The Texas A&M University System
Workday Training Course Catalog and
Video Help Release Schedule
Overview

This curriculum includes training courses focused on Core HR, Payroll, and Benefits employees, HR Departmental Processors / Liaisons and managers, and is organized by Workday security roles, which may differ slightly from current system access.

This just-in-time curriculum will introduce The Texas A&M University System (TAMUS) members to Workday through a blended approach of the following learning opportunities and materials:

- eLearning courses (TrainTraq)
- Instructor-Led courses (On-Site)
- Virtual Instructor-Led courses (WebEx)
- Video Help (Workday Help Site)
- Job Aids (Workday Help Site)

Training Strategy

Our training strategy is based on Prosci’s ADKAR model describing how individuals change and is comprised of the following:

- Awareness courses to introduce topics and provide a general level of understanding of a topic
- Skills courses to help employees gain knowledge and build skills on how to use business processes in Workday
- Readiness activities to help employees become more familiar with Workday

Using this Catalog

This catalog is organized by stakeholder group, and includes sections for Core HR, Payroll and Benefits employees, HR Departmental Processors / Liaisons, Managers and Employees / Retirees, and a section of finance-related courses.

The “Security Roles” column denotes security roles that are required to complete the course, unless the security role is denoted with an “optional” tag.

This catalog also includes the video help release schedule, for those who wish to include these videos in member-developed training materials. Please see pages 23 and 24.

Please remember that all training material and video help is in DRAFT form until after Workday 29.
# Course Catalog

The following courses comprise the TAMUS Workday and legacy systems training program.

## Core HR, Benefits and Payroll

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Purpose</th>
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</table>
| TAMUS Workday Core Concepts for Employees        | The purpose of this course is to provide an introduction to Workday including functionality and processes | - Provide users with a basic understanding of Workday  
- Provide an understanding of the use of supervisory organizations  
- Detail the impacts and usage of self-service within Workday | 60 Minutes | elearning | - All employee security roles (optional)  
- Core HR, Payroll and Benefits Partners  
- HR Departmental Processor / Liaison security roles  
- Manager |
| Navigating Workday for Employees                  | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation | - Demonstrate how to navigate the home page and worklets  
- Explain the Inbox and notifications, and how to use the search and mobile features | 60 Minutes | elearning | - All employee security roles (optional)  
- Core HR, Payroll and Benefits Partners  
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| Workday Core HCM Concepts for Core HR, Benefits and Payroll | The purpose of this course is to introduce Workday staffing models and how they apply to TAMUS | • Define staffing models  
• Describe the difference between managing delegations for business processes and delegating a single task | 60 Minutes | elearning | • Core HR, Payroll and Benefits Partners  
• Absence Partner* |
| Workday’s Approach to HR Business Processes for Core HR, Benefits and Payroll | The purpose of this course is to provide an overview of HR business processes from the employee’s perspective | • Discuss multiple HR processes related to daily interactions in Workday  
• Introduce Workday terminology | 60 Minutes | elearning | • Core HR, Payroll and Benefits Partners  
• Absence Partner* |
| Safety | The purpose of this course is to provide an overview of safety and incident reporting | • Detail key concepts and terminology related to safety, including safety incident reporting | 30 Minutes | elearning | • HR Partner  
• Safety Partner  
• Workers Compensation Partner |
| Safety Q&A Forum | The purpose of this forum is to provide participants with the opportunity to ask Kevin McGinnis questions directly | • TBD | 60 Minutes | Facilitated Q&A | • HR Partner  
• Safety Partner  
• Workers Compensation Partner |
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| Positions and Requisitions| The purpose of this course is to provide an understanding of the requisition and position management functions | • Detail position management processes, including creating and editing a position  
• Discuss job requisition processes, including creating a new position and assigning costing allocation | 180 Minutes | Classroom  | • Compensation Partner  
• Faculty Partner  
• HR Partner  
• Payroll Partner  
• Recruiting Partner |
| Recruiting                | The purpose of this course is to provide an understanding of the full-cycle recruiting process | • Discuss job application processes and how to update a job posting  
• Detail the process to close a job requisition and position  
• Outline the various recruiting exceptions, including changing and freezing a job requisition  
• Discuss recruiting reports | 180 Minutes | Classroom  | • HR Partner  
• Recruiting Partner |
| Hiring and Onboarding     | The purpose of this course is to provide an overview of the onboarding process | • Detail the management of the hiring process and onboarding process  
• Review related reports for onboarding and hiring, such as the Form I-9 monitoring | 120 Minutes | Classroom  | • Faculty Partner  
• Graduate Studies Partner  
• HR Partner  
• Recruiting Partner |
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| Benefits          | The purpose of this course is to provide an overview of benefits and life events | • Review key benefits concepts and terminology  
• Detail changes for employees and retirees, such as change benefits  
• Detail the management of Medicare information  
• Review related reports for benefits and life events | 120 Minutes | Classroom   | • Benefits Partner  
• Retiree Partner  
• System Benefit Support |
| Time Off and Leave| The purpose of this course is to provide an overview of time off and leave | • Detail key concepts, terminology and changes as related to employee leave  
• Detail less frequent processes related to leaves and time off  
• Review related reports for time off and leave | 120 Minutes | Classroom   | • Absence Partner*  
• HR Partner |
| Payroll           | The purpose of this course is to provide an overview of the payroll process | • Detail key concepts and terminology related to payroll, such as pay cycle event and tax election  
• Discuss payroll reporting code and less frequently utilized areas | 120 Minutes | Classroom   | • Payroll Partner  
• Payroll Tax / Withholding Partner  
• International Tax View Only Security Role |
## Job and Organizational Changes

The purpose of this course is to provide a process overview related to job and organizational changes:

- Detail items triggered by Employee Self-Service, such as personal data and contact information
- Detail terminology and changes related to staffing, including staffing and initiating a change in job
- Detail less frequent processes related to moving a worker and changing an organization assignment
- Review related reports for job and organization changes

**Overview:**

- Detail items triggered by Employee Self-Service, such as personal data and contact information
- Detail terminology and changes related to staffing, including staffing and initiating a change in job
- Detail less frequent processes related to moving a worker and changing an organization assignment
- Review related reports for job and organization changes

**Duration:** 180 Minutes

**Delivery:** Classroom

**Security Roles:**

- Faculty Partner
- Graduate Studies Partner
- HR Partner
- Payroll Partner

## Talent

The purpose of this course is to provide an overview for the talent process:

- Explain talent management related items, such as manage awards and manage internal projects
- Review related reports for talent, including worker expiring certifications

**Overview:**

- Explain talent management related items, such as manage awards and manage internal projects
- Review related reports for talent, including worker expiring certifications

**Duration:** 60 Minutes

**Delivery:** Classroom

**Security Roles:**

- Talent Partner

## Merit and Compensation

The purpose of this course is to provide an overview of merit and compensation:

- Detail the processes related to compensation, such as proposing a compensation change
- Review the process related to requesting a compensation change and one-time payment

**Overview:**

- Detail the processes related to compensation, such as proposing a compensation change
- Review the process related to requesting a compensation change and one-time payment

**Duration:** 60 Minutes

**Delivery:** Classroom

**Security Roles:**

- Compensation Partner
- Faculty Partner
- HR Partner
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<tr>
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</table>
| Separation        | The purpose of this course is to provide an overview of separation        | • Detail items related to separation, including COBRA and Medicare information  
• Provide an understanding of the processes related to termination and ending a contingent worker contract | 60 Minutes | Classroom | • Absence Partner*  
• HR Partner  
• Payroll Partner |
| Performance       | The purpose of this course is to provide an overview of performance management | • Discuss items related to team performance, such as the performance review process and goals  
• Review performance items related to new hires, promotions and transfers  
• Review exceptions or less frequent events on cancel and rescind, such as giving an award and feedback  
• Review reports related to performance management | 60 Minutes | Classroom | • Talent Partner |
| Management        |                                                                           |                                                                                                                                                                                                         |            |           |                                              |
### Workday Life – 4 Part Series

**Purpose**: The purpose of these events is to provide Core HR, Payroll and Benefits Partners with an overview of change impacts related to the Workday transition

- Define security roles and supervisory organizations
- Describe changes that will come about with Workday
- Detail various change impacts as they relate to key functional areas
- Provide a general awareness of key concepts within Workday

**Security Roles**: Core HR, Payroll and Benefits Partners

**Duration**: WebEx

**Delivery**: Core HR, Payroll and Benefits Partners, Budget Partner, Cost Center Approver, Sponsored Research Services

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* Denotes a full-time HR, Benefits and/or Payroll employee

** Denotes a full-time HR Departmental Processor or Liaison employee
### TAMUS Workday Core Concepts for Employees

**Course Title:** TAMUS Workday Core Concepts for Employees  
**Purpose:** The purpose of this course is to provide an introduction to Workday including functionality and processes  
**Overview:**  
- Provide users with a basic understanding of Workday  
- Provide an understanding of the use of supervisory organizations  
- Detail the impacts and usage of self-service within Workday  
**Duration:** 60 Minutes  
**Delivery:** elearning  
**Security Roles:**  
- All employee security roles (optional)  
- Core HR, Payroll and Benefits Partners  
- HR Departmental Processor / Liaison security roles  
- Manager

### Navigating Workday for Employees

**Course Title:** Navigating Workday for Employees  
**Purpose:** The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation  
**Overview:**  
- Demonstrate how to navigate the home page and worklets  
- Explain the Inbox and notifications, and how to use the search and mobile features  
**Duration:** 60 Minutes  
**Delivery:** elearning  
**Security Roles:**  
- All employee security roles (optional)  
- Core HR, Payroll and Benefits Partners  
- HR Departmental Processor / Liaison security roles  
- Manager
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</table>
| Workday Core HCM Concepts for HR Departmental Processors / Liaisons | The purpose of this course is to provide an introduction to terminology and key concepts as well as an overview of business processes | • Review Workday basics, such as security roles and real time data  
• Detail getting work done through self-service  
• Detail the process of delegating work and requesting a delegation change  
• Provide an overview of common Workday processes, such as those related to recruiting and talent management | 120 Minutes | WebEx | • HR Contact  
• I-9 Processor  
• Recruiting Coordinator  
• Talent Analyst  
• Timekeeper |
| Recruiting | The purpose of this course is to provide an overview of the recruiting process | • Detail items related to position management and compensation, such as create position and request compensation change  
• Review cost allocation and the job application process  
• Detail processes for staff and evergreen requisition as well as exceptions | 120 Minutes | WebEx | • HR Contact  
• Recruiting Coordinator |
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</thead>
</table>
| **Staffing and Onboarding** | The purpose of this course is to provide an overview of onboarding, hiring, staffing and security roles | • Detail onboarding items, including processes related to the Form I-9  
• Detail hiring and staffing, such as hire employee or contract contingent worker and add additional job  
• Review of assigning roles and changing organization assignments | 120 Minutes | WebEx | • HR Contact  
• I-9 Processor |
| **Goals and Performance** | The purpose of this course is to provide a general overview of the processes related to goals and performance management | • Detail initiated processes, such as cascade goals  
• Discuss steps that must be taken by employees and managers for both goal setting and performance reviews | 30 Minutes | WebEx | • Talent Analyst |
| **Tracking Time** | The purpose of this course is to provide an overview of time tracking | • Detail items related to time tracking, including entering time and assigning a work schedule  
• Review exceptions related to time tracking, including cancel and rescind assigned work schedule  
• Review reports related to time tracking | 30 Minutes | WebEx | • Timekeeper |
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</table>
| Managing Time Off and Leave                      | The purpose of this course is to provide an overview of how to manage time off and leave | • Detail processes related to time off, such as cancel request time off  
• Detail processes related to leave, including correcting and canceling a leave of absence or returning from leave  
• Review reports related to time off and leave | 30 Minutes | WebEx    | • Absence Partner**  
• HR Contact |
| Answering Common Employee Questions              | The purpose of this session is to provide answers and tips for common questions from employees | • Provide a list of questions and answers for common questions asked by employees | 60 Minutes | WebEx    | • HR Contact  
• I-9 Processor  
• Recruiting Coordinator  
• Talent Analyst  
• Timekeeper |
| Answering Common Manager Questions               | The purpose of this session is to provide answers and tips for common questions from managers | • Provide a list of questions and answers for common questions asked by managers | 60 Minutes | WebEx    | • Absence Partner**  
• HR Contact  
• Recruiting Coordinator  
• Talent Analyst  
• Timekeeper |
| Absence Partner Training for HR Departmental Processors and Liaisons | The purpose of this course is to provide an overview of the processes that are essential to performing job duties related to this security role | • Provide an understanding of the time off and leave processes that relate to the Absence Partner security role  
• Provide an overview of the staffing processes that relate specifically to the Absence Partner role | 30 Minutes | elearning | • Absence Partner** |
### Course Title: Drop In Learning Lab for HR Departmental Processors and Liaisons

**Purpose:** The purpose of this learning opportunity is to reinforce training by allowing participants to log in to Workday prior to Go Live and walk through common actions they will perform.

**Overview:**
- Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday.

<table>
<thead>
<tr>
<th>Duration</th>
<th>Delivery</th>
<th>Security Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 Minutes</td>
<td>Self-Paced Learning</td>
<td>• HR Contact</td>
</tr>
</tbody>
</table>

### Course Title: Viewing Reports in Workday

**Purpose:** The purpose of this course is to provide an overview of reports specific to the view only security role.

**Overview:**
- Provide participants with an understanding of how to access and run reports in Workday.
- Provide an understanding of the reports that are available to those assigned to a view only security role.

<table>
<thead>
<tr>
<th>Duration</th>
<th>Delivery</th>
<th>Security Roles</th>
</tr>
</thead>
</table>
| 30 Minutes | elearning  | • Immigration Services for Faculty & Scholars (ISFS) View Only  
• International Student Services (ISS) View Only  
• International Tax View Only  
• ISSG TAMUS Report Execution Group |

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## Workday Training Course Catalog

### Managers

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</table>
| TAMUS Workday Core Concepts for Employees        | The purpose of this course is to provide an introduction to Workday including functionality and processes | • Provide users with a basic understanding of Workday  
• Provide an understanding of the use of supervisory organizations  
• Detail the impacts and usage of self-service within Workday | 60 Minutes | elearning | • All employee security roles (optional)  
• Core HR, Payroll and Benefits Partners  
• HR Departmental Processor / Liaison security roles  
• Manager |
| Navigating Workday for Employees                 | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation | • Demonstrate how to navigate the home page and worklets  
• Explain the Inbox and notifications, and how to use the search and mobile features | 60 Minutes | elearning | • All employee security roles (optional)  
• Core HR, Payroll and Benefits Partners  
• HR Departmental Processor / Liaison security roles  
• Manager |
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</table>
| **Workday Core HCM Concepts for Managers**       | The purpose of this course is to provide an overview of key concepts and terminology for managers | • Detail the usage of staffing models  
• Review calculating overtime and delegating work  
• Review functionality that allows employees and managers to initiate actions and processes on their own  
• Detail the specifics related to initiating, review and approving processes | 60 Minutes | elearning | • Manager       |
| **Merit and Performance Management Processes**    | The purpose of this course is to provide an overview of the processes related to merit and performance | • Detail key concepts of processes related to merit, including employee merit award and merit reports  
• Review the performance management processes, including various phases of the performance review and performance management reports | 60 Minutes | elearning | • Manager       |
<p>| <strong>Managing Your Inbox</strong>                          | The purpose of this course is to provide an overview of items related to the Inbox | • Detail how a manager will manage their Inbox, such as delegation as well as notifications | 30 Minutes | elearning | • Manager       |</p>
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</table>
| Recruiting                           | The purpose of this course is to provide an overview of various processes the manager may be involved in related to recruiting | • Detail the job application process  
• Review processes including those related to job requisition and evergreen requisition | 30 Minutes | elearning   | • Manager                |
| Staffing and Separation              | The purpose of this course is to provide managers with an overview of staffing and separation processes | • Review the process of initiating and approving new hires, title changes and switching a primary job  
• Detail the process of termination and approving a resignation | 30 Minutes | elearning   | • Manager                |
| Time Off and Leave / Time Tracking   | The purpose of this course is to provide an overview of various processes the manager may initiate or perform related to time off and leave | • Provide an overview of time tracking and related processes  
• Detail the difference between time off and leaves as well as provide an understanding of relevant business processes | 30 Minutes | elearning   | • Manager                |
| Drop In Learning Labs for Managers   | The purpose of this learning opportunity is to reinforce training by allowing participants to log in to Workday prior to Go Live and walk through common actions they will perform | • Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday | 15 Minutes | Self-Paced Learning | • Manager (readiness metric is 30% of member managers attending the lab) |
### Workday Training Course Catalog

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| Manager Q&A Readiness Forum          | The purpose of this session is to provide a means for Managers to get answers to frequently asked questions that will prepare them for their job responsibilities in Workday | • Detail the member’s answer as to what managers are expected to do in Workday (from the “Who Does What” activity)  
• Answer questions not answered by required training  
• Explain how managers get help | TBD      | Facilitated Q&A managed by the member | • Manager  
(readiness metric is 30% of member managers attending the Q&A session) |
| Video Help for Managers              | The purpose of these materials is to demonstrate how to perform Workday functions | • Reference the supplemental catalog for more detailed information | 3 – 5 Minutes per video | Video | • Manager |
| Performance Management               | The purpose of this course is to provide an in-depth review of the performance management processes | • Detail and review the goal setting process  
• Detail the performance management process including providing a rating | TBD      | elearning | • All Employee, security roles |

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## Finance

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• Provide an understanding of the use of supervisory organizations  
• Detail the impacts and usage of self-service within Workday | 60 Minutes | elearning | • All employee security roles (optional)  
• Core HR, Payroll and Benefits Partners  
• HR Departmental Processor / Liaison security roles  
• Manager |
| Navigating Workday for Employees                 | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation | • Demonstrate how to navigate the home page and worklets  
• Explain the Inbox and notifications, and how to use the search and mobile features | 60 Minutes | elearning | • All employee security roles (optional)  
• Core HR, Payroll and Benefits Partners  
• HR Departmental Processor / Liaison security roles  
• Manager |
### FAMIS Changes

The purpose of this instruction is to provide finance teams with an overview of change impacts and new processes for daily work.

- Detail changes to who oversees AA Codes and define certain new codes and what they will mean
- Explain the changes in completing a payroll cost transfer
- Detail payroll suspense account
- Detail manual vendor payments
- Encumbrances
- Pay History

| 30 Minutes | TBD | TBD |

### SRS Cost Allocation Forum

The purpose of this forum is to provide an opportunity to learn about cost allocation specific to Sponsored Research Services.

- Cost allocation
- TBD

| TBD | TBD | TBD |

### Cost Allocation and Delegation

The purpose of this course is to provide an overview of the cost allocation process and delegation.

- TBD

| 30 Minutes | elearning | TBD |

### Budget Prep Changes

TBD

| TBD | TBD | TBD |

### Budget and Merit Process Changes

TBD

| TBD | TBD | TBD |
# Workday Training Course Catalog

## Employees and Retirees

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• Core HR, Payroll and Benefits Partners  
• HR Departmental Processor / Liaison security roles  
• Manager |
| Navigating Workday for Employees | The purpose of this course is to overview the basic functionality of Workday with a specific focus on navigation | • Demonstrate how to navigate the home page and worklets  
• Explain the Inbox and notifications, and how to use the search and mobile features | 60 Minutes | elearning | • All employee security roles (optional)  
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<td>• Participants will be provided with access to a live tenant as well as a script to discover key elements in Workday</td>
<td>15 Minutes</td>
<td>Self-Paced Learning</td>
<td>• All Employees (readiness metric is 10% of member employees attending the lab)</td>
</tr>
<tr>
<td>First Login, Day 1 Checklist (Employee)</td>
<td>The purpose of this checklist is to provide employees with a guide to log in to Workday for the first time and verify key personal information</td>
<td>• Provide a step-by-step list of actions that provide navigation support to help employees learn how to use Workday and let the employee verify that certain personal and financial information is reflected correctly • Provide directions on how to change incorrect information</td>
<td>N/A</td>
<td>Job Aid</td>
<td>• All Employees</td>
</tr>
<tr>
<td>Video Help for Employees</td>
<td>The purpose of these videos is to demonstrate how to perform Workday functions</td>
<td>• Reference the supplemental catalog for more detailed information</td>
<td>3 – 5 Minutes / per video</td>
<td>Video</td>
<td>• All Employees</td>
</tr>
</tbody>
</table>
**Video Help Release Schedule**

Video help courses have been identified to demonstrate specific Workday functions of common Employee, Retiree and Managers actions.

<table>
<thead>
<tr>
<th>Video Help (Employee) Topics</th>
<th>Draft (Pre-Workday 29)</th>
<th>Final (Post Workday 29)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change Personal Information</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Change Emergency Contacts</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Contact Change</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Enter Time</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Assign Work Schedule</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Request Time Off</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Correct Time Off</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Request Leave of Absence</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Request Return from Leave of Absence</td>
<td>July 17</td>
<td>September 25</td>
</tr>
<tr>
<td>Update your Work Schedule</td>
<td>July 17</td>
<td>September 25</td>
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<tr>
<td>Manage Internal Career Apply</td>
<td>July 18</td>
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</tr>
<tr>
<td>Complete Federal Withholding Elections</td>
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<tr>
<td>Complete State and Local Withholding Elections</td>
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<tr>
<td>Edit Worker Additional Data Event</td>
<td>July 18</td>
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<tr>
<td>Change Beneficiary</td>
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<td>Change Benefits</td>
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<td>Change Benefits for Life</td>
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<tr>
<td>Dependent Event</td>
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<tr>
<td>Cascade Goals (view)</td>
<td>July 18</td>
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<tr>
<td>Manage Goals</td>
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<tr>
<td>Complete Self Evaluation for Performance Review</td>
<td>July 19</td>
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<tr>
<td>Give Feedback</td>
<td>July 19</td>
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<tr>
<td>Get Feedback on Employee</td>
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<td>Submit Resignation</td>
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<tr>
<td>Report Safety Incident</td>
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<td>Access the Workday Mobile Application</td>
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<tr>
<td>Manage a Delegation</td>
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## Video Help (Manager) Topics

<table>
<thead>
<tr>
<th>Video Help (Manager) Topics</th>
<th>Draft (Pre-Workday 29)</th>
<th>Final (Post Workday 29)</th>
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<tbody>
<tr>
<td>Screen candidates</td>
<td>July 24</td>
<td>October 2</td>
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<tr>
<td>Manage interviews</td>
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<tr>
<td>Customize the home landing page</td>
<td>July 24</td>
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<tr>
<td>View and navigate the my team worklet</td>
<td>July 24</td>
<td>October 2</td>
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<tr>
<td>Where to find and general navigation of a business process status</td>
<td>July 24</td>
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<td>Delegate to someone such as an assistant</td>
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<td>Convert a contingent worker to an employee</td>
<td>July 25</td>
<td>October 3</td>
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<tr>
<td>Enter time for an employee (under review)</td>
<td>July 25</td>
<td>October 3</td>
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<td>Approve a time off request</td>
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<td>Manager worklets and viewing reports</td>
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<td>October 3</td>
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