Hire Employee

Engineering Human Resource Contact Information

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- Engineering Phone: 979.458.7699

What Is Workday?

Workday is a cloud-based system that The Texas A&M University System uses to manage the Human Resources, Benefits and Payroll functions for all employees.

Workday is built on three basic fundamentals:

- **Organizations**: Organizations are used to group people, resources, workers and their institution or agency. They provide management, visibility and reporting structures for resource allocation.

- **Business Process**: A business process is a set of tasks used to accomplish a specific goal such as posting a position. Workday will automatically route specific steps in a workflow to those responsible for them. Certain processes may require multiple approvals within Workday and may also have additional approvals outside of Workday.

- **Security Roles**: Security roles determine what you can see and do. Initiation of a business process is determined by the employee’s security role in the Workday system. The same business process may be initiated by multiple security roles.
  - Security roles are not job titles. The roles provide Workday users access to appropriate data within the assigned organization structure. The roles also determine functional responsibilities, routing of actions in a business process and access to reports.
  - Workday users will be assigned a security role based on the access they will need in the system. Some users may be assigned to multiple security roles depending on their duties and responsibilities.

Navigating Workday

Accessing Workday

All A&M System employees will access Workday through Single Sign On (SSO).

Workday Home Page

The Workday Home page provides an icon-rich user experience much like what exists on your smart phone or tablet. These icons, called worklets, enable you to quickly access tasks that you will perform on a daily basis as well as the links to pages that will provide additional resources for you.

Worklets

A **worklet** is an icon found on the Home page that makes it easier to access information needed on a routine basis. Some examples of tasks that you can access through worklets include:

- View paystubs or benefits elections.
• View reports
• Enter time or request time off
• Access your Inbox
• Use the Gear Icon to add/delete the worklets on your home page.

Workday Inbox

• All approvals, reviews, to-dos and other action items are accessed through your Workday Inbox
• Action items remain in your Inbox until you (or someone with the same security role) takes the action
• Access your Inbox by clicking the **Inbox** worklet on your Home page

Overview

This job aid outlines the process for the

• Benefits Partner, HR Partner, HR Contact, Retiree Partner, Manager or Management Chain to hire an Employee
• UIN Partner to get the Employee’s UIN and edit the Employee ID
• HR Partner and HR Contact to assign the Employee’s costing allocation

Prerequisites:

• Position has been created in the desired supervisory organization with all required information (i.e., employee type, job profile, time type, location and pay rate type)
• Candidate needs to be moved to the “Ready for Hire” stage when using the Job Application process; a pre-hire needs to be created during the Hire process if the candidate was not recruited using the Job Application process

Important Information:

• The employing supervisory organization is responsible for ensuring appropriate approvals and budget authority prior to initiating any change job event (including any additional approvals required beyond what is configured in Workday)
• After the Hire Employee business process is initiated, the next steps are to propose compensation, change organizational assignments and verify the hire process before the information goes through a series of additional steps by other individuals

Steps

1) **OUTSIDE of WORKDAY**: Submit **Initiate to Hire (I2H)**
a. **Business Contact**: fill out the Laserfiche form ([https://edocs.tamu.edu/Forms/Department-Pre-Onboarding](https://edocs.tamu.edu/Forms/Department-Pre-Onboarding)), which will initiate a Laserfiche form that the new employee will complete. All of this information is sent to the HR Partner to process on the back end.

2) **Search for candidate in Workday search bar**
   a. If in Workday as an active employee, stop and use **Change Job** business process

   ![Search Results](image1)

   1. 
   2. 

   b. Use “People” tab of the search function to determine if the candidate has a pre-hire record.

   3. If in Workday as a former employee or pre-hire, continue with hire process

   ![Search Results](image2)

3) **Type the Supervisory Organization name in the Search bar where you want to hire an employee and press Enter**

   ![Search Results](image3)

4) **Click the desired Supervisory Organization, then click the Staffing tab**
5) Select the position you want to fill (P- _____)

6) Review the information in each tab

7) Navigate to Actions and select Hire → Hire Employee

8) Select one of the following options:
a. Click **Existing Pre-hire.** To select an existing candidate type their name in the “Existing Pre-hire” box.
   i. **Note:** If you found a pre-hire record (during Step 1) use the **Existing Pre-Hire** option.

b. Click **Create Pre-Hire** to enter candidate information not recruited through the Job Application process
   i. Complete the following fields: **country,** **name,** **address,** and **email address**
   ii. Only need to fill out this information if you need to **Create Pre-Hire**

c. Click **OK**
9) On the next page, complete the following Job details:
   a. **Hire Date (required)**
   b. **Reason (required)**
   c. Remaining fields will populate
   
   d. Must select **Additional Information**
      i. Complete **Annual Work Period** and **Disbursement Plan Period**
   
   e. **Note:**
      i. The **Annual Work Period** and **Disbursement Plan Period** must be the same
      ii. The **Job Title, Business Title, Default Weekly Hours, Scheduled Weekly Hours** and **Job Classifications** field will be automatically populated from the selected position
      iii. The **Job Classification** field will be used to override or add Job Classifications on the position
      iv. All other fields will **NOT** be used during this process
9. **Propose Compensation Hire**
   
   a. **Effective Date** should equal the original hire date
   
   b. **Salary** defaults from Offer Letter
      
      i. Select **Edit Salary**: Frequency will always be either **Monthly** (if on salary) or **Hourly** (if paid hourly)
   
   c. Click **Submit**
   
   d. **Note**: If hiring pay rate is out of the pay grade range, you need to submit a compensation request form through Laserfiche ([https://edocs.tamu.edu/forms/ENGRCompensation-Actions](https://edocs.tamu.edu/forms/ENGRCompensation-Actions))

10. **One-Time Payment**

    a. If a onetime payment is needed contact Engineering Payroll
    
    b. For the time being, we will not use the “**One-time payment**” process in Workday. Enter “not applicable” as the reason for skipping the one-
time payment task

12) Submit **Change Organization Assignment**
   a. **Note**: Do not change. There is rarely a reason to change Org Assignment here

13) Only complete the following To Do items after you receive notice that these actions have cleared through I2H
   a. To Do: Complete Background Check
   b. To Do: Complete Degree Verification
   c. To Do: Export Controls
   d. To Do: Selective Service

14) Complete **Minor’s Employment Release** Form
   a. If applicable, send completed form to the Payroll office and click **Submit** on the To Do step
      i. Email: engrpayroll@tamu.edu

15) Manager Consolidated Approval

16) HR Partner Consolidated Approval

17) Absence Partner: Edit Service Dates
   a. **Transfers** – Do NOT alter the **Time Off Service Date** field, leave as is and if alterations are needed Payroll will adjust.
   b. **New Hires** – Enter a date 6 months from the Hire Date for **Faculty and Staff ONLY in the Time Off Service Date field**. (ie: hire date is 9/1, enter 3/1). For New hires with previous State Service, Payroll will verify and adjust the date as needed.

*PLEASE DO NOT ALTER OR ENTER ANY OTHER DATE INFORMATION

If you have questions regarding the Service Dates please contact Engineering HR.
18) HR Contact: **Assign Costing Allocation**
   
   a. On the **Assign Costing Allocation for Hire**, always select **Worker and Position**

   ![Assign Costing Allocation for Hire](image)

   11.
   
   b. Enter the duration of the costing allocation. Complete the following fields:
      
      i. **Start Date**
      
      ii. **End Date** (optional)
      
      iii. **Note**: **End Date** signifies the last date that the salary / wages will be charged to the designated account
   
   c. Update the account number in the **Worktags** field (e.g. Business Computing Services). Click the **Add Row** and use the **Prompt** icon to select an account
      
      i. **Note**: Many accounts may be used, but the **Distribution Percent** must total 100%

12.

   d. **Costing Allocation** Approval Steps:
      
      i. Approval by Cost Center Approver
      
      ii. Approval by SRS (if SRS accounts are flagged)

19) HR Contact: **To Do: Record Background Check and Selective Service**

   a. **Submit** this to do – the I2H (step 8) will produce all the necessary information for the HR partner to complete the Background Check and Selective Service

   b. **Note**: This step occurs only if the New Hire does not go through the Recruiting Process

20) Payroll Partner: **Assign Pay Group**

   a. **Note**: Once this is completed, the **Onboarding** Business Process will be triggered
<table>
<thead>
<tr>
<th>Name</th>
<th>Worklet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>![heart]</td>
<td>A worklet linking you to common actions and views related to benefits, including change benefits, beneficiaries and dependents. You can use the worklet to view your benefit elections and current benefits cost</td>
</tr>
<tr>
<td>Favorites</td>
<td>![star]</td>
<td>A worklet containing favorite reports and tasks for easy access</td>
</tr>
<tr>
<td>Inbox</td>
<td>![file]</td>
<td>A worklet showing your action items, To Dos, and approvals; required for all users and is required on the Home page</td>
</tr>
<tr>
<td>My Team</td>
<td>![people]</td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their employment information (transfer, promotion or change of job). This worklet is being retired in 2018</td>
</tr>
<tr>
<td>My Team Management</td>
<td>![people]</td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their recent activity. For example you can Promote, or Change Job, Add Job, Terminate and Place Worker on Leave here. Finally, you can view important information such as a team comparison, the Organization Directory, Headcount, Management Chain and Timeline</td>
</tr>
<tr>
<td>Pay</td>
<td>![lock]</td>
<td>A worklet linking you to common actions and views related to your pay, including accessing withholding elections and payment elections and viewing payslips, total compensation, bonus and one-time payment history, tax documents and allowance plans</td>
</tr>
<tr>
<td>Personal Information</td>
<td>![id_card]</td>
<td>A worklet linking you to common actions and views related to your personal information, including changing your contact and personal information (such as your addresses, e-mail and phone number), emergency contacts, photo, legal name, preferred name and government IDs; required for all users and cannot be removed from the Home page</td>
</tr>
<tr>
<td>Safety</td>
<td>![exclamation]</td>
<td>A worklet enabling employees, managers and safety partners to report safety incidents</td>
</tr>
<tr>
<td>Time</td>
<td>![clock]</td>
<td>A worklet linking you to common actions and views related to your time, including entering your time and viewing your time-off balance</td>
</tr>
<tr>
<td>Time Off</td>
<td>![luggage]</td>
<td>A worklet linking you to common actions and views related to time off, including viewing your time-off correction, leave of absence, time off &amp; time-off balance</td>
</tr>
</tbody>
</table>
## Appendix 1: Workday Common Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit event</td>
<td>An event that gives you the opportunity to change your benefit elections.</td>
</tr>
<tr>
<td>Business object</td>
<td>A set of related fields. Instances of a business object include rows in a table or a spreadsheet, with each instance representing a unique occurrence of that type of object. A business object can have no instances, one instance or many instances. Workday automatically links related business objects together. For example, supervisory organization details are linked to a supervisory organization; the supervisory organization is linked to positions; positions are linked to employees; etc.</td>
</tr>
<tr>
<td>Business process</td>
<td>A task that you can initiate, act upon and complete to accomplish a desired business objective. Business processes are created using a combination of actions, approvals, approval chains, To Dos and/or checklists. An action can be a single task or sub-process. Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee etc.</td>
</tr>
<tr>
<td>Drill-down</td>
<td>A feature to view more data in a matrix report. When you click a drillable element (such as a drillable field in the table view), a context menu appears that enables you to select a new View By field. If the Enable Drilldown to Detail Data check box is selected on the Advanced tab of the report definition, you can also select details associated with the selected report element</td>
</tr>
<tr>
<td>Event</td>
<td>A transaction that occurs within your organization, such as hiring or terminating a worker</td>
</tr>
<tr>
<td>Field</td>
<td>An area that contains data related to a particular primary or related business object</td>
</tr>
<tr>
<td>Filter</td>
<td>A clickable icon used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns</td>
</tr>
<tr>
<td>Full Time Equivalent (FTE) %</td>
<td>The ratio of a worker's scheduled weekly hours to the weekly hours for the business site. If a worker works 20 hours a week and the business site weekly hours are 40, then the worker's FTE% is 50%</td>
</tr>
<tr>
<td>Functional Area</td>
<td>A group of tasks, reports and objects. For example, the HCM solution includes functional areas such as Benefits, Talent &amp; Performance, Absence and Manager/Employee self-service. Each of Workday's solutions is grouped into distinct functional areas</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of workers in an organization</td>
</tr>
<tr>
<td>I-9</td>
<td>An employment eligibility verification. A document all workers must complete to verify their identity and employment authorization</td>
</tr>
<tr>
<td>Life Event</td>
<td>A benefit event that occurs in your personal life, such as getting married or having a child</td>
</tr>
<tr>
<td>Open Enrollment Event</td>
<td>A type of enrollment event that typically occurs once per year system wide. Unlike benefit event enrollment, which is triggered by a life event or job change, an open enrollment event applies to an entire employee and retiree population</td>
</tr>
<tr>
<td>Org Chart</td>
<td>A visual depiction of how an organization is structured. It outlines the roles and responsibilities of and relationships among individuals within an organization</td>
</tr>
<tr>
<td>Performance Review Process</td>
<td>The formal process to establish annual worker goals and conduct the performance evaluation process, which includes review and rating of goals, competencies and position responsibilities</td>
</tr>
<tr>
<td>Pre-Hire</td>
<td>A term used in Staffing to identify individuals (candidates) before employment and used in Recruiting to identify candidates who are in the Offer or Background Check stage</td>
</tr>
<tr>
<td>Roles</td>
<td>A group of people with specific responsibilities and permissions. When a business process runs, the role for each step includes all of the workers in that role in the business process target organization</td>
</tr>
<tr>
<td>Staffing Event</td>
<td>Any event that changes your position or job, such as a hire, a transfer or a promotion</td>
</tr>
<tr>
<td>Supervisory Organization</td>
<td>Workers grouped into a management hierarchy. Supervisory organizations are the primary organization type in Workday. All approvals and checklists are established for the supervisory organization hierarchy, with possible variations for particular organizations within that hierarchy</td>
</tr>
<tr>
<td>Task</td>
<td>An action you must take in a business process, unless you reassign or delegate the task. For example, notifications or inbox alerts are triggered by steps in a business process</td>
</tr>
<tr>
<td>To-Dos</td>
<td>Reminders to do something. They can be part of business processes and must be marked complete before the workflow will go to the next step</td>
</tr>
<tr>
<td>W-4</td>
<td>A withholding allowance certificate. This will inform an employer of how much income tax to withhold from your paycheck</td>
</tr>
<tr>
<td>Worker</td>
<td>A person who is either an employee hired by a company or a contingent (contracted) worker</td>
</tr>
<tr>
<td>Worker Profile</td>
<td>A continuously updated page that provides a view of an employee's experience, skills, education, etc.</td>
</tr>
<tr>
<td>Worklet</td>
<td>A compact report displayed as an app on your Home page, providing easy access to tasks and information you use on a regular basis, including: Pay, Time Off, Personal Information, and Benefits</td>
</tr>
</tbody>
</table>

However, this table does not seem to exactly represent the content of the original text. The original text discusses business processes, staffing events, roles, and other similar concepts, which are likely to be covered in the appendix. The provided table seems to cover general terms used in Workday’s human resource management system, which might not necessarily correspond to the content of the text.