Integrating 'Approval to Post' into HCM Systems: Enhancing Efficiency and Transparency through Workday Solutions

Shweta Pandey[1] Sumit Pandey[2]

Email: shweta1780@gmail.com[1], sumpandey@gmail.com[2]

Abstract

In today's corporate world, effective cost management is crucial across industries. Employees are both valuable assets and significant expenses, particularly highlighted post-Covid-19. Companies now carefully approve new hires or replacements, yet the process often occurs outside Human Capital Management (HCM) platforms, causing reporting gaps and inefficiencies. This article explores using questionnaires, approval frameworks, and business process workflows to track and manage "Approval to Post" within HCM systems, with a focus on Workday's tools and solutions to optimize these processes.

Keywords: Workday, Headcount Management, Cost Management, Human Capital Management, Questionnaires, Business Process, Approval to Post.

Introduction

The "Approval to Post" serves as a critical step in the hiring process, enabling organizations to prioritize their hiring needs, streamline recruitment efforts, and ensure effective decision-making. This process allows recruiters or hiring managers to provide essential details about the role, justify the necessity of filling it, identify budget sources, and secure necessary approvals from stakeholders like cost center managers, HR teams, and finance departments.

While most Human Capital Management (HCM) platforms offer robust solutions for managing and tracking job requisition approvals [2], they often lack the capability to capture additional crucial details typically managed outside the system via emails. These details include identifying the budget sponsor, explaining why the existing team cannot fulfill the role's responsibilities, justifying the need for a full-time employee versus a contractor, and reasons why the role cannot be filled in a low-cost location. Managing these details

outside the system leads to inefficiencies, transparency issues, and incomplete audit trails.

Integrating this critical information within the HCM platform would significantly enhance the efficiency, transparency, and auditability of the hiring process [1]. By centralizing all aspects of position justification and approval, organizations can streamline workflows, improve decision-making, and ensure compliance with internal policies and budgetary constraints [1].

Problem Statement

When a team identifies the need to add a new resource or replace an existing position within the company, the process initiates with a thorough approval process. Typically, this involves multiple stages of justification, including detailed discussions to clarify the role's necessity and identify the budget source. These stages are often managed through email exchanges among various stakeholders. Once the need and budget source are sufficiently justified and approved, typically through these email conversations, the request is

then forwarded to the HR and Recruiting teams. These teams proceed to create the position and job requisition within the company's tracking system. However, this initial stage, where justification and approval occur via email, is often not formally documented within the systems used for position management and job requisition processes [2].

For improved record-keeping, auditing, and future reference by senior management, it is crucial to systematically record these initial conversations and approvals. Existing tools on the market designed for managing position creation and job requisition tracking [2] often lack the functionality to capture and support activities occurring before HR and Recruiting's involvement. This gap underscores the need for an integrated system that tracks and manages data, requests, and approvals across the entire hiring lifecycle, starting from the initial justification and budget approval stages. Such a system would ensure comprehensive documentation of all relevant communications and approvals, providing a robust audit trail and enabling more efficient and transparent decision-making processes.

Solution

Business Processes - Create Position and Edit Position Restrictions

Integrating pre-hiring processes with the position workflow framework is crucial for tracking the details that justify creating a new role in the system. Workday offers two business processes: Create Position [3] and Edit Position Restrictions [8], which can be customized to meet this requirement. These processes ensure that all necessary information is captured and documented within the system, providing a clear justification for the new position.

Workday Questionnaires

Workday allows customers to add questionnaires to permitted business processes to gather comprehensive information [5]. These questionnaires can be configured [7] to ask various types of questions, including date, numeric, and multiple choice with branching options for follow-up information. This feature can be used to create a request form that includes all the questions currently tracked via emails before a new or replacement position is created, streamlining the information-gathering process.

Integrate Questionnaires with Create Position and Edit Position Restrictions

The "Complete Questionnaire" step [4, 5] type allows distributing questionnaires to users as part of the Create Position or Edit Position Restrictions processes. This enables companies to gather relevant information from the requestor about the position [6]. Workday also allows business process approvers and reviewers to view questionnaire results completed in prior steps, giving them the flexibility to review responses and approve role requests accordingly [6].

The following figures illustrate: Questionnaire configuration in Workday, and Business Process customized to include the "Complete Questionnaire" step.
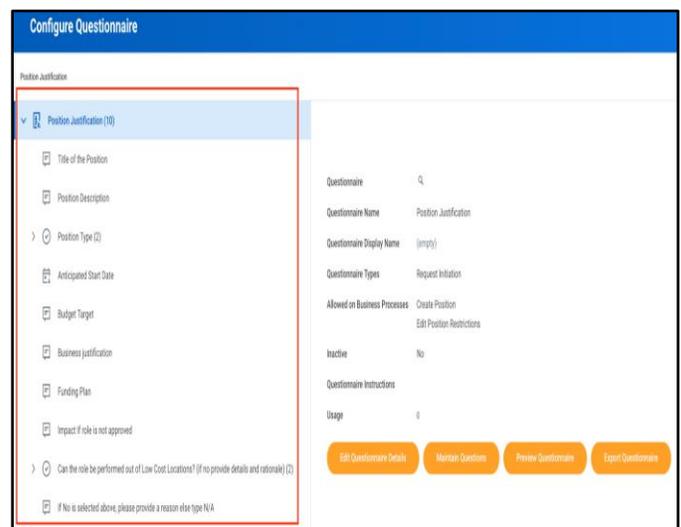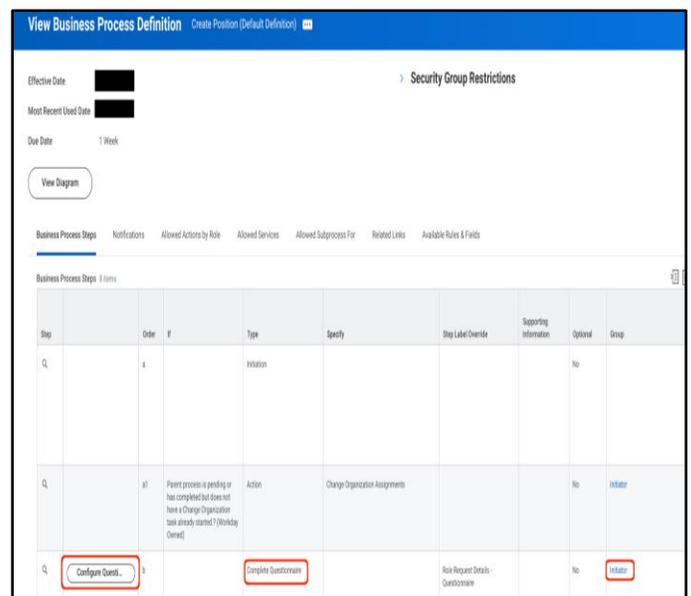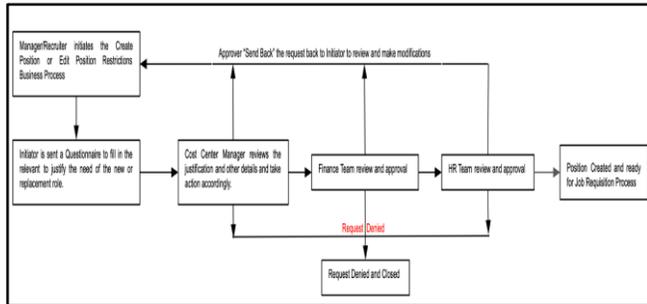

Fig 1: Configuration of Questionnaire in Workday[7]

Fig 2: Complete Questionnaire step in Business Process Definition [3, 5]

The overall process workflow that integrates "Approval to Post" and "Position" creation should look like the one described in the figure below.

Fig 3: Process Flow from 'Approval to Post' to 'Position'

Impact

The custom solution leveraging Workday's Questionnaire functionality and Position-related business processes effectively integrates the "Approval to Post" phase that precedes position creation, and the subsequent position creation and approval process within the system. This integration significantly impacts the overall hiring process by capturing all details, actions, and approvals within the Human Capital Management (HCM) application. This enhances transparency, accountability, and facilitates robust reporting for future reference.

Key Advantages of this Approach:

- **Enhanced Control:** HR, Recruiting, and Administration teams can implement validations and security measures to protect confidential information, such as budget details and justifications.
- **Structured Approval Framework:** Incorporating pre-hiring processes into configurable approval workflows enhances accountability and ensures alignment with company standards and policies.

- **HR and Finance Oversight:** Involvement of HR and Finance teams in approval processes ensures that new and replacement positions are posted only after thorough checks, ensuring compliance with budgetary and business requirements.

This integrated approach not only streamlines the hiring process but also standardizes position filling across the organization. It promotes accuracy, fairness, and consistency by adhering to a unified process, thereby optimizing organizational efficiency and resource allocation.

Conclusion

- **Strategic Alignment**: Effective headcount management aligns hiring needs with strategic goals and fiscal responsibility.
- **Current Challenges**: Traditional "Approval to Post" processes lack HCM integration, leading to inefficiencies and transparency issues.
- **Workday's Solutions**: Customizable business processes and questionnaires streamline and document the "Approval to Post" process, enhancing transparency and accountability.
- **Enhanced Collaboration**: Empowers HR, recruiting, and finance teams to ensure justified, budgeted, and approved positions.
- **Operational Efficiency**: Optimizes efficiency, standardizes hiring, and supports organizational agility.
- **Improved Compliance**: Centralization improves accuracy, fairness, and compliance, meeting evolving business needs.

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