Workday Tip #2
Navigate to Roster History

Payroll Representatives – Effective: 8/8/22

Human Resources Division
Updated: 8.16.22

Workday – Roster History

Payroll Representatives will resume inputting data into **Roster History custom object** starting Monday, August 8th. This is an essential step, **not to be skipped**, to ensure Workday provides a record of all changes to the County's positions. Workday will provide the data to be extracted and reported to Civil Service for entry into its official database.

NOTE: do **NOT** duplicate any entries on the Workday roster and the excel sheets from civil service.

The input occurs as a **To Do** in the following Business Processes:
- Hire
- Change Job
- Termination
- Leave of Absence

Manual completion of the excel spreadsheet previously provided by Civil Service to report roster actions will *only* be required for prior transactions applied from 12/27/21 through 8/7/22.

For transactions <u>entered</u> starting on Monday, 8/8/22 and forward, a report will be generated from the custom object entries.

Payroll Representatives will still need to review the report data before the reports are provided to Civil Service to be entered, and to act as the official report of personnel actions. The exact process for review of the report is still in development.

Workday – Roster Reports

The following are **two (2) reports** Payroll Representatives to run:

1. **Bob Tom Roster History**
    - This report allows you to view roster history for one or all employees where the effective date of the roster entry falls between the start and end dates.

2. **Bob Tom Roster History Review**
    - **Run this report 1 time per day**
    - Review every Friday before Workday sends to Civil Service
    - This report allows you to view the roster history where the date entered or date updated falls between the start and end dates. This report is used to verify and certify the roster data is correct before we send it to civil service. It is recommended to run this report once a day to keep up with changes but at the very least it must be run at the end of the payroll.

Workday – Position Number Information

The Workday Position Number (**4 digits**) is the old PPS position #.

Example:
- In the following, enter into Workday: **2468 as the position #**

Break down of old PPS position number **001-1490-1234-2468-1** is as follows:

001 = fund

1490 = appropriation

1234 = unit

2468 = position #

1 = position count

NOTE: Both **Unit** & **Position Number(s)** for **Seasonal / Temps** = **0000**

Workday – Position Number Information, cont.

Navigate to *Position Restrictions* for worker to locate **Position Number**

1. Under worker's profile (**blue area**) go to **JOB**:

2. Under **Job Details** tab
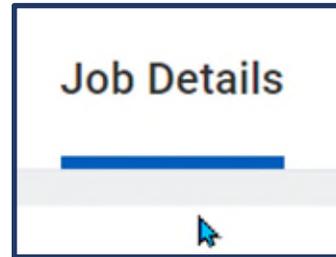
3. Scroll down to **Position** – and *click* on **Blue Link**

Position   POS_14049 AUTO MECHANIC I

4. On the Position page – to the right of **Position Restrictions** – *click* on **Blue Link**

Position Restrictions   POS_14049 AUTO MECHANIC I –

Workday – Position Number Information, cont.

5. *Click* on **Additional Data** Tab

Additional Data
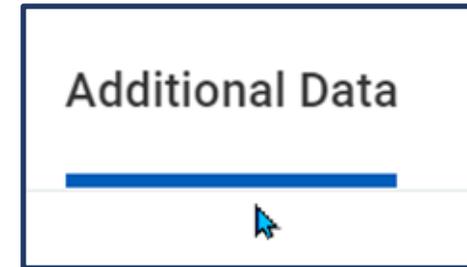
6. **Under**: Suffolk County Position Details:

Suffolk County Position Details
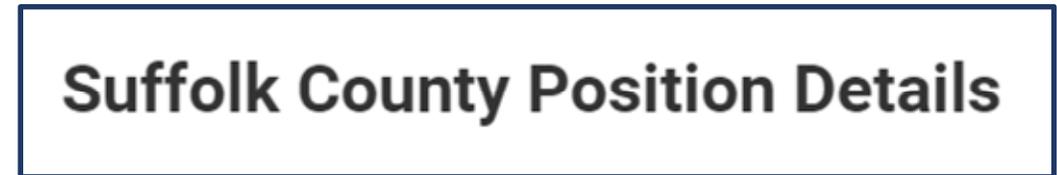
7. Locate Fund-Approp-Unit & **4 Digit Position Number**
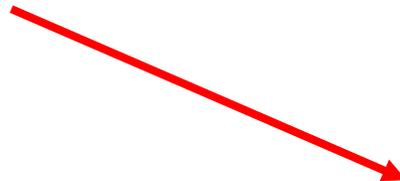
Fund-Approp-Unit	Position Number
016-5130-2010	0074

Workday – **Navigate to Roster History** – Effective Date: 8/8/22

1. Under worker's profile (**blue area**) go to **JOB**:

   Job

2. Click on: **More** tab

   More
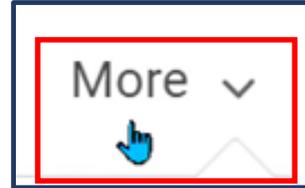
3. Scroll down to click on **Additional Data** tab
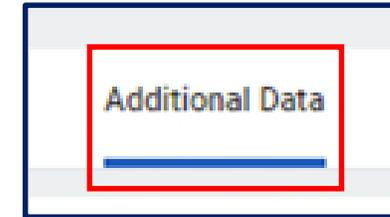
   Additional Data

4. Scroll down to: **Roster History**

   Roster History

   2 items

Unique ID	Effectiv Date
1	08/01/20

5. Click on: **Edit** (below the image)

   Edit

5. Landing page where data is entered:
- Under **Edit Additional Data** . . .
- Read the **Instructions**

6. **Roster History**
- **Unique ID** – is a sequential (in order) number per employee, per record – **Employee "A"** as shown

6.a. **Unique ID Example**:
- **Employee "A"** – the first record would be 1, second 2, third 3, etc.
- **Employee "B"** – the first record will be 1, second 2, third 3, etc.

Edit Additional Data

Custom Object   Roster History

Unique ID - Unique Row to each employee (Start with 1 and increase by 1 for each row)
Date Sequence - Usuallly 1 unless multiple events on same day
Civil Service Notes - DO NOT use Civil Service Only
Last Updated Date - DO NOT USE FOR ADMIN ONLY

Roster History

2 items

	*Unique ID	*Effective Date	*Date Sequence	*Department
⊖	1	08/01/2022	× 1	× DPW
⊖	2	08/08/2022	× 1	× DPW

6.b. **Date Sequence Example**:
- If *same* Effective Date, then enter unique date sequence numbers, i.e. 1, 2, etc.
  - The largest sequence # should be the most recent record
- If *different* Effective Dates, then enter 1 for each date sequence
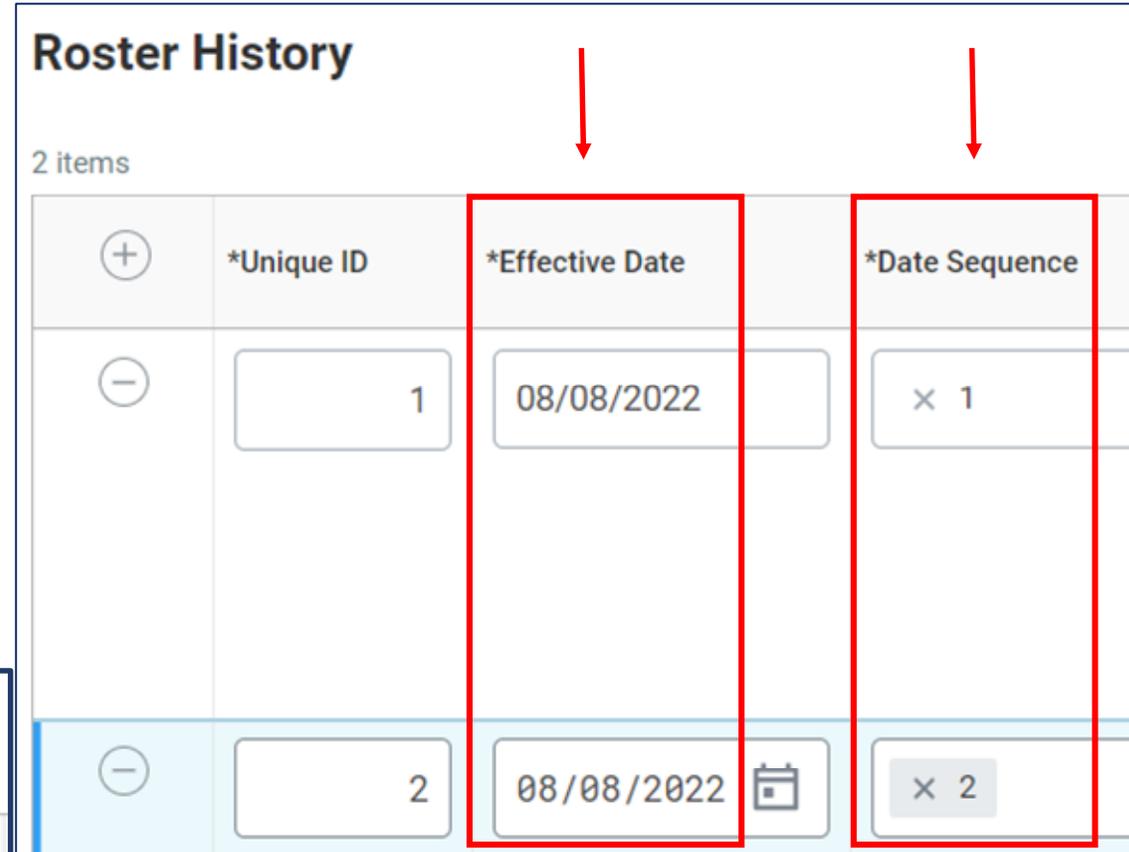
7. Fill in data accordingly:
- **See**: ***Position Number**

8. Under header: ***Title**
- Type in "**Spec**" Number
  - Or, any part of the Title name

2 items

*Fund-Approp-Unit	*Position Number	*Count	*Title
× 001-1165-0400	× 0010	× 1	× 0568C - PR PROGRAMMER ANALYST
× 259-8195-0500	× 0010	× 1	× 0909C - ADMINISTRATOR IV

2 items

*Jurisdictional Class	*Action Code 1	*Action Code 2	*Budget Status
× C (Competitive)	× TR/ (Transfer)	× RLW Reinstatement from Leave Without Pay	× A
× C (Competitive)	× CC/ (Reclassification)	× PP (Promotional Provisional)	× AP

9. Continue to fill in data

*Salary	*Pay Type	*Grade	*Step
Salary * 1,000.00 Currency ✕ USD ⋯	✕ Biweekly	✕ 24	✕ 10
Salary * 3,400.00 Currency ✕ USD ⋯	✕ Biweekly	✕ 31	✕ 11

10. Currency: type USD →

11. NOTE: Position Fill % data: *must* enter for Full-time; Part-time not required →

Position Fill %	Hours per Week	Eligible List #
0	0	1234

12. **NOTE**: **DO NOT use:** **Civil Service ONLY**

Pay Rep Notes	Civil Service Notes	Last Updated Date
Test	Test	

13. **NOTE**: **Last Updated Date:** *please* **Don't Touch**
    Admin Use Only

14. Click: **OK** to save

OK   Cancel

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