORTCUTS P. Lyms 1. Tenant P. Lyms 2. E2E Tenant		workday	
P Workday Community	Welcome to Lynn University Workday Documentatio unable to find the information you are looking for h	on home. This website provides detailed Workday "how to" instructions and answers to	
METREE Available Functionality to Employees and Managers	Workday@Lynn will transform how we deliver service	es to staff, faculty and students. The system provides various advantages for the Unive	ersity community, including:
Applications Replaced by Workday Getting Started - Workday Employee Job Ards and Training Materials Manager Job Ards and Training Materials Role Specific Job Ards and Training Materials	Improved Workflow: Personalized paperless Increased Viability: Supervisory organization Integration: All users—exempt and non-exe Mobile-Friendly: You have secure access to i	information such as pay electron (jup to three direct deposit account), benefits and ninos and notification allow yoo to track the track of vinos class, which is expected in which is how Worksky organizes people and processes, provide increased transpare or start. Budit, valuet worksen - sign in do one pystem. Inside shorts that is updated regularly to stay current with compliance and risk cond years budit starts. The start is updated regularly to stay current with compliance and risk cond years budits.	ly helpful for processes involving multiple parties. ency.
		Q Search for a solution	
	Frequently asked questions	Need more help?	Other resources
	How to Novigate Workday. Applications Replaced by Workday.	For information on Workday please contact: Maria Piret moint@ymn.edu Ruth Benavides RBenavides@lym.edu	Workday Community (Requires approved access) Foundation Terunt: lynn1 End-to-End Terunt: lynn2
	Browse by topic	Recently updated	1 articlas

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





Email your questions to: workday@lynn.edu



