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
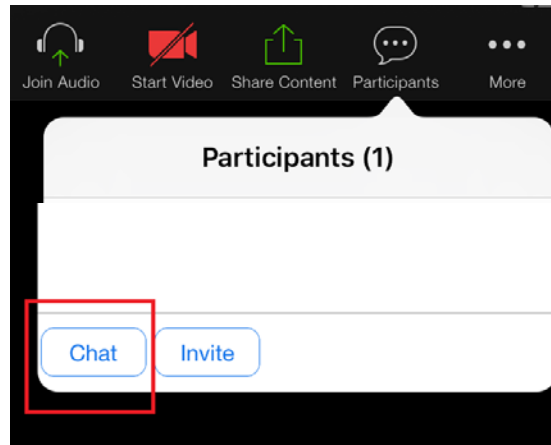- Workday Self-Service for Faculty
- Questions

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
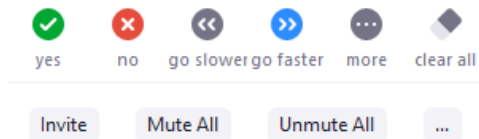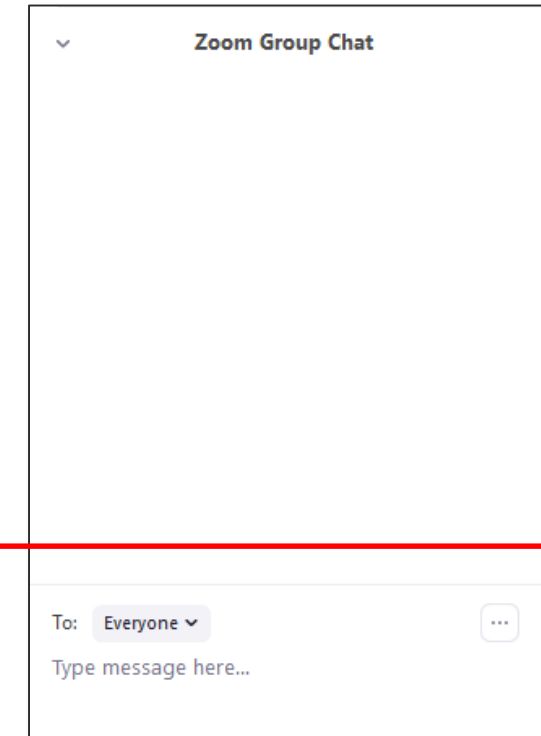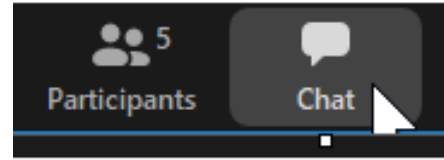
Learning Objectives

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)

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

WARNING

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

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.
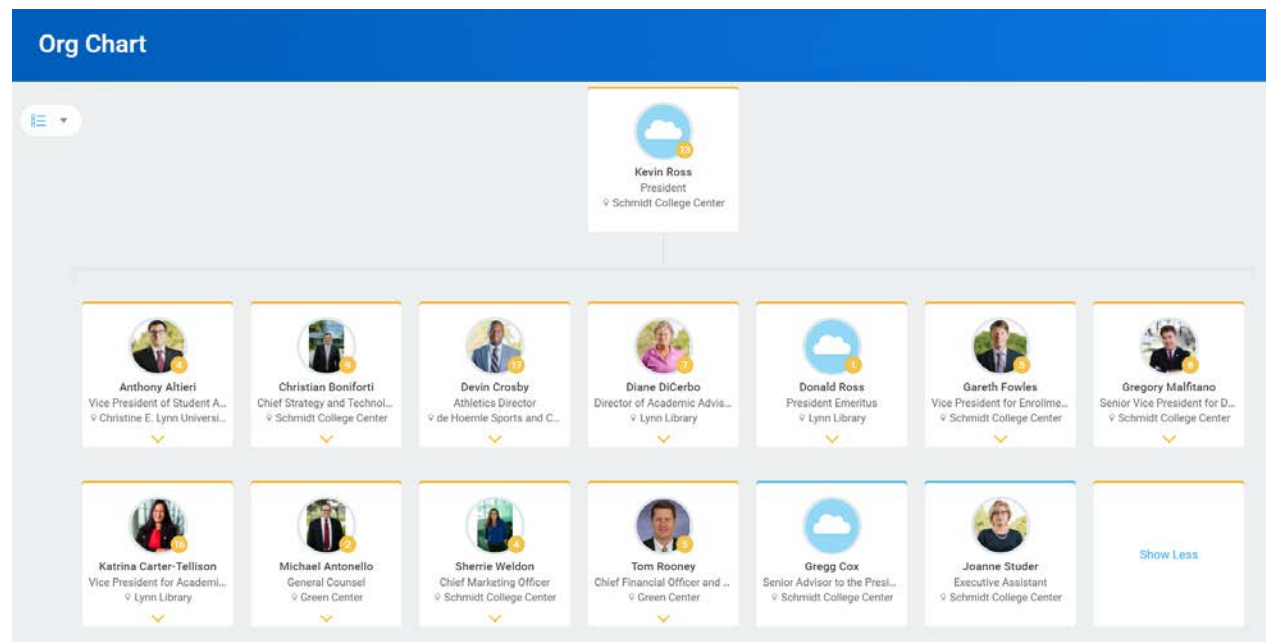
New Academic Related Concepts in Workday

- Academic Units
- Academic Appointments
- Period Activity Pay

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.
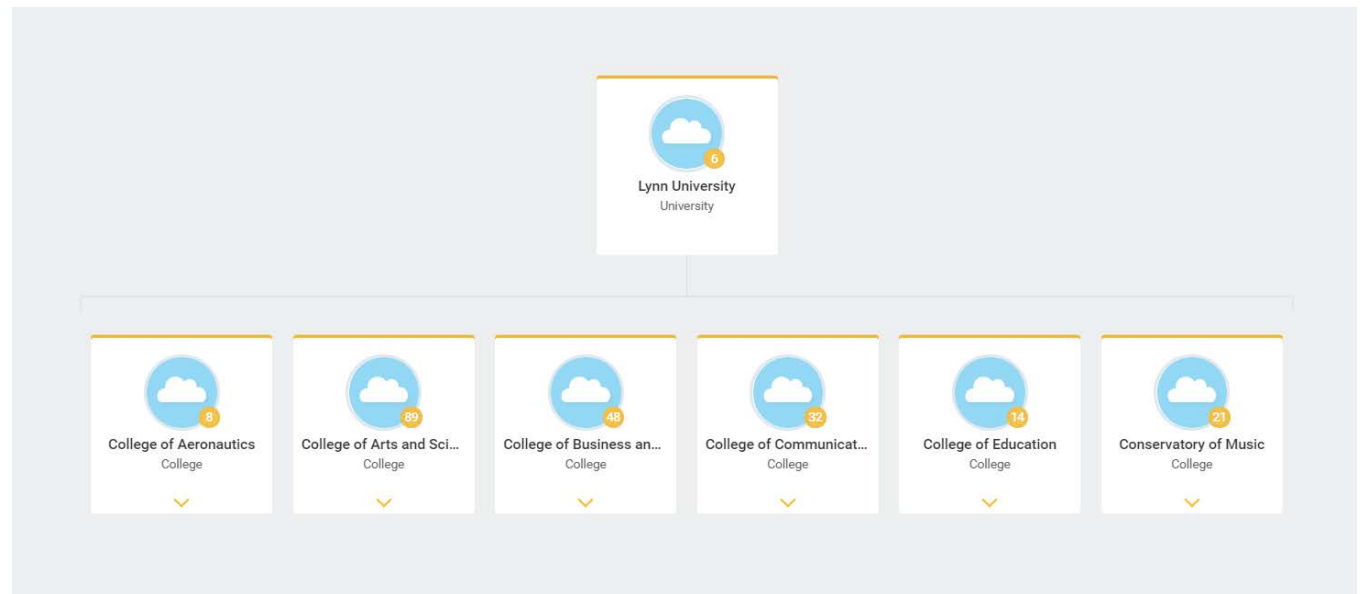
Academic Units

- 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
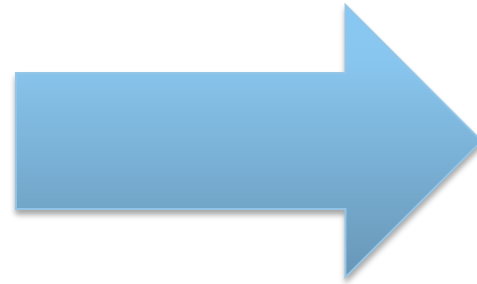
Academic Units

- 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.

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

workday

On your payslip, click the view or print button:

Payslip

| 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

Then select "Historical Activity Pay" tab

| Compensation | Current Activity Pay | **Historical Activity Pay** | Pay Change History |
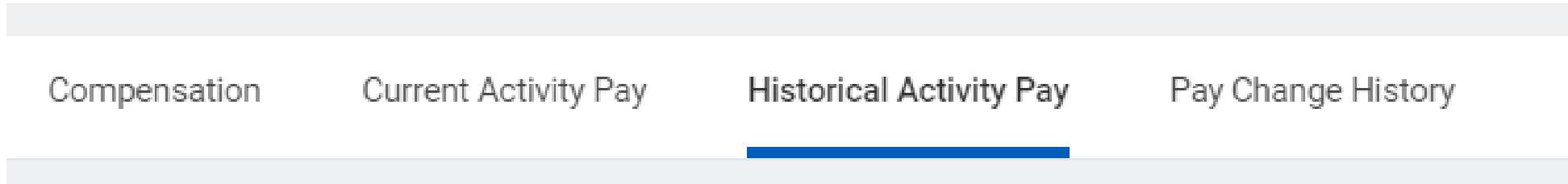
Click "View with Payment Deta…" button on the Academic Period (Term):

Position   College of Arts and Sciences ▨▨▨▨▨▨▨

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			

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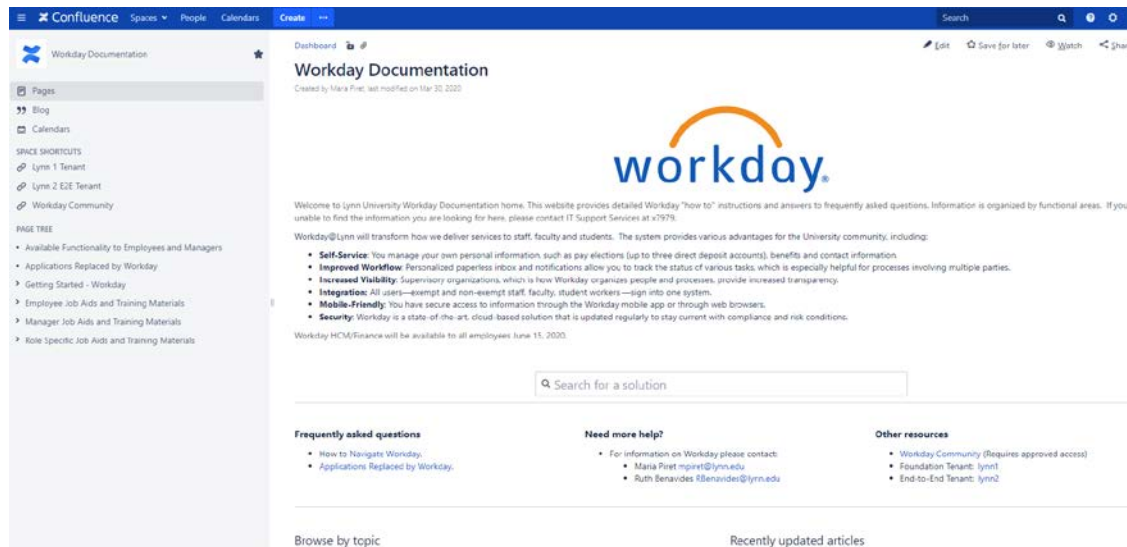workday.

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](#)

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workday.

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

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