workday®

CORE DESIGN SESSION: Academic Framework

November, 2014

CORE DESIGN SESSION: ACADEMIC FRAMEWORK

DESCRIPTION

This Core Design Session will assist you in understanding how Academic Appointments are stored and reflected in your Workday system, and will aid you in determining how you want to capture this data, as well as impacts to Integrations, Reporting, and other areas of functionality. A Solution Architect and/or Principal Consultant, and Engagement Manager are with you to ensure that the content is clear and to answer specific questions you may have pertaining to your deployment.

We will have time at the end of the session for Q&A, and we will also be pausing throughout the session to ask if there are questions or clarification points.

GOAL & OBJECTIVES

The goal of this session is to provide you with detail on Workday Academic Framework so that you can:

- Determine impacts of your design decisions regarding tracking the Academic Information of a worker, including Appointment Identifiers, Ranks, Tenure Statuses, Track Types, Assignment Date Range and Academic Units;
- Determine the scope of your Regulatory Reporting requirements (i.e. OFCCP) and how that will drive your design decisions;
- Understand tracking and concepts;
- Understand the types of Academic Appointments that can and will be captured during Worker Transactions;

AGENDA

- Conceptual Overview Presentation/Demonstration
- Review of Decision Guide, decision points, and follow-on activities
- Q & A

Conceptual Overview – Academic Framework

OVERVIEW

Workday provides a number of different mechanisms for collecting, managing, securing and analyzing the Academic attributes of a faculty member.   The purpose of this document and the supporting presentation and demonstrations is to provide an overview of these mechanisms to help guide you in determining:

- **What Academic attributes will be captured in Workday**

- **What will be the Academic structure in Workday**

- **Who will be involved in identifying these attributes and assigning them to the affected faculty member**

- **How the data will be maintained**

- **What are the reporting requirements**

Below will be covered during the Academic Framework Session:

- Academic Overview

- Academic Units and Academic Unit Hierarchies

- Academic Appointments

- Roles

- Security Groups

- Business Processes

- Reports

ACADEMIC UNITS AND ACADEMIC UNIT HIERARCHY

You can define the values for Academic Units to reflect your Academic structure which could be by campus, discipline, etc. Academic Units are not considered the same as Supervisory organizations. Academic Units may be related to Supervisory organizations however.

Academic Unit Hierarchy (AUH)

A hierarchical organization type used to represent the superior/subordinate relationships of units within an educational institution's academic structure.

- Can be associated with other AUH entities at Superior/Subordinate levels to establish overall hierarchy.

- Typically used to represent entities with multiple related Academic Units. (e.g. Alma Mater College, College of Business and Economics, or School of Nursing)

- Can be assigned as the superior entity for Academic Units (AU) to determine what roles will be inherited and represent where the Academic Unit falls in the overall academic organization.

- Can be optionally designated as an Academic Curricular Division (ACD) for recruiting functions, academic criteria definitions and to drive business process flow such as academic approvals.
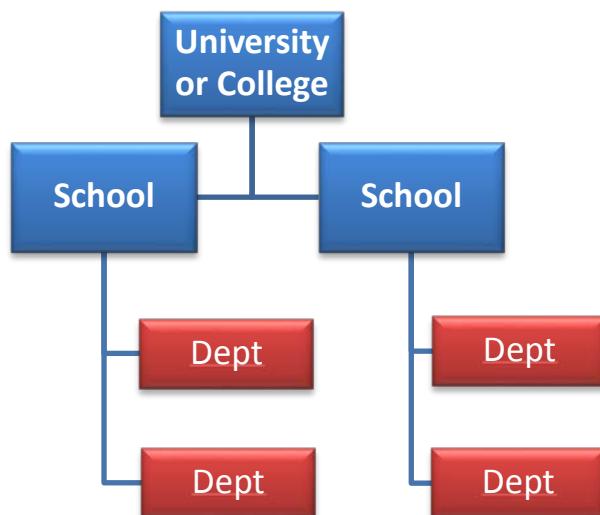

Academic Unit (AU)

A stand alone (non-hierarchical) organization type used to represent an individual unit of an educational institution's academic structure.

- Is the bottom-most entity in an Academic Structure

- Can be associated with one of the user defined Academic Unit Subtypes

- Is typically used to represent a "Department" (e.g. Biology, Math, Finance, etc.)

- Is usually tied to an Academic Unit Hierarchy (AUH) to represent where the entity falls in the overall academic organization

- Optionally designated as an Academic Curricular Division (ACD) for recruiting functions, academic criteria definitions and course assignments, as well as to drive business process flow such as academic approvals.
- Can be used for "Academic Appointments" (HCM)
- May associate courses with these entities for administration (if designated as an ACD)
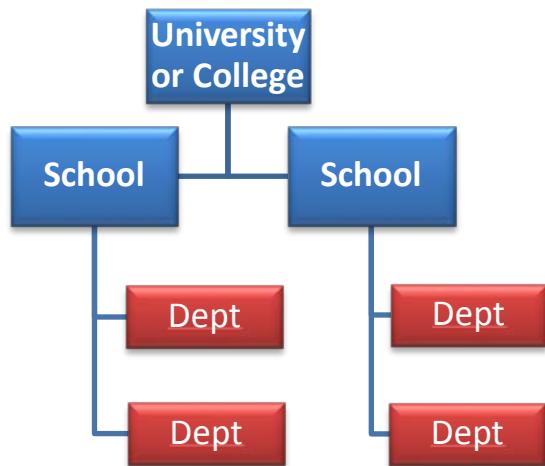
Below is an example of an Academic Unit with its elements that can be configured:

ACADEMIC APPOINTMENTS

Academic Appointments can track Appointment Types such as Academic Affiliates and Named Professorships. Track Types may also be created and categorized such as Regular, Professional, and Administrative. Academic Ranks may be designated such as Chairman, Professor, Associate Professor, and Assistant Professor. Tenure statuses may reflect Tenured, Non-Tenured and Tenure-Track. See below for an example:

Appointment Identifier / Types

Primary
Dual

Position

P0199, Chair, College of Arts & Sciences

Academic Rank

Professor
Chairman

Track Type / Category

Regular/Professional - Tenure

Academic Appointment

Tenure Status

Tenured
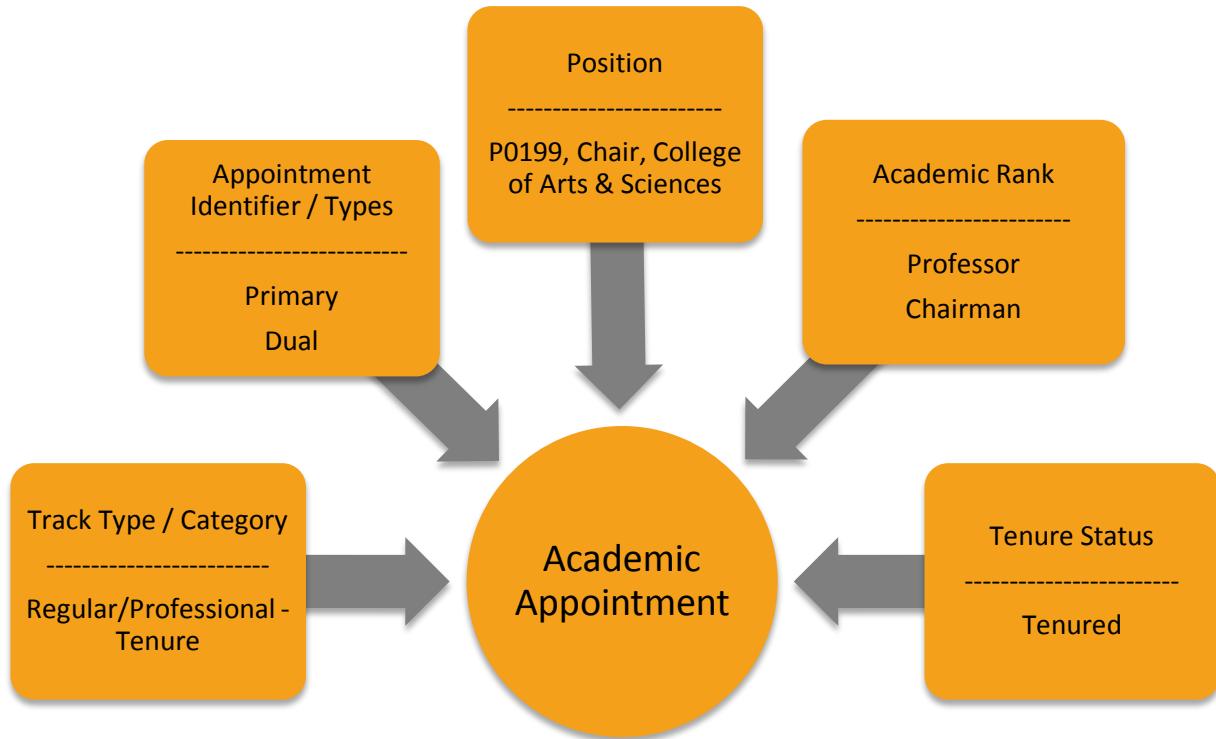
- An academic appointment tracks an academic worker's career at a university or college.

- Workday provides 3 business processes to track academic appointments for paid and unpaid academic members, including relevant dates, academic unit affiliation, rank, title, and tenure status.

  - ➤ *Add Appointment*

  - ➤ *Update Appointment*

  - ➤ *End Appointment*

- Schools can record additional types of appointments and affiliations, including administrative and courtesy appointments, and participation in centers and programs.

- The academic appointment business processes are available as related actions on academic workers.

- Access is available to users who hold a role on the academic's employment supervisory organization.

- There is an optional one to many relationship between position and academic appointment.

- Appointment letters & annual reviews can be attached.

- Academic Review Date can trigger notifications to School/Department.

Decision Guide & Design Decision Documentation

PURPOSE & REQUIRED ACTION

The Decision Guide and Design Decisions Documentation section is designed to assist you in making decisions around Academics.

These questions will be covered with your Project Team. Decisions during this session will be documented via another document by the Project Team. The information provided will be used to assist in completing the design of the Academic Framework in Workday, as well as your reporting requirements related to that data.

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This is a high-level review of the general Academic data needs within your organization. Note any design decisions or comments in the table below.

SCOPE: Design Decision Notes
Do you currently utilize Academic Units? If so, how are they determined and what are there current attributes? What is desired?
Do you have an Academic Unit Hierarchy? If so, how is the hierarchy determined? Do you have more than one?
What Academic attributes are currently captured on your faculty?
Do you need to store documents related to these Academic employees within Workday? What types of documents do you store?
Are there any restrictions around who can see/add/edit/delete these documents?

REPORTING IMPACT

Reporting requirements will impact your worker data decisions. Please review the questions below to determine where your needs are from a reporting perspective.

REPORTING IMPACT: Design Decision Notes
What types of regulatory reporting are you required to generate?
What types of diversity and demographic reporting are you required to generate?
If you have Employment Contracts, what type of reporting is required including that data?
Do you have any specific reporting needs around your Part-time Adjunct Faculty? Or reporting needs to include FTE (full time equivalent)?

INTEGRATION IMPACT

Consider your integrations to or from other systems and whether your data will have any downstream impacts.

INTEGRATION IMPACT: Design Decision Notes
Which pieces of data will be critical for: • Integrations to 3rd party systems?