Changes Coming with New Workday HR and Finance System

BYU Dining Services

Version 2 – December 13, 2024

There are two minor updates from version 1 which are highlighted in red.

BYU goes live with Workday on Saturday, December 21. This document outlines changes to business processes and organization coming to Dining Services with this new system.

Contents

New Emphasis on Self-Service

Workday is designed to make HR and Finance processes more efficient by allowing employees to initiate their own HR and Finance tasks. Often this will be as easy as a few clicks in the system. Once workers are comfortable, it will be much easier to perform tasks themselves rather than asking for someone else to do it via email or a phone call.

Best practice dictates that people closest to the information are in the best position to initiate and approve the transactions. This improves accuracy and efficiency across campus, prevents fraud, and empowers employees to get their work done.

Here are some examples of common transactions and how they will be different in Workday:

Transaction	Current Process	Process in Workday
Spend Authorizations and Expense Reports	Secretaries and support staff have proxy access in Chrome River to complete expense reports on behalf of managers or other department employees.	Best practice is for employees to initiate their own expense reports.
Financial Report Access	Access to financial reports is manually managed through access groups.	Employees automatically receive access to Workday reporting based on their position's areas of responsibility.
Requisitions	Purchasing helps users submit Y-Marketplace requisitions.	Employees will initiate their own Workday requisitions.
eForms/Job Changes	HR Coordinators submit eForms for PT employees in their department. Manase submits EForms for FT.	Managers submit job changes for employees in their own organization. HR will assist with positions recruited using the Dining Hiring Portal.
Job Postings	Employees with hiring manager access in area or DESO submit job postings.	Managers can post their own jobs. HR will assist with positions recruited using the Dining Hiring Portal.
Time Approvals	Managers submit time approvals after employees are paid.	Managers have a one-day window each week to complete time approvals for the previous week to ensure the employee is paid.
Time Corrections	Employees go to a time manager in their area to make corrections to reported time.	Employees make corrections to timesheet before submitting time for approval.

Managers in Workday

The term "Manager" in Workday is used to describe an employee that is the direct supervisor for one or more employees (including student employees).

Managers will have direct access to initiate tasks allowing them to better manage their team. For example, they can begin the hire process for new employees, set goals for their employees, start a performance review, and other tasks.

Because of the increased permissions that managers will inherently hold, only non-student employees are authorized to be set as managers. An employee's manager should be the non-student employee that most closely supervises their day-to-day work. This will ensure that we align with the intended design and workflow of Workday.

Unified HR and Impacts on Recruiting

BYU is adjusting the "service delivery model" (SDM) for HR and Finance services across campus. For HR, this means that many business processes previously executed on the department or area level will be moved to either self-service or BYU Human Resource Services. The Dining Employee Success Office (DESO) will be merging into the HR Recruiting Office but will still primarily operate out of the University Services Building and provide much of the same support that DESO provides today.

Here is a quick look at different employee roles relating to recruiting starting January 1, 2025:

- **Recruiting specialist** (solid-line reports to HR Recruiting Manager, dotted-line reports to Joe Tiapson)
    - Coordinate job posting and recruiting (the "primary recruiter") for "part-time front-line support positions" (positions whose recruitment has historically been managed using the Dining Hiring Portal). This is most of our hiring and constitutes around 90% of Dining Services positions.
- **Joe Tiapson**
    - Caretaker for Dining's service level agreement with HR to ensure that unified HR services are meeting Dining's needs.
    - Oversee the DESO transition over to HR.
    - Dotted-line supervise the recruiting specialist.
- **Department managers**
    - Designate a full-time employee as the recruiting contact. This is the new term for today's HR coordinators.
- **Recruiting Contacts**
    - Communicate front-line support staffing needs to the recruiting specialist.
    - Liaise with recruiting specialist to ensure support for department recruiting needs.
    - Help with PT front-line support recruiting, especially during busy times. Recruiting contacts will not have access to manage job postings or positions in Workday but will continue to support recruitment processes using the Dining Hiring Portal.
- **Managers**

  - Will have hiring manager access for all employees under their jurisdiction.
  - Authorized to direct hire PT front-line support employees under their jurisdiction and support recruiting efforts as needed.
  - Primary recruiter for all other positions (FT positions and PT specialized positions) that report to them. Management approvals are still required to open vacant positions (upline to the managing director for FT positions and upline to the department manager for PT specialized positions).

Time Approvals

Within Workday, both managers and employees have increased autonomy and responsibility to submit and approve timesheets. Workday empowers hourly employees to record their time, review their timesheet, and make corrections when errors are made. To verify the accuracy of time worked, BYU relies on managers (those who supervise the work of the employee) to verify their employees' reported hours. The manager review helps BYU continue to be good stewards of sacred resources by encouraging proper time reporting and helps prevent time theft.

Employees

- Employees must accurately record their time. In addition to checking in and out, time must be submitted weekly at the end of each week using the Workday application. *Best practice is for the employee to do this when checking out for their last shift of the week. Time not submitted by 8:00 AM on Monday the following week will not be picked up by the payroll process, which means that the employee will not be paid until the subsequent pay period (**a two-week delay**).*
- Self-corrections are to be made by the employee before submitting their time.

Managers

- Managers must approve their employees' submitted time by 11:59 PM on Monday the following week. Managers who do not complete their time approvals by the deadline will be subjected to a compliance process. The first Monday for time approvals will be Monday, January 6.
- If the manager does not approve the submitted time by noon of the deadline day, an escalation notification will be sent to the manager's manager.
- Managers are not able to change employee time, but they are able to send it back to the employee with comments.
- Managers with front-line employees should use Dining Services' Employee Labor Audit Report to compare reported time against scheduled time when completing

time approvals. Managers will receive an email over Christmas Break with instructions on using the new Workday version of this report.

- If a manager is unable to approve their employee's time due to a vacation or other short-term leave, they can delegate this approval to another manager. Delegation of approval processes come with security implications so delegations will be limited to temporary, short-term timeframes (usually one to two weeks). Time approvals should not be delegated to student employees. See "Delegations" for more information.
- Workday will mass approve all submitted time for at least the first quarter of 2025 once the payroll. Managers can send time back to the employee, but this will not prevent the employee from being paid for the originally submitted time unless the employee makes and submits a change before payroll is run. Submitted corrections made after the deadline will be reflected on the following paycheck.

Department Managers

- Department managers are responsible for ensuring that all managers have time each Monday to complete their time approvals.

Employee Meal Credit

- Meal credit will still be issued each night for employee time reported the previous day.
    - Time does not need to be "submitted" by the employee to be pulled by DTG's employee meal credit application. As long as a check in and check out are reported it will create a shift and the employee will receive credit.
    - Time corrections will also still be calculated each night, which may occasionally result in employees losing meal credit or getting a negative meal credit balance.
- Employees current classified as "¾ time employees" will be shifted from the employee meal card to employee meal credit. This is because there will be less separation between ½ and ¾ time employees in Workday (now both will be called part-time staff).
    - ¾ time employees will start receiving meal credit once they begin checking in and out of Workday.
    - Meal cards will be terminated the second week of January. This provides an overlap so that ¾ time employees can build a meal credit balance.
- Some areas currently request "special meal credit" for employees on special occasions (e.g., birthdays, job well done, extra meal) using a form. Special meal credit will be retired on Monday, December 30, 2024. Dining Services is working on a

new program that will be unveiled in early 2025 to recognize employees who have gone above and beyond.

Delegation

Delegation Principles

- Workday empowers employees to initiate or approve transactions directly. However, there are times such as illness or vacation when another employee can be delegated certain task initiations or business process to enable workflow efficiency.
- Delegations are intended to be done on a short-term basis.
- Exceptions to the short-term delegation limitation are:
  - Expense report initiation
  - Spend authorization initiation
- HR-approved extended absence duties will be reassigned in Workday rather than delegated.
- Delegation is NOT intended to be a long-term solution to off-load tasks to another employee. Doing so compromises security policies and disrupts the intended design and workflow of Workday.
- Delegating responsibilities transfers Workday security access to the person taking on the task. Every function delegated increases access to private information. As a result, delegation must be done intentionally and with caution to keep information secure and safe.
- A delegated task does not alleviate the delegator of the accountability that the task has been done correctly and with proper approval.
- Only the employee wishing to delegate a task may initiate the delegation and must include a start and end date. If the person to whom a task was delegated leaves, the employee must initiate the delegations with a replacement employee.
- Routing restrictions for business process are still applied during delegation.
  - Example: Request Time Off Business Process- Manager (Bob) delegates a business process to his employee (Sue) while he is out on vacation. The Request Time Off Business Process requires a Manager approval. Routing restrictions will prevent Sue (as the Delegate) from being able to approve her own time off request.
- The only processes authorized for delegation to a student employee include:
  - Expense Report initiation
  - Spend Authorization initiation

- Delegation will be monitored through timestamps and reporting. After a short learning period, a compliance process, including department penalties, will be instituted for the misuse of task and approval delegation.

Delegation of Task Initiation

- Task initiation activities that can be delegated include spend authorizations and expense reports.
    - When an employee delegates the initiation of a task, the delegate has access to all of that employee's history for that task. Example: When an expense report delegation is created, the delegate has access to all of the existing expense reports.
    - Delegation must be done intentionally and with caution to keep information secure and safe.
    - Delegations should be limited to employees in the same supervisory organization (i.e., College, Division, or Department to which they are assigned).
    - Student employees can be designated as delegates.
    - Delegates can be assigned for up to one year for spend authorizations and expense reports only. All other delegations must be short-term in nature (usually one to two weeks).
    - Delegates can only be assigned by the employee granting the delegation to their tasks.

Delegation of Business Process Approval

- Business process approvals that can be delegated include Time Entry, Correct Time Off, and Request Time Off.
    - Delegates for business process approvals will have access to view all historical data in Workday related to that business process. Delegation must be done intentionally and with caution to keep information secure and safe.
    - Delegations should be limited to employees in the same supervisory organization (i.e., College, Division, or Department to which they are assigned).
    - Student employees can NOT be delegates for approvals.
    - Delegates should be assigned for a short time only (i.e., one week)
    - Delegates can only be assigned by the employee granting the delegation of their approvals.

Inbox Delegation

- Employees should only delegate specific business processes and should NOT delegate their entire inbox to another employee. This action poses several security risks as delegates will be given access to sensitive data including financial reporting, budgets, compensation, performance reviews, employee data, etc.

Other Business Process Delegation

- Beyond Time approval, Expense Report initiation, and Spend Authorization initiation addressed in detail above, there are many other business processes that can be delegated. These come with the same restrictions and cautions as mentioned previously, including:
    - Delegations are intended to be done on a short-term basis.
    - Delegating responsibilities transfers Workday security access to the person taking on the task.
    - Every function delegated increases access to private information.
    - Delegation must be done intentionally and with caution to keep information secure and safe.
- Because these additional areas are less frequently delegated and the access being granted to another person can be significant, prior to delegating other business processes the planned delegation should be reviewed with their Business Partner or Operations Specialist.