

TEXAS A&M
AGRI LIFE

EMPLOYEE
DEVELOPMENT

AgriLife Employee

Development Symposium



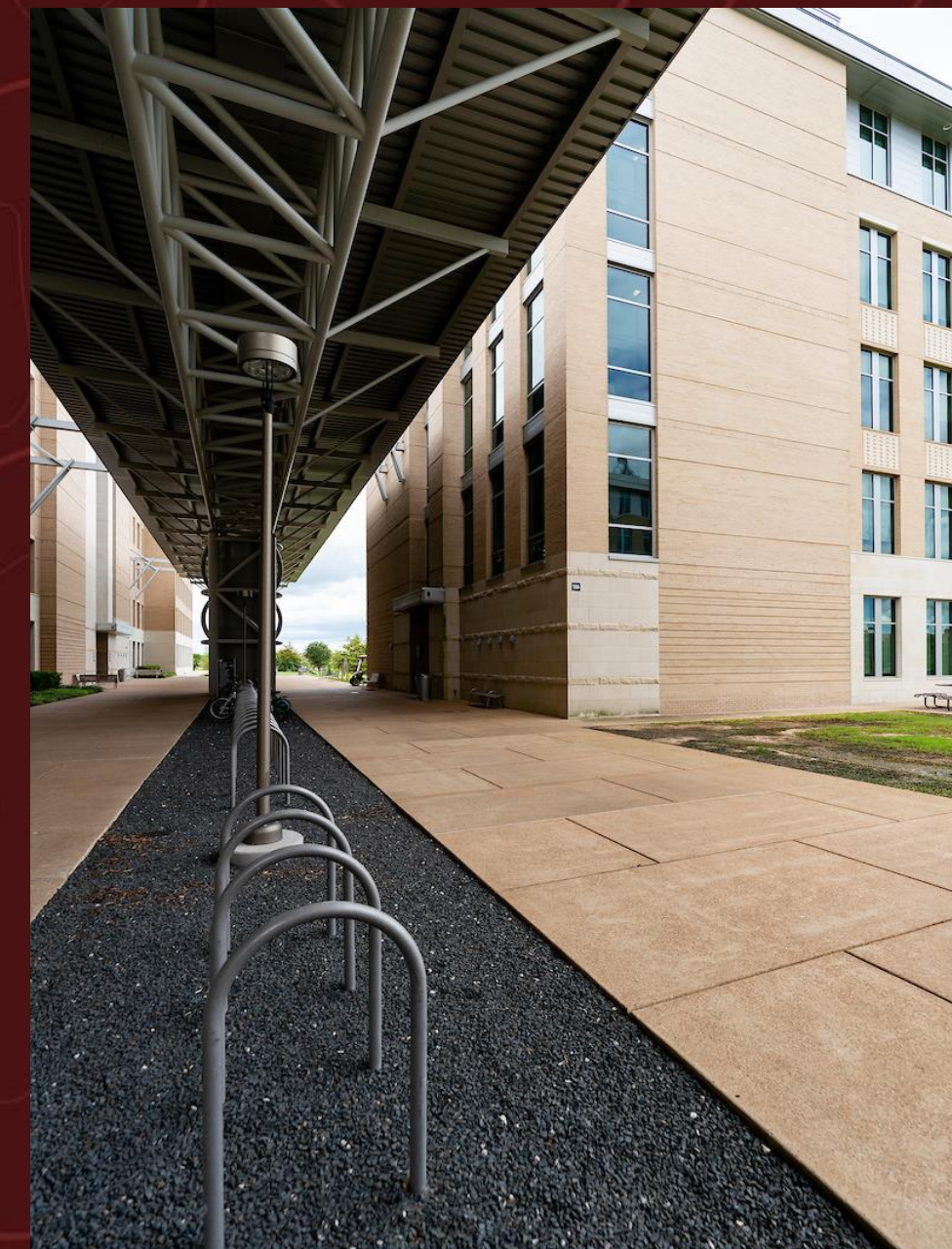
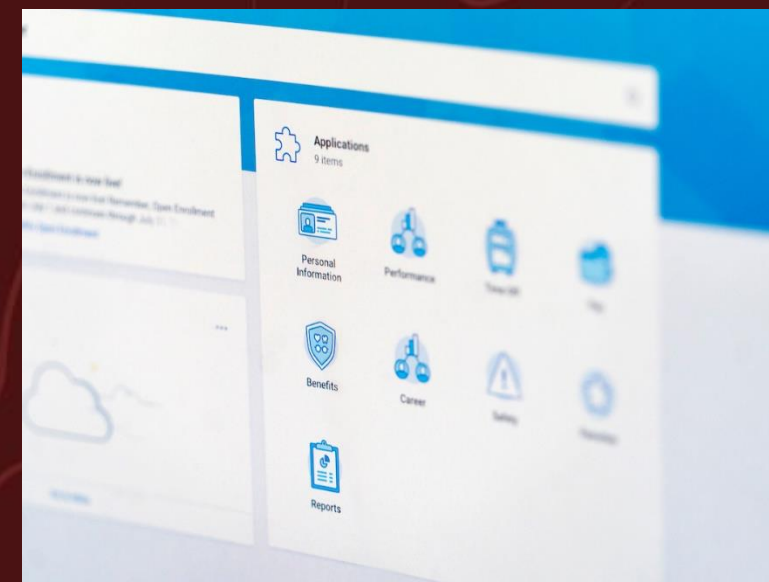
Workday Mishaps

Melanie Upton

*HR Manager
AgriLife Administrative Services*

TEXAS A&M
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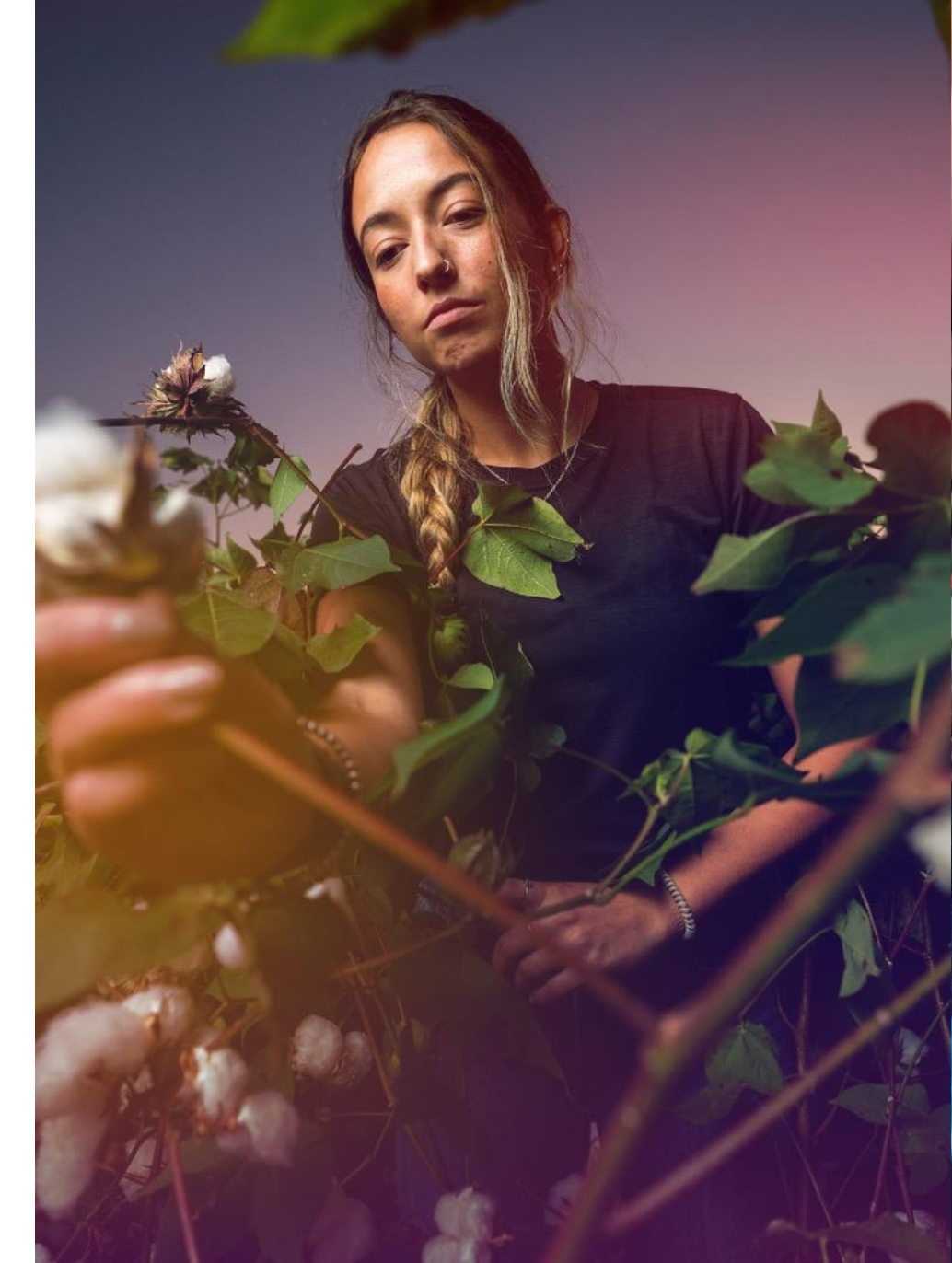
MEET THE HR MANAGERS

- **Joy Bading** – Dean's Office Staff, Administrative Services, COALS
- **Evelyn Castaneda** – Research Director's Office, Research Centers, Vice Chancellor's Office Administration, Dean's Office Dept Heads, AIT, Digital Education, Marketing and Communications, Unit Business Services
- **Jessica Lennerton** – Extension Director's Office, EFNEP, BLT, 4H, ODA, Wildlife Services, Disaster Assessment & Recovery, Extension County Programs/District Offices
- **Melanie Upton** – TAMFS, TVMDL, and Institute for Advancing Health through Agriculture



ONE DISCLAIMER

Information is intended to be general tips, tricks and guidelines. You will still need to follow any of your unit's internal processes. This is not intended to be a comprehensive, in-depth training.





TIPS & TRICKS GENERAL



WORKDAY HELP

The screenshot shows the Workday Services website for The Texas A&M University System. The header includes 'WORKDAY SERVICES' and navigation links like 'Home', 'About', 'News and Updates', 'Reporting', 'Training', 'Support', and a search bar. A main banner reads 'Making Workday Work for you' with a 'Learn to use Workday' button. Below, there's a 'Quick access to helpful resources' section with 'Common Tasks' and 'Report' cards. An 'SSO Menu' overlay is positioned in the foreground, listing various applications. The 'Workday Help' item in the SSO Menu is circled in red.

THE TEXAS A&M UNIVERSITY SYSTEM
OFFICE OF INFORMATION TECHNOLOGY
Services Contact Search OIT

WORKDAY SERVICES

Home About News and Updates Reporting Training Support Search

Making Workday Work for you
Workday Services supports the Workday application and those who use it to manage human resources, payroll and benefits across The Texas A&M University System.
[Learn to use Workday »](#)

Quick access to helpful resources

Common Tasks
View resources related to the most common Workday tasks for employees and managers.
[Common Tasks for Employees and Managers](#)

Report
Find the... needs. Fi
[View Wo](#)

SSO Menu

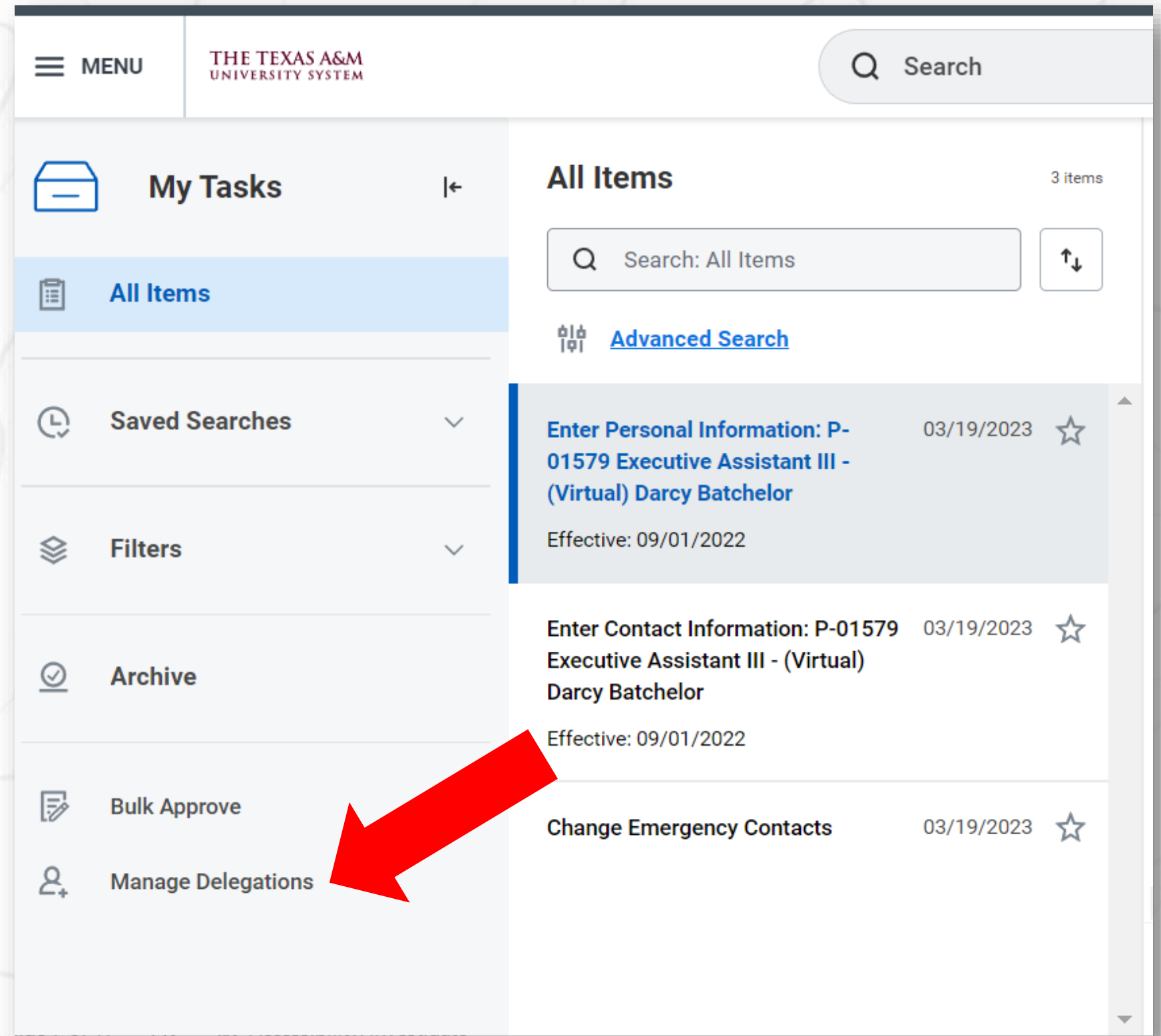
- ▶ AggieBuy
- ▶ Guardian Electronic I-9
- ▶ Maestro
- ▶ TrainTraq
- ▶ UIN Search
- ▶ **Workday Help**
- ▶ Concur
- ▶ HRConnect Legacy
- ▶ MyEvive
- ▶ UIN Manager
- ▶ Workday
- ▶ Workday Sandbox

[Manage Menu](#) [Refresh Menu](#)

- **Job Aids** step-by-step instructions for specific processes
- **Reports** Workday reports available to certain security roles
- **Release Notes** keep users updated weekly on changes to the Workday application
- **Upcoming Webinars** open to all, but content focuses on specific security roles

MANAGING DELEGATIONS

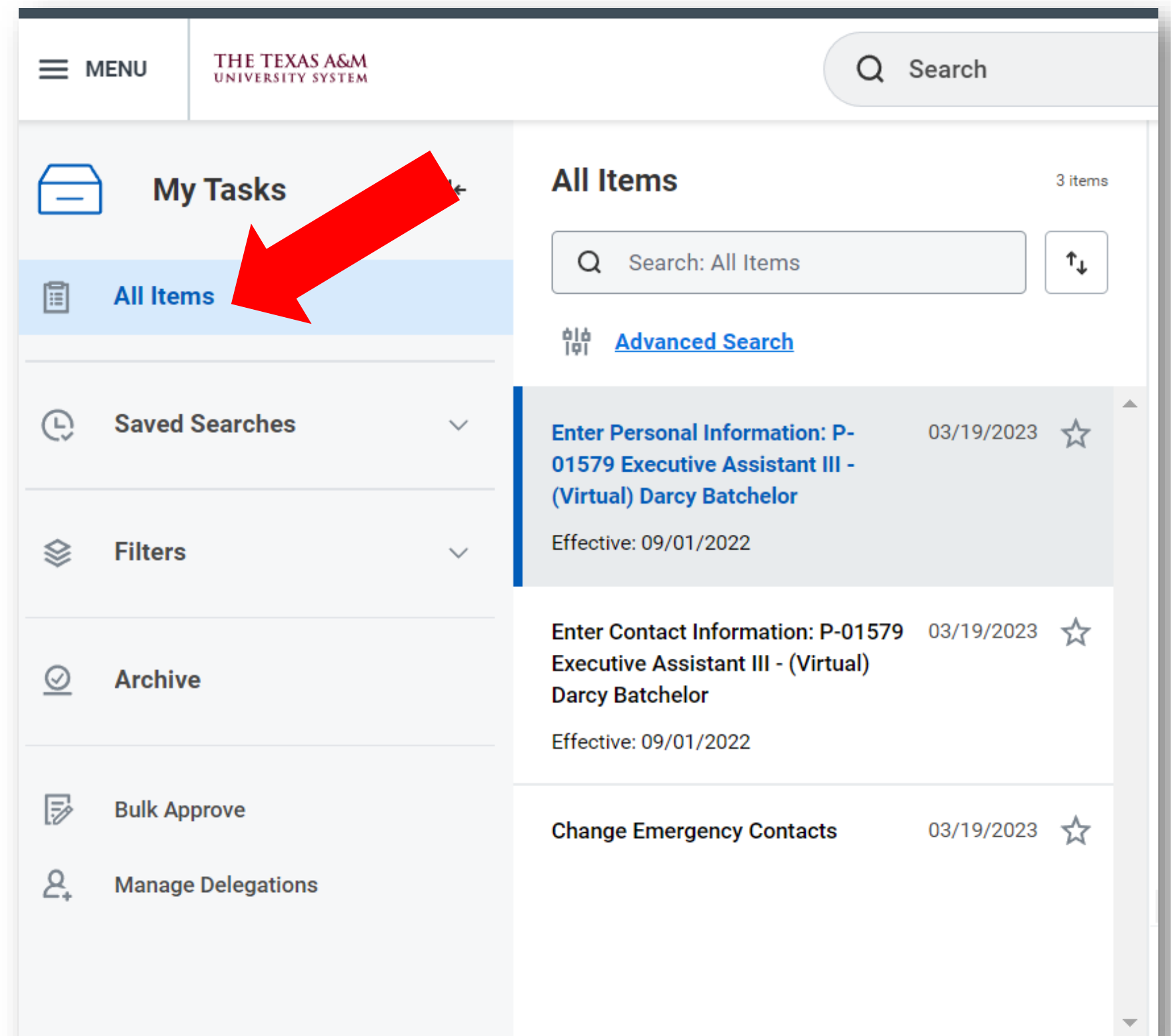
Delegation *temporarily* reassigns tasks to another user, enabling that user to perform individual actions on the Delegator's behalf.



***Manage Delegations can be set up by employee as self or HR Partner.

REMINDERS ABOUT DELEGATIONS

- Only good for up to 12 months at a time
- The As Self security roles (Employee As Self, Retiree As Self, etc.) cannot set up a delegation
- Let's look at a few settings...



The screenshot displays the user interface of the Texas A&M University System portal. At the top, there is a navigation bar with a 'MENU' icon, the text 'THE TEXAS A&M UNIVERSITY SYSTEM', and a search bar labeled 'Search'. Below the navigation bar, a sidebar menu is visible with several options: 'My Tasks', 'All Items', 'Saved Searches', 'Filters', 'Archive', 'Bulk Approve', and 'Manage Delegations'. A large red arrow points to the 'All Items' option in the sidebar. The main content area shows a list of items under the heading 'All Items' (3 items). The first item is 'Enter Personal Information: P-01579 Executive Assistant III - (Virtual) Darcy Batchelor' with an effective date of 03/19/2023 and a star icon. The second item is 'Enter Contact Information: P-01579 Executive Assistant III - (Virtual) Darcy Batchelor' with an effective date of 03/19/2023 and a star icon. The third item is 'Change Emergency Contacts' with an effective date of 03/19/2023 and a star icon.

HELPFUL REPORTS

- **Current Delegations** - Returns all current delegations for the prompted organizations.
- **Onboarding Status Summary** - Personnel should run this report daily and reach out to individuals or departments holding up onboarding events.
- **View Open Positions** - Used to see open position details, such as open job requisitions, earliest hire dates, etc.

WORKDAY SERVICES

[Home](#) [About](#) [News and Updates](#) [Reporting](#)

Reporting

Reports available in Workday

[Home](#) / [Reporting](#)



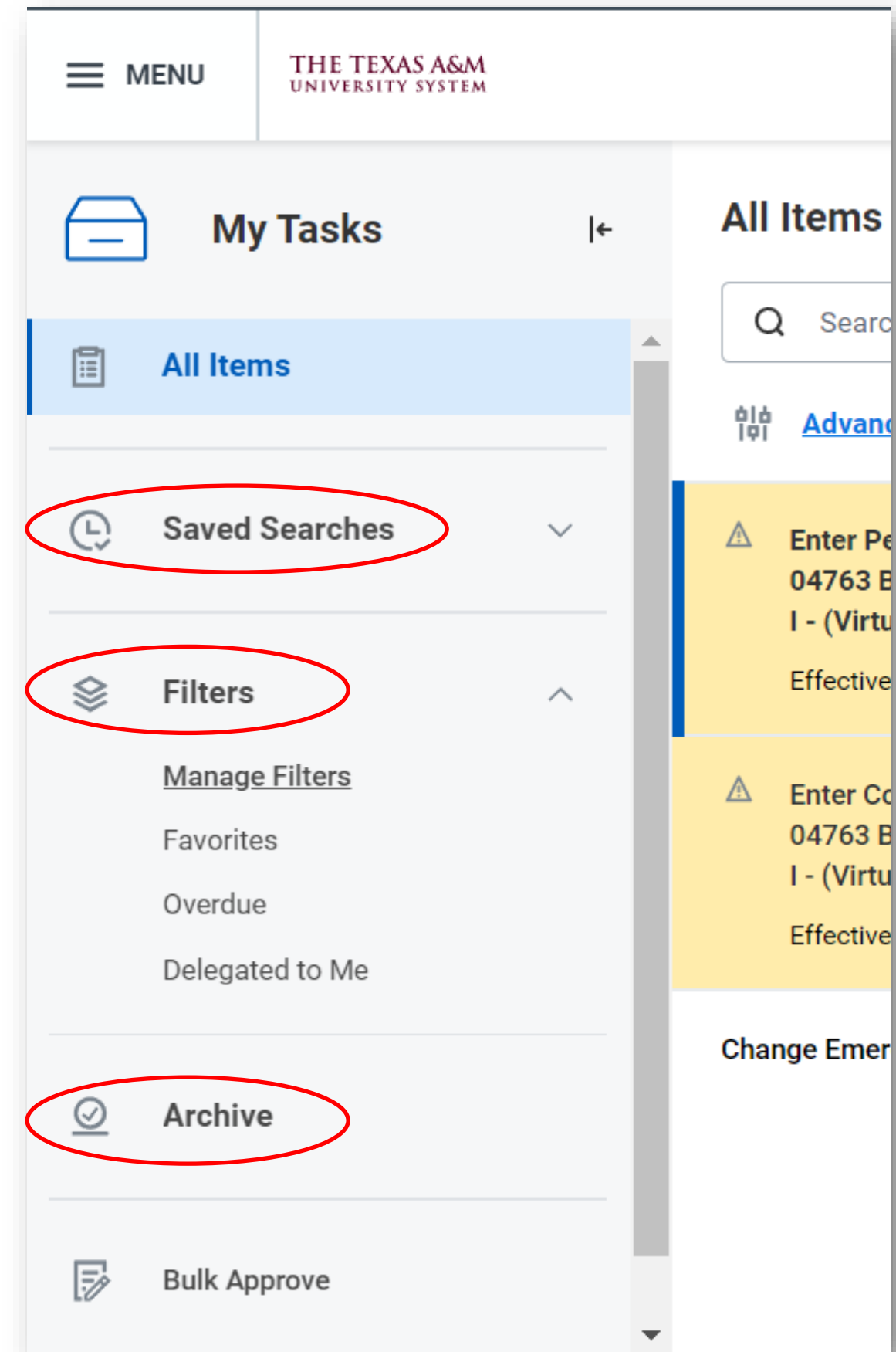
CONFIGURE SEARCH RESULTS

- Configure for your most used categories
- No longer have the “all of Workday” option. Pull all categories up to **Saved Categories.**



INBOX FILTERS & ARCHIVE

- Use **Filters** to quickly find specific tasks
- Access **Archive** to get back to positions or in progress business processes
- Use **Saved Searches** to quickly find tasks related to a position or employee



WORKER HISTORY

- See what step is awaiting action in a business process by viewing **Worker History**

(Virtual) Cammy Oren
Provost & Executive Vice President

Actions

Email Team

Summary

Overview

Absence

Career

Compensation

Job Details

Employee ID: 999091100

Supervisory Organization: Board of Regents (Timothy Leach [C]) >> 06999991 AGRILIFE WU Office of

Position: P-01580 Provost & Executive Vice President

Business Title: Provost & Executive Vice President

Job Profile: Provost and Executive Vice President

Job Family: TAMUS > Academic Affairs

Employee Type: Staff

Management Level: Executive Management (2)

Time Type: Full time

FTE: 100.00%

Location: College Station, TX, US

Details: **Process**

Process History 9 items

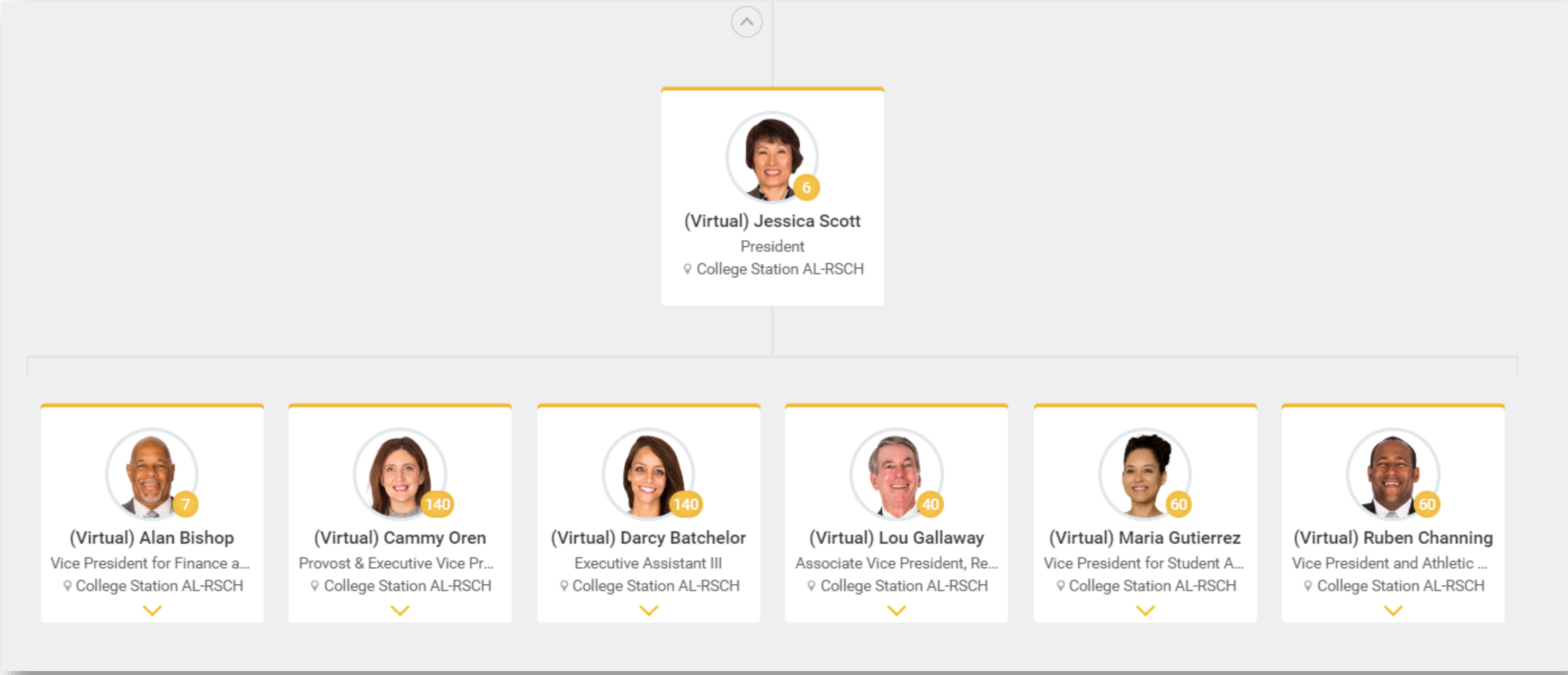
Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Request Compensation Change	Request Compensation Change	Step Completed	03/22/2023 06:22:01 PM	03/29/2023	(Virtual) Debbie James - 10	1	Melanie Upton on behalf of (Virtual) Debbie James - 10: Requesting salary increase as out of cycle merit. Increase request is for exceptional work and increased responsibilities as outlined in memo that was approved by VP and HR.
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Approval by Sponsored Research Partner	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Not Required		03/29/2023		0	
Request Compensation Change	Review Compensation Change	Awaiting Action		03/29/2023	(Virtual) Pauline Williams (Compensation Partner)	1	

Remaining Process

Click on the button below to review remaining process details.

Remaining Process

INHERITANCE EXPLAINED



MOVE WORKERS

Can only be used within the same company/member



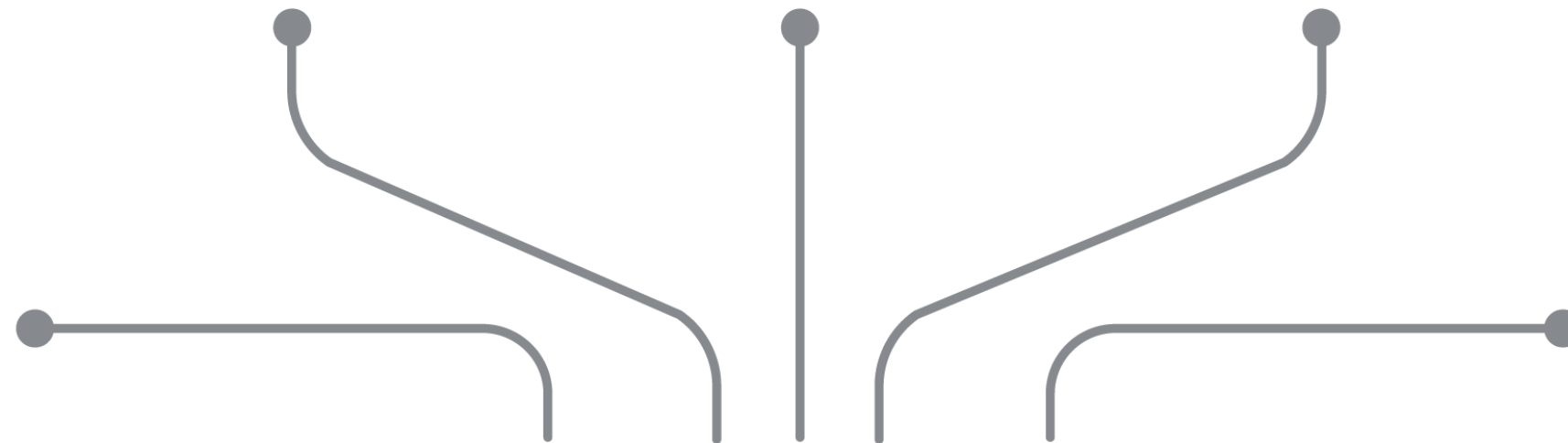
TEXAS A&M UNIVERSITY
College of Agriculture
& Life Sciences

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RESEARCH

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EXTENSION

TEXAS A&M
TVMDL
VETERINARY MEDICAL
DIAGNOSTIC LABORATORY

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SUPERVISOR ORGANIZATION REQUESTS

- [Workday Supervisory Organization Request](#)

Adloc Number

Sup Org Name

Superior Org

06999991 AGRILIFE WU Office of the President ((Virtual) Jessica Scott) ⋮

Type	Supervisory	Superior Organization	<u>06999990 AGRILIFE Workday University (Elizabeth Schwartz (Inherited))</u>
Organization ID	06999991_office_president_wu2	Subordinates (first 5)	06999992 AGRILIFE WU Administrative Services ((Virtual) Darcy Batchelor) 06999993 AGRILIFE WU Finance & Operations ((Virtual) Alan Bishop) 06999994 AGRILIFE WU Athletics ((Virtual) Ruben Channing) 06999995 AGRILIFE WU University College ((Virtual) Cammy Oren) 06999996 AGRILIFE WU Research ((Virtual) Lou Gallaway)

Members Roles

Members

Members 6 items

Worker	Position	Phone	Email
(Virtual) Alan Bishop	P-01581 Vice President for Finance and Administration		✉ Virtual.Jessica@gmail.com



TIPS & TRICKS RECRUITING



SHARING CANDIDATES

- **Search Committee** - gives members read-only access to the application materials for all candidates in the Screen and Interview status. Search Committee members do not have the ability to update, rank or disposition the candidates in Workday. Typically used for faculty or administrator positions.
- **TIP:** Only Recruiting Partners can create Search Committees and assign members.



SHARING CANDIDATES (cont.)

- **Interview Team** - interview management step will provide you with options on establishing the interview team and details about the interview. **TIP:** Job Aid titled **Job Application Process (Manager)** provides step-by-step instructions.

Schedule Interview (Virtual) Alanda Bloomberg - 10 (Internal) - R-051674 Financial Specialist I - 10 (C-100312285)

3 minute(s) ago - Due 07/01/2022

INSTRUCTIONS: Identify who will interview this Candidate; then use this task to schedule the **Interviewers**. The interview team can be one or more persons. On this first page you will schedule the individual interviewers. When you are ready to schedule the interview, please follow the steps below:

- **Date.** Enter the earliest date you anticipate an interview might take place, this will be the initial date the scheduling grid will start with on the next page.
- **Interviewers.** Search for the interviewer you want to add by typing their name into the field. If you are unsure the person displayed in the results of your search is correct, you can enter the UIN of the interviewer to match.
- **Duration.** Enter the anticipated duration of the interview.
- **Interview Type.** Select the interview format (phone, in person etc.).
- **Notes.** Enter any relevant information you would like to share with interviewers.

IMPORTANT: Be sure the Manager is listed as an **Interviewer** and do not remove the Manager from the Interview Team if they need to provide interview feedback in Workday.

When completing this task, you will see optional features:


- The **Recommended Interview Settings** allows you to add parameters for the interview schedule. Enter the interviewers on this page and click the **Next** button to schedule specific interview times.
- The **Recommend Times For Me** button takes the **Recommended Interview Scheduling Settings** and displays sample interview schedules.

You will verify the interview schedule on the final page.


BE ADVISED: Documents attached on the final page have limited visibility at this time. Only a Manager, Recruiting Partner and Recruiting Coordinator will be able to view the attachment. This means Interviewer and Candidate security roles in Workday will not be able to view the document and you will need to provide access outside of Workday.

Next Steps: After you submit this task, each interviewer will receive an inbox task in Workday to **Give Interview Feedback** and an email confirmation.

Date *

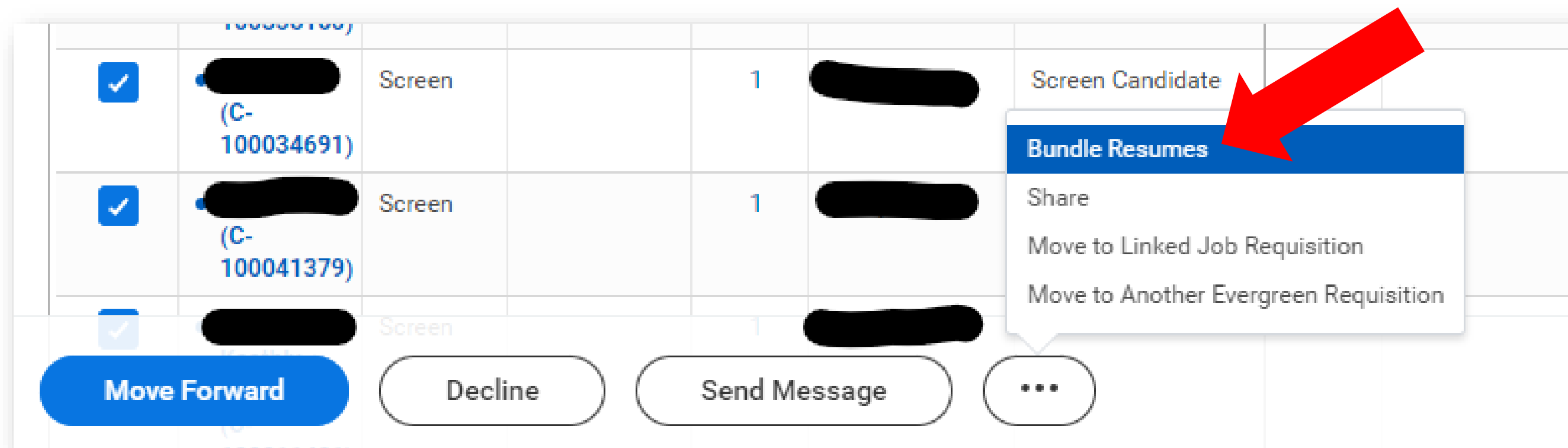
06/29/2022  ←

Time Zone *

× GMT-06:00 Central Time (Chicago)  ←

SHARING CANDIDATES (cont.)

- **Bundle Resumes** – feature in requisition to create a PDF of all selected candidates' resumes to share with others to review.



The screenshot displays a table of candidates with the following columns: selection status, candidate name, status, and a menu icon. The first two rows are selected (checked boxes). The first candidate is labeled 'Screen Candidate' and has a 'Bundle Resumes' option highlighted in the context menu. The second candidate is also labeled 'Screen Candidate'. The third candidate is not selected. Below the table are four buttons: 'Move Forward' (blue), 'Decline', 'Send Message', and a three-dot menu icon.

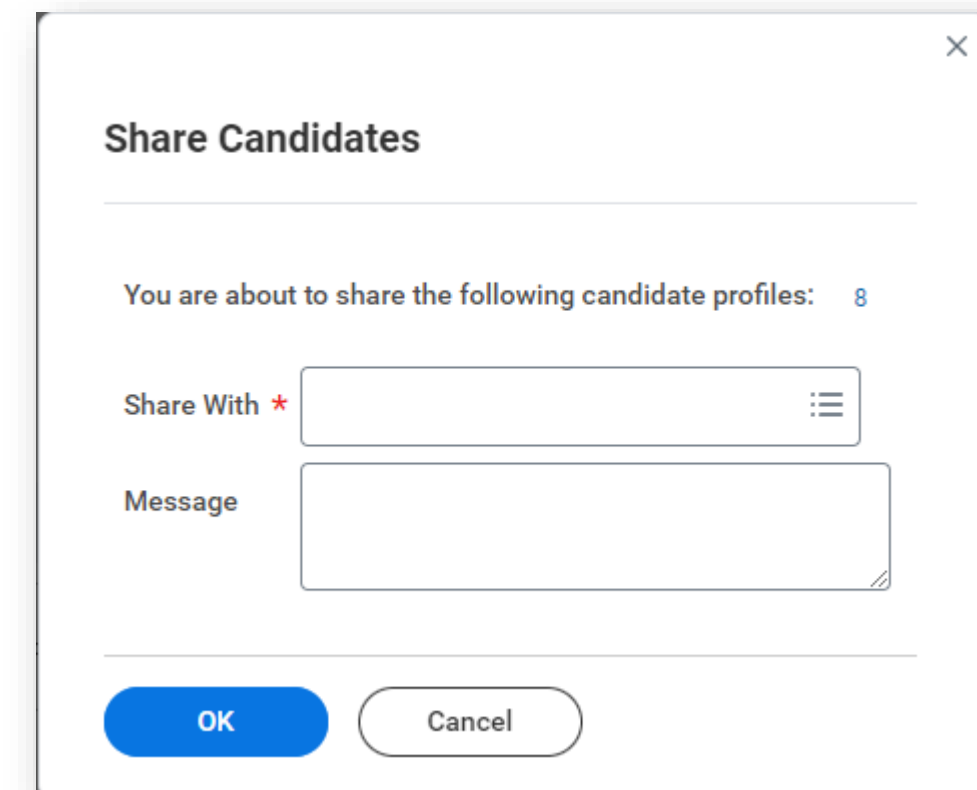
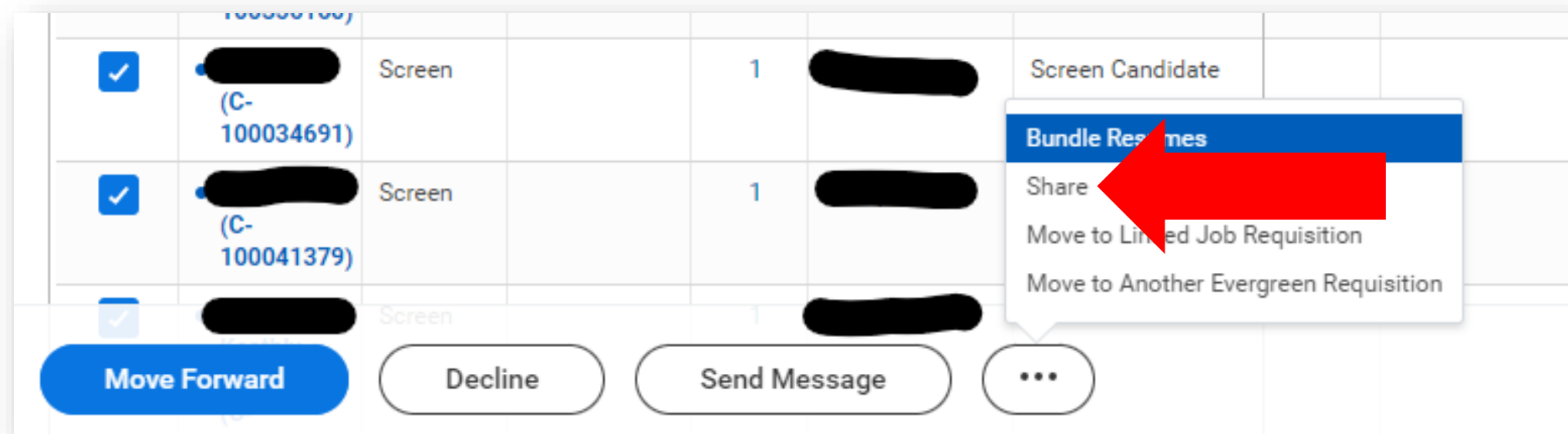
Selection	Candidate Name	Status	Menu
<input checked="" type="checkbox"/>	[Redacted] (C-100034691)	Screen	1 [Redacted] Screen Candidate
<input checked="" type="checkbox"/>	[Redacted] (C-100041379)	Screen	1 [Redacted]
<input type="checkbox"/>	[Redacted]	Screen	[Redacted]

Buttons: Move Forward, Decline, Send Message, ...

Context Menu Options: Bundle Resumes, Share, Move to Linked Job Requisition, Move to Another Evergreen Requisition

SHARING CANDIDATES (cont.)

- **Share Candidates** – select the **Share** option to provide read-only access to one or more individuals. A notification in Workday is sent with a link to the candidate's application profile.



EVERGREEN REQUISITIONS

- Evergreen Requisitions, unlike Job Requisitions, do not require a position in order to be created and/or posted on the career site(s).
- If you plan on using an evergreen for open rank positions, meaning several different job profiles, ensure you include all job profiles during the creation of the evergreen.
- You cannot create a search committee on an evergreen requisition. Connect a search committee to the primary requisition.
- Discuss with your HR Manager first, not all positions lend themselves to using Evergreens.

RELOCATION ALLOWANCES

- Can be listed in official offer letter
- Can process during **Hire** or as a separate **Request One-Time Payment** in Workday
- Must have an approved **AG-516** uploaded to WIP-Payroll



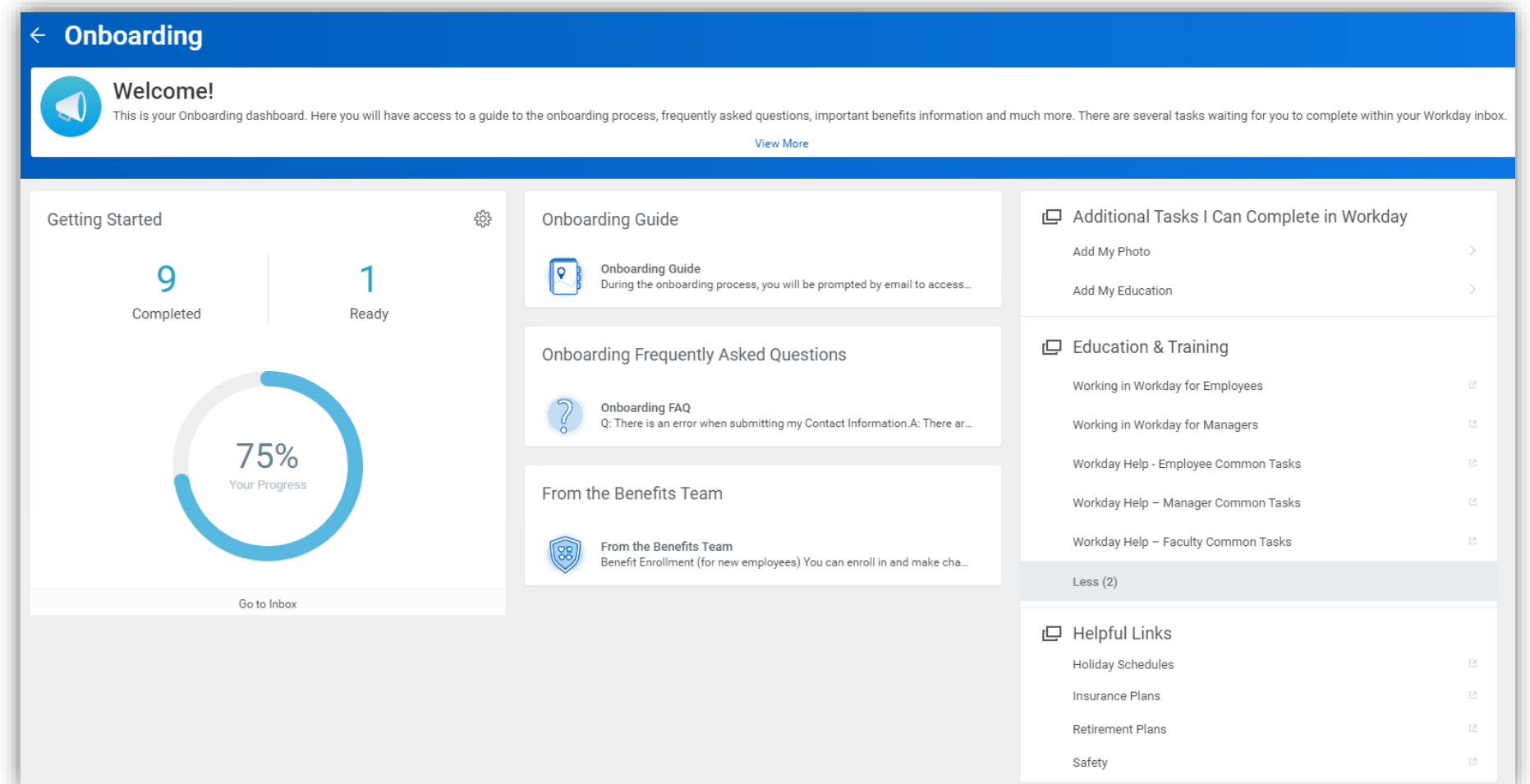


TIPS & TRICKS HIRE



ONBOARDING PROCESS

- Onboarding Job Aid for new employees.
- Onboarding Processes by Security Role Reference Guide
- Onboarding Dashboard Webinar
- Onboarding Status Summary





TIPS & TRICKS COMPENSATION



COMPENSATION CHANGES

- Write notes in comments, including justifications and what you are trying to accomplish.
- Very few reasons you would use "increase" as the compensation reason.

Request Compensation Change > Request Compensation Change

- Request Compensation Change > Across the Board
- Request Compensation Change > Allowance Adjustment
- Request Compensation Change > Counter Offer
- Request Compensation Change > Decrease
- Request Compensation Change > Equity Adjustment
- Request Compensation Change > Hiring Salary Adjustment
- Request Compensation Change > Increase
- Request Compensation Change > Market Adjustment
- Request Compensation Change > Merit Increase - Outside Budget Cycle

Search

Request Compensation Change > Merit Increase - Outside Budget Cycle

> Details

Add

Merit

Add

Requesting salary increase as out of cycle merit. Increase request is for exceptional work and increased responsibilities as outlined in memo that was approved by VP and HR.

Attachments

HELPFUL REMINDERS

- **One-Time Payments** – Use gear to skip the task if not needed
- **Review Duplicates** – Necessary step to ensure internal applicants have applied through the Workday Career site.
- **Hire Dates** – Can be adjusted by HR Partners.
- **Performance Reviews** are just around the corner. Review positions for any updates. More information coming soon!

QUESTIONS?



The background of the entire image is a dark brown color with a subtle, repeating pattern of light brown topographic contour lines, resembling a map of a hilly or mountainous region.

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