

LYNN
UNIVERSITY

End User Training Workday Managers - Basics

Instructor



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Agenda

- Welcome and Introductions
- Learning Objectives
- Workday Navigation and Self-Service for Managers
- Approvals for Managers
- Delegations
- Questions

Welcome and Introductions

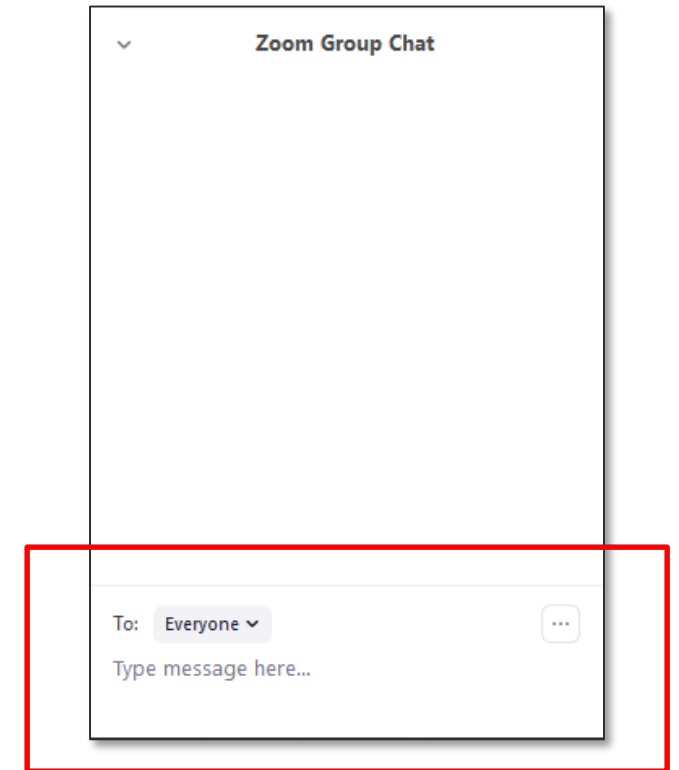
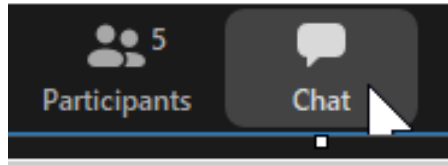
- Training prerequisites: Workday Employee basics
- Attendees: All Lynn University managers, assistants, approvers.

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

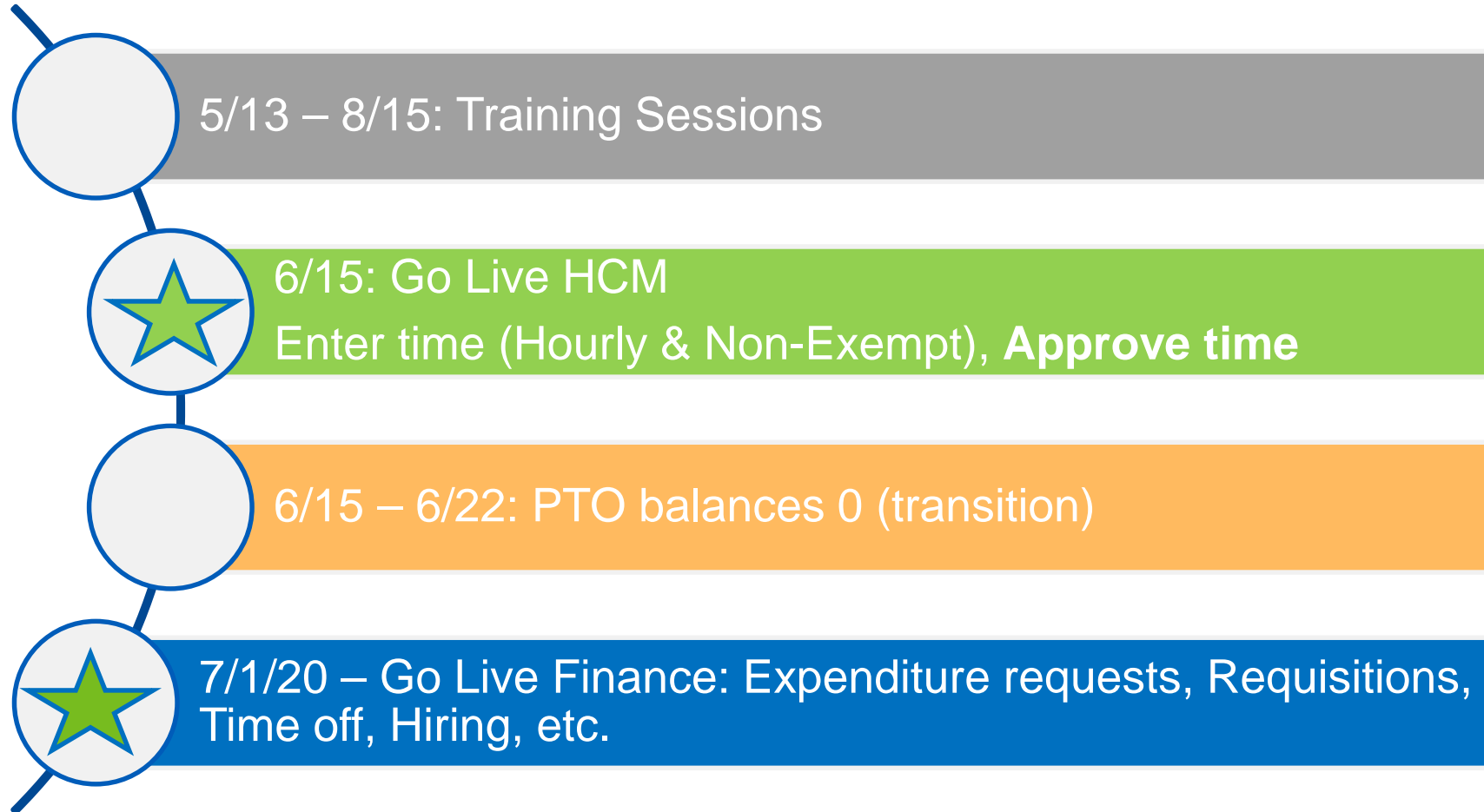


Learning Objectives

Upon completion of this training session, managers should be able to:

- Navigate Workday applications available to managers
- Compare previously used programs to Workday
- Recognize the core concepts of Workday
- Understand difference between Supervisory Organization and Cost Center
- Recall how to initiate employee changes
- Explain importance of delegations
- Identify how to approve tasks

Important Dates



Goodbye TimeForce and paper forms!

LYNN UNIVERSITY **Employee Change Form**

EMPLOYEE INFORMATION

Name: _____ Address: _____
 Employee ID: _____ City, St, Zip: _____
 Email Address: _____ Phone: _____
 Effective Date: _____ Cell Phone: _____

ACTION REQUESTED

New Hire Voluntary Termination
 Rehire Involuntary Termination
 Transfer/Promotion
 2nd On-Campus Position Reason: _____
(Requires current Vice President approval)

CLASSIFICATION

Employee Type: Full-Time Staff (001) Exempt (Salaried)
 Full-Time Faculty (002) Part-Time Faculty (003) Non-Exempt (Hourly)
 Part-Time Staff (004) Student (005) Volunteer

CHANGES REQUESTED

Job Title: _____ Current Information: _____ New Information: _____
 Dept Name: _____
 Budget Acct #: _____
 Pay Rate: _____
 For lump sum payments provide total hours worked: _____
 Timescard Approver: _____

NOTES

AUTHORIZATION (TWO LEVELS OF SIGNATURE REQUIRED)

Supervisor: _____ Date: _____

Employee Travel Expense Report [Click here for instructions](#)

Lynn University

Employee Name: _____ Extension: _____ Dept #: _____ Dept Name: _____ Report Dates: (Enter in cell 13C) _____

Purpose of Trip (i.e., Conference; Fund Raising, etc): **Only 1 trip per expense report!**

[Click here to see Non-Reimbursable Expenses](#) Insert first date - All remaining dates will automatically fill in.

Employee Paid Expenses (to be reimbursed)

Travel Expenses	Day	Date	City	Total	Account #
Air Fare					
Baggage Fee					
Car Rental					
Gas for Rental Car					
Taxi / Local Transportation					
Parking					
Tolls					
Lodging					
Sub-Total Travel					
Mileage (personal car)					
cents per mile: 0.575					
Total Travel					1-045
Breakfast					
Lunch					
Dinner					
Total Food Expense					1-259
Misc.- Non Travel (list below)					

LYNN UNIVERSITY **Expenditure Request Form**

For Business Office Use Only

Date for pickup or mailing: _____

Department # _____ Account Code _____ Amount \$ _____

Forms will not be processed without a code for each amount.

Most Common Codes:
 Department # + 620 Office Supplies
 Department # + 629 Conferences
 Department # + 635 Dues & Subscriptions
 Department # + 640 Miscellaneous
 Department # + 645 Travel

Check Request (Invoice Attached)
 Purchase Order Request (submit to Purchasing Department)
 Reimbursement Request
 Petty Cash Request (submit to Cashier)
 AP Payment(s) to Employees (submit all paperwork to HR)
 Interdepartment

Total: _____

Purchase/Service: Description, Purpose, Invoice#, Invoice Date, Etc.

Firm or Person to Be Paid:

Name: _____ Person Picking up Check: _____
 Address: _____ Extension: _____
 City: _____ State: _____ Zip Code: _____
 Phone #: _____ Person Originating Request: _____
 Full Name: _____

All checks will be mailed unless otherwise stated

TIME CARD **REPORTS** **EMPLOYEE** **SCHEDULE** **JOB TRACKING**

*Time Card *Daily Details *Supervisor *Requests *Absence Requests *Support Form

MESSAGES REPORT: ABSENCE REQUESTS

Date Range: _____

Absence Type: Select an Absence Type

Sender's Department: _____ Inc Sub

Recipient's Department: _____ Inc Sub

Sender's Supervisor: _____

Recipient's Supervisor: _____

Sender: _____

Recipient: _____

Sort by: Employee Name Date Time Group Results

Employee Card Employee Name Show Completed
 Employee ID Department

Absence Requests
 Sorted by Employee Name

Emp	Emp	Type	Hours Per Day	Total Hours
7/8/2020 - 7/10/2020	Vacation 35	6.5	32.5	
00:00 - 06:30				

IMPORTANT

Managers and timekeepers must approve timesheets prior to payroll. Unlike approvals in TimeForce, employees will not be paid for non-approved hours.



IMPORTANT

User permissions are assigned to positions and roles in Workday. We cannot assign manager permissions to regular employees. If you would like someone in your staff to initiate or approve tasks on your behalf, you must create a delegations first.



Supervisory Organization

- Foundation Workday HCM
- Provide a management structure and hierarchy for University workers.
- Each Supervisory Organization is assigned one manager and contains his/her workers.
- Supervisory Organizations are not used to manage finances and financial responsibilities (Budget, Expenses).

Cost Center

- Foundation Workday Finance
- Provide a management structure and hierarchy for University financial transactions: Expenses and Revenues.
- Each Cost Center is assigned one manager and contains his/her workers.
- Cost Centers are not used to manage jobs and employees non financial tasks.

Process for Managers

- Position Management
 - Create, close positions
- Hiring
 - Hire employees, students, contingent workers
- Time and Attendance
 - Correct time and absences
 - Approve timesheets
 - Approve time off and leave

Process for Managers

- Employee Changes

- Second positions
- Switch primary jobs
- Compensation changes
- One time payments
- Terminations

- Employee Performance

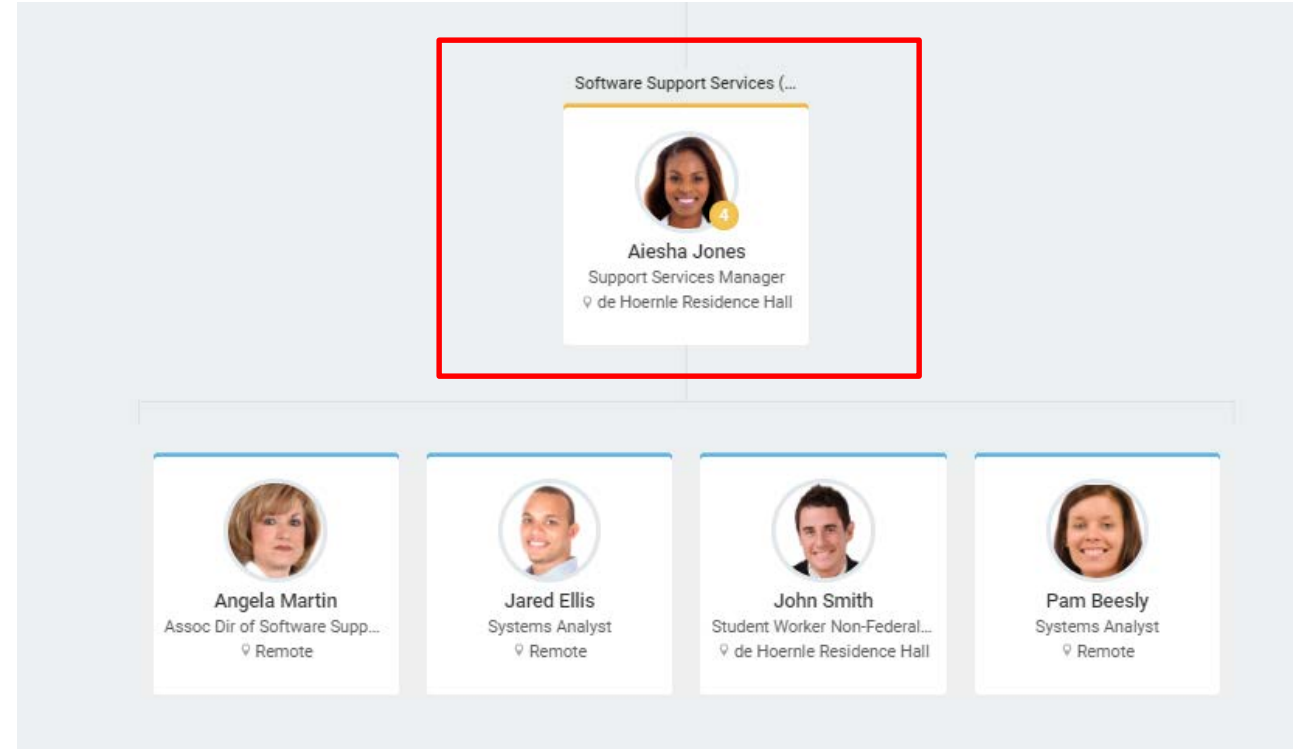
- Yearly performance reviews (employees and faculty)

- * Expenses and Procurement: Cost Center manager training

Workday Navigation and Self-Service Demo

Software Support Services

- Aiesha Jones (manager)
- Angela Martin
- Pam Beesly
- John Smith (hourly)
- Jared Ellis



Demo

Next

Follow up email:

Quick [survey](#)

Link to [documentation site](#)

Link to [test tenant](#)

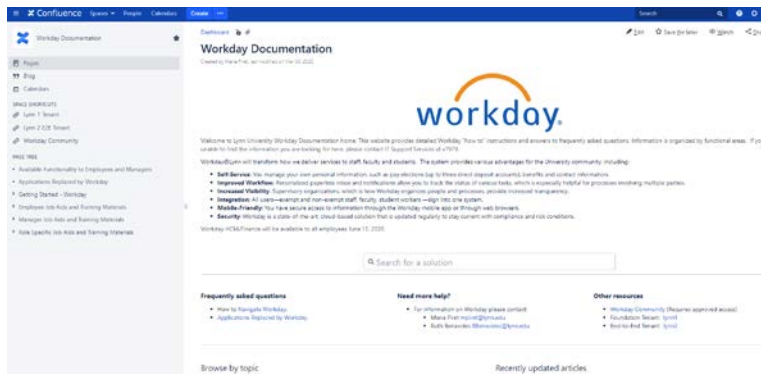
Copy PowerPoint

Copy manager checklist

Please visit our Workday new website for more info
lynn.edu/workday

Next

- Documentation:
kb.lynn.edu



- Training Sessions
 - Employee (basics)
 - Time and Absences
 - Manager (basics)
 - Expenses
 - Cost Center Managers
 - Procurement (Requisitions, Invoices)
 - Hiring Managers

Thank you for attending Workday Employee - Basics

Email your questions to: mpiret@lynn.edu