Workday Pro - Absence

Report Writer

The following topics have been taken directly from the Workday Report Writer course manual and will help prepare you for the Workday Pro exam. These topics serve as a study guide for the exam.

Course Goals and Objectives

This course introduces you to the Workday Report Writer tool. You will learn how to leverage Workday business objects and data sources to access the report data you need. You will also learn how to build custom reports to meet business requirements from various functional areas. By the end of this course, you will be able to:

- Build custom reports.
- Sort and filter data.
- Configure prompts.
- Configure totaling, grouping, and outlining.
- Manage report security.
- Schedule reports.
- Utilize matrix reports.
- Work with calculated fields.
- Maintain optimal report performance.

You should know:

- Common reporting terminology.
- The following key concepts:
    - Report Data Source (RDS)
    - Primary Business Object (PBO)
    - Related Business Object (RBO)
    - Class Report Field (CRF)
- Tools to determine the primary business object and data source of a report.
- Available options when performing the following functions on custom reports:
    - Sorting
    - Filtering
    - Configuring prompts
    - Totaling, grouping, and outlining data
- Factors that impact report security.
- Available options when scheduling a report.
- Matrix reporting capabilities.
- Available options when configuring charts on reports.
- The purpose of calculated fields and how to control access to them.
- The capabilities and use cases of the following functions: Lookup Related Value and Format Date
- Factors that can impact the performance of reports

Your screens may vary from this document. ©2015 Workday, Inc.

Workday Pro - Absence

HCM Fundamentals

The following topics have been taken directly from the HCM Fundamentals course manual and will help prepare you for the Workday Pro exam. These topics serve as a study guide for the exam and will help you prepare as you study.

Key Concepts

- Core Concept Overview
- Navigation
- Organization Structures
- Creating Supervisory Organizations
- Other Organization Types and Hierarchical Rollups
- Staffing Models
- Jobs and Positions
- Creating Jobs and Positions Using Our Delivered Staffing Models
- Compensation Components
- Configuring Compensation
- Security
- Defining the Security Groups
- Modifying Security
- Business Process Framework
- Modifying Your Business Processes
- Reports for Understanding and Managing Business Processes
- Hiring Employees
- Contingent Workers
- Staffing Movement
- Termination and Job Overlap
- Task Reassignment and Delegation
- Event Management and Security
- Self Service
- High Level Overview of Integration
- Understanding the Integration Flow
- Defining High Volume Events
- Workday Standard Reports: XpressO and Custom Report Creation
- Reporting Roles and Strategies
- Custom Fields
- Resources
- Workday Community
- Updates and New Functionality
- Documentation Overview
- Workday Mobile
- Workday on the iPad, iPhone, Android and other mobile devices

You should know:

- Basic navigation in Workday
- The definition of the Core Concepts: Supervisory organizations, staffing models, job profiles, compensation, security, and business processes.

You should know how to:

- Create a location and supervisory organization
- Assign roles to an organization
- Create subordinate supervisory organizations
- Divide a supervisory organization
- Create a company and cost center organization
- Create a hierarchy
- Differentiate staffing models

Your screens may vary from this document. ©2015 Workday, Inc.

Workday Pro - Absence

- Differentiate job profiles, job families, and job family groups
- Create a job profile
- Create positions and set hiring restrictions
- Create compensation eligibility rules
- Create a Compensation Grade with grade profiles
- Create Salary and Allowance plans
- Create a Compensation Package
- Understand and identify domain security policies
- Understand and identify business process security policies
- Edit and copy business processes
- Hire an employee
- Contract a contingent worker
- Change a worker's job
- Terminate a worker
- Cancel and Rescind an event
- Correct an event
- Set up a delegation
- Move workers between supervisory organizations
- Inactivate a supervisory organization

Your screens may vary from this document. ©2015 Workday, Inc.

Workday Pro - Absence

Absence Management: Configuration and Administration

The following topics have been taken directly from the Absence Management: Configuration and Administration course manual and will help prepare you for the Workday Pro exam. These topics serve as a study guide for the exam and will help you prepare as you study.

Description

This four-day instructor-led course consists of lectures, demonstrations, and hands-on activities covering absence setup and administration. You will configure functionality and apply the core concepts of Workday Absence Management, set up time off and leave calculations using Workday's Calculation Engine and Calculated Fields, configure business processes, and administer time off and leave plans. Course Goals and Objectives.

- Define and differentiate time off plans and leave types.
- Configure a time off plan and its components.
- Design calculation engine calculations to drive time off plan functionality.
- Configure a leave type and its components.
- Define and execute basic administrative tasks.
- Configure the four business processes related to Absence Management.

Identify and use delivered reports relating to time off and leaves of absence. Key Concepts

- There are two types of absence plans in Workday: time off and leave. Whether you create a plan as a time off or a leave will depend on your business requirements for that plan.
    - Time off plans are at the center of all time off rules, calculations, transactions and processes in Workday. There are four main components of time off plans: accruals, time off, period schedules, and balance periods
- The Workday Calculation Engine is a core system utility that enables you to define time off calculations and the business logic and rules governing time off. It is used to define accruals, eligibility rules, carryover amounts, upper and lower limits, and other time off values.
- Leave types are at the center of all leave of absence rules, calculations, transactions and processes in Workday.
    - There are four main components of leave types: entitlements, balance calendars, leave of absence rules, and leave families

You should know how to

- Create a time off plan that track balances
- Configure carryover limits
- Configure upper limits
- Configure lower limits
- Explain the impact of the accrual frequency method
- Define accrual priorities
- Define time off priorities
- Define validation rules on a time off
- Allow administrative overrides of a validation rule
- Calculate accruals using a conditional calculation
- Calculate accruals using a lookup calculation
- Ensure that accrual calculations account for mid-period terminations and hires

Your screens may vary from this document. ©2015 Workday, Inc.

- Prorate accruals
- Define eligibility criteria for a time off plan
- Define scheduling logic on a time off plan
- Create an accrue-as-you-go plan
- Create a plan that becomes available when another plan drops below a certain limit
- Create a leave type that tracks balances
- Define eligibility criteria for a leave type
- Define entitlements for a leave type
- Define validation rules for a leave type
- Define supporting data for bereavement leave
- Create an intermittent time off plan and associate it with a leave type
- Coordinate two leave types
- Correct a time off request

You should know:

- The definition and purpose of all time off plan, time off, and accrual fields
- The definition and purpose of all leave type fields
- The general purpose of each calculation engine calculation:
    - Absence Balance
    - Aggregate Calculation
    - Arithmetic Calculation
    - Build Date Calculation
    - Conditional Calculation
    - Constant Date Calculation
    - Constant Value Calculation
    - Date Difference Calculation
    - Date Extract Calculation
    - Date Increment/Decrement Calculation
    - Instance Set Comparison
    - Logic Calculation
    - Lookup Calculation
    - Value Comparison Calculation

Your screens may vary from this document. ©2016 Workday, Inc.

Business Process Fundamentals

The following topics have been taken directly from the Business Process Fundamentals course manual and will help prepare you for the Workday Pro exam. These topics serve as a study guide for the exam and will help you prepare as you study.

Course Goals and Objectives

- Gain an understanding of the concepts involving Workday business process Framework.
- Gain helpful information maintaining Business Process Definitions going forward.

You should know:

- Business process definition terminology
- The purpose of the Business Process Configuration Options Report
- Business process columns
- Business process step types
- The relationship between business processes and organizations
- The relationship between business process definition effective dates and event initiation dates How to locate business process events
- The components of the configurable security framework including business process security policies

You should know how to:

- Edit the business process
    - How to add and remove steps from a business process definition
- Configure the following:
    - Configurable Validation Message Text
    - Maintain Validation Rule
    - Create. Maintain, and Troubleshoot Step Conditions
    - Maintain Action Label Override
    - Maintain Step Help-Text
    - Maintain Related Links
    - Maintain Step Delay
    - Maintain Advanced Routing
    - Create Questions and a Questionnaire and add it to a business process definition
    - Adding a Report Step
    - Associate a Task with a To-Do item
    - Create and Distribute a Document or Task
    - Enable Attachments
    - Embed a Standard or Custom Report or Report Group

Your screens may vary from this document. ©2016 Workday, Inc.

Workday Pro - Absence

- Setup approvals for business processes including ad hoc approvals and a consolidated approval chain
- Maintain ToDo's and Checklists
- Manage a business process for a worker
- Assign roles to a worker
- Correct, cancel, and rescind an event
- Manage Mass Operations
- Configure notifications (system, custom, and email templates)

Your screens may vary from this document. ©2016 Workday, Inc.

Configurable Security Fundamentals

The following topics have been taken directly from the Configurable Security Fundamentals course manual and will help prepare you for the Workday Pro exam. These topics serve as a study guide for the exam and will help you prepare as you study.

Course Description

In this course you will work through hands on activities that are designed to build a foundation of knowledge in Workday's Configurable Security model. You will gain an understanding of the various types of Security Groups including User-based, Role-based and Job-based. You will also learn how to navigate through Workday's Functional Areas, Domains and Sub-Domains. Lastly, you will edit both Domain Security Policies as well as Business Process Security Policies.

Course Goals and Objectives

Understand how security is configured in Workday and the differences between the various security groups that are available.

You should know:

- Security Landscape
    - Functional Areas, Domains and Business Process Types
    - Domain Security Policies
    - Business Process Security Policies
- Security Groups
    - Delivered & Workday Assigned Security Group Types
    - Constrained vs. Unconstrained Security Groups
    - User-Based Security Groups
    - Role-Based Security Groups
    - Job-Based Security Groups
    - Segment-based Security Groups
    - Membership Security Groups (Location Membership & Organization Membership)
    - Intersection Security Groups
    - Aggregation Security Groups
    - Service Center Security Groups
    - Integration system security groups
    - Level Based Security Groups
- Security Tips
    - Security methodology
    - The steps for configuring security
    - Recommendations
    - Managing Workforce Security Assignments
    - Security Configuration Restrictions

Your screens may vary from this document. ©2016 Workday, Inc.

- Reports and Other Tools

You should know how to:

- Navigate functional areas
- Navigate domain and business process security policies by functional area
- Edit domain security policies
- Edit business process security policies
- Activate pending security policy changes
- Identify security reports to help with your configuration, management and troubleshooting
- Activate previous timestamps
- Create and manage proxy access policies for environments
- Work with user-based security groups
  - Create user-based security groups
  - Assign users to user-based security groups.
- Work with role-based security groups
  - Maintain Assignable Roles
  - Create role-based security groups (Constrained vs. Unconstrained)
  - Assign roles
- Work with Job-based security groups
  - Create job-based security groups (Constrained vs. Unconstrained)
- Work with segment-based security groups:
  - Create Security Segments
  - Create Segment based security groups
- Work with Membership based security groups
  - Location Membership
  - Organization Membership
- Create Intersection and Aggregation security groups
- Understand limitations of Aggregation and Intersection security groups.
- Work with service center-based security groups
  - Create Service Centers
  - Create Service Center Representatives
  - Create Service Center Based Security groups (Constrained vs. Unconstrained)
- Work with level based security group
  - Maintain leveling mechanism – Compensation Grade Hierarchy or Management Hierarchy
  - Create level-based based security group
- Work with Integration System security groups:
  - Assign Integration System users to Integration System security groups.

Your screens may vary from this document. ©2016 Workday, Inc.