# **Employee Movement Guide: Design and Development Notes for Portfolio**

#### **Proprietary Content Redaction:**

For this document to be used as an example of my skills, I needed to remove the Boeing proprietary business content. Note that this Guide should only be used as an example of my design, development, and technical writing and not for any technical or business process-based uses as the data has been changed or redacted to follow Boeing proprietary content policy.

Any content left in the document is general for the Workday system and available on the Workday website. Please focus on the design used to simplify large amounts of complex information along with the job aid steps that would allow a person to use the Workday system. The job aids have been mostly redacted because they had Boeing only content. **The Workday system process steps that still show can be found on the Workday website and are not specific to Boeing**.

\*\*Some links will not work on purpose because of the redaction.

#### **Analysis and Design Documentation:**

#### **Project Assignment**

I was assigned this learning solution deliverable as a part of a larger project to improve the Knowledge Articles and Job Aids used in Boeing's 2019 implementation of Workday as the Boeing HR system of record. The larger project utilized Usability Studies to identify the pain points of the documents available for Boeing employees to use Workday at the moments of New, Change, and Apply (See <u>5 Moments of Need</u> for more information).

The Usability Study that I completed for Employee Movement Guide learning solution showed that Managers were not able to use the many materials available to complete the Employee and Executive Movement processes in Workday. Additionally, the new template that was designed based on usability studies was found to be too simple for the complex employee and executive movement steps, policy, and guidelines.

#### **Audience**

- Managers with employees assigned to them (K, L, and M level managers)
- Human Resources Executive Specialists
- Executive Management

# Design and Development Notes for Portfolio (Page 2 of 3)

#### **Analysis Description**

I used a combination of Task, Environment, Learner, Root Cause, and 5 Moments of Need analysis to review and evaluate the employee movement Knowledge Articles, job aids, and process guides to determine overlaps, gaps, and what would be a viable step forward to design an improved learning experience for users.

#### **Design Description**

Once I determined what needed to be added, removed, or combined, I used sticky notes on chart paper to bucket the various topics of the documents to make the guide's table of contents. I identified seven distinct categories that the topics could fit into and placed sticky notes for each topic under the seven category titles. I confirmed these categories and topics with subject matter experts (SMEs) as I moved to the next step. In addition to determining the categories and topics, I created a quick template in PowerPoint for each content page that the fit the topics. I also created a rough draft table of contents page that gave a quick picture of what the final deliverable would look like. I was able to show SMEs the protype template for their feedback.

The colors I chose to use for each category are part of the Boeing branded colors available to use in documents and on the intranet for HR. I wanted a separate color for each category to distinguish the different content so it would be easier to read. I chose large blocks of color to help employees who use screen readers or have visual needs where blocks of color and text help. I purposely chose not to use red and green or blue and orange together because of color blindness. There are directions on the job aids for how to zoom in because the users determined that they often ended up with super tiny text on their screens compared to my large screens.

The icons that I chose are also meant to help with visual connections between the content and the categories. Each category has a different icon that is used at the top of each common topic page.

I knew I wanted the document to be an interactive PDF that allowed users to click from topic to topic using the table of contents as a navigation tool. I determined that the best tool to create the PDF was to make a PowerPoint Presentation with links to different slides and websites that included videos, help solutions, and other Knowledge Articles that were periphery to the main topic.

#### **Learning Objectives**

With the assistance of the Employee Movement Guide interactive PDF, Managers and Human Resources Executive Specialists will be able to successfully complete employee or executive movement tasks in Workday according to Human Resources strategy, policies, and guidelines.

# Design and Development Notes for Portfolio (Page 3 of 3)

#### **Development Documentation:**

#### **Software & Technical Tools**

- Microsoft PowerPoint
- Adobe Professional DC
- Getty Images and paid subscription for icons

#### **Strategy of Development**

Diligently working through the Knowledge Articles, job aids, and other documents provided to me, I copied content from the legacy material into the new format based on the categories and topics. As I worked to move the content, I updated wording to make sure the content would be very clear to the general employee. The usability studies found that the legacy materials were written in a very HR styled format that the average manager would not be able to understand (unless they worked in HR, of course).

Most of the job aids had to be completely rewritten as the legacy job aids only contained workflow steps from the initial implementation or general Workday process steps. Job aids for Workday at Boeing did not include screen shot images because of large amount of job aids and considerations for the management of the job aids since the system frequently was updated by Boeing and Workday based on changing software and business policy. I continued this imageless format to be consistent and to manage future maintenance.

The final document went through multiple rounds of SME review for content along with an editorial and consistency check by one of my coworkers. The result that you see may have some general consistency issues because of the redactions that were necessary.

#### **Outcome:**

Administered Usability Studies to improve the user experience of performance support materials like job aids and knowledge articles to help employees use Workday cloud ERP.

Developed an Employee Movement Guide that helped managers and HR move employees and executives within Workday.

\*Results of A/B Usability Study for the Employee Movement Guide:

29% increase in task completion | 63% decrease in average on-task minutes



# ONE BOEING HR ALWAYS PEOPLE FIRST

### **Employee Movement Guide**

**Using the Employee Movement Guide**: Select action title to access general information, directions for tasks to complete, business rules, and considerations.

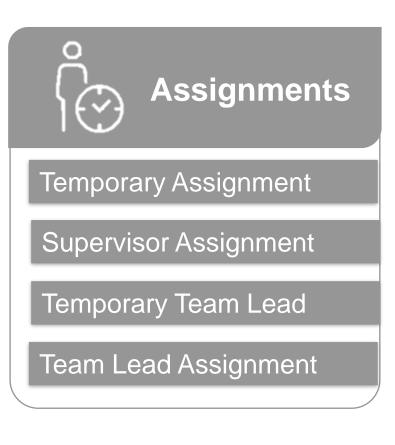


Change or Close











#### **Executive Movement**



**Position Management** 

**Executive Movement** 

**Data Changes** 

**Hire Executives** 

**Promote Executives** 

**Business Title Change** 



#### **Overview**

Position Management allows for the tracking of open, filled, closed, and frozen positions within a Supervisory Organization and across the business. In order to make an employee movement such as a hire or promotion, an available and open position much first exist. Workers new to a position inherit those position details (e.g., job profile or security role). Headcount is another term used instead of position, especially during transfers, e.g., Transfer: Employee and Headcount.

Managers should only create positions that have alignment from appropriate leadership teams.

#### **Assumptions:**

- There is a unique position in Workday for every employee.
- An open position must exist.
- Hiring managers must adhere to enterprise policies.

#### **Tasks**

- Create and Approve Position
- Freeze and Unfreeze Position
- Change Position
- 10+ Position Changes
- Close Position

#### When to create a position:

Use the following guidelines to determine if a new position should be created, or if an existing position should be edited.

- You have new statement of work.
- The existing position's statement of work changes in a way that alters the hiring pool (e.g., new skill set or bigger scope of work).

All other changes can be done without requiring a new position via <a href="Change Job">Change Job</a>.





### **View Team Information**

#### **Overview**

Manage My Team on the <u>Workday</u> home page allows you to view and access some of the frequent managerial tasks related to team performance, compensation, time tracking, and hiring.

**Supervisory Organizations** are the teams of employees that report to a given manager. Roles and role-based security groups can be assigned to a supervisory organization. These groups determine access to information about the organization including business process approvals and notifications.

#### **Manager Information**

- Manage My Team lists the names of your team members. Click the name of any employee to view their profile.
- **Employee Changes** allows you to update and view a team member's job details, such as location changes, job changes, terminations, and transfers.
- Recent Changes lists the recent updates made to the employee's job details.
- Team Time displays actions related to the team's time and absence, such as reviewing time, viewing team schedule, and time off.
- **Team Performance** displays performance-related tasks, such as adding priorities, getting feedback, and other performance review information.

Note: You can ...

- **Hiring** allows the user to view and perform actions related to hiring new employees, creating job requisitions, and managing positions.
- Compensation allows you to view pay ranges and compensation for direct reports
  as well as request compensation changes or one-time payments for employees.





# Supervisory Organizations: New

#### **Overview**

Supervisory Organizations are the teams of employees that report to a given manager. Roles and role-based security groups can be assigned to a supervisory organization. These groups determine access to information about the organization including business process approvals and notifications. Managers must submit requests for new supervisory organizations, but they are responsible for transferring employees between existing supervisory organizations.

#### **Tasks**

#### Request New Supervisory Organization

- 1. Select Worklife Get Support in General Category.
- 2. Click new Supervisory Organization.
- 3. Click Create Request.
- 4. Enter "Supervisory Organization Request" in the **Short Description** with details of the request in the **Description** field.

#### Transfer Employees

Once the new supervisory organization has been created, the manager can transfer appropriate employees and open positions into their new supervisory organization using the <a href="Change Job Request">Change Job Request</a>.





## **Supervisory Organizations: Edit**

#### **Overview**

Some supervisory organization edits can be made by the manager (e.g., delegate your supervisory organization to another manager), while other edits will need to be made by HR (e.g., move both manager and their supervisory organization).

**Note:** Any time you change a manager's position you need to be aware of supervisory organization implications.

#### **Tasks**

#### Request Supervisory Organization Edits or Closure

- 1. Select the **General** category in **Worklife Get Support**.
- 2. Click Supervisory Organization.
- 3. Click Create Request.
- 4. Enter "Supervisory Organization Request" in the **Short Description** with details of the request in the **Description** field:
  - Please update Sup Org <number> to <number> effective <date>.
  - Reason for Sup Org update.

#### Self-Service Edits Available

- 1. Add or remove delegation of your supervisory organization to another manager (e.g., due to extended absence or LOA).
- 2. Transfer employees and open positions into supervisory organization using the <a href="Change Job Request">Change Job Request</a>.
- 3. Transfer a manager and their supervisory organization to a different supervisory organization.

#### **Related Resources**

#### **Knowledge Articles**

Workday Delegation Overview and Rules





### **Transfer: Employee Without Position**

#### **Overview**

The Receiving and Releasing managers have tasks to complete the employee without headcount transfer. This lateral move transfers the employee to another position of equal level. Headcount is another term used instead of Position, especially during transfers, e.g., Transfer: Employee, Not Headcount.

Note: Releasing manager should not ....

#### **Tasks**

Receiving Manager	Releasing Manager
Create Non-Competitive Job Requisition and Create Position (if position does not already exist)  Note: You can be more efficient if you create a position at the same time you create a requisition.	<ol> <li>Open Workday.</li> <li>Select the employee.</li> <li>Follow steps for the Change Job Request task with the following specifics:         <ul> <li>Select Lateral Move from the Why are you making this change? drop-down menu.</li> </ul> </li> <li>Complete redacted actions</li> <li>Click Submit.</li> </ol>

#### **Related Resources**

#### Videos

- Change and Transferring Jobs in Workday Demo
- Creating a Requisition in Workday Demo (Non-Competitive Requisition)
- Hourly Employee Transfers & Lateral Moves (Reclassification)

#### **Knowledge Articles**

 Relocation & Assignment - US Region Extended Business Travel







## Transfer: Employee With Position

#### **Overview**

The Releasing Manager completes the following tasks to transfer an employee and the headcount (position) to a new manager. Headcount is another term used instead of position, especially during transfers, e.g., Transfer: Employee and Headcount.

#### **Tasks**

- 1. Open Workday.
- 2. Select the employee.
- 3. Follow steps for the <a href="Change Job Request">Change Job Request</a> task with the following specifics:
  - Select Transfer.
- 4. Complete the remaining fields.
- 5. Click Submit.

#### **Business Rule**

If the ....., then ......

#### **Related Resources**

#### Videos

- Change and Transferring Jobs in Workday Demo
- Hourly Employee Transfers & Lateral Moves (Reclassification)

#### **Knowledge Articles**

 Relocation & Assignment - US Region Extended Business Travel







## Transfer: Ten or More Employees

#### **Overview**

The Current Manager should use the following information to move 10 or more employees at one time.

#### **Tasks**

Complete the **Employee Change Job** form from the Mass Change website.

**Note:** Use the form directly from the webpage for the newest version of the forms as they are modified and updated frequently.

#### **Business Rule**

If the ....., then ......

#### **Related Resources**

#### Videos

 Hourly Employee High Volume Hiring & Transfer





### , Hire: One Employee

#### **Overview**

The Receiving Manager will need to create a requisition and position in Workday. Hiring one employee is the most efficient when you create the requisition and position at the same time.

#### **Tasks**

If	Then
Position exists in Workday	Create Non-Competitive Job Requisition or Competitive Job Requisition and fill the position.
Position has not been created in Workday	Create Position, Create Job Requisition, and fill the position.

#### **Related Resources**

#### Videos

- Creating a Requisition in Workday Demo (Non-Competitive Requisition)
- Creating a Competitive Requisition in Workday
- Hourly Employee Hiring & Transfer
- Hire External Hourly Employees for an Open Requisition

#### **Knowledge Articles**

- Hiring Contingent Labor
- Hire an Intern

#### **Considerations**

If you are creating a new management level position, submit a case in <u>Worklife Get Support</u> using these steps:

- 1. Select the **General** category.
- 2. Click new **Supervisory Organization**.
- 3. Click **Create Request** to request support.





# Hire: Ten or More Employees

#### **Overview**

The Current Manager will need to submit the create a requisition form to hire more than ten employees at a time. Only hourly population can mass create requisitions.

#### **Tasks**

Complete the Mass Requisition Creation form. Visit the Mass Changes website for the form and more information.

Purpose: Intake form for users....

#### **Related Resources**

#### Videos

Hourly Employee High Volume Hiring and Transfer

#### **Considerations**

If you are creating a new management level position, see <u>Supervisory Organization</u>: <u>New</u> for more information.





# **Temporary Assignment**

#### **Overview**

The Current Manager will need to complete the following steps to place an employee into a temporary assignment.

#### **Task**

- 1. Open Workday.
- 2. Navigate to the employee's profile.
- 3. Click Actions.
- 4. Complete redacted actions...

5. Click Submit.

#### **Business Rule**

If the ....., then ......

Click next to review the **Temporary Assignment** page 2 of 2 for important union considerations. < This function has been redacted.>







# **Temporary Team Lead**

#### **Overview**

The Current Manager will need to complete the following steps to place an employee in a temporary team lead assignment.

#### **Task**

- 1. Open Workday.
- 2. Navigate to the employee's profile.
- 3. Click Actions.
- 4. Complete redacted actions...

- 5. Enter both Effective End Date and Actual End Date fields.
- 6. Click Submit.
- 7. Click Done.

#### **Correction Needed?**

If you need to correct an existing transaction for temporary team lead assignment, contact your HR Specialist.







# ักัชั Promote or Demote: Employee

#### **Overview**

Current managers can use the tasks below to promote or demote an employee from one level to another.

#### **Tasks**

- 1. Create a Non-Competitive Job Requisition, as needed.
- 2. Create a Position, as needed.
- Navigate to the employee's profile.
- Follow steps for the Change Job Request task with the following specifics:
  - Select ....

#### **Related Resources**

#### Videos

- Change and Transferring Jobs in Workday Demo
- **Hourly Employee Transfers &** Lateral Moves (Reclassification)
- Creating a Requisition in Workday **Demo (Non-Competitive)** Requisition)

#### **Knowledge Articles**

- Offer Decision Process
- Relocation and Assignment US Region

#### **Considerations**

- If you are creating a new management level position, see **Supervisory Organization: New** for more information.
- Any time you change a manager's position you need to be aware of supervisory organization implications, see **Supervisory Organization: Edit** for more information.





#### **Overview**

The current or receiving manager can reclassify an employee. Reclassification is a change in job code or job family. Reclassification is not a change in the level or grade.

#### **Tasks**

- 1. Create a Non-Competitive Job Requisition, as needed.
- 2. Create and Approve a Position, as needed.
- 3. Navigate to the employee's profile.
- 4. Follow steps for the <a href="Change Job Request">Change Job Request</a> task with the following Reclassification specifics:
  - Select Lateral Move from the Why are you making this change? drop-down menu.

#### **Related Resources**

#### Videos

- Change and Transferring Jobs in Workday Demo
- Hourly Employee Transfers & Lateral Moves (Reclassification)
- Creating a Requisition in Workday <u>Demo (Non-Competitive</u> Requisition)

#### Knowledge Articles

 Create Hourly Union Requisition and Position





#### **Overview**

Current managers can use the tasks below to increase the level of an hourly union apprentice. This task is processed under Promotion/In-Line Promotion.

**Note:** The hourly union apprentice level ....

#### **Tasks**

- 1. Open Workday.
- 2. Navigate to the employee's profile.
- 3. Follow steps for the Change Job Request task with the following specifics:
  - Select Union Progression from the Why are you making this change? drop-down menu.

#### **Business Rule**

If the ....., then ......

#### **Related Resources**

#### Videos

- Change and Transferring Jobs in Workday Demo
- Hourly Employee Transfers & Lateral Moves (Reclassification)
- Creating a Requisition in Workday Demo (Non-Competitive Requisition)





### Position Management: Executives and Managers

#### **Detailed Information:**

- For managers or executives, the Supervisory Organization associated with that position will be inherited by the one-up manager.
- A worker cannot occupy more than one position at the same time.
- Redacted statement.
- Each Supervisory Organization has a unique Organization ID in Workday...
- To move a Supervisory Organization to a different manager, a <u>Worklife ticket</u> must be submitted to Employee Data Management (EDM).
- Two or more supervisory organizations can be combined into one via a <u>Worklife</u> <u>ticket</u> submitted to EDM.
- The name of a Supervisory Organization can be changed via a Worklife ticket submitted to EDM.
- An existing position may be frozen to temporarily stop hiring for a position. The reasons for <u>freezing a position</u> could be ...
- A frozen position can be reactivated using the <u>unfreeze position</u> task.

**Related Resources** 

• Executive Movement Playbook





## Executive Movement (1 of 2)

#### **Overview**

Purpose of this Executive Movement page is to help the user understand:

- When to use a ... within Workday.
- What are the key differences between executive and non-executive movement.
- Who initiates the steps involved in all types of movement (both inside and outside of Workday).

#### **Key Differences: Executive and Non-executive Movement**

#### Intake

- Executive Movement Specialists manage intake.
- · Redacted bullet item.

### Sourcing & Slating

- Candidate ....
- Executive Movement Specialists ....
- Redacted bullet item.

# Offer and Background Check

- Total Rewards coordinates ....
- Redacted bullet item.

## Position Management & Supervisory Org

- A new position is created
- Redacted bullet item.
- Redacted bullet item.
- Redacted bullet item.





# ந் Executive Movement (2 of 2)

#### **Overview**

For the actions below, Employee Data Management (EDM) will manage the steps to complete the movement. The Human Resources Business Partner should partner with the Executive Movement Specialist, who is the interface with EDM.

Action	EDM Steps	Notes
Demotion	Search Create Job Requisition     Complete redacted actions	Ensure you     Any
Reclassify	Search Create Job Requisition     Complete redacted actions	• Ensure you
Transfer	Search: Change Job     Complete redacted actions	Move Team question: "Do you want to move their teams with them?" defaults to "No", but cabe changed to "Yes". Select correct Sup Org.







#### **Overview**

The Executive Movement Specialist will create the confidential requisition ....

#### Tasks: (Executive Movement Specialist)

- 1. Create confidential requisition.
- 2. Complete redacted actions....
- 3. Proceed with the confidential requisition process per the <a href="Executive Movement Playbook">Executive Movement Playbook</a> directions.

Use the **Communication Template**.

#### Hiring an Executive for a New or Replacement Position:

Could be ....

#### **Considerations**

- Ensure you ....
- There is no ....





#### **Overview**

Executives are encouraged to modify their Business Title in order to more accurately reflect their job role and responsibilities.

#### Tasks:

- 1. Open Workday.
- 2. Enter **Change My Business Title** into the search field at the top of any Workday page.
- 3. Select Change My Business Title from the Search Results.
- 4. Click the Calendar icon to select the new business title start date.
- 5. Click Submit.

Note: The business title...



### Non-Competitive Job Requisition

Task	Task Steps
Non-Competitive	Create Job Requisition  1. Open Workday.  2. Enter Create Job Requisition into the search field at the top of any Workday page.  3. Click Create Job Requisition.  4. Enter job requisition details.  5. Click OK.  6. Complete redacted actions  7. Complete redacted actions  8. Complete redacted actions  9. Add any relevant Attachments.  10. Click Next.  11. Review the requisition details and click Submit (or click Save for Later to save and return later)
Jse Ctrl+ Wheel to Zoom	
	Edit Job Requisition Details  1. Navigate to your Workday Inbox to find and click the job requisition.  2. Complete redacted actions  3. Complete redacted actions  4. Complete redacted actions  5. Complete redacted actions  6. Click Submit.
Non-competitive requisition	





### **Competitive Job Requisition**

1. Ope 2. Ente	Job Requisition
Jse Ctrl+ Wheel to Zoom  5. Clic 6. Cor 7. Cor 8. Cor 9. Cor 10. Cor 11. Cor 12. Add 13. Clic 14. Rev  Edit Jol 1. Nav 2. Cor 3. Cor 4. Cor 5. Clic 5. Clic 15.	en Workday.  It create Job Requisition into the search field at the top of any Workday page.  It Create Job Requisition.  Implete field information on the Create Job Requisition page.  Verify that the Supervisory Organization auto-populates correctly.  Select either Create New Position or the unfilled position in the For Existing Position drop-down menu if a position has already exists.  Verify the Worker Type.  It OK.  Implete redacted actions  In plete redacted actions  Implete redacted actions



### **Create and Approve Position**

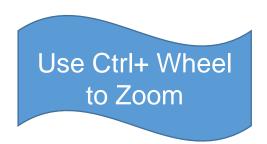
Task	Task Steps
Create Position  Use Ctrl+ Wheel to Zoom	<ol> <li>Open Workday.</li> <li>Enter Create Position into the search field at the top of any Workday page.</li> <li>Click Create Position on the Search Results page.</li> <li>Validate the Supervisory Organization details.</li> <li>Click OK.</li> <li>Complete redacted actions</li> <li>Click Submit.</li> </ol>
When creating job requisi-	tions
Approve Position	Complete redacted actions…



### Freeze and Unfreeze Position

Task	Task Steps
Freeze Position	Freeze Position is initiated to  1. Open Workday. 2. Enter Manage Position Freeze into the search field at the top of any Workday page. 3. Click the task from the menu. 4. Complete redacted actions 5. Complete redacted actions 6. Complete redacted actions 7. Click Submit.
If the <b>Freeze Position</b> req	uest is
Unfreeze Position	Unfreeze Position is initiated to begin rehiring for a position. You can unfreeze positions that were previously on freeze. You may need to unfreeze a position due to business reasons such as a budget unfreeze or the completion of organization restructuring.  1. Open Workday.  2. Enter Manage Position Freeze into the search field at the top of any Workday page.  3. Click the task from the menu.  4. Complete redacted actions  5. Complete redacted actions  6. Complete redacted actions  7. Complete redacted actions  8. Click Submit.

If the **Unfreeze Position** request is ....





### **Change or Close Existing Position**

Task	Task Steps
Change Position	1. Step 1. 2. Step 2. 3. Step 3. 4. Step 4.
Some of these changes m	ay apply to
Close Position	Closing a position in Workday is a <i>permanent change</i> . You cannot reopen a position once it is closed.  1. Step 1. 2. Step 2. 3. Step 3. 4. Step 4.
If the Close Position requ	uest is initiated…







### **Change Job Request**

Change Job Request  1. Open Workday. 2. Navigate to the employee's profile. 3. Click Actions. 4. Scroll and mouse over Job Change. 5. Select Transfer, Promote or Change Job. 6. Click the Edit pencil icon to enter changes for each section on the Start Details page. • Specific field requirements can be found on the type of Change Job Request that is being initiated: • Data Change • Demotion • Lateral Move • Promotion • Iransfer • Click Start. 7. Verify the details and click Submit. 8. Click Done to complete the Change Job request.	Task	Task Steps
		<ol> <li>Navigate to the employee's profile.</li> <li>Click Actions.</li> <li>Scroll and mouse over Job Change.</li> <li>Select Transfer, Promote or Change Job.</li> <li>Click the Edit pencil icon to enter changes for each section on the Start Details page.         <ul> <li>Specific field requirements can be found on the type of Change Job Request that is being initiated:                  <ul></ul></li></ul></li></ol>



