

A GUIDE FOR WORKDAY REORGANIZATIONS

Ready, set, restructure!

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alight

Reorganizations.

Let's face it—reorganization of the supervisory organization hierarchy can be complex and require extensive analysis and data gathering prior to initiating the events. It's important that your HR partners and business leaders are engaged in order to ensure a comprehensive list of all updates needed are included. You may find it helpful to run a custom report, similar to this one on [Workday Community](#), to ensure you're capturing all of the data that needs to be changed for each worker.

Data gathering and analysis.

This phase should help you answer the following questions:

For supervisory organizations

Are new supervisory organizations required (i.e. a new team is being created, likely for a worker that has not been a manager before)?

- If so, you'll need to obtain the following information that is required:
- Details (i.e. availability date, name, code, visibility, primary location)
- Staffing model
- Role assignments (i.e. manager, owner, hierarchy owner)
- Organization assignments (allowed and default)

Are there updates required for existing supervisory organizations? Some examples include:

- Assigning a new superior organization (if hierarchy structure is changing and the organization will be reporting to a different manager's manager)
- Assigning a new manager role (if the team remains the same but a new worker will be managing them)
- If any of the other details about the organization are changing (i.e. name, primary location, organization assignments)

Should any existing organizations be inactivated (if the organization is no longer needed, has no active members, open positions or has any staffing actions in progress)?

For workers

Which workers are changing positions?


- For those that are changing positions:
- Will new positions need creating?
- Will the position details of existing positions need updating?
- Will any positions need closing?

Which workers will be moving to a new manager/supervisory organization? If the worker is a manager, will his or her supervisory organization also be moving to the new superior?

What other job data needs updating (i.e. job profile, work location, scheduled weekly hours, compensation)?

Are organization assignments being updated (i.e. business unit, company, cost center, custom organizations, region)?

And finally, what is the effective date of the reorganization?



What's the difference between manual initiation vs. Enterprise Interface Builder (EIB)?

Once your data has been gathered you'll need to determine how each type of change should be made (either manual or EIB). As a general rule, EIBs should primarily be used when 20 or more of the same type of changes needs to be made. This is due to the amount of effort that is required to load and test the EIBs. For fewer than 20 similar events or changes, it is often more efficient to move forward initiating the events manually.

Hint: If you select Automatic Processing as the Processing Instruction for the EIBs, you should ensure that approvals are obtained and retained outside of Workday as Workday approvals will not be required during EIB processing.

Managing **manual** events.

Manual tasks that may be utilized during the reorganization include:

Change Job

Including transfers, promotions, demotions, moving workers into a lateral position, moving a manager's team or changing the position details for a worker.

Change Organization Assignment

Close Position

Create Position

Create Supervisory Organization

Edit Position

When you update position details, it will update the incumbent worker but not the position restrictions. It's recommended as an administrative task to process out of order events only.

Edit Supervisory Organization

This is a related action off of the supervisory organization that needs to be updated.

Inactivate Supervisory Organization

Similar to editing, this is a related action off of the supervisory organization that needs to be updated. It's important that you do not remove the supervisory organization from the hierarchy to ensure the organization's historical data is included in roll up reporting.

Move Workers (Supervisory)

You can move workers from one supervisory organization to another. Here's a tip—manager's teams are not moved with the manager during a Move Worker event. While the manager will in fact move to the new supervisory organization, his or her organization will remain in the hierarchy and the former manager's manager will inherit.

Managing **EIB** events.

EIBs that may be utilized during the reorganization include:

Add Update Organization¹

Add new supervisory organizations and/or update existing organizations, including assigning a new superior organization.

Assign Roles²

Assigns roles to assignees and uses the Assign Roles business process. You may specify a worker or position.

Change Job²

Perform a job change on an employee or contingent worker. Use the Change Job business process. The types of changes include transfer, promotion, demotion, lateral moves and any other change of data on the job.

Change Organization Assignments²

Assigns company, cost center, region, fund, grant, business unit, program, gift and custom organizations configured for staffing usage to a filled position or position restriction. Uses the Change Organization Assignments for Worker business process.

Close Position²

This operation will invoke the Business Process to Close a Position.

Inactivate Organization¹

Inactivate organizations that have no active members, open positions or in progress staffing events. Do not remove from the hierarchy to ensure the organization's historical data is included in roll-up reporting.

Move Workers by Organization²

The following Organizations are valid for this Web Service: Company, Cost Center, Region, Custom Orgs that are Unique and are part of Change Organization Assignment, Supervisory Organizations (except Headcount Management). Job Management Supervisory Organizations must have Hiring Restrictions defined. If the Organization is Supervisory, Position Management Positions, Job Management Positions, Position Restrictions can be moved (except Position Restrictions and the filled positions that are overlapped). If the Organization is not Supervisory, Position Restrictions, Headcount Restrictions, and all filled positions of any staffing model can be moved.

Put Supervisory Organization Assignment Restrictions¹

This operation updates the Organization Assignment Default Value and Allowed Values for a Supervisory.



It's time to complete the reorganization.

After you determine which updates need to be made through the EIBs, populate the EIB templates and thoroughly test, it's time to complete the entire reorganization in a sandbox or implementation tenant. You should adjust the process to correct any errors or issues along the way. Once any errors have been resolved in sandbox, you are ready to complete the reorganization in your production tenant.

Outlining the order of events

1.

Data gathering and analysis.

2.

Determine which updates will need to be made manually and which are better served using the EIB.

3.

Create EIBs and generate template models.

4.

Create new positions.

5.

Create new supervisory organizations.

6.

Assign roles for new supervisory organizations.

7.

Complete change job events for workers who are managers and/or those that have multiple updates (i.e. more than just moving to a new manager), ensuring that:

- The headcount is backfilled, moved to the new manager or closed, as appropriate.
- If the person is a manager, the team is moved with the manager or kept with the former superior organization.

8.

Update existing supervisory organizations, to include assigning new superiors and/or updating names, allowed/default organizations, visibility and primary location.

Hint: Updates to supervisory organization names, allowed/default organizations, visibility, or primary location are not effective dated. Therefore, any updates will impact the historical view.

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Outlining the order of events *Continued*

9.

Assign roles for existing supervisory organizations, if they are changing.

10.

Move workers to new managers using Move Workers (Supervisory) or Move Workers by Organization. You can do this manually or by using an EIB.

11.

Complete change organization assignment events for all workers whose company, cost center, business unit, region or custom organization need updating and were not already updated as part of the change job process.

12.

Ensure approvals for all manually initiated events by reviewing the Business Process Transactions Awaiting Action report.

13.

Review the data in Workday and compare it to the data gathered from HR partners and/or the business to ensure that the organization hierarchy is correct, workers are aligned to the appropriate organizations and all job details have been updated appropriately.

14.

Correct any errors discovered in the review and comparison process.

15.

Close positions that are no longer needed and were not already closed as part of the change job process.

16.

Inactivate organizations that are no longer needed. Be sure there are no active members, no open positions and no in progress staffing events before completing this step.

Hint: To ensure accurate historical roll up reporting, elect to “keep in hierarchy” when inactivating the organizations.

We're here to help you thrive.

Just as every organization is unique, every reorganization is unique and may have different requirements. Due to this uniqueness, there are certainly steps that must be taken during the reorganization that were not covered here. We hope this can serve as a general guideline that you can customize to meet your individual requirements.

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To learn more about Workday reorganizations, please contact workday.solutions@alight.com.