



Design Decision Guide - Organizations

[Date]

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Core Design Session – Design Decision Guide - Organizations

DESCRIPTION

This Core Design Session will assist you in understanding Workday organization structures and will provide questions, exercises and examples to help drive your organizational structure decisions. While your Solution Architects may be virtual, your Engagement Manager and/or your Principal Consultant(s) are present 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 – please feel free to ask questions. If your session is virtual, please ask your question live or via the chat window.

GOAL & OBJECTIVES

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

- Define your Supervisory Organization Hierarchy;
- Determine your Cost Center and Company structure;
- Determine if you will use Regions or Matrix organizations and, if so, define those structures;
- Determine which other Workday organization types (Retiree, Union, Location Hierarchy, Committee) you will need;
- Determine if you have requirements that would benefit from a “custom” organization;

AGENDA

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

Conceptual Overview – Workday Organizations

OVERVIEW

Workday's sophisticated organization model provides extensive capabilities to handle traditional, hierarchical and administrative organizations, as well as geographic, costing and collaborative organizations concurrently. Reports and analysis can be run for any organization type, allowing you to slice and dice staffing activity, for example, from multiple perspectives. You can also enable specific business processes according to your organizational structure, allowing you to roll out relevant workflow practices for each level or structure within your overall enterprise.

Workday's flexible organizations also allow you to reorganize on the fly. Whether you're creating new geographic divisions, rearranging cost center structures, or moving organizational reporting relationships from one group to another, you'll be able to perform these actions quickly and easily within Workday.

Workday also allows you to create “custom” organizations. These can be used for diverse functions like tracking employee turnover by “class” or hire year, certain benefits eligibility groupings, and so forth.

Workday delivers several organization types. One type, the “custom” organization, allows you to create additional organization types as needed with no limit.

The eight delivered organization types we will be discussing are:

- Supervisory
- Location and Location Hierarchy
- Company and Company Hierarchy
- Cost Center and Cost Center Hierarchy
- Region and Region Hierarchy
- Matrix
- Retiree
- Custom
- Union
- Committee

For the purposes of today's presentation, we will discuss all of the above with the exception of the Pay Group. This will be covered when you are deploying either Workday Payroll or Payroll Interface.

Decision Guide & Design Decision Documentation

PURPOSE & REQUIRED ACTION

The Decision Guide and Design Decisions Documentation section is designed to assist you and your deployment team in making decisions around which organizations to deploy, how to best structure your supervisory and other organizations to maximize the reporting power of Workday, etc. Additionally, you will capture the decisions made during the Workday core design workshops.

You will walk through these questions with your Project Team. A consolidated version of this document will be used to document decisions. Please provide thorough answers to these questions, as the information you provide will be used to assist you in completing the design of your Organizations in Workday.



It is required that you have a working understanding of how YOUR organization's Supervisory Structure will be defined before you can move to Business Process

DECISION GUIDE: SUPERVISORY ORGANIZATIONS

REVIEW: Supervisory organizations are required and they group workers into a management hierarchy. A supervisory organization can be a business unit, department, group, or project. Supervisory organizations drive all staffing actions as well as ESS and MSS in Workday: jobs, positions, and compensation structures are associated with supervisory organizations, and workers are hired into jobs or positions associated with a supervisory organization. You must create at least one location prior to creating a supervisory organization.

Considerations

CONFIGURATION

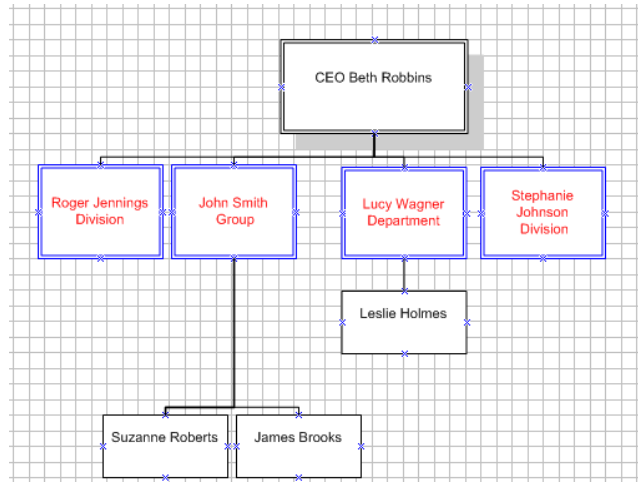
This is a high-level review of the configuration requirements for supervisory organizations. Note any design decisions or comments in the table below.

SUPERVISORY ORGANIZATIONS - Configuration	
Populate a spreadsheet of your Managers and their related Direct Reports. You should be able to derive your Supervisory Organization structure from this data.	
Example:	
Direct Reports	Manager
John Smith	Beth Robbins
Lucy Wagner	
Stephanie Johnson	
Roger Jennings	
Suzanne Roberts	John Smith
James Brooks	
Leslie Holmes	Lucy Wagner
Attach your spreadsheet here.	

SUPERVISORY ORGANIZATIONS - Configuration

Let's figure out if how you are going to use the Workday field "Organization Subtype". Do you have organizational levels or do you refer to different groups of workers differently (see diagram)? – i.e. Do you refer to a certain set of Managers and their Direct Reports as Departments, or Divisions, or Groups? Is there a need to call out these 'levels/groups' separately in reports? Would you like this org type to be a part of the org name?

Do you have a hierarchy of these sub-types that you would like to enforce? For example, if you have Departments and Divisions, do you want to make it so that a Department *always* rolls up into a Division?



Describe or attach your organization levels or "sub-types".

Organization visibility determines who can view information about an organization. The options are administrators only, members only, or everyone.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.

Identify the visibility option you have chosen for your supervisory organizations.

SUPERVISORY ORGANIZATIONS - Configuration

Organization naming convention – will you include manager's name in the organization title? Will you follow some other naming convention? Will you include the organization code in the title?

It's a good idea to include a default Location on each supervisory org for defaulting purposes. Are most of your organizations in one geographic location, or if not, following the 80/20 rule, would it make sense to assign the Manager's location as the default?

Let's review the Supervisory Organization Chart and determine if there are changes you would like to make via configuration.

CROSS-PRODUCT IMPACT

Supervisory organizations can be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your supervisory structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area, this review is to make sure you are aware that your Supervisory Organization structure can have cross-product impact.

SUPERVISORY ORGANIZATIONS – Cross Product Impact

Compensation: Can a worker's supervisory organization drive eligibility for types of compensation? For example, are all workers in a call center eligible for an on-call allowance? Do members of different supervisory organizations have different annual increase or bonus plans? Are ALL members of that organization eligible or are their differences within organizations? If yes, list examples here.

Benefits: Can a worker's supervisory organization drive eligibility for different types of benefits? For example, are all members of the sales organization eligible for different benefits than workers in the development organization? If yes, list examples here.

Absence: Is time off taken or accrued differently for workers in different supervisory organizations? For example, do manufacturing employees accrue based on actual hours worked while employees in Research & Development accrue based on years of service? If yes, list examples here.

Time Reporting: Do workers in different supervisory organizations use different methods for reporting time? If yes, list examples here.

All Time Off Plans ...

42 items

Time Off Plan	Default Payslip Name	Unit of Time	Worker Eligibility	Track Balance
AUS Annual Leave	Annual Leave	Days	Worker's Company = GMS (Australia) Worker Employee Type is Regular as of PE Date	Yes
AUS Personal/Carer's Leave		Days	Worker: Active Workers Worker's Company = GMS (Australia)	Yes

Payroll: Are workers in different supervisory organizations eligible for different types of earnings. For examples, IT HelpDesk workers get shift differential.

SUPERVISORY ORGANIZATIONS – Cross Product Impact

ESS: Does the structure you are defining enable employee self-service? For example, a time off request normally goes from the employee to his/her manager for approval. In Workday, this is normally the manager of the supervisory organization as opposed to cost center or company.

MSS: The manager of the supervisory organization can normally initiate staffing transactions on the employees who report to them based on the supervisory organization. Is the structure you are defining conducive to enabling this functionality? What might some exceptions be?

Talent: When initiating talent transactions like employee reviews, Workday normally looks to the supervisory structure to determine the employee/manager relationship. Does the structure you are defining enable this functionality? What might some exceptions be?

GLOBAL IMPACT

If your organization is global, have you considered the following:

SUPERVISORY ORGANIZATIONS – Global Impact

Do your global workers report to managers outside the country in which they live and or work? If so, who should initiate or approve staffing transactions? Is it the manager to whom they report? Or, is it an alternate manager within their country?

How are global workers supported from an HR perspective? Is HR managed by location or by organizational unit? Provide examples.

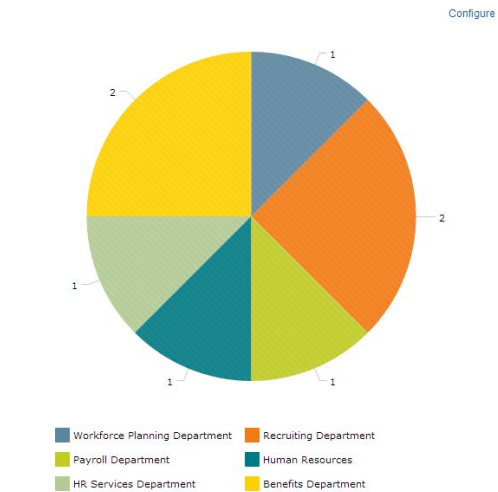
REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Supervisory Organizations optimally, think about the following questions:

SUPERVISORY ORGANIZATIONS – Reporting Impact

What kind of headcount reporting do you need to perform and to whom is it available?

My Open Positions



Total for Total : 8

My Organizations	Open	Total
Workforce Planning Department	1	1
Recruiting Department	2	2

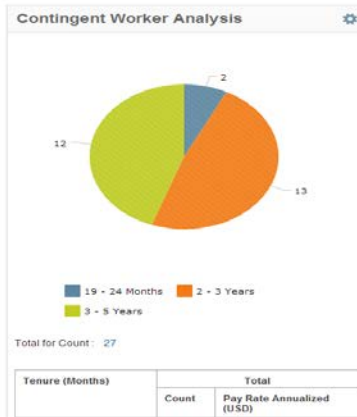
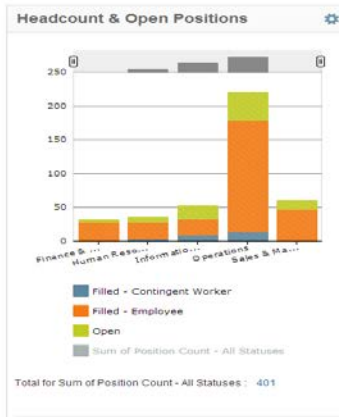
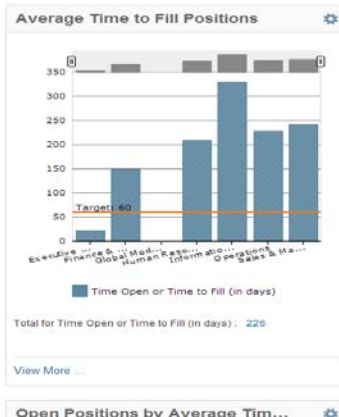
Can you think of examples of roll-up reporting? If so, to whom is it available?



What types of reports do you provide to the Executives in your Organization? Are these reports consolidated by organization, by cost center, by business unit? How are those organizational units defined today? How do they access those reports?

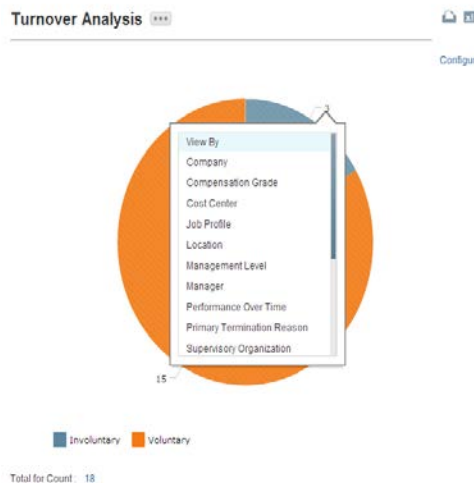
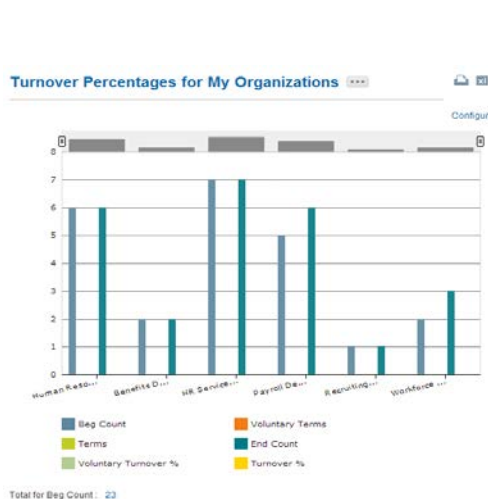
SUPERVISORY ORGANIZATIONS – Reporting Impact

Workforce Planning



When Managers, HR Professionals, Compensation Professionals, etc. log on to Workday, what kind of analytic reports should be available for them regarding the workers they support? For example, would you like them to see analytics for Turnover and Average Time in Positions? Are there others?

Managers should have access to headcount reports in their own organization. Will continue to look at this data during implementation. May provide Turnover Analysis at the Group level but not across countries.



INTEGRATION IMPACT

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

SUPERVISORY ORGANIZATIONS – Integration Impact

Think about your integrations and provide examples of where the supervisory structure may impact integrations either into or out of Workday.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

SUPERVISORY ORGANIZATIONS – Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Supervisory Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

If you have submitted or identified any enhancement requests, note those here.

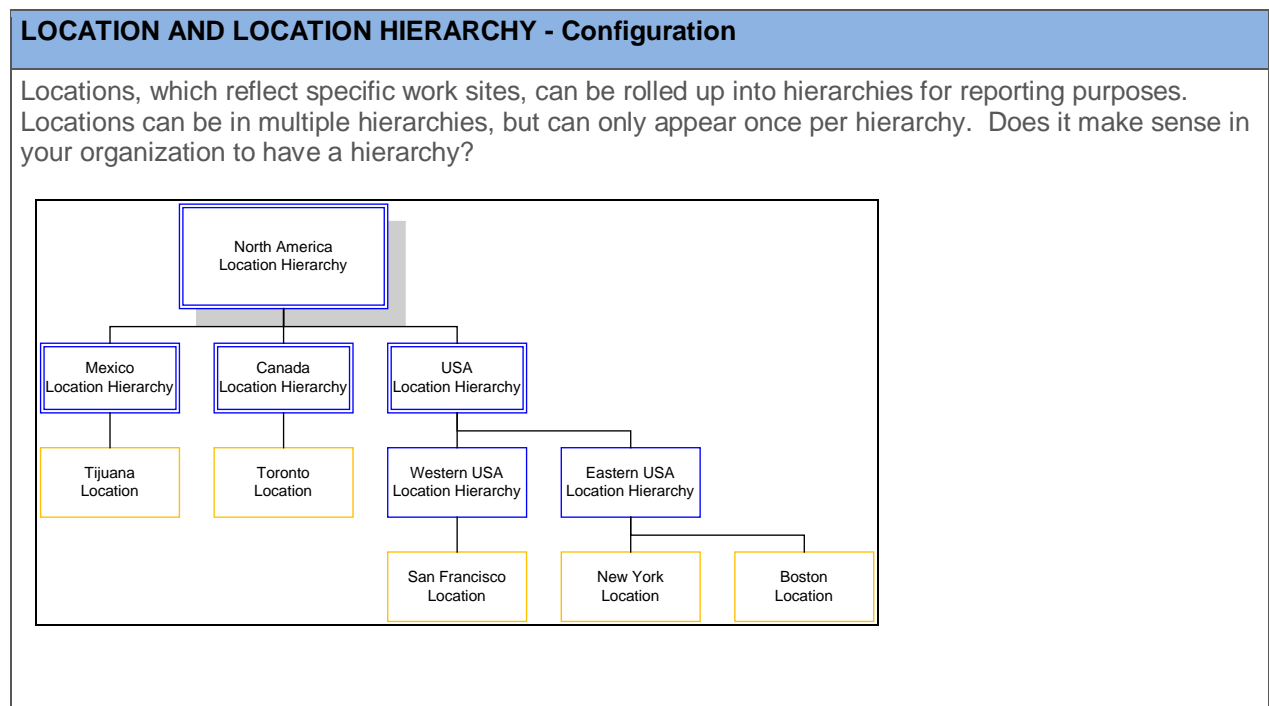
DECISION GUIDE: LOCATION & LOCATION HIERARCHY

REVIEW: At least one location is required. A location hierarchy can roll locations up for reporting purposes. Location hierarchies reflect a worker's work location rather than an area of responsibility. The location defines the default location for the organization and the locale (language preference, standard hours default, etc) for the organization. When an employee is hired into an organization, by default, the location of the supervisory organization is assigned to the worker: however, this value can be overridden if the worker's location is different. The employee's locale is also inherited from the location of the supervisory org, but the locale preference can be changed.

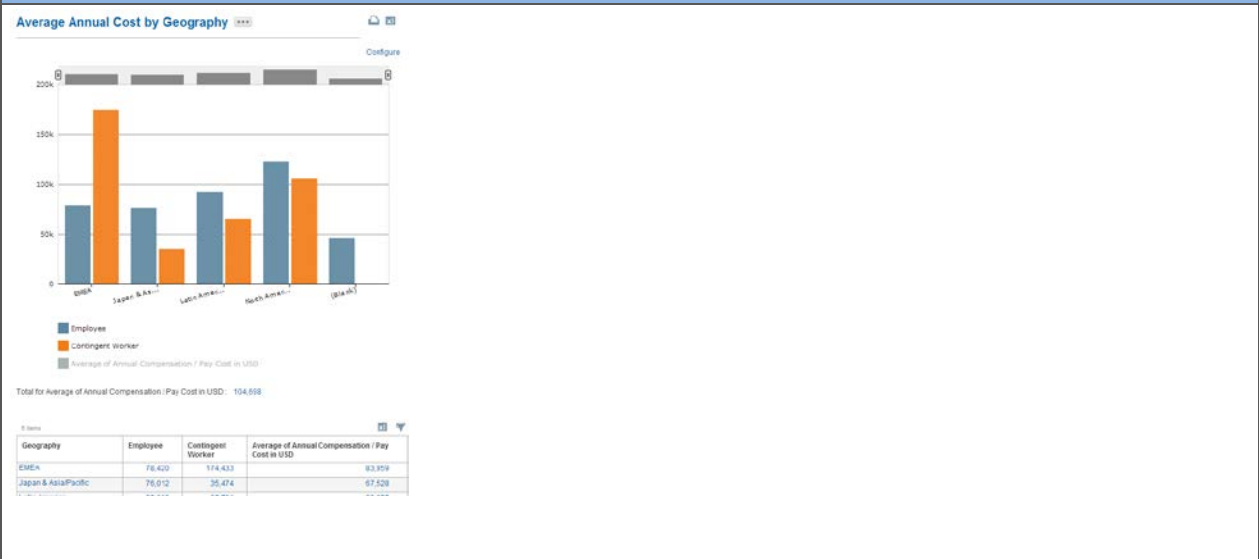
Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for location and location hierarchies. Note any design decisions or comments in the table below.



LOCATION AND LOCATION HIERARCHY - Configuration



How many locations or work sites do you have? You will need to gather the contact information (phones, addresses, web addresses) for each site. One piece of contact information is required.

What are the different standard hours for different work sites? For example, do you have manufacturing sites with negotiated standard hours of 38 rather than 40?

In addition to the address for each location, you can track very specific data on work locations, like buildings, floors and cubicles. Think about how granular you want to be.

Do you include very specific information such as building, floor, office or cubicle or actual coordinates? If so, you'll need to gather that information to add to the Locations.

Job | Contact | Personal | Compensation

Professional Profile | **Job Details** | All Jobs | Job History | Manager History | Management Chain

Job Details

Employee ID: 21001

Organization: Global Modern Services >> Executive Management Group

Position: Chief Human Resources Officer

Business Title: Chief Human Resources Officer

Job Profile: Chief Human Resources Officer

Employee Type: Regular

Management Level: 4 Vice President

Time Type: Full time

FTE: 100.00%

Location: San Francisco

Work Space: San Francisco - Embarcadero Tower 1 > Suite 100 > Office of the CHRO

Contact Information - Public

Phone: +1 (415) 441-7842 (Telephone)

+1 (415) 789-9904 (Mobile)

Email: lmcneil@workday.net

Work Address

3939 The Embarcadero
San Francisco, CA 94111
United States of America

Instant Messenger: lmcneil

Social Network:

LOCATION AND LOCATION HIERARCHY - Configuration
Do you track business assets by Location? If not, and you now have the capability, is this something you would be interested in doing?
Let's review the Location Hierarchy Organization Chart and determine if there are changes you would like to make via configuration.

CROSS-PRODUCT IMPACT

Locations can be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your locations will enable efficient setup in these functional areas. You will set up the actual plans and rules as you configure each functional area, this review is to make sure you are aware that your location definition and structure can have cross-product impact.

LOCATION AND LOCATION HIERARCHY – Cross Product Impact
Compensation: Can a worker's location drive eligibility for types of compensation? For example, are all workers in specific manufacturing facility eligible for a hazardous duty allowance? If yes, list examples here.
Benefits: Can a worker's location (or city or state or country) drive eligibility for different types of benefits? For example, are all workers in the Mumbai office eligible for different benefits than workers in New Delhi office? If yes, list examples here.
Absence: Is time off taken or accrued differently for workers in different locations? For example, do employees in Manila accrue based on actual hours worked while employees in Paris accrue based on years of service? If yes, list examples here.
Time Reporting: Do workers in different locations use different methods for reporting time? If yes, list examples here.

LOCATION AND LOCATION HIERARCHY – Cross Product Impact

Payroll: If you are implementing Workday Payroll for the US remember that the worker’s work address (which may or may not be the same as their “location”) will drive their work tax location. Consider how you want to track the location for remote or home-based workers.

ESS: “Locale” drives what the default language, standard hours, currency format, date format, etc. are for your workers. Consider the impact of those defaults on ESS.

View Location:
San Francisco ...
 View As Of: 12/09/2013

Location Name	San Francisco
Date of Last Change	06/11/2013
Location Usage	Business Asset
	Business Site
Location Type	Headquarters
Subordinate Location	Embarcadero Tower 1
	Embarcadero Tower 2
Location Hierarchy	USA - Western US
Location Chain	San Francisco
URLs	Business Site Website
Inactive	No

Coordinates

Latitude	37.808462
Longitude	-122.40881
Altitude	0

Time Profile	Standard Hours - 40
Locale	English (United States) - en_US
Time Zone	Pacific Time (San Francisco)

GLOBAL IMPACT

If your organization is global, have you considered the following:

LOCATION AND LOCATION HIERARCHY – Global Impact

Do you have workers globally? Will all be included within your Phase I deployment? Be sure that you gather the required work location details on all your global locations.

REPORTING IMPACT

In addition to being reportable within many standard and custom reports, locations are used as dimensions in multi-dimensional reporting as well as within the faceted search. To help ensure that you are defining your locations optimally, think about the following questions:

LOCATION AND LOCATION HIERARCHY – Reporting Impact

LOCATION AND LOCATION HIERARCHY – Reporting Impact

How do you organize your locations for compliance reporting (e.g., EEO-1 in the US) purposes? How do you roll-up locations for other reporting purposes?

Employment Diversity Demographics by Location Summary

View As Of * 12/09/2013

Country * Search

Location * Search

Job Classification Group Search

Employee Type Search

Contingent Worker Type Search

Select Locations with Total Workers

At Least 0

Fewer Than 0

None of the above

Do you have remote employees? If so, how do you track them for compliance reporting purposes today? Do you want to continue to track them in the same manner, or do you want to change the way you currently manage their locations?

What are other examples in your organization of reports where work location is a criteria or dimension?

INTEGRATION IMPACT

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

LOCATION AND LOCATION HIERARCHY – Integration Impact

Think about your integrations and provide examples of where location may impact integrations either into or out of Workday.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

LOCATION AND LOCATION HIERARCHY – Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Locations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

LOCATION AND LOCATION HIERARCHY – Update Impact

If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: COMPANY & COMPANY HIERARCHY

REVIEW: Companies, while used across Workday applications, are the primary organization type used by Workday Financial Management. A Workday company equates to a single tax ID within your enterprise. All financial transactions are for a company, and most financial reports are run in the context of a company, such as balance sheets and income statements. For each company, you define a ledger, a fiscal calendar, accounting rules, and an account set. Also, Workday Financial Management's configurable business processes are based on companies.

If you are deploying HCM and Payroll and/or Financials, you will need to work with the financial deployment project team to correctly define your companies.

Considerations

CONFIGURATION

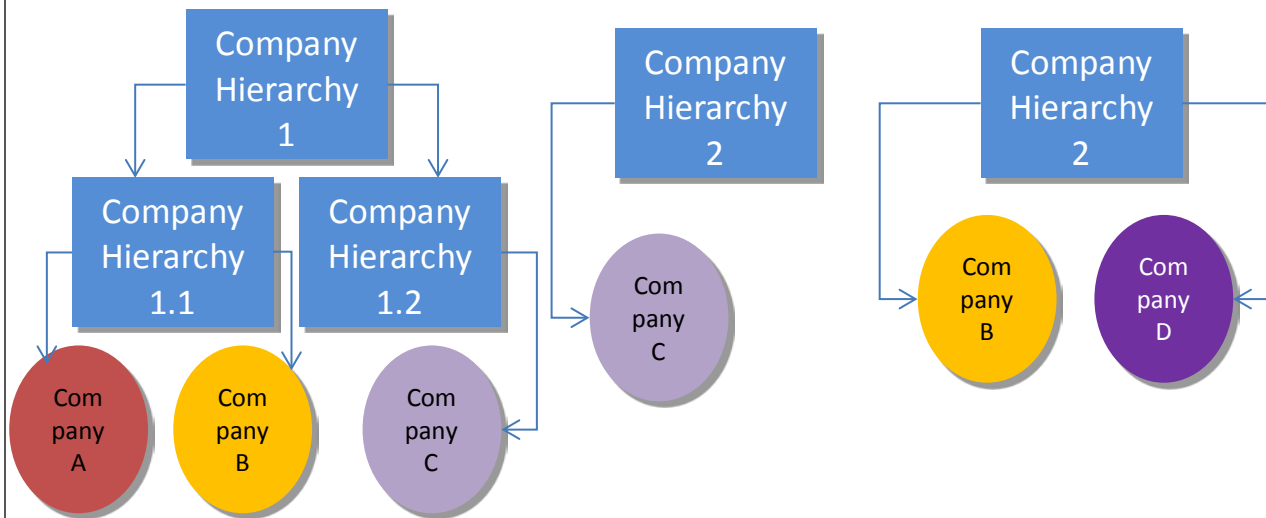
This is a high-level review of the configuration requirements for Company and Company Hierarchy. Note any design decisions or comments in the table below.

COMPANY & COMPANY HIERARCHY CONFIGURATION- Configuration

How many financial entities (Companies) with unique FEINs (US only) do you have that currently house workers?

COMPANY & COMPANY HIERARCHY CONFIGURATION- Configuration

Using the visual below as an example of hierarchical structures, what type of roll-up reporting do you perform on your financial entities and their members? – i.e. if you have six Companies, do you roll them up for reporting, or typically report distinctly? Notice that a single Company can be a member of multiple hierarchies, but may only exist once in a hierarchy.



Organization Visibility - for companies, who should be able to view these organizations? In general, “administrators only” is appropriate for Company Organizations.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.

COMPANY & COMPANY HIERARCHY CONFIGURATION- Configuration

Let's review the Company and Company Hierarchy Organization Chart and determine if there are changes you would like to make via configuration.

CROSS-PRODUCT IMPACT

Company organizations are critical to and often “owned” by your financial organization. They can also be used to drive eligibility or condition rules across the Workday. These are critical to keep in mind to ensure that your company structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area, this review is to make sure you are aware that your Company structure can have cross-product impact.

COMPANY & COMPANY HIERARCHY - Cross Product Impact

Compensation: If you do acquisitions or mergers or maintain multiple companies, “Company” can be used to drive eligibility for types of compensation or grades.

Benefits: Can a worker's Company drive eligibility for different types of benefits? For example, are all members of Company A eligible for different benefits than workers in Company B? If yes, list examples here.

Absence: Is time off taken or accrued differently for workers in different companies? If yes, list examples here.

Time Reporting: Do workers in different companies use different methods for reporting time? If yes, list examples here.

Payroll: For HCM + Payroll customers – how do you report your taxes to your third party tax administrator? Ensure that you have a company set up for each legal entity (e.g., FEIN in the US) for which you report taxes.

Financials: If you are implementing Worker Spend, Initiatives or Workday Financials, the Company is a critical financial organization. Ensure that HCM and Financials project team members are working together to define the companies.

GLOBAL IMPACT

If your organization is global, have you considered the following:

COMPANY & COMPANY HIERARCHY - Global Impact
Do you have a different company (or legal entity) for each country or geography in which you operate? Ensure that you have documented every company in which you will have workers within Workday.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Companies optimally, think about the following questions:

COMPANY & COMPANY HIERARCHY - Reporting Impact
What kind of reporting do you typically need that is company-based or company-specific?
Can you think of examples of company roll-up reporting? If so, to whom is it available?

INTEGRATION IMPACT

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

COMPANY & COMPANY HIERARCHY - Integration Impact
Think about your integrations and provide examples of where the Company structure may impact integrations either into or out of Workday.
If you are integrating to a third party payroll or to a tax-filing partner, ensure that your company structure will facilitate that integration.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

COMPANY & COMPANY HIERARCHY – Update Impact
Work with your consultant to ensure that you understand any known/planned enhancements to Company that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.
If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: COST CENTER & COST CENTER HIERARCHY

REVIEW: Cost centers are used to track financial transactions and HCM transactions with a financial impact, such as hiring or terminations. Employees and contingent workers are assigned a cost center when hired. You can roll up cost centers into cost center hierarchies, which can only store cost centers for reporting purposes. You can't associate transactions with a cost center hierarchy.

Many Workday customers are converting from systems where the “department” = cost center. This can be confusing when you are first learning Workday. Remember that in Workday, the Supervisory structure represents who reports to whom. Regardless of the individual manager, each employee will also be assigned to a cost center.

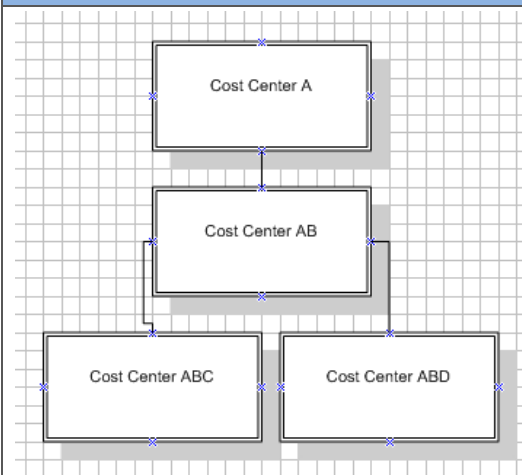
Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for cost center organizations. Note any design decisions or comments in the table below.

COST CENTER & COST CENTER HIERARCHY - Configuration
Do you currently associate a costing entity with your workers so that labor costs are properly allocated? If so, are your costing entities/cost centers hierarchical in any way? If so, please provide examples.
Do you have a hierarchy of sub-types that you would like to enforce? For example, if you have Departments and Divisions, do you want to make it so that a Department <i>always</i> rolls up into a Division?

COST CENTER & COST CENTER HIERARCHY - Configuration



Are your costing entities identified differently in some cases? Program, Cost Center, Business Unit? If so, please provide examples.

Is your costing entity/cost center structure such that you could associate a default cost center to each of your Managers' Organizations (Supervisory Organizations)? i.e. The workers in Tom Smith's Marketing Supervisory Organization would likely always be associated with Cost Center AB.

If not one default, do you feel you could associate a list of valid cost centers to each or some of your Supervisory Organizations

Who manages cost center definition today? Will that continue? Who will "own" cost centers in Workday? Will this be managed through an inbound integration from Finance or will it be manually maintained?

Organization Visibility - for Cost Centers, who should be able to view these organizations? In general, "administrators - only" is appropriate for Cost Centers.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.

COST CENTER & COST CENTER HIERARCHY - Configuration
<ul style="list-style-type: none"> ○ Members Only - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization. ○ Everyone - Anyone can see this organization. This is how most supervisory organizations should be set up.
<p>Organization naming convention – how do you name your cost centers today? Does that naming convention need to continue or will you simplify for your Workday deployment?</p>
<p>Let's review the Cost Center and Cost Center Hierarchy Organization Chart and determine if there are changes you would like to make via configuration.</p>

CROSS-PRODUCT IMPACT

Cost Center is critical for any transaction that is financial in nature. Cost center can also be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your cost center structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your cost center structure can have cross-product impact.

COST CENTERS & COST CENTER HIERARCHY – Cross Product Impact
<p>Compensation: Can a worker's cost center drive eligibility for types of compensation? If yes, list examples here.</p>
<p>Benefits: Can a worker's cost center drive eligibility for different types of benefits? If yes, list examples here.</p>
<p>Absence: Is time off taken or accrued differently for workers in different cost centers? If yes, list examples here.</p>

COST CENTERS & COST CENTER HIERARCHY – Cross Product Impact

Time Reporting: Do workers in different cost centers use different methods for reporting time? If yes, list examples here.

Payroll: How are earnings and deductions allocated? Will you allow for costing overrides? If yes, at what level – employee? Earning? Position? At time of Pay Input?

Assign Costing Allocation

Worker Maximilian Schneider

Add

Start Date

12/09/2013

End Date

Default Organizational Assignments (As of Start Date)

Cost Center: 30000 Office of COO

Costing Allocation Attachments

Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	Costing Override	*Distribution Percent
	Cost Center: 30000 Office of COO		Search	100
Total:				100

ESS: Keep in mind that a limitation of some systems is the inability to separate cost center (or department) structure from the supervisory structure. In Workday, an employee can be in one cost center and yet directly report to a manager who is in a different cost center. This is what enables Workday business processes to truly function.

MSS: Do managers interact with cost center data on a regular basis? If so, how? Ensure that you are defining your cost centers so that managers can understand and update employee cost center data where appropriate.

Financials: If you are implementing Worker Spend, Initiatives or Workday Financials, the Cost Center is a critical financial organization. Ensure that HCM and Financials project team members are working together to define the cost center structure.

GLOBAL IMPACT

If your organization is global, have you considered the following:

COST CENTER & COST CENTER HIERARCHY – Global Impact

COST CENTER & COST CENTER HIERARCHY – Global Impact

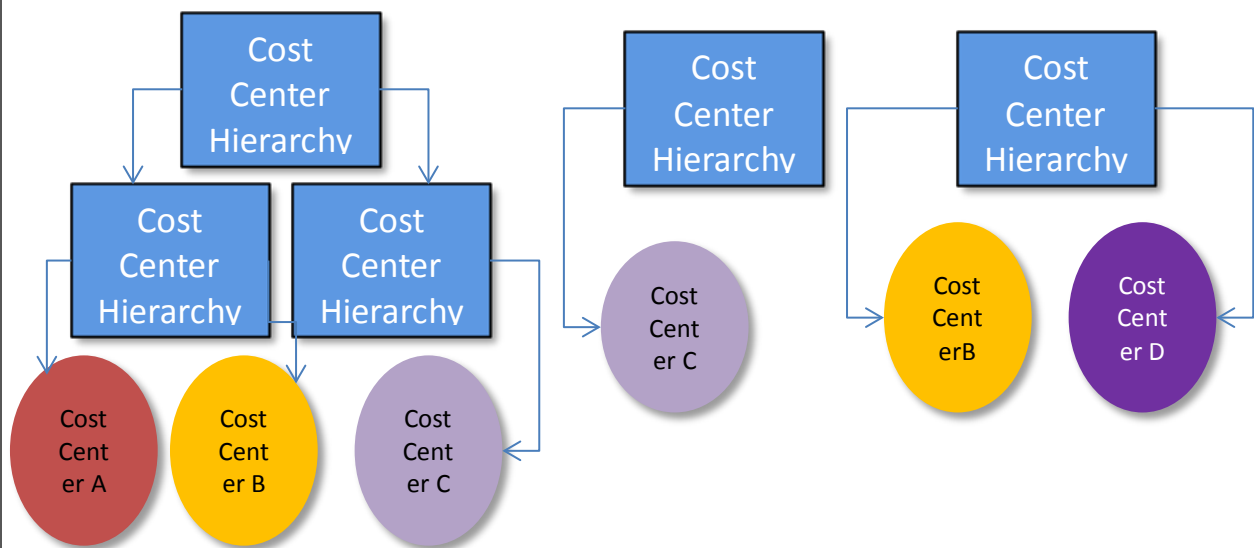
If you are rolling out globally in Phase I ensure that you are defining cost centers for all global locales.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Supervisory Organizations optimally, think about the following questions:

COST CENTER & COST CENTER HIERARCHY – Reporting impact

For reporting purposes, do costing entities/cost centers roll-up to other entities – i.e. business units, divisions, programs, etc?



Is there specific reporting you do at the Costing Entity level? To whom do you provide these reports? Who should be able to run these reports? Please provide examples, if applicable.

INTEGRATION IMPACT

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

COST CENTER & COST CENTER HIERARCHY – Integration Impact

COST CENTER & COST CENTER HIERARCHY – Integration Impact

Think about your integrations and provide examples of where the cost center structure may impact integrations either into or out of Workday.

Will you need an interface to update cost center data on a regular basis?

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

COST CENTER & COST CENTER HIERARCHY – Update Impact
Work with your consultant to ensure that you understand any known/planned enhancements to Cost Centers that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.
If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: REGION AND REGION HIERARCHY

REVIEW: Regions are an optional organizational structure and can be used to reflect the area of responsibility for a worker instead of the work location – this is different than the location hierarchy. For example, a Salesperson might work from (be located in) a Miami location, but may be responsible for Sales in the Latin American Region.

Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for supervisory organizations. Note any design decisions or comments in the table below.

REGION ORGANIZATIONS - Configuration
Do you need the ability to identify Regions that workers are responsible for? If so, please provide some examples.
<p>Organization Visibility - for regional organizations, who should be able to view these organizations?</p> <ul style="list-style-type: none"> ○ Administrators Only - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone. ○ Administrators Only All Organizations – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.

REGION ORGANIZATIONS - Configuration
<ul style="list-style-type: none"> ○ Members Only - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization. ○ Everyone - Anyone can see this organization. This is how most supervisory organizations should be set up.
<p>Organization naming convention – How will you name your regions? Will this facilitate reporting and searching?</p>
<p>Let's review the Region and Region Hierarchy Organization Chart and determine if there are changes you would like to make via configuration.</p>

CROSS-PRODUCT IMPACT

Regions can be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your regional structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your Regional structure can have cross-product impact.

REGION ORGANIZATIONS – Cross Product Impact
<p>Compensation: Can a worker's region drive eligibility for types of compensation? For example, do you have geographic differentials, allowances or grade profiles? If yes, list examples here.</p>
<p>Benefits: Can a worker's region drive eligibility for different types of benefits? If yes, list examples here.</p>
<p>Absence: Is time off taken or accrued differently for workers in different regions? If yes, list examples here.</p>

REGION ORGANIZATIONS – Cross Product Impact

Time Reporting: Do workers in different regions use different methods for reporting time? If yes, list examples here.

Payroll: Are workers in different regions eligible for different types of earnings? If yes, list examples here.

GLOBAL IMPACT

If your organization is global, have you considered the following:

REGION ORGANIZATIONS – Global Impact

How do you organize your global areas by region? How will this enable global business practices?

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Regions optimally, think about the following questions:

REGION ORGANIZATION – Reporting Impact

What types of Regional Reporting do you require? Please provide examples, if applicable.

Do you perform roll-up reporting on your Regions and foresee needing a Regional Hierarchy? A single region can belong to one or more region hierarchies but only once within a hierarchy.

REGION ORGANIZATION – Reporting Impact

What types of reports do you provide to the Executives in your Organization? Are these reports ever consolidated by region?

Region is available in standard and custom reports but can also be a dimension for multi-dimensional reporting and faceted search. Keep this in mind when defining your regions.

INTEGRATION IMPACT

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

REGION ORGANIZATION – Integration Impact

Think about your integrations and provide examples of where the regional structure may impact integrations either into or out of Workday.

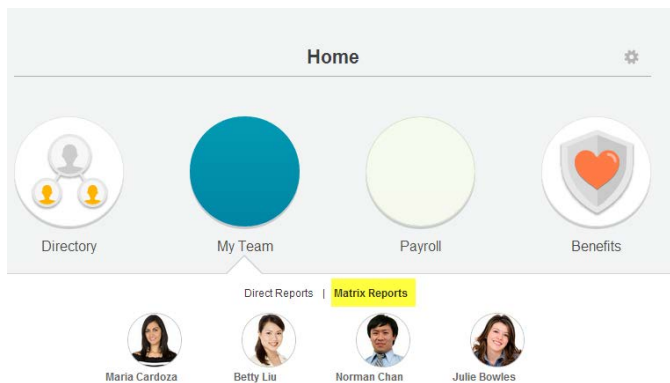
UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

REGION ORGANIZATION – Update Impact
Work with your consultant to ensure that you understand any known/planned enhancements to Regions that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.
If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: MATRIX ORGANIZATION

REVIEW: You can use matrix organizations to contain workers from different supervisory organizations who work together. Each matrix organization has a manager who has a dotted-line relationship to all the members of the Matrix organization. However, the Manager of a worker's supervisory organization retains ultimate authority over the worker. Matrix organizations are freestanding and cannot be part of a hierarchy or related to a supervisory organization. Matrix organizations are most useful for semi-permanent relationships, as the matrix manager can view a matrix organization member's: compensation, past jobs, skills and experience, time off and leave, and worker history



Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for matrix organizations. Note any design decisions or comments in the table below.

MATRIX ORGANIZATION - Configuration
Do you currently have dotted line relationships in your organization?
Who should create and manage the matrix organization definitions?
Do your Matrix Managers participate in staffing transactions or performance reviews for the employees they support via this dotted line relationship? What types of transactions?

MATRIX ORGANIZATION - Configuration

Organization visibility determines who can view information about an organization. The options are administrators only, members only, or everyone.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.

Identify the visibility option you have chosen for your matrix organizations.

Organization naming convention – if using matrix organizations, how will you manage the naming? Will it be consistent across the organization or does it not matter?

Let's review the Matrix Organization Chart and determine if there are changes you would like to make via configuration.

CROSS-PRODUCT IMPACT

Matrix organizations can be used to drive eligibility or condition rules across the Workday applications although this is less common than for other organization types. These are critical to keep in mind to ensure that your matrix structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your Matrix structure can have cross-product impact.

MATRIX ORGANIZATIONS – Cross Product Impact

Compensation: Can a worker's matrix organization drive eligibility for types of compensation? If yes, list examples here.

MATRIX ORGANIZATIONS – Cross Product Impact
Benefits: Can a worker's matrix organization drive eligibility for different types of benefits? If yes, list examples here.
Absence: Is time off taken or accrued differently for workers in different matrix organizations? If yes, list examples here.
Time Reporting: Do workers in different matrix organizations use different methods for reporting time? If yes, list examples here.
Payroll: Are workers in different matrix organizations eligible for different types of earnings.
ESS: Does the structure you are defining enable employee self-service? For example, a time off request normally goes from the employee to his/her manager for approval – does the Matrix Manager need to be notified? Are there other employee initiated requests that should go to the Matrix Manager for review/approval or notification?
MSS: The Matrix Manager can see his or her “indirect reports” on the “My Team” page in Workday. Additionally, with delivered security, the Matrix Manager can view and/or participate in processes around compensation and performance. How do your matrix manager's interact with their indirect reports' transactions?
Talent: Matrix Managers can participate in performance reviews and other talent-related activities for their indirect reports. What should your matrix managers be able to see and/or do relative to their indirect reports' talent data?

GLOBAL IMPACT

If your organization is global, have you considered the following:

MATRIX ORGANIZATIONS – Global Impact
Do you have dotted line relationships globally?
Consider global data privacy rules when defining what a matrix manager can see and/or do relative to indirect reports.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Matrix Organizations optimally, think about the following questions:

MATRIX ORGANIZATIONS – Reporting Impact

What type of reporting might you want relative to matrix organizations?

INTEGRATION IMPACT

Matrix Organizations should have minimal impact on integrations. However, you should consider your integrations to or from other systems and whether your matrix organizations will have any downstream impacts.

MATRIX ORGANIZATION – Integration Impact

Think about your integrations and provide examples of where the matrix structure may impact integrations either into or out of Workday (e.g., timesheet approval).

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

MATRIX ORGANIZATION – Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Matrix Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: RETIREE ORGANIZATION

REVIEW: Retiree Organizations are optional and are used simply to track retirees in your organization.

Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for supervisory organizations. Note any design decisions or comments in the table below.

RETIREE ORGANIZATION - Configuration

RETIREE ORGANIZATION - Configuration

Do you wish to track Retirees in Workday? If so, do you have different types of Retirees that need to be grouped separately from others? Please provide examples, if applicable.

Who should create and manage the retiree organization definitions?

Organization visibility determines who can view information about an organization. The options are administrators only, members only, or everyone.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.
- .

Identify the visibility option you have chosen for your retiree organizations.

Organization naming convention – if using retiree organizations, how will you manage the naming? Will it be consistent across the organization or does it not matter?

CROSS-PRODUCT IMPACT

Retiree organizations can be used to drive eligibility or condition rules across the Workday applications although this is less common than for other organization types. These are critical to keep in mind to ensure that your matrix structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your Matrix structure can have cross-product impact.

RETIREE ORGANIZATION – Cross-product Impact

Benefits: Are retirees eligible for benefits? Do they need to be grouped for eligibility rule purposes? Please provide examples.

ESS: Will you allow Retirees access to Workday to make personal data updates or to enroll in benefits?

GLOBAL IMPACT

If your organization is global, have you considered the following:

RETIREE ORGANIZATION – Global Impact

Will you be tracking retirees across the globe or only in specific locations?

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Retiree Organizations optimally, think about the following questions:

Design Decision Notes

If you have different groups of Retirees, do you typically report on them separately, or would you like to do roll-up reporting on all Retirees?

Are there other retiree-related reports you require?

INTEGRATION IMPACT

Retiree Organizations should have minimal impact on integrations other than for benefit providers. However, you should consider your integrations to or from other systems and whether your retiree organizations will have any downstream impacts.

RETIREE ORGANIZATIONS – Integration Impact
Think about your integrations and provide examples of where the matrix structure may impact integrations either into or out of Workday (e.g., Pensions).

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

RETIREE ORGANIZATIONS – Update Impact
Work with your consultant to ensure that you understand any known/planned enhancements to Retiree Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.
If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: CUSTOM ORGANIZATIONS

REVIEW: Custom Organizations are optional and are used for many different purposes. If you have a need to report on or group workers in a way that is not covered by the other organizations we have reviewed, you may have a need for custom organizations.

Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for custom organizations. Note any design decisions or comments in the table below.

CUSTOM ORGANIZATIONS – Configuration
Do you have any organization specific reporting requirements in which you group workers together and want the ability to track staffing actions, turnover, etc. on that group?
<i>Example: Law firms frequently track employees by their “class year” or the recruiting cohort in which they were hired. Creating a Class Year Hierarchy with individual Class Years gives very clear reporting of attrition by class year, for example.</i>

CUSTOM ORGANIZATIONS – Configuration

Provide details on any unique organization reporting requirements you might have.

Organization visibility determines who can view information about an organization. The options are administrators only, members only, or everyone.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.

Identify the visibility option you have chosen for your custom organizations.

Organization naming convention – How will you name any custom organizations?

Let's review the Custom Organization Chart and determine if there are changes you would like to make via configuration.

CROSS-PRODUCT IMPACT

Custom organizations can be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your custom organizational structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your Custom Organization structure can have cross-product impact.

CUSTOM ORGANIZATIONS – Cross-Product Impact

CUSTOM ORGANIZATIONS – Cross-Product Impact
Compensation: Do you have unique compensation requirements that might require a custom organization definition? If yes, list examples here.
Benefits: Do you have the need for grouping employees for benefit or compensation eligibility purposes? For example, do you have a group of workers who should be “grandfathered” for specific benefits? Or, do you have groupings of workers for “wellness” programs that need to be identified for eligibility purposes?
Absence: Is time off taken or accrued uniquely for a specific set of workers? If yes, list examples here.
Time Reporting: Do you have unique requirements for time reporting that would require a custom organization? If yes, list examples here.
Payroll: Do you have any unique earnings for which you need to group workers?

GLOBAL IMPACT

If your organization is global, have you considered the following:

CUSTOM ORGANIZATIONS – Global Impact
Do you have any unique global requirements that would necessitate creating a custom organization? Please provide specific examples.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Supervisory Organizations optimally, think about the following questions:

CUSTOM ORGANIZATIONS – Reporting Impact

Do you have any organization specific reporting requirements in which you group workers together and want the ability to track staffing actions, turnover, etc. on that group?

Can you think of examples of unique roll-up reporting? If so, to whom is it available?

What types of reports do you provide to the Executives in your Organization? Are these reports consolidated by any unique grouping like business unit or product? How do they access those reports?

INTEGRATION IMPACT

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

CUSTOM ORGANIZATIONS – Integrations Impact

Think about your integrations and provide examples of where the custom organizations may impact integrations either into or out of Workday.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

CUSTOM ORGANIZATIONS – Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Custom Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

CUSTOM ORGANIZATIONS – Update Impact

If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: UNIONS “LIGHT ORGANIZATION”

REVIEW: Unions are a specific type of organization in Workday used to track details about a union and its members. Workday allows you to create different Unions and associate workers to those Unions via a workflow event (business process).

Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for unions. Note any design decisions or comments in the table below.

UNIONS - Configuration

Will you be tracking unions in your Workday system? If so, which?

Do you track the following with regard to Union Membership?

Membership Types (ex: Regular, Waiting for Union Card, Dues Only, Provisional)

Active or Inactive

Pays Dues Yes or No

Examples:

Type	Active / Inactive	Pays Dues YorN
Regular	Active	Y
Waiting for Union Card	Inactive	Y

UNIONS - Configuration

Who will be responsible for creating and maintaining unions?

Organization visibility determines who can view information about an organization. The options are administrators only, members only, or everyone.

- **Administrators Only** - Only a worker with a defined role can view an organization. This would typically only be used when reorganizations are in process and not effective. Once the reorganization is completed, an administrator would change the visibility of those organizations to everyone.
- **Administrators Only All Organizations** – Only a worker with a defined role in the organization or who is the organization owner of this or a superior organization can view the organization. If you can view this organization, you can also view all of its subordinate organizations regardless of your role.
- **Members Only** - This generally applies to teams. When an organization has this visibility, only the members of the team and anyone who has a supporting role can view the organization.
- **Everyone** - Anyone can see this organization. This is how most supervisory organizations should be set up.

Identify the visibility option you have chosen for your unions.

Organization naming convention – How will you name your unions?

CROSS-PRODUCT IMPACT

Custom organizations can be used to drive eligibility or condition rules across the Workday applications. These are critical to keep in mind to ensure that your custom organizational structure will enable efficient setup in these functional areas. You will set up your plans and rules as you configure each functional area; this review is to make sure you are aware that your Custom Organization structure can have cross-product impact.

UNIONS – Cross Product Impact

Compensation: Do you have specific Compensation plans for union members? Are there any special rules around these groups?

UNIONS – Cross Product Impact

Benefits: Do you have specific Benefit plans for union members?

Absence: Is time off taken or accrued uniquely for union members? If yes, list examples here.

Time Reporting: Do you have unique requirements for time reporting for union members? If yes, list examples here.

Payroll: Do you have any unique earnings for which you need to group workers? Do you deduct Union Dues from pay?

GLOBAL IMPACT

If your organization is global, have you considered the following?

UNIONS – Global Impact

Do you have any unique global requirements for unions? Please provide specific examples.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your Unions optimally, think about the following questions:

UNIONS – Reporting Impact

UNIONS – Reporting Impact

What type of reporting do you need to produce with regard to unions?

INTEGRATION IMPACT

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

UNIONS – Integration Impact

Think about your integrations and provide examples of where the union organizations may impact integrations either into or out of Workday.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

UNIONS – Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Union Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

If you have submitted or identified any enhancement requests, note those here.

DECISION GUIDE: COMMITTEES “LIGHT ORGANIZATION”

REVIEW: Committees are a specific type of organization in Workday used to track various types of committees and their members from the corporate to department level .Workday allows you to create different committee types, committee classifications (and classification groups), committees, and member types and to associate workers to those Committees via a workflow event (business process).

Considerations

CONFIGURATION

This is a high-level review of the configuration requirements for committees. Note any design decisions or comments in the table below.

COMMITTEES - Configuration											
Will you be tracking committees in your Workday system? If so, which?											
Do you track the following with regard to Committee Membership? Sponsoring Organization (Supervisory Org, Fund, or Grant) Membership Types (ex: Director, Chair, Member) Membership Start and End Dates Examples:											
<table border="1"> <thead> <tr> <th>Membership Type</th> <th>Start Date</th> <th>Term End Date</th> </tr> </thead> <tbody> <tr> <td>Director</td> <td>9/16/2012</td> <td>9/15/2014</td> </tr> <tr> <td>Member</td> <td>01/01/2012</td> <td>n/a</td> </tr> </tbody> </table>			Membership Type	Start Date	Term End Date	Director	9/16/2012	9/15/2014	Member	01/01/2012	n/a
Membership Type	Start Date	Term End Date									
Director	9/16/2012	9/15/2014									
Member	01/01/2012	n/a									
Who will be responsible for creating and maintaining committees?											
Committees can be configured so that Committee Membership appears on the worker's Worker Profile. Should committee membership appear on the Worker Profile?											
Organization naming convention – How will you name your committees?											

GLOBAL IMPACT

If your organization is global, have you considered the following?

COMMITTEES– Global Impact

Do you have any unique global requirements for unions? Please provide specific examples.

REPORTING IMPACT

Workday Organizations provide powerful reporting. To help ensure that you are defining your committees optimally, think about the following questions:

COMMITTEES– Reporting Impact

What type of reporting do you need to produce with regard to committees?

INTEGRATION IMPACT

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

COMMITTEE– Integration Impact

Think about your integrations and provide examples of where the committee organizations may impact integrations either into or out of Workday.

UPDATE IMPACT

Is this feature subject to change in the next two Updates or, have you identified enhancement requests?

COMMITTEE– Update Impact

Work with your consultant to ensure that you understand any known/planned enhancements to Committee Organizations that will occur during your deployment period. If there are, identify a plan to address those enhancements to limit any re-work that might be needed.

COMMITTEE– Update Impact

If you have submitted or identified any enhancement requests, note those here.