

HR Workday Town Hall

August 21st, 2024

HR Workday Town Hall Agenda

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- Welcome
- HR Reporting
- License and Certification
- Workday Insights
- Next Steps/Q&A



HR Reporting

HCM Reporting Philosophy

- Standardization to create common metrics and KPIs
- Centralized data sources to reduce the risk of discrepancies and errors
- Real-time dashboards

Overall intent is to create reports in a way that enhances the consistency, accuracy and impact of reports across the organization.

Who can run an HCM report?

- Access to a report can vary based on your role and the supervisory organizations you have access to
- Primary roles with access to reports with HR type information include:
 - Manager
 - HCM Business Manager
 - HCM Business Assistant (with and without Compensation)
 - HR Leader Viewer
 - HCM Viewer (with and without Compensation)

HCM Report Resources

- Manager Hub in Workday
- Type the following in the Search field in Workday to find all reports you can run:
 - ✓ Standard Reports I Can Run CR
 - ✓ Custom Reports I Can Run CR
- WDHR-102 HR Reports in Workday (Managers) - QRG with HR report information (https://www.vumc.org/myworkday/sites/default/files/public_files/Training/HCM/HR_Report_Crosswalk.pdf)
- To request a report from HCM, complete the HR Report Request Form in Pegasus (<https://pegasus.vumc.org/request/start/5486>)

HCM Reports Available

REPORT TYPE	REPORT	BRIEF DESCRIPTION
Absence/Leave/Time Off	My Team's Time Off Balance CR	View time off balances for flexPTO and sick time for direct and indirect reports.
Absence/Leave/Time Off	My Team's Upcoming Time Off	Displays workers in your supervisory organization with approved time off in the next 7 days. Does not include workers on Leave of Absence or unapproved time off.
Compensation	Compensation Summary CR	This report captures the total base pay as well as min, mid and max of the pay range for active workers. This report is intended for managers via the Manager Hub dashboard.
Compensation	Relevant Years of Experience - Manager Hub CR	Shows sum of relevant years of experience by worker using weighted modifier of 100% for related, 50% for partially related, and 0% for not related. The relevant experience categories and start and end dates are sourced from the 3 Job History custom business object.
Recruiting	Candidate Status Tracking - Manager Hub CR	This report captures candidates in the Offer, Background Check or Ready for Hire stage. This report is available for self-service access via the Manager Hub dashboard.
Recruiting	Contract Contingent Worker & Direct Hire Status	This report provides information for tracking direct hire & contingent worker hires in Workday. The report is available for self-service via the Manager Hub dashboard.
Recruiting	Filled Job Requisitions - Manager Hub CR	This report captures Filled job requisitions for hiring managers to view in the Manager Hub dashboard.
Recruiting	Manage Job Requisitions	View all open, frozen, and closed job requisitions. Details include job requisition and the total number of active candidates. Also included are the days the requisition has been open, the requested completion date, the close date, and last recruiting stage.
Recruiting	My Interviews	View all the interviews scheduled for the day for the user running the report. Includes interview details such as the date, time, and interviewer name.
Recruiting	Open and Frozen Job Requisitions - Manager Hub CR	This report captures Open and Frozen job requisitions and is intended for hiring managers to access via the Manager Hub dashboard.
Talent Management	All Certifications and Licenses Tracking - Manager Hub CR	This report captures license and certification data for active workers.
Talent Management	Certifications and Licenses Tracking - Manager Hub (Expiration in 90 Days or Less) CR	This report displays worker license & certification information in the Manager Hub dashboard. The report captures licenses & certifications with an expiration date 90 days from current date and before.

HCM Reports Available (continued)

REPORT TYPE	REPORT	BRIEF DESCRIPTION
Workforce Reports	Current Worker Detail Report	<p>View compensation details for all workers with active status in one or more selected organizations that you manage or support. Enables you to verify compensation for your active workers. Details include information about the worker's job, compensation plans, and compensation ranges. You can optionally include information about managers or narrow report results to a specified date, custom organization, or organization role.</p> <p>Required prompt: Organizations Optional prompts: View as of, Include Subordinate Organizations, Include Managers, Show Custom Organization Type, Show Organization Role</p>
Workforce Reports	Employee Movement by Supervisory Organization - CR	Report shows beginning headcount, terminations, transfer in, transfer out, and end headcount by month by Supervisory Organization.
Workforce Reports	Headcount & Open Position Analysis	<p>View list of filled positions (headcount) and open position by supervisory organization. This report filters on workers in which the user has access based on a role of Manager or HR Partner. No prompts required. This report answers questions such as:</p> <p>How many filled and open positions by supervisory organization where the role is an HR Manager or HR Partner?</p>
Workforce Reports	Hires and Terminations by Quarter	
Workforce Reports	My Positions CR	This report captures basic position information for a particular supervisory organization(s), including subordinates. The report includes a filter prompt for Staffing Status (Open, Filled, etc.).
Workforce Reports	My Team's Anniversaries CR	Provides a list of employee anniversaries in the next 30 days.
Workforce Reports	My Team's Birthdays CR	Provides a list of employee birthdays in the next 30 days.

HCM Reports Available (continued)

REPORT TYPE	REPORT	BRIEF DESCRIPTION
Workforce Reports	My Team's Contact Information	This report displays contact information, including home address, for active workers. The report is available for managers via the Manager Hub dashboard.
Workforce Reports	My Team's Emergency Contacts CR	This report displays emergency contact information for active workers. The report is available for managers via the Manager Hub dashboard.
Workforce Reports	My Team's Milestone Service Anniversaries CR	This report provides milestone service anniversary information for a manager's supervisory organization. This report is available via the Manager Hub dashboard.
Workforce Reports	Open Positions by Organization, Worker Type, and Date Range	This matrix report enables managers to view the count of open positions for a supervisory organization. Managers can drill down to view the position restriction, availability date, earliest hire date, days available, and any effective job requisitions. The report uses the Open Positions by Organization report data source. Required prompt: Organization.
Workforce Reports	Position Summary	View information about all positions in your organization to track the status of Filled Positions, Future Hires, Pending Offers, and the number of open positions by quarter.
Other Reports	Job Profile Attributes CR	This report captures information related to active Job Profiles, including job description detail.
Other Reports	Job Profile List CR	This report provides information on all active job profiles, including job description detail, in a row by row format.
Other Reports	Processes Awaiting Action Tracking CR	This report captures HCM related business process transactions awaiting persons. The report is intended for manager self-service access via the Manager Hub dashboard.

Report Demo

License and Certification

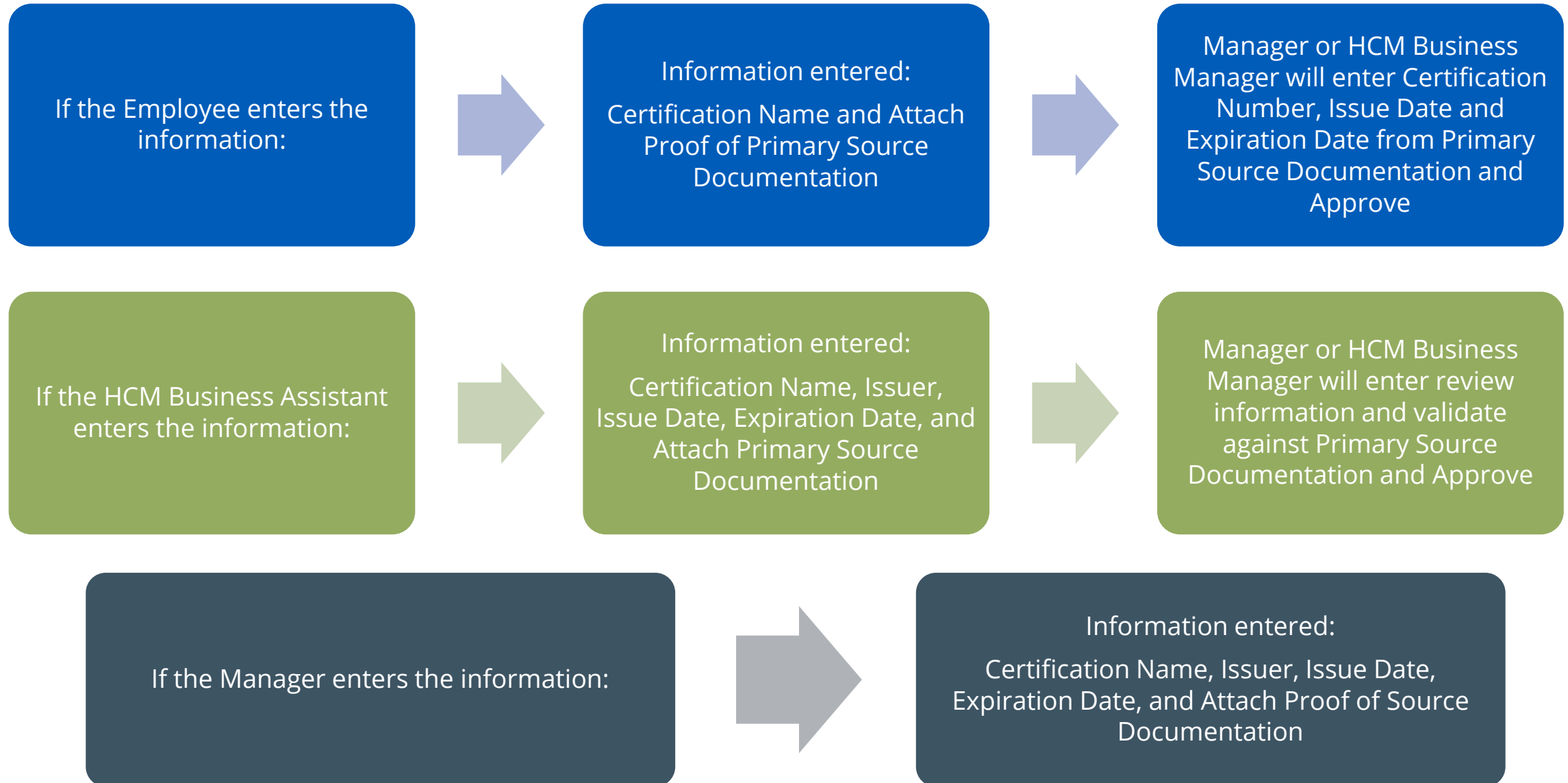
Importance of Certification and License Information in Workday

- Allows HR to extract documents when requested by accrediting bodies during HR file reviews
 - Good, consistent place to store the source documentation for easier access
- Integration with Workforce Management – impact on ability to schedule
- Inaccurate report results

Current State of Certification/License information in WD

- Identified items that need attention, including duplicate, expired and missing license information on individuals records within Workday
- Will be sending out information to managers on individuals records that need attention in their area
- Individuals are no longer able to create a new issuer and license name in the system if they do not find a match
 - Submit a Help ticket to request a new type of license be added

Entering/Updating Certification/License information in WD



Key Reminders

Editing/Updating Expired

- Any changes require a document to be uploaded to provide evidence of the change. For licensure, this should be the primary source verification documentation.

Duplicate License Removal

- Occurs when an individual adds a certification/license when one already exists in the system instead of editing the existing one.
- Duplicates can cause reports and other systems to believe a license is expired when it is not.

Missing Certifications/Licenses

- Follow the Entering/Updating certification/license process

Key Reminders (continued)

If initiated by:	Approval Required
Employee	Manager or HCM Business Manager
HCM Business Assistant	Manager or HCM Business Manager
Manager	No additional approval required

- To prove continuous licensure, the verification dates must be before the previous expiration date.
- If the employee completes the Certification Number, the Issue Date and/or the Expiration Date and submits the form, an error message will appear. To correct the error, the employee will need to delete this additional information and resubmit the form again.

Available Resources

Quick Reference Guides (QRGs)

- ✓ [Add a License or Certification in Workday](#)
- ✓ [Renew/Edit a Certification or License](#) (All Employees)
- ✓ [Renew/Edit a Certification or License](#) (Managers)
- ✓ [Manage Duplicate Certifications in Workday](#)
- ✓ [Correct Certification Errors in Workday](#)

Reports Available in Manager Hub within Workday

- ✓ Certifications/Licenses Tracking (Expiration in 90 Days or Less)
- ✓ All Certifications and Licenses Tracking – Manager Hub CR

Demo – Certifications/Licenses

Workday Insights

Position required when creating a Job Requisition

A position must be available before creating a job requisition.

- Select “replace a worker” when replacing an active worker who will be vacating the position. Or when replacing a worker who has vacated the position within the past 90 days.
- Select “add a worker” if the position is new or has been vacated for more than 90 days.

Start Job Requisition

Job Details

Enter the recruiting and job details for the job posting to get approval and begin the hiring process.

Basic Information

What supervisory organization is this job for? *

x HR Operations Support Department (Suzanne Guye (0109314)) (S108220AA)

This job will *

replace a worker

add a worker

Is there an existing position for this job? *

Yes

No, create a new position for this job

Select an existing position for this job *

x P00121796 Processing Specialist-1 (Unfilled)

Job Information

Job Profile *

Suggested for you 1495 - Manager, Workday Functions 4288 - Mgr, HR Operations 6024 - Manager Onboarding

x 6078 - Processing Specialist

Job Title *

Processing Specialist

Option to create a position will be removed on Job Requisition

View positions within a Supervisory Organization

View Staffing information within the supervisory organization.

HR Operations Support Department (Suzanne Guye (0109314)) (S108220AA)

Type: Supervisory
Superior Organization: HR Operations Admin Department (Karen Rolling (0009432)) (S108219AA)
Organization ID: S108220AA
Subordinates: HR Onboarding Department (Cortney Bogard (0181376)) (S108223AA), HR Operations Department (LaKeisha Lawson (0113770)) (S108222AA), HR WD Sustainment Department (PJ Deussenberry (0196129)) (S108221AA)

Details | Members | **Staffing** | Unavailable to Fill | Roles | Security Groups | Organization Assignments

Staffing Model: Position Management

Positions with Open Job Requisition: 1 item

Position Restrictions	Effective Job Requisition	Job Requisition FTE	Job Family	Job Profile
P00121595 Processing Specialist (Unfilled)	R-27870 Processing Specialist (Open)	1	HR Operations	6026 - HR Onboarding Specialist

Positions without Job Requisition: 3 items

Position Restrictions	Job Profile	Location
P00115006 Mgr. HR Operations - (Unfilled)	4288 - Mgr. HR Operations	2525 WEST END AVE (LOC00248)
P00121596 Processing Specialist (Unfilled)	6026 - HR Onboarding Specialist	2525 WEST END AVE (LOC00248)
P00121597 Manager (Unfilled)	4288 - Mgr. HR Operations	2525 WEST END AVE (LOC00248)

Positions with Open Job Requisitions

Positions without Open Job Requisitions.
*Note: you will see positions with current occupants if the position is setup to allow overlap.

Report: Can be accessed through Manager Hub

My Positions CR – Displays filled and open positions by Supervisory Organization. Shows positions that are currently tied to a job requisition.

Workday Ticket Guide

https://www.vumc.org/myworkday/sites/default/files/public_files/Training/WorkdayTicketGuide.pdf



Workday Ticket Guide



Pegasus and Workday Help Tickets

Area Need	Description	Link
Certifications and Licenses for Worker	<p>Workday Help Ticket: Request assistance with certifications or licenses for a worker or request a new certification be added to the base list, please go to the Workday Menu and select Help.</p> <p>Select Create Case, then select General HR Case Type Option.</p>	Certification and Licenses Help Ticket
Expense Reports	<p>Pegasus Ticket: For assistance, please select Ask a Workday Question in the <i>What area are you having a problem with?</i> Field.</p>	Expense Reports Pegasus Ticket
Goals and Performance Review	<p>Workday Help Ticket: Request assistance with Goals or Performance Reviews.</p> <p>Select Create Case, then select General HR Case Type Option.</p>	Goals and Performance Review Help Ticket
HCM Report or Dashboard Request	<p>Pegasus Ticket: Submit and HCM Report or a Dashboard Request</p>	HCM Report or Dashboard Request Pegasus Ticket
Job Requisition Removal	<p>Pegasus Ticket: Request assistance in removing a job requisition that was created in error.</p> <p>Please select HCM Recruiting in the <i>What area are you having a problem with?</i> Field.</p>	Job Requisition Removal Pegasus Ticket
Ordering Supplies and Updating Location	<p>Pegasus Ticket: Request assistance in ordering supplies or updating your location.</p> <p>Please select SCM Procurement from the drop-down menu.</p>	Ordering Supplies or Updating Location Pegasus Ticket
PO Payments and Reimbursement Payments	<p>Pegasus Ticket: For assistance, please select Ask a Workday Question in the <i>What area are you having a problem with?</i> Field.</p>	PO Payments and Reimbursement Payments Pegasus Ticket
Security	<p>Pegasus Ticket: Request a Workday security change (i.e., HCM Business Assistant with Compensation, HCM Viewer, etc.) or role change for an employee.</p>	Security Pegasus Ticket
Supervisory Organization	<p>Pegasus Ticket: Request a supervisory organization</p>	Supervisory Organization Pegasus



Goals Workshop September 11th, 2:30pm

Next HR Town Hall:

Wednesday, October 16th, 10:00 am





Questions?