Human Resource Management System

Workday Job Aid
Managing Org.'s, Positions, Supervisory Orgs

Many functions are initiated and maintained by HR. Supervisory Organizations are the foundation in Workday and drive a number of the business processes configured in Workday. Understanding position management, position and employee lifecycles are included in this guide because of their linkage to Organizations.

○ Employees
○ People Managers
● Human Resources

Contents

1. Understanding the Employee Lifecycle

Workday helps us manage the Employee lifecycle from recruiting (pre-hire) until a worker leaves Suffolk County.

The Employee lifecycle is unique for each employee and may include activities that are initiated by HR, Managers, or Employees. Some of the key lifecycle events include:

- Recruiting, applicant tracking
- Hire/Onboarding
- Change job, location, company, cost center
- Promotion/demotion
- Leave of Absence
- Compensation Change
- Performance Management
- Time Tracking

Note: For further details on each of these topics, please see the Job Aid dedicated to that specific topic.

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2. Working with Supervisory Organizations

At a high level, a **Supervisory Organization** (Sup Org) is an entity used to organize people, resources, etc. within Workday. There is a parent-child relationship among Sup Orgs in which the child rolls up to the parent with the top-level being the "Citizens of Suffolk County" Sup Org.

The Sup Org represents the structure of who reports to whom. For the County, a Sup Org has been created for each manager with direct reports. The cost center associated with each Sup Org provides a better understanding of what department the Sup Org is part of.

The Supervisory Organization allows a user to view all information about the organization. **Note:** The information displayed will vary based on your security access to view that organization. Information is divided in a tab format and includes:

- **Members** – workers that report up to the displayed manager
- **Details** – a summary of this supervisory organization structure
- **Staffing** – the staffing model being used (Position Management). It also shows any in-progress staffing transactions that are going on and the status is of that transaction.
- **Roles** – the roles associated with the supervisory organization and the workers assigned to those roles
- **Security Groups** – the security group roles associated with the supervisory organization and the workers assigned to those groups
- **Organization Assignment** – the organization hierarchy within <client> associated with the displayed supervisory organization

Sup Orgs are also used to group security access, reports, and business processes. The common attributes of the parent are shared with the child, thereby minimizing the need to replicate information.

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3. Understanding the Position Lifecycle

For the majority of the County workforce, the **Position Management** staffing model is used. What this tells us is that to hire a person for a given job, a position must exist for that job in Workday.

The life of a position starts with a manager identifying a need for additional headcount for their area and including that need in the annual budget for their department. If that position is included in the approved budget and it is not already defined in Workday, a budget office administrator will create the position. If the position already exists, then it will need to be unfrozen so that it can be hired against.

The next step in the process is to insure that the appropriate budget funding has been assigned to the position (if not already there) so that it can be approved. Once the position has been approved, a requisition is created for that position. At this point, the recruitment team works to fill the position.

The person hired for the position could eventually be promoted out of that position, leave the company, or retire. At the point the position becomes vacant it is not closed, but rather set to a frozen state in Workday. If the position is to be filled again it needs to be unfrozen. This is a County rule that requires budget approval each time someone is hired into a position, even if that position previously existed.

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4. Understanding Position Management

In Workday, there are two types of staffing models: **Position Management** and **Job Management**. For a majority of the County's workforce, Position Management is used. This provides the County with the most control, budget adherence, and overall reporting capabilities.

The basic premise behind Position Management is that there is one worker per position and that it requires an opened, approved position to exist before a person can be hired or transferred into it. As part of the controls used, a position can have its unique definition and corresponding hiring restrictions as well. Default values can also be established for the position by an organization (e.g. Cost Center) and compensation. All of this adds to the control and ease of processing under the Position Management Staffing model.

It is also important to note that security access is assigned to the position and not the worker. This minimizes the setup required for when a new person takes on the position. Within Position management, reports are available that show open and filled positions as well as overall position history. This provides further insight to better manage positions.

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Change Log				
Revision Number	**Date of Change**	**Affected Lesson**	**Action**	**Initials**
1.1.1.1	09/15/2021		Log Created	RK

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