Core Design Session – Staffing Model, Jobs & Positions

[Date]

Table of Contents

Core Design Session – Staffing Model, Jobs & Positions

DESCRIPTION

This Core Design Session will assist you in understanding Workday staffing models as well as job and position definition and will provide questions, exercises and examples to help drive your staffing 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 staffing features so that you can:

- Determine your Staffing Model or Models, and, if more than one, where each type will be used and the impact of multiple staffing models;
- Review Job Family Groups, Job Families and Job Profiles to gain understanding and to determine if you will use all of these levels;
- Begin to design your global job catalog;
- Understand Positions and Position Restrictions
- Determine if you will use Workday Job Requisitions
- Understand the impact of these decisions on integration to a Recruiting Management System

AGENDA

- Conceptual Overview Presentation/Demonstration: Workday Staffing Models
- Conceptual Overview Presentation/Demonstration: Jobs & Positions
- Review of Decision Guide, decision points, and follow-on activities
- Q & A

Conceptual Overview – Staffing Models

OVERVIEW

In Workday, staffing refers to a broad range of activities involved in establishing, maintaining, or managing the professional relationship between an enterprise and its workers. Unlike traditional applications that offer rigid, one-size-fits-all staffing processes, Workday Staffing is highly configurable and supports the unique business processes of each organization or department. Staffing in Workday is driven by "positions": no matter which approach to staffing an organization uses. Workday creates and maintains slots or "positions" behind the scenes. A position consolidates key job information, such as job family, job profile, worker type and location, as well as whether the worker is full-time or part-time. You may also define required qualifications, experiences and education level for positions. In Workday every supervisory organization must be associated with a **staffing model** by either directly assigning the staffing model to the organization or allowing the model to default from the superior organization. Staffing Models, which are used, at their simplest, to determine how jobs are defined and filled, provide different levels of control over staffing and support different staffing goals. The two available staffing models are: **position management, and job management**.

- *__Position Management__* – Of the three staffing models, position management provides the greatest control over hiring, as it gives you the ability to define separate hiring rules and restrictions for each position.

  With position management, you staff organizations by creating and defining positions. For each position, you can restrict hiring to particular job families, job profiles, worker types, or locations, and specify whether workers must be full- or part-time. In addition, you can use position management to define the required qualifications, experience, and education levels for a worker. Because you define hiring restrictions position by position, and can therefore define job characteristics and qualifications very narrowly, *this staffing model is particularly useful for organizations that need to impose controls on who can be hired and that require a precise definition of each position they want to fill.*

  - To hire, promote or transfer into a position, there must be an approved position available as of the worker's start date.

  - Positions can remain open after a transfer, promotion, or termination.

  - Positions can be moved from one supervisory organization to another as part of a job change.

  - A position must be closed if it is no longer needed

  - Hiring managers fill only specific, approved positions. Compensation components may optionally be assigned to unfilled positions.

  - Position Budget, along with Commitment Accounting require position management

  __Job Management__ – Job management less control over the definition of individual positions: with job management the hiring restrictions you define apply to all jobs in the supervisory organization, and you can define only one set of hiring restrictions per organization.

  With job management, you staff organizations by defining one set of hiring restrictions for the entire organization. You can restrict hiring to particular job families, job profiles, worker types, or locations, and specify whether workers must be full- or part-time. Because the same set of hiring restrictions apply to all of the jobs in a job management organization, and because there can be

only one set of restrictions per organization, *this staffing model is particularly useful for organizations that prefer to define broad job requirements and rely on staffing workflow and approvals to control the number of workers in a supervisory organization.*

- o Position no longer exists after a worker is transferred, promoted or terminated unless moved with the employee.

- o Hiring managers hire as they see fit with no specific target, subject only to the hiring guidelines defined for the organization.

- o Hiring is not limited to a predefined number of openings.

- o You do not need to create a separate, open position for each job you want to fill.

- o Any hiring restrictions you define apply equally to all jobs in the organization.

STAFFING MODEL COMPARISON CHARTS

STAFFING RESTRICTIONS COMPARISON

	Position Management	Job Management
Set hiring restrictions based on job family, job profile, worker type, location, and full or part-time status?	Yes	Yes
Define hiring restrictions based on qualifications such as education, experience level, languages spoken, and so forth? **Note:** You can define basic qualifications for jobs and positions at the job profile level regardless of the staffing model selected; however, only position management enables you to define qualifications for individual positions in addition to qualifications defined at the job profile level.	Yes	No
Level at which hiring restrictions are set.	Hiring restrictions apply at the level of **individual positions.**	Hiring restrictions apply to the **entire organization**. You cannot define hiring restrictions for individual jobs in the organization.

HIRING LIMITS AND CONTROL COMPARISON

	Position Management	Job Management
Imposes hiring limits?	Yes—You must specify the number of positions you want to fill; Workday allows you to fill only open positions.	No—Workday imposes no limit on the number of jobs you can fill in an organization; however, you can set up workflow to require approval for individual jobs.
Open position or headcount required before a worker can be hired?	Yes	No
Approval is required to fill positions or jobs?	Configurable. There is no **required** approval process. Depending on your workflow configuration, you may or may not need approval to create and fill a position.	Configurable. There is no **required** approval process. Depending on your workflow configuration, you may or may not need approval to fill a job.
Ability to adjust number of positions or jobs up or down?	Yes—You can request new positions using the **Create Position** task; you can close existing ones using the	No—Workday imposes no limit on the number of jobs you can fill in an organization; however, you can limit hiring

	Position Management	Job Management
	Close Position task. Both tasks have configurable workflow and approvals.	by enabling approval workflow.

MOVING WORKERS, JOBS, AND POSITIONS COMPARISON

	Position Management	Job Management
Multiple workers and positions can be moved from one organization to another as part of reorganization? **Note:** Use the **Move Workers** task to move workers in groups.	Yes	Yes
A worker can be moved along with his/her *current* position or job into a new organization as part of a promotion or transfer?	Yes	Yes
A worker can be moved into a *new* position or job in another organization as part of a promotion or transfer?	Yes	Yes
Positions or jobs persist in the old organization after a transfer, promotion, or termination?	If you move a worker together with his/her *current* position into a new organization, the position is unavailable for staffing in the old organization. If you move a worker into a *new* position in another organization, you have the option to close the position in the old organization or to keep it open for staffing. When you terminate an employee, you have the option to close the position in the employee's organization or keep it open for staffing.	If you move a worker together with his/her *current* job into a new organization, the job remains available for staffing in the old organization. If you move a worker into a *new* job in another organization, the job remains available for staffing in the old organization. When you terminate an employee, the job remains available for staffing in the employee's old organization.

ORGANIZATION ASSIGNMENTS COMPARISON

	Position Management	Job Management
Organization assignment defaulting (ability to define at the supervisory organization level the company, cost center, and region that defaults to a newly	Yes	Yes

	Position Management	**Job Management**
created position or job)?		
Edit open/unfilled positions' organization assignments (ability to change the company, cost center, or region that the position is assigned to)?	Yes—You can edit each position's assignments separately.	No
Edit filled positions' organization assignments (ability to change the company, cost center, or region that the position is assigned to)?	Yes	Yes

COMPENSATION COMPARISON

	Position Management	**Job Management**
Allow defaulting of compensation components based on rules or Default Comp attached to Position?	Yes (Default Comp attached to Position)	Yes (can default comp components by rule, but cannot use the Default Comp object)

TRACKING AND REPORTING COMPARISON

	Position Management	**Job Management**
Ability to report on both open and filled positions?	Yes	No—Workday tracks only filled positions.
Full reporting on staffing events (reporting on all hires, transfers, promotions, and terminations, with access to details of the job, worker, process, and approvals)?	Yes	Yes
Track worker history (ability to track details of all business processes from the perspective of individual workers; for example, hires, transfers, terminations, compensation changes, bonuses, and so forth)?	Yes	Yes
Track basic position history (ability to track position history from the time an individual worker is hired into a position until the worker transfers out or is terminated)?	Yes	Yes
Track advanced position history (ability to track history of open and closed positions *across* different workers who have occupied the position)?	Yes	No

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 staffing models as well as the design of your job catalog and decisions around use of requisitions. You can capture here 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 jobs and positions in Workday.

> *It is required that you have determined what staffing model or models you will use before you can move to Business Process Design.*

DECISION GUIDE: STAFFING MODELS

REVIEW: In Workday every supervisory organization must be associated with exactly one **staffing model** by either directly assigning the staffing model to the organization or allowing the model to default from the superior organization. Staffing Models, which are used, at their simplest, to determine how jobs are defined and filled, provide different levels of control over staffing and support different staffing goals. The two available staffing models are: **position management** and **job management**.

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Considerations

CONFIGURATION

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

STAFFING MODELS – Configuration		
Which of the following most closely represent the way your organization manages jobs or positions today? If you choose more than one, give examples of where each is used.		
Staffing Model	Use Case	Applicability to your organization or parts of your organization?
Position Management	You need the ability to **define each position narrowly** based on the hiring location, job requirements and current needs, and are **subject to tight hiring controls.** You also have requirements for budgeting by position and/or reporting on open, unfilled position. You want to keep the hiring manager in Workday, enabling them to initiate a job requisition which might then integration to your recruiting system. You need the ability to allow two workers to temporarily share the same position in situations of Leave of Absence or a worker leaving a position due to Termination or some type of transfer.	
Job Management	You need **flexibility** when hiring and are less interested in filling a narrowly defined position than in **assembling a critical mass** of employees in the shortest possible time. You have no need to report on open, unfilled positions and do not plan to integrate open positions to a recruiting system. (Although you could integrate Job Requisitions to a recruiting system using Job Management)	
Position Management: The following are important things to consider when evaluating Position Management as a staffing model. Position Management optimizes processes within Workday and enables you to do the most granular level of reporting. Additionally, it is the only staffing model that will enable integration of open positions to your recruiting management system (Job Requisitions can be integrated to a recruiting system using Position Mgmt or Job Mgmt).		

STAFFING MODELS – Configuration

Do you need to:	Yes or No
Track and report on open positions	
Control or have the ability to freeze open positions for hiring process	
Ability to close positions when no longer available to fill	
Track position history – tracking changes made over time to the position itself, not the incumbent.	
Initiate requisitions	
Pass open position details to/from recruitment system.	
Define restrictions at the level of individual positions	
Refine qualifications in addition to any defined on the job profile	
Move unfilled positions between supervisory organizations	
Move workers/filled positions between supervisory organizations	
Tie requisition fulfillment back to specific positions for reporting purposes	
Budget based on positions	
Use position commitment accounting	
Ability to associate default Organization Assignments for Cost Center, Company, or Region to an open position so that the worker filling the position inherits those defaults.	
Ability to edit the Organization defaults associated with the open position.	
Ability to track history of open and closed positions across different workers who have occupied the position	

STAFFING MODELS – Configuration	
Ability to simplify security organization role assignments by having position incumbents assume roles automatically	
Ability to allow two workers to temporarily share the same position	

Job Management: The following are important things to consider when evaluating Job Management as a staffing model. Job management provides the least control over the definition of individual positions. With job management the hiring restrictions you define apply to all jobs in the supervisory organization, and you can define only one set of hiring restrictions per organization. This staffing model is particularly useful for organizations that prefer to define broad job requirements and rely on staffing workflow and approvals to control the number of workers in a supervisory organization. You still have the option of using Job Requisitions with Job Management.

Do you need to:	Yes or No
Set hiring restrictions equally to all jobs in a supervisory organization based on job family, job profile, worker type, location, and full or part-time status or set no hiring restrictions for the jobs in the organization.	
Track and report on filled jobs only – no ability to track and report on open positions	
Impose no hiring limits	
Allow hiring managers to hire as they see fit with no specific target, subject only to the hiring guidelines defined for the organization	
Pass details from a Job Requisition to a recruiting system	
Not tie requisition fulfillment back to specific positions	

CROSS-PRODUCT IMPACT

Staffing Models drive how managers and HR interact with employee transactions.

STAFFING MODELS – Cross-Product Impact
How do managers request and staff positions? Do they request in a system? Does HR make the request for them? How do you want them to interact with positions within Workday?
Do you plan to deploy talent features like Succession Planning in the future? If so, then position management may be a better choice than job management.
Do you manage position budgets? Do you plan to use Position Budgeting or Commitment Accounting?

GLOBAL IMPACT

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

STAFFING MODELS – Global Impact
Does your organization manage staffing differently in various locations?   Do some locations require tighter controls over position requests or staffing?

REPORTING IMPACT

Your choice of staffing model will have an impact of the type of reporting you can perform, especially on filled vs unfilled positions/headcount.

STAFFING MODELS – Reporting Impact
How do you report on the headcount in your organization? Filled vs Unfilled? Rolled up by certain organization types?

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STAFFING MODELS – Reporting Impact
What types of staffing metrics should Managers and HR be able to produce in Workday?
Do you need the ability to report on a position's history i.e. the incumbent history, as well as historical changes to the attributes of the position?
Do you report on Open Positions? If so, at what level? Who needs these reports?
Do you want open positions to be viewable on a manager's view of their organization chart?

INTEGRATION IMPACT

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

STAFFING MODELS – Integration Impact
Do you plan to integrate to a recruiting system? If so, what will you be passing – open positions? Requisitions? Hires only?

UPDATE IMPACT

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

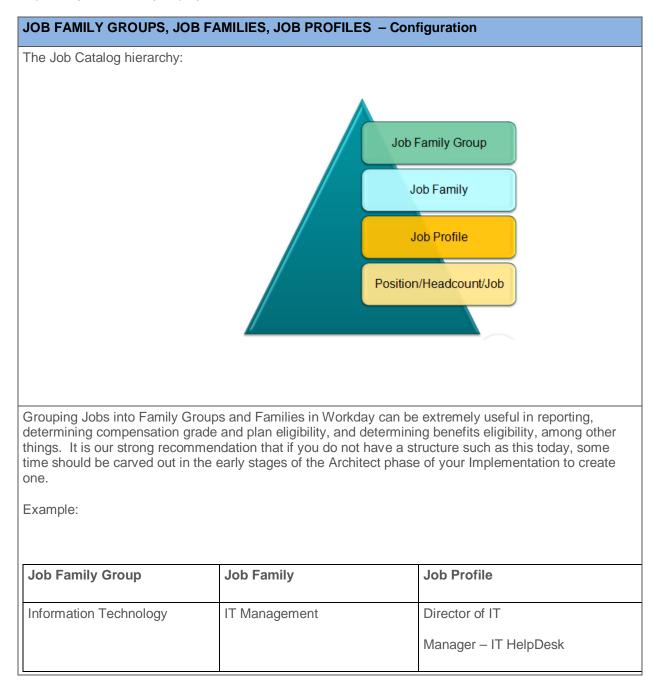| STAFFING MODELS – Update Impact* |
|---|
| |

DECISION GUIDE: JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES

REVIEW: Before you can create job openings or fill jobs and positions in a supervisory organization, you must create generic definitions of jobs and positions in Workday's job catalog.

Considerations

CONFIGURATION

The goal of this section will be to determine which aspects of the job catalog you will design and configure as part of your Workday deployment.

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Configuration
The Job Catalog hierarchy:
Grouping Jobs into Family Groups and Families in Workday can be extremely useful in reporting, determining compensation grade and plan eligibility, and determining benefits eligibility, among other things. It is our strong recommendation that if you do not have a structure such as this today, some time should be carved out in the early stages of the Architect phase of your Implementation to create one. Example:

Job Family Group	Job Family	Job Profile
Information Technology	IT Management	Director of IT Manager – IT HelpDesk

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Configuration		
	IT Help Desk	IT HelpDesk Specialist Senior IT Analyst
	IT Systems	Senior Network Engineer System Administrator
Example of using these values to establish Compensation Eligibility:	If the worker's Job Family Group = Information Technology, then the worker should, by default, be granted the IT Merit Plan. If the worker's Job Family = IT Management, then the worker should, by default, be granted the Compensation Grade = Management	
Example of using these values to establish Benefits Eligibility	If the worker's Job Family = IT Management, then the worker should, by default, be eligible to enroll in Benefit Plans housed in the Management Benefit Group	

Please provide your current Job Catalog (job listing), including related job attributes, qualifications, job descriptions, etc.

Do you store Benchmark Salary Data related to your jobs so that you can perform market comparisons with your employees' salaries? If so, what categories of benchmark data do you track? Base Pay, Total Compensation, etc?

Will the market data you use vary based on location?

What type of benchmark reporting do you need?

Do you see value in or a need for market comparison data (Above Market, At Market, Below Market) available during a staffing or compensation transaction?

CROSS-PRODUCT IMPACT

Job Profiles, Families, and Family Groups can be used across the Workday application to provide reporting granularity, narrow compensation and benefits eligibility, categorize prompts, and define hiring restrictions.

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Cross-Product Impact
Compensation: Do you directly correlate Compensation Grades with your jobs? Please describe. Do jobs or job groupings drive compensation grade or plan eligibility in your organization?
Benefits: Do jobs or job groupings drive benefit group or plan eligibility in your organization?
Absence: Do jobs or job groupings drive time off and leave plan eligibility in your organization?
Payroll: Do jobs or job groupings have eligibility for specific earnings codes in your organization?
Security: Are there specific security requirements based on certain jobs or types of jobs in your organization? For example, should only exempt employees be able to request PTO?

GLOBAL IMPACT

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

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Global Impact
Do you have workers globally? Will all be included within your Phase I deployment? If so, does your global workforce share the same job catalog as your domestic workforce? If not, consider the benefits of being able to compare jobs globally from a compensation perspective.

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Global Impact
Do you track regulatory codes for your global jobs, similar to an EEO code?
Do you operate in countries that require Worker's Compensation Codes?
Do you track Exempt status for jobs by Country?

REPORTING IMPACT

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

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Reporting Impact
What types of reporting requirements do you have that include or reference the employee's job profile details? Are there reports that HR is asked to generate on a regular basis that focus on the jobs that worker's fill?
What types of job-related reporting do you do that would benefit from the Family Group > Family > Job relationship?
What types of job-related Regulatory Reporting do you do?
Do you report on headcount by job? Or job grouping (e.g., families, profiles)?
What employee job-related analytics or reports would you like your Managers to have available to them?

INTEGRATION IMPACT

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

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Integration Impact
Think about your integrations and provide examples of where job 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?

JOB FAMILY GROUPS, JOB FAMILIES, JOB PROFILES – Update Impact*
Work with your consultant to ensure that you understand any known/planned enhancements to Jobs 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: POSITIONS

REVIEW: Regardless of the Staffing Model or Models you choose, each worker will be associated to a "Position" or slot in Workday. Positions are the conduit through which a worker's staffing information flows, as well as the foundation for most staffing related reporting. The Staffing Model chosen will drive how much data is directly associated to a position in advance of encumbering it.

Considerations

CONFIGURATION

POSITIONS – Configuration
What types of "restrictions" do you place on hiring managers when hiring in to their organization? Is a job requisition required in advance of hiring?
Is a manager restricted to hiring in a specific location, for a specific worker type, or for a particular job profile? How are those restrictions managed today?
Do you define qualifications at the position level that are more granular or different from those defined for the job profile?

POSITIONS – Configuration
Do you associate "default" compensation with a position – is the compensation package and base salary amount approved prior to filling the position?
Do you have workers who occupy more than one position at a time? If so, are they eligible for different compensation and/or benefits based on position?

POSITIONS: Cross-product Impact
Compensation: Is compensation very different across the same "position" in an organization or is it very standard?
Benefits: Is benefit eligibility defined at a very granular level such that incumbents of specific positions have different benefits than others in similar positions? Do you have multiple job requirements? If so, how is benefit eligibility defined?
Absence: Is time off and leave defined at a very granular level such that incumbents of specific positions have different absence plans than others in similar positions? Do you have multiple job requirements? If so, how is absence handled?
Time Reporting: Does position drive requirements around time reporting? Do you have workers who occupy more than one position at a time? If so, how do they report time for each?
Payroll: Is earnings eligibility based on position? Do you have multiple job requirements? If so, there will be a detailed discussion when designing payroll about those requirements.
MSS: Consider how managers request and fill positions carefully and in conjunction with your decision on staffing models. Enabling MSS for creating and filling positions can drive efficiencies and can reduce the number of processes that happen outside the system.

POSITIONS: Cross-product Impact
Financials: Do you have financial reporting requirements by position? Are you planning to use position budgeting?

GLOBAL IMPACT

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

POSITIONS – Global Impact
Do you plan to translate job and position titles?

REPORTING IMPACT

POSITIONS – Reporting Impact
What types of analysis do you do across the organization that is based on position? Who is the consumer of those reports? Will these reports be needed in Workday given the interactive nature of the application?

INTEGRATION IMPACT

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

POSITIONS – Integration Impact
Think about your integrations and provide examples of where positions may impact integrations either into or out of Workday.
Specific areas frequently impacted by positions are learning management and recruiting.

UPDATE IMPACT

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

POSITIONS – Update Impact*
Work with your consultant to ensure that you understand any known/planned enhancements to Positions 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: JOB REQUISITIONS

If you plan to use Workday Recruiting, Job Requisitions are required.

Considerations

CONFIGURATION

JOB REQUISITIONS – Configuration
After seeing the job requisition in the demonstration, do you feel this is a piece of functionality you would like to use in Workday?

JOB REQUISITIONS – Configuration

Do you have the desire to be able to recruit for positions before they are vacated?

JOB REQUISITIONS: Cross-product Impact

Budgeting: Do you plan on budgeting by position in Workday?

GLOBAL IMPACT

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

JOB REQUISITIONS – Global Impact

Job Requisitions is a tenant wide setting. If you choose to use it for Position Management orgs, then you must decide if you want to require a Requisition for ALL position fill events, or if you want it to be optional and controlled via condition rules on your Business Processes. If you use Job Requisitions for Job Management, then a Job Requisition is optional for fill events in Job Management orgs.

REPORTING IMPACT

JOB REQUISITIONS – Reporting Impact
What types of analysis do you do across the organization that is based on requisition? Who is the consumer of those reports? Will these reports be needed in Workday given the interactive nature of the application?

INTEGRATION IMPACT

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

JOB REQUISITIONS – Integration Impact
Think about your integrations and provide examples of where job requisitions may impact integrations either into or out of Workday.
Specific areas frequently impacted by job requisitions are learning management and recruiting.

UPDATE IMPACT

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

JOB REQUISITIONS – Update Impact*
Work with your consultant to ensure that you understand any known/planned enhancements to Job Requisitions 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.

Any unreleased services, features or functions referenced in any Workday document, blog, our website, press releases or any public statements that are not currently available are subject to change at Workday's discretion and may not be delivered as planned or at all. Customers who purchase Workday, Inc. services should make their purchase decisions based upon services, features and functions that are currently available.