



Session 10: Position Control and Position Management
February 6, 2014
Workday

Name _____

Functionality	Comments
1. Demonstrate the following Position Control functions:	
a) Creation of a new position with the ability to search by title as well as by position number. Online personnel change form that notifies HR, P/R, Benefits, and Accounting. (Flow chart).	
b) Encumbrance of funds for filled positions and vacant positions including salary and benefits and how it relates to the payment of benefits. Also include the encumbrance of part-time faculty and hourly employees.	
c) Allocation of funding for a position across multiple accounts by either percentages or absolute dollar amounts (formula to adjust the percentage of load, ability to look at the split account value charges to adjust the percentage)	
d) Assignment of a job code number (a unique identifier) to an open position	
2. Demonstrate the following Position Management functions:	
a) Detailed creation of a job position, including title, description, classification, requirements, skills, funding source(s), , is it primary, temporary or permanent, assignment type per Chancellor's Office and College requirements, department name, work calendar/schedule, range/step with salary automatically calculated, etc. (Ability to connect the Position to TOPS/ASA codes for reporting)	
b) Automatic verification that funding is available for a position and the ability to determine the funding source, and if there are restrictions. Need a field that indicates the type of funding. (Based on Account Codes e.g. Restricted/Unrestricted)	
c) Designation of a position as full-time, part-time, % worked, etc. (9 mo., 10 mo., 11 mo., 12 mo., student workers)	
d) Designation of applicable benefits, if any to the position. Rates per classification, eligibility, and flexibility to make changes/updates and benefit allowance.	



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e) Ability to add Ranks (Assistant Professor, Associate Professor, etc.)	
f) Creation of multiple salary schedules including differential and longevity (e.g., full-time faculty, adjunct faculty, classified staff, and administrators, confidential, non-bargaining unit) with the ability to project costs and salary schedule override.	
g) Ability to integrate with separate student system to automate faculty contracts and Notices of Assignment for full time and adjunct faculty. Ability to automate Management, Classified and Faculty Status Changes. Demonstrate electronic workflow of the notice of personnel action that would be distributed to payroll, health benefits, etc.	
h) Ability to customize contracts. Report writing capability. (e.g., Administrative Managers)	
i) Ability to automate faculty and management contracts that entail classes with varied start/end dates. End dates to feed payroll module to stop pay.	
j) Ability to identify all courses and assignments that are taught as overload, regular load, continuing education, release time, banked time, ancillary etc.	
k) Ability to designate extraordinary work assignments (e.g., shift differential, longevity, out of class)	
l) Ability to integrate with separate student system to track student workers' class schedules with the number of units they are enrolled in. Warning report if a student drops classes, and sent to immediate supervisor and HR. End position in system. Verify Student has enough units to qualify, before rehiring them for the next semester. Ability to block rehiring of a student worker if they have reached the max of 6 years of employment	



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<p>m) Ability to automatically rollover positions, vacant and filled, from one fiscal year to the next. Ability to update position budget in Mass. Rollover budget +/- X% from previous year budget. Ability to update new fiscal when making changes in current year. Ability to make changes in the new fiscal year without affecting the current fiscal year. Ability to run multiple budget cycles (e.g., Tentative and Adoption)</p>	
<p>n) Ability to assign a single employee to multiple positions with varying pay rates and ability to track total hours worked. Is there a max # of positions or jobs an employee can be assigned to?</p>	
<p>o) Ability to cap hours per week based on the position (e.g., percent of contract employees, hourly employees) Ability to cap adjunct faculty load per semester based on various position assignments.</p>	
<p>p) Ability to track faculty who advance through tenure process l.</p>	
<p>q) Ability to track P/T faculty that have rehire rights and when they lose preference</p>	
<p>r) Ability to track retirees that have post-retirement rights. Multiple classifications of retirees. Can select list of privileges/perks for retirees. Can this be associated by Position Code</p>	
<p>s) Ability to track an employee's work history including multiple start and stop dates. Ability to report eligibility for rehire list and teaching assignment history</p>	
<p>t) Ability to query the balance of funds that remain for a position (i.e., allocated budget minus expenses equals ending position balance)</p>	
<p>u) Ability to track Minimum Qualifications including approved Equivalencies for all disciplines.</p>	
<p>v) Ability to track by job family</p>	



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w) Ability to enter and maintain Position Descriptions for online display and search.	
x) Ability to route Position Descriptions for review, revision, and approval	
y) Ability to maintain a history of Position Description changes and the resulting range and compensation changes.	
z) Ability to attach job market data for classification and compensation analysis.	
aa) Ability to search Position Descriptions for common job duties and/or education and experience	
3. Demonstrate how faculty load calculations are performed for particular semesters and years. In particular, describe how faculty load data is accessed within various systems (e.g., student, human resources) and eventually incorporated within MIS reports (LED to FTE and vice versa with historical calculations). Demonstrate ability to generate payroll from load scheduling for various pay methods which includes payment of professional development week as one payment, and the remaining compensation paid in 4 equal payments over the remainder of the semester for part time faculty. Demonstrate reports by division, department, and discipline displaying LED. Calculation of part time faculty assignments is based on Load Equivalency Decimal and their individual step and column per .01 LED (an example would be: LED =.20 employee step and column = \$182.45 per .01 LED)	
4. Demonstrate how to prorate a faculty load when an assignment ends due to a resignation prior to the end of a semester	
5. Demonstrate how the system can be queried with respect to employee positions (e.g., number of open positions closed over a user-specified period of time, number of FTE, average annual salary and benefit costs for particular employee groups, number of employees at various points on the salary schedules).	



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6. Demonstrate the ability to query payroll data and generate custom reports on labor expenses (salaries & benefits) by, College, Dept. and GL Number. For a specified date range defined by the user.	
7. Demonstrate the ability to query payroll data and generate custom reports on any part of an employees pay (e.g., Medicare wages only, overtime only, W-2 wages only, Sec 125 only) for a specified date range defined by the user by College, District, Dept., GL Number.	
8. Ability to track all contractual salary increases. Track the percentage increase and the effective date.	
9. Ability to tack part time faculty advancing to the next step based on the completion of 2 semesters.	
10. Ability to print/email mailing and campus address labels available by employee group, department, division, etc. With the capability of printing/reviewing total number of active employees by group	
11. Demonstrate how anniversary dates (hire dates and leave accrual dates) are maintained. Ability to maintain Multiple Service dates. Track Seniority Date, Service dates, benefit eligibility date, etc.	
12. Maintain and display the base salary and the total salary for each assignment	
13. Ability to automatically maintain contract status for employees that include percentage, effective dates, and status title.	
14. Ability to maintain a supervisor/manager for each employee assignment. If a change is made to supervisor title or a new supervisor is in position, automatically change to all assignments. Mass update of Supervisors. As well as assign a secondary supervisor/ manager when the supervisor/manager position becomes vacant	



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15. Ability to assign the EE06 code to each position throughout the classification scheme. Ability to breakdown the EE06 code into a Sub EE06 code. Assign each job class an EE06 code, and ability to determine which Sub EE06 code is assigned to each position.	
16. Ability to assign work calendar (work days/holidays) to one or more employee groups. Define when and how employees in a position move along on the salary schedule. What are the reporting relationships for each position? Define full-time equivalency.	
17. Demonstrate the ability to maintain Faculty Banking of an overload class in LED, with the ability to put a threshold on earned banking. Ability to display instructor load when banking is used. Ability to generate a report that indicates the banked liability based on a user defined date	
18. Ability to track incidentals (e.g., TB tests, I30 forms, Certificates for specific positions, CPR/Lifeguard, pesticide license)	



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Evaluation Form	
Name of Reviewer:	
Perceived Strengths:	
Perceived Weaknesses:	
Overall Comments:	
Acceptability of Vendor Solution:	<input type="checkbox"/> Yes <input type="checkbox"/> No