Workday Training Program
Course Catalog

# Overview

This curriculum includes training courses focused on Core HR, Payroll, and Benefits employees, HR Departmental Processors / Liaisons and managers, and is organized by Workday security roles, which may differ slightly from current system access.

This just-in-time curriculum will introduce The Texas A & M University System (TAMUS) members to Workday through a blended approach of the following learning opportunities and materials:

* eLearning courses (TrainTraq)
* Instructor-Led courses (On-Site)
* Virtual Instructor-Led courses (WebEx)
* Video Help (Workday Help Site)
* Job Aids (Workday Help Site)

# Training Strategy

Our training strategy is based on Prosci’s ADKAR model describing how individuals change and is comprised of the following:

* Awareness courses to introduce topics and provide a general level of understanding of a topic
* Skills courses to help employees gain knowledge and build skills on how to use business processes in Workday
* Readiness activities to help employees become more familiar with Workday

# Course Catalogue Structure

This catalog is structured according to security roles and training required based on those security roles. The following is the primary groups of focus:

**Core HR, Payroll and Benefits** – this group include personnel who function within human resources, payroll and benefits supporting the campus or agency from a central perspective.

**HR Departmental Processors and Liaisons** – this group include personnel who function within human resources, payroll and benefits supporting various aspects of the member or agency at a college or departmental level and are distributed across the member and its locations.

**Managers** – this group includes personnel who supervise at least one employee (faculty, staff and / or students).

**View Only** – this group includes personnel who need security roles that allow them to view (not edit) data within Workday that are essential to the individual’s day-to-day activities

The remainder of this catalog covers additional training available as supplements based on Workday implementation impact to legacy systems such as Enterprise Data Warehouse, FAMIS, and Prep Budget functionality and processes.

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# Course Catalog

The following courses comprise the TAMUS Workday and legacy systems training program.

## Core HR, Benefits and Payroll

| Course Title | Purpose | Overview | Duration | Delivery | Security Roles |
| --- | --- | --- | --- | --- | --- |
| TAMUS Workday Core Concepts | The purpose of this course is to provide an introduction to Workday including functionality and processes  | * Provide users with a basic understanding of Workday
* Provide an understanding of the use of supervisory organizations
* Detail the impacts and usage of self-service within Workday
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* HR Departmental Processors and Liaisons security roles
* Manager
 |
| Navigating Workday  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  | * Demonstrate how to navigate the home page and worklets
* Explain the Inbox and notifications, and how to use the search and mobile features
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* HR Departmental Processors and Liaisons security roles
* Manager
 |
| Workday Core HCM Concepts for Core HR, Benefits and Payroll | The purpose of this course is to introduce Workday staffing models and how they apply to TAMUS | * Define staffing models
* Describe the difference between managing delegations for business processes and delegating a single task
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Absence Partner\*
 |
| Workday’s Approach to HR Business Processes for Core HR, Benefits and Payroll  | The purpose of this course is to provide an overview of HR business processes from the employee’s perspective  | * Discuss multiple HR processes related to daily interactions in Workday
* Introduce Workday terminology
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Absence Partner\*
 |
| Safety | The purpose of this course is to provide an overview of safety and incident reporting  | * Detail key concepts and terminology related to safety, including safety incident reporting
 | 30 Minutes | elearning | * HR Partner
* Safety Partner
* Workers Compensation Partner
 |
| Safety Q&A Forum  | The purpose of this forum is to provide participants with the opportunity to ask Kevin McGinnis questions directly  | * TBD
 | 60 Minutes | Facilitated Q&A | * HR Partner
* Safety Partner
* Workers Compensation Partner
 |
| Positions and Requisitions  | The purpose of this course is to provide an understanding of the requisition and position management functions  | * Detail position management processes, including creating and editing a position
* Discuss job requisition processes, including creating a new position and assigning costing allocation
 | 180 Minutes | Classroom | * Compensation Partner
* Faculty Partner
* HR Partner
* Payroll Partner
* Recruiting Partner
 |
| Recruiting  | The purpose of this course is to provide an understanding of the full-cycle recruiting process  | * Discuss job application processes and how to update a job posting
* Detail the process to close a job requisition and position
* Outline the various recruiting exceptions, including changing and freezing a job requisition
* Discuss recruiting reports
 | 180 Minutes | Classroom | * HR Partner
* Recruiting Partner
 |
| Hiring and Onboarding  | The purpose of this course is to provide an overview of the onboarding process | * Detail the management of the hiring process and onboarding process
* Review related reports for onboarding and hiring, such as the Form I-9 monitoring
 | 120 Minutes | Classroom | * Faculty Partner
* Graduate Studies Partner
* HR Partner
* Recruiting Partner
 |
| Benefits  | The purpose of this course is to provide an overview of benefits and life events  | * Review key benefits concepts and terminology
* Detail changes for employees and retirees, such as change benefits
* Detail the management of Medicare information
* Review related reports for benefits and life events
 | 120 Minutes | Classroom | * Benefits Partner
* Retiree Partner
* System Benefit Support
 |
| Time Off and Leave  | The purpose of this course is to provide an overview of time off and leave  | * Detail key concepts, terminology and changes as related to employee leave
* Detail less frequent processes related to leaves and time off
* Review related reports for time off and leave
 | 120 Minutes | Classroom | * Absence Partner\*
* HR Partner
 |
| Payroll | The purpose of this course is to provide an overview of the payroll process  | * Detail key concepts and terminology related to payroll, such as pay cycle event and tax election
* Discuss payroll reporting code and less frequently utilized areas
 | 120 Minutes | Classroom | * Payroll Partner
 |
| Job and Organizational Changes | The purpose of this course is to provide a process overview related to job and organizational changes  | * Detail items triggered by Employee Self-Service, such as personal data and contact information
* Detail terminology and changes related to staffing, including staffing and initiating a change in job
* Detail less frequent processes related to moving a worker and changing an organization assignment
* Review related reports for job and organization changes
 | 180 Minutes | Classroom | * Faculty Partner
* Graduate Studies Partner
* HR Partner
* Payroll Partner
 |
| Talent | The purpose of this course is to provide an overview for the talent process  | * Explain talent management related items, such as manage awards and manage internal projects
* Review related reports for talent, including worker expiring certifications
 | 60 Minutes | Classroom | * Talent Partner
 |
| Compensation and Merit | The purpose of this course is to provide an overview of merit and compensation  | * Detail the processes related to compensation, such as proposing a compensation change
* Review the process related to requesting a compensation change and one-time payment
 | 60 Minutes | Classroom | * Compensation Partner
* Faculty Partner
* HR Partner
 |
| Separation  | The purpose of this course is to provide an overview of separation  | * Detail items related to separation, including COBRA and Medicare information
* Provide an understanding of the processes related to termination and ending a contingent worker contract
 | 60 Minutes | Classroom | * Absence Partner\*
* HR Partner
* Payroll Partner
 |
| Performance Management  | The purpose of this course is to provide an overview of performance management  | * Discuss items related to team performance, such as the performance review process and goals
* Review performance items related to new hires, promotions and transfers
* Review exceptions or less frequent events on cancel and rescind, such as giving an award and feedback
* Review reports related to performance management
 | 60 Minutes | Classroom | * Talent Partner
 |
| Workday Life – 4 Part Series  | The purpose of these events is to provide Core HR, Payroll and Benefits Partners with an overview of change impacts related to the Workday transition | * Define security roles and supervisory organizations
* Describe changes that will come about with Workday
* Detail various change impacts as they relate to key functional areas
* Provide a general awareness of key concepts within Workday
 |  | WebEx | * Core HR, Payroll and Benefits Partners
* Budget Partner
* Cost Center Approver
* Sponsored Research Services
 |

\* Denotes a full-time HR, Benefits and/or Payroll employee

\*\* Denotes a full-time HR Departmental Processor or Liaison employee

## HR Departmental Processors and Liaisons

| Course Title | Purpose | Overview | Duration | Delivery | Security Roles |
| --- | --- | --- | --- | --- | --- |
| TAMUS Workday Core Concepts  | The purpose of this course is to provide an introduction to Workday including functionality and processes  | * Provide users with a basic understanding of Workday
* Provide an understanding of the use of supervisory organizations
* Detail the impacts and usage of self-service within Workday
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* HR Departmental Processors and Liaisons security roles
* Manager
 |
| Navigating Workday  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  | * Demonstrate how to navigate the home page and worklets
* Explain the Inbox and notifications, and how to use the search and mobile features
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* HR Departmental Processors and Liaisons security roles
* Manager
 |
| Workday Core HCM Concepts for HR Departmental Processors / Liaisons  | The purpose of this course is to provide an introduction to terminology and key concepts as well as an overview of business processes  | * Review Workday basics, such as security roles and real time data
* Detail getting work done through self-service
* Detail the process of delegating work and requesting a delegation change
* Provide an overview of common Workday processes, such as those related to recruiting and talent management
 | 120 Minutes | WebEx | * Absence Partner
* HR Contact
* I-9 Processor
* Recruiting Coordinator
* Research Partner
* Talent Analyst
* Timekeeper
* UIN Partner
 |
| Recruiting | The purpose of this course is to provide an overview of the recruiting process  | * Detail items related to position management and compensation, such as create position and request compensation change
* Review cost allocation and the job application process
* Detail processes for staff and evergreen requisition as well as exceptions
 | 120 Minutes | WebEx | * Recruiting Coordinator
 |
| Staffing and Onboarding  | The purpose of this course is to provide an overview of onboarding, hiring, staffing and security roles  | * Detail onboarding items, including processes related to the Form I-9
* Detail hiring and staffing, such as hire employee or contract contingent worker and add additional job
* Review of assigning roles and changing organization assignments
 | 120 Minutes | WebEx | * HR Contact
* I-9 Processor
* Research Partner
* UIN Partner
 |
| Goals and Performance  | The purpose of this course is to provide a general overview of the processes related to goals and performance management | * Detail initiated processes, such as cascade goals
* Discuss steps that must be taken by employees and managers for both goal setting and performance reviews
 | 30 Minutes | WebEx | * Talent Analyst
 |
| Tracking Time | The purpose of this course is to provide an overview of time tracking  | * Detail items related to time tracking, including entering time and assigning a work schedule
* Review exceptions related to time tracking, including cancel and rescind assigned work schedule
* Review reports related to time tracking
 | 30 Minutes | WebEx | * Timekeeper
 |
| Managing Time Off and Leave  | The purpose of this course is to provide an overview of how to manage time off and leave  | * Detail processes related to time off, such as cancel request time off
* Detail processes related to leave, including correcting and canceling a leave of absence or returning from leave
* Review reports related to time off and leave
 | 30 Minutes | WebEx | * Absence Partner\*\*
* HR Contact
 |
| Answering Common Employee Questions  | The purpose of this session is to provide answers and tips for common questions from employees  | * Provide a list of questions and answers for common questions asked by employees
 | 60 Minutes | WebEx | * Absence Partner\*\*
* HR Contact
* I-9 Processor
* Recruiting Coordinator
* Research Partner
* Talent Analyst
* Timekeeper
* UIN Partner
 |
| Answering Common Manager Questions | The purpose of this session is to provide answers and tips for common questions from managers | * Provide a list of questions and answers for common questions asked by managers
 | 60 Minutes | WebEx | * Absence Partner\*\*
* HR Contact
* I-9 Processor
* Recruiting Coordinator
* Research Partner
* Talent Analyst
* Timekeeper
* UIN Partner
 |
| Drop In Learning Lab for HR Departmental Processors and Liaisons  | The purpose of this learning opportunity is to reinforce training by allowing participants to log in to Workday prior to Go Live and walk through common actions they will perform  | * Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday
 | 15 Minutes | Self-Paced Learning | * HR Contact
 |
| Reporting in Workday | The purpose of this course is to provide an overview of reports specific to the view only security role  | * Provide participants with an understanding of how to access and run reports in Workday
* Provide an understanding of the reports that are available to those assigned to a view only security role
 | 30 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
* View Only Security Roles
 |

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\*\* Denotes a full-time HR Departmental Processor or Liaison employee

## Managers

| Course Title | Purpose | Overview | Duration | Delivery | Security Roles |
| --- | --- | --- | --- | --- | --- |
| TAMUS Workday Core Concepts  | The purpose of this course is to provide an introduction to Workday including functionality and processes  | * Provide users with a basic understanding of Workday
* Provide an understanding of the use of supervisory organizations
* Detail the impacts and usage of self-service within Workday
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Navigating Workday  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  | * Demonstrate how to navigate the home page and worklets
* Explain the Inbox and notifications, and how to use the search and mobile features
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Workday Core HCM Concepts for Managers  | The purpose of this course is to provide an overview of key concepts and terminology for managers  | * Detail the usage of staffing models
* Review calculating overtime and delegating work
* Review functionality that allows employees and managers to initiate actions and processes on their own
* Detail the specifics related to initiating, review and approving processes
 | 60 Minutes | elearning | * Manager
 |
| Merit and Performance Management Processes | The purpose of this course is to provide an overview of the processes related to merit and performance  | * Detail key concepts of processes related to merit, including employee merit award and merit reports
* Review the performance management processes, including various phases of the performance review and performance management reports
 | 60 Minutes | elearning | * Manager
 |
| Managing Your Inbox | The purpose of this course is to provide an overview of items related to the Inbox  | * Detail how a manager will manage their Inbox, such as delegation as well as notifications
 | 30 Minutes | elearning | * Manager
 |
| Recruiting | The purpose of this course is to provide an overview of various processes the manager may be involved in related to recruiting  | * Detail the job application process
* Review processes including those related to job requisition and evergreen requisition
 | 30 Minutes | elearning | * Manager
 |
| Staffing and Separation | The purpose of this course is to provide managers with an overview of staffing and separation processes  | * Review the process of initiating and approving new hires, title changes and switching a primary job
* Detail the process of termination and approving a resignation
 | 30 Minutes | elearning | * Manager
 |
| Time Off and Leave / Time Tracking | The purpose of this course is to provide an overview of various processes the manager may initiate or perform related to time off and leave  | * Provide an overview of time tracking and related processes
* Detail the difference between time off and leaves as well as provide an understanding of relevant business processes
 | 30 Minutes | elearning | * Manager
 |
| Drop In Learning Labs for Managers  | The purpose of this learning opportunity is to reinforce training by allowing participants to log in to Workday prior to Go Live and walk through common actions they will perform | * Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday
 | 15 Minutes | Self-Paced Learning | * Manager
 |
| Manager Q&A Readiness Forum | The purpose of this session is to provide a means for Managers to get answers to frequently asked questions that will prepare them for their job responsibilities in Workday  | * Detail the member’s answer as to what managers are expected to do in Workday (from the “Who Does What” activity)
* Answer questions not answered by required training
* Explain how managers get help
 | TBD | Facilitated Q&A managed by the member | * Manager
 |
| Video Help for Managers | The purpose of these materials is to demonstrate how to perform Workday functions  | * Reference the supplemental catalog for more detailed information
 | 3 – 5 Minutes per video | Video | * Manager
 |
| Performance Management  | The purpose of this course is to provide an in-depth review of the performance management processes  | * Detail and review the goal setting process
* Detail the performance management process including providing a rating
 | TBD | elearning | * All Employee, security roles
 |

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\*\* Denotes a full-time HR Departmental Processor or Liaison employee

## Non HR, Payroll and Benefits Personnel

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Course Title | Purpose | Overview | Duration | Delivery | Security Roles |
| TAMUS Workday Core Concepts  | The purpose of this course is to provide an introduction to Workday including functionality and processes  | * Provide users with a basic understanding of Workday
* Provide an understanding of the use of supervisory organizations
* Detail the impacts and usage of self-service within Workday
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Navigating Workday  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  | * Demonstrate how to navigate the home page and worklets
* Explain the Inbox and notifications, and how to use the search and mobile features
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Enterprise Data Warehouse Session 1 – Workday HCM Business Objects Universes | The purpose of this course is to describe the change impacts to Enterprise Data Warehouse and subsequently Business Objects Universes as a result of the Workday implementation with a specific focus on positions | * Position
* Position Source
* Worker
 | 90 minutes | WebEx | * All EDW users
 |
| Enterprise Data Warehouse Session 2 – Workday HCM Business Objects Universes | The purpose of this course is to describe the change impacts to Enterprise Data Warehouse and subsequently Business Objects Universes as a result of the Workday implementation with a specific focus on payroll | * Pay History
* Pay History FTE
* Pay History Deductions
 | 90 minutes | WebEx | * All EDW users
 |
| FAMIS Session 1 – Business Office Payroll Accounting | The purpose of this course is to provide training for users on how to utilize FAMIS to conduct the day-to-day business that took place in BPP or has otherwise been impacted by the Workday implementation. | * FAMIS Back Office duties
* Payroll Control Screens
* Withholding Orders and Other Deduction Payments
* Managing College Work Study Splits
 | 120 Min | WebEx | * Payroll Accountants
* Accounting Operations
* Payroll Managers
* Financial Aid Office
 |
| FAMIS Session 2 – Title Codes, ADLOCSs, and Accounting Analysis | The purpose of this course is to provide training for users on how to utilize FAMIS to replace specific functions previously provided by the BPP system. | * Title codes
* ADLOCs
* Accounting Analysis Setup
* Overrides
 | 60 minutes | WebEx | * Payroll Partners
* HR Partners
* Accountants
* State Fund / USAS Managers
 |
| FAMIS Session 3 – Encumbrances, Salary Savings and Budget Transfers | The purpose of this course is to provide training for users on how to utilize FAMIS to conduct the day-to-day business that took place in BPP or has otherwise been impacted by the Workday implementation. | * Payroll encumbrance display screens
* Supplemental encumbrances (allowances)
* Daily encumbrance processing
* Monthly salary savings process
* Daily cost allocation budget transfers (requirement accounts)
 | 60 minutes | WebEx | * Business officers
* Budget officers,
* Departmental Accountants
 |
| SRS Cost Allocation Forum  | The purpose of this forum is to provide an opportunity to learn about cost allocation specific to Sponsored Research Services | * Cost allocation
* TBD
 | TBD | TBD | * Sponsored Research Services
* TBD
 |
| Cost Allocation and Delegation  | The purpose of this course is to provide an overview of the cost allocation process and delegation | * TBD
 | 30 Minutes | elearning | * Budget Partner
* Cost Center Approver
* HR Contact
* SRS
 |
| Prep Budget Awareness Training Session 1 – Workday Terms and Overview and Phase 1 Budget | The purpose of this course is to provide an overview of what changes are expected due to the transition from legacy systems to Workday. Specific focus will be on Workday terminology as well as Phase 1 Budget. | * Positions in Workday
* FAMIS Budget Module
* Cost Allocations
* New Business Objects Universes
* Phase 1 Budget
 | 90 minutes | WebEx | * Budget Officers
* HR Staff involved with Phase 1 budget preparation
 |
| Prep Budget Awareness Training Session 2 – Workday Merit Module and Phase 2 Budget | The purpose of this webinar is to discuss the Workday Merit module and discuss change impacts on the Phase 2 budget process. | * Phase 2 Budget
* Merit Module in Workday
 | 90 minutes | WebEx | * Budget Officers
* HR Staff involved with Phase 2 budget preparation
 |
| Budget and Merit Process Changes | TBD | * TBD
 | TBD | TBD | * Budget Partner
* TBD
 |

## Employees and Retirees

| Course Title | Purpose | Overview | Duration | Delivery | Security Roles |
| --- | --- | --- | --- | --- | --- |
| TAMUS Workday Core Concepts  | The purpose of this course is to provide an introduction to Workday including functionality and processes  | * Provide users with a basic understanding of Workday
* Provide an understanding of the use of supervisory organizations
* Detail the impacts and usage of self-service within Workday
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Navigating Workday  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  | * Demonstrate how to navigate the home page and worklets
* Explain the Inbox and notifications, and how to use the search and mobile features
 | 60 Minutes | elearning | * Core HR, Payroll and Benefits Partners
* Departmental Processors and Liaisons security roles
* Manager
 |
| Drop In Learning Lab (Employee) | The purpose of this learning opportunity is to reinforce training by allowing participants to log in to Workday prior to Go Live and walk through common actions they will perform | * Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday
 | 15 Minutes | Self-Paced Learning | * All Employees
 |
| First Login, Day 1 Checklist (Employee)  | The purpose of this checklist is to provide employees with a guide to log in to Workday for the first time and verify key personal information  | * Provide a step-by-step list of actions that provide navigation support to help employees learn how to use Workday and let the employee verify that certain personal and financial information is reflected correctly
* Provide directions on how to change incorrect information
 | N/A | Job Aid | * All Employees
 |
| Video Help for Employees  | The purpose of these videos is to demonstrate how to perform Workday functions | * Reference the supplemental catalog for more detailed information
 | 3 – 5 Minutes / per video | Video | * All Employees
 |

**Note**: Course assignment to security roles listed may be varied by system member. For further information please contact your HR Office

# Supplemental Catalog

Video help courses have been identified to demonstrate specific Workday functions of common Employee, Retiree and Manager actions.

| Video Help (Employee) Topics |
| --- |
| Change Personal Information |
| Change Emergency Contacts |
| Contact Change |
| Enter Time |
| Assign Work Schedule  |
| Request Time Off  |
| Correct Time Off |
| Request Leave of Absence |
| Request Return from Leave of Absence |
| Update your Work Schedule |
| Manage Internal Career Apply  |
| Complete Federal Withholding Elections |
| Complete State and Local Withholding Elections |
| Edit Worker Additional Data Event  |
| Change Beneficiary  |
| Change Benefits |
| Change Benefits for Life  |
| Dependent Event |
| Cascade Goals (view) |
| Manage Goals |
| Complete Self Evaluation for Performance Review |
| Give Feedback  |
| Get Feedback on Employee |
| Submit Resignation |
| Report Safety Incident  |
| Access the Workday Mobile Application |
| Manage a Delegation |

|  |
| --- |
| Video Help (Manager) Topics |
| Screen candidates |
| Manage interviews |
| Customize the home landing page  |
| View and navigate the my team worklet  |
| Where to find and general navigation of a business process status  |
| Delegate to someone such as an assistant  |
| Convert a contingent worker to an employee |
| Enter time for an employee (under review) |
| Approve a time off request  |
| Manager worklets and viewing reports  |