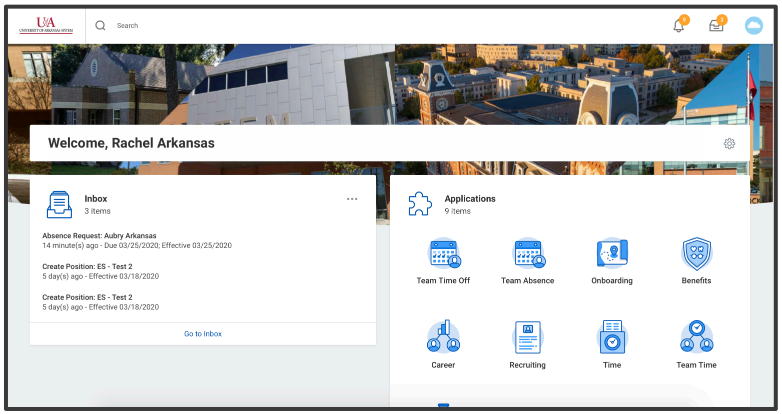
HOME PAGE ELEMENTS

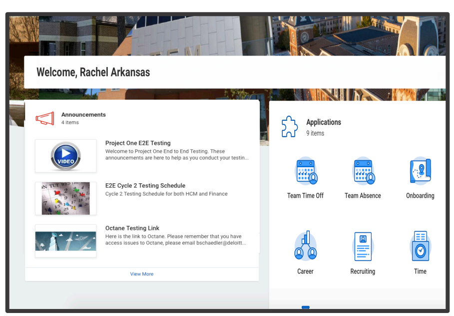
INBOX

The Inbox is the primary source for tasks that require action in Workday. The Inbox is always accessible from the icon in the top right corner of every page and can also be accessed from the body of the home page.



ANNOUNCEMENTS

Announcements appear on the home page and convey important information to employees. The opening line of the message will be shown and clicking on the announcement will display the full message.



APPLICATIONS

In Workday, one of the easiest way to find common tasks is through applications. The Workday home page displays applications that provide access to tasks and reports. Because the home page is highly configurable, your organization may display different applications.

CONFIGURE APPLICATIONS

You can add, remove, and arrange applications on your home page.

From your Home page:

1. Click the **Configure Applications** icon on the right side of the page. The Configure Applications page displays.
2. Click the **Add Row** icon to add a new application.
3. Click the **Prompt** icon to select from the list of existing applications.
4. Click the **Remove Row** icon to remove an application from the home page.
5. Click the **Move Row Up** arrow or **Move Row Down** arrow to reorder the applications on the page. To move an application to the first or last position, use the **Move Row to Top** or Move **Row to Bottom** arrows .
6. Click **OK** and **Done**.

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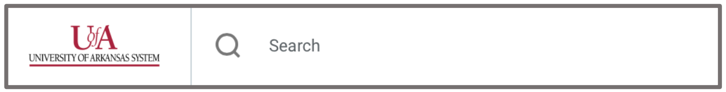
NAVIGATE USING SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search bar at the top of each page.



For example, to find a worker, type their name into the Search field and press Enter. From the search results, click People to filter the results to only display workers in your organization. Search categories are used to filter your search for faster, more accurate results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely not see any results. You can shorten words to find more matches. Use longer search terms to improve accuracy and reduce the time to return results. For example, if you are searching for the Maintain Project Worker Roles task, the search string "main pro work" returns more relevant results than the search string "Maintain Project."

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, "bp:" returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the search field.

In addition to the search field, there are Find pages where you can use filters to narrow down your results. For example, you can use the **Find Workers** report to search for employees by city, skillset, cost center, and so on.

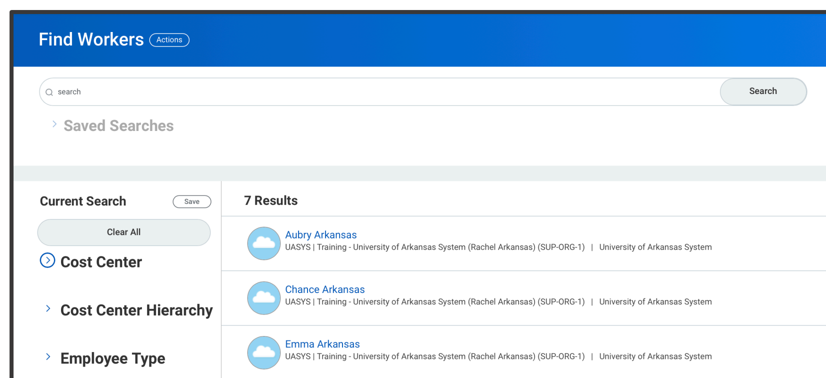
On search report pages (or reports that likely start with "Find," i.e. the Find Workers report), you can use the faceted search box.

You can customize your faceted search in a variety of ways, including:

- Boolean search – (marketing OR branding) AND manager
- Phrase search – "marketing manager"
- Exact Match – specificmail@workday.com

You can then save these faceted searches for later use.

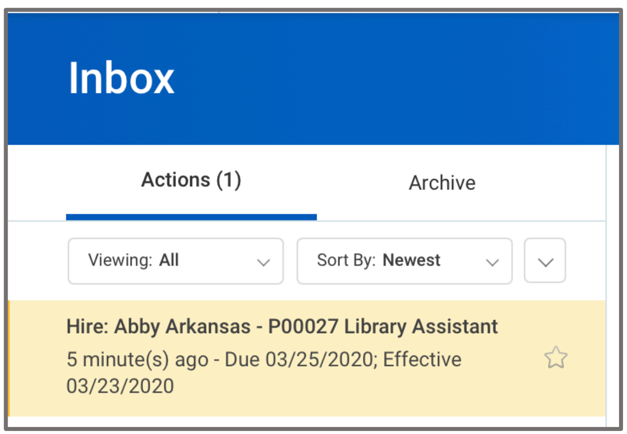
When the search results provide what you're looking for, you can either initiate an action using the object's Related Actions or click the link to see more information.



Your Inbox includes tasks, approvals, To Dos, and other items sent to you as part of your institution's business processes. You can access your Inbox using your desktop/web browser or mobile device.

VIEW YOUR INBOX

Click the **Inbox** icon next to your **Profile** icon.
Click the **Actions** tab to view your business process tasks, approvals, and to dos.
Click the **Archive** tab to access the status of any business process in which you have been involved in from the last 30 days.



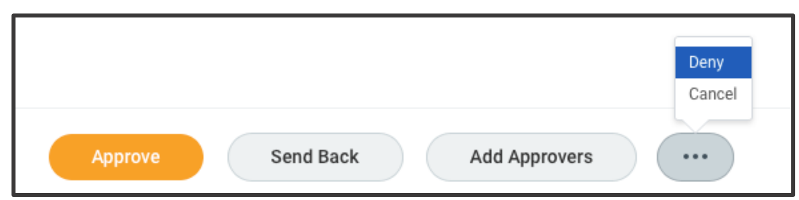
TAKING ACTION ON INBOX ITEMS

The actions available to you for each Inbox item will differ based on the business process, your assigned security role(s) and where you are on the approval chain.

The most common Inbox actions are:
Approve – approves a specific step in a business process then moves to the next step.
Deny – does not approve a request and immediately ends the business process.
Cancel – immediately ends the business process.
Save for Later – some processes allow you to save your input before submitting so it can be reviewed or changed later.

Members of certain security groups may also be able to:
Send Back – sends the current step back to a prior step – can also be sent back to initiation step.
Correct – allows for the correction of data to fix data entry errors or react to changes.
Rescind – cancels a business process after it has been completed.

Note: Not all actions can be performed by all employees.

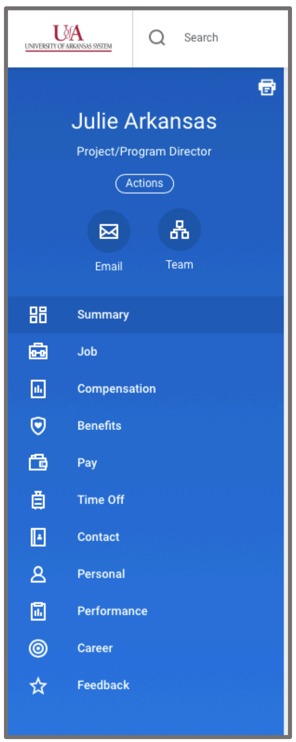


Getting Started: Managing My Personal Information

ACCESS YOUR WORKDAY PROFILE PAGE

Your Workday Profile page displays information about you, including your office location, phone number, and compensation. Note that the visibility of sensitive information is controlled by individual users' security profiles.

To access your Workday profile page, click your Profile icon, then View Profile. Your Profile page displays. **All instructions in this job aid start from the Workday Profile page.**



ADD OR CHANGE YOUR CONTACT INFORMATION

1. Click the **Contact** tab. The **Contact** subtab is selected.
2. Click **Edit**. Within each section, click the **Edit** button to change existing information or click **Add** to add new information. You can also click within a field to edit.
3. Click **Submit.**

ADD OR CHANGE EMERGENCY CONTACTS

1. Click the **Contact** tab.
2. Click the **Emergency Contacts** subtab.
3. Click **Edit**. Enter or modify your emergency contacts.
4. Click **Submit**.

MODIFY YOUR PERSONAL INFORMATION

1. Click the **Personal** tab from the Worker Profile. The **Personal Information** subtab is selected.
2. Click **Edit**. Enter or modify your personal information.
3. Click **Submit**.

VIEW YOUR IDENTITY INFORMATION

1. Click the **Personal** tab.
2. Click the **IDs** subtab. You cannot make changes to this information; you can only view it.

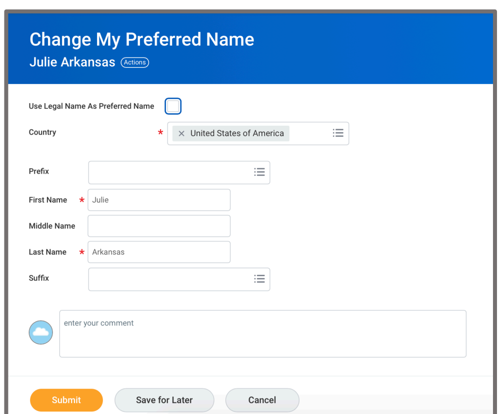
CHANGE YOUR LEGAL NAME

1. Click your **Related Actions** button. Actions
2. Select **Personal Data** > **Change My Legal Name**.
3. Enter your new information.
4. Click **Submit**.
5. Click **To Do.** You will be prompted to submit documentation to your HR department for the to be reviewed. Your change will be reviewed by your HR Partner.

CHANGE YOUR PREFERRED NAME

If you choose, your preferred name will display within Workday instead of your legal name.

1. Click your **Related Actions** button. Actions
2. Select **Personal Data** > **Change My Preferred Name**.
3. Uncheck **Use Legal Name** as **Preferred Name**.
4. Enter your new information.
5. Click **Submit** and **Done**. Your change will be reviewed by your HR Partner.



ADD OR CHANGE YOUR PHOTO

1. Click your **Related Actions** button > **Personal Data** > **Change My Photo**.
2. Click the **Select files** button to locate, crop, and upload your image, or drag and drop your image directly into the Attachments section from your local drive. You can crop and adjust the image by dragging the white corners to the desired specifications. The portion of the image within the unshaded circle represents how your photo will look on your Profile page.
3. Click **OK** and **Submit**.
4. Your HR Partner or Onboarding Partner will need to approve your photo change.

Note: Supported formats are .png, .jpg, and .gif.

VIEW TRANSACTION HISTORY

View your transaction history to see information such as benefit enrollment or personal data change dates.

1. Click the **Job** tab.
2. Click the **Worker History** subtab. Your business process history displays.
3. Click **View Worker History by Category**. The data is organized into different tabs to make it easier for you to review your history.

Payroll: Managing My Pay Options

Employee

ABOUT THE PAY APPLICATION

The Pay application contains links to payroll-related tasks and information. You may need to add this application to your home page by configuring your apps. Use these links and options to do the following:

- **Withholding Elections**: View withholding information on the State Elections tab and View/Modify your Federal Elections.
- **Payment Elections**: Distribute payroll and expense payments between different bank accounts (checking or savings) and specify the payment method. New hires will only have the option of direct deposit.
- **Payslips**: View and print payslips or change your payslip printing election. You may view payslips for any previous period when the data is provided.
- **Timesheets**: Record work hours for submission, approval, and eventual payment through payroll (if enabled).
- **Total Rewards**: View rewards by Base Pay, Allowances, Incentive Pay, and even Benefits, depending on your organization's configuration.
- **Merit Statement History**: View and print your merit statement history. This view includes the effective date of the review, the type of review, and the position for which you were reviewed**.**
- **Bonus & One-Time Payment History**: Review payments received outside of the regularly scheduled payroll process, such as one-time payments.
- **My Tax Documents**: View the annual tax documents associated with your earnings.
- **Reimbursable Allowance Plan Activity**: View the amounts, of any allowances received from your institution.

VIEW YOUR WITHHOLDING DEDUCTIONS

From the **Pay** application:

1. Click **Withholding Elections** under Actions.
2. View your Federal Elections or click the **State Elections**, **Local Elections**, or **Tax Allocations** tabs to review your status.
3. To make changes on any elections, click **Update**.
4. Select **Effective Date** and any other required fields, then click **OK**.
5. Make any needed adjustments, then click **OK**.

PRINT PAYSLIPS

From the **Pay** application:

1. Click **Payslips** under the View section.
2. Here you can view a list of all payslips. Click the **Print** button next to a payslip name. You can also View the payslip and save it to your computer as a PDF.
3. To print multiple payslips, click **Print Multiple Payslips**.

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ADD/EDIT A DIRECT DEPOSIT ACCOUNT

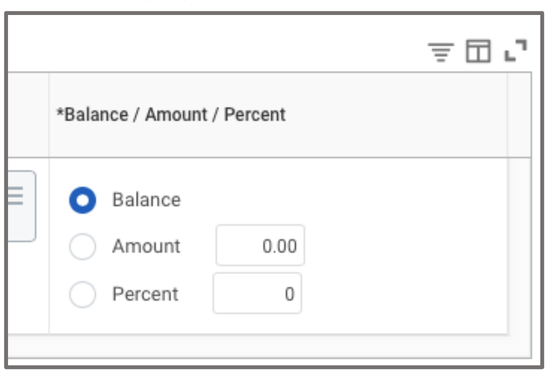
From the Pay application:

1. Click **Payment Elections** under Actions.
2. Click **Add** to add a new account or **Edit** to edit an existing account.
3. Select the Account Type and enter the Bank Name, Routing Transit Number, and Account Number.
4. Click **OK** to save. Once the account has been added, you may use it to make a payment election.
   Note: your institution may require you to submit documentation to the Payroll office when adding an account.

MANAGE YOUR PAYMENT ELECTIONS

From the **Pay** application:

1. Click **Payment Elections** under Actions.
2. Edit or remove bank accounts using the **Edit** or **Remove** buttons. An account can only be deleted if it is no longer used as a payment election.
3. After clicking **Edit**, you can change the amount or percent that goes to the account or the account that receives the balance of payments for the pay type.
4. Click **OK** to save.
5. Note: New hires in Workday will only have the option of direct deposit.



VIEW YOUR REWARDS

From the **Pay** application:

1. Click **Total Rewards** under View.
2. Review your total rewards.

VIEW MERIT STATEMENT HISTORY

From the Pay application:

1. Click **Merit Statement History** under View.
2. Review your merit history.
3. Click **Create New Statement** to create a merit report.

VIEW ONE-TIME PAYMENT HISTORY

From the **Pay** application:

1. Click **Bonus & One-Time Payment History** under View.
2. Review your bonus and one-time payment history.

VIEW YOUR TAX DOCUMENTS (beginning 2021)

From the **Pay** application:

1. Click **My Tax Documents** under View.
2. Review the documents Workday has on file for you.

VIEW REIMBURSABLE ALLOWANCE PLAN ACTIVITY

1. Click **Reimbursable Allowance Plan Activity** under View.
2. Review the allowed expenses you have incurred against the allowance set up as a part of your employee role.

Time Tracking: Tracking Your Time

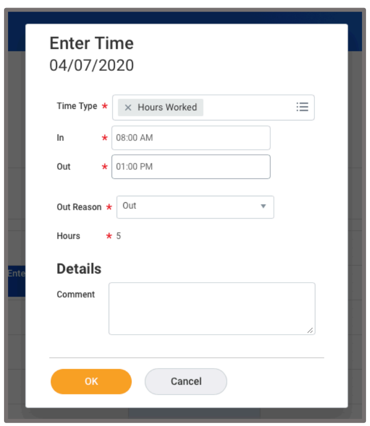
Employee

Hourly employees, classified non-exempt employees, and those who work only when needed will track time in Workday. Non-classified and classified exempt employees will not track time.

CALENDAR-BASED USER INTERFACE

Employees can enter time worked based on hours per day. From the **Time** application:

1. Select the appropriate week under Enter Time. Most commonly, you will be selecting **This Week.**
2. Click the day on the time entry calendar for which you want to enter time. <u>Note:</u> You cannot enter time for periods in the future.
3. The Enter Time window displays. Complete all required fields.



4. Click **OK**.
5. Complete all calendar entries according to the time worked. Total hours update and display above the calendar.
6. Select any time block to make necessary corrections.
7. In the time block window, click **OK** to save corrections or **Delete** to remove a time block.
8. Click **Submit** twice, then **Done**.

TIME CLOCK ENTRY

Employees can enter time worked by checking in and out each day.

From the **Time** application:

1. Click **Check In** under Time Clock.
2. Note: The current date and time will default in and cannot be changed.
3. The Time Type will default to Hours Worked
4. Click **OK**.
5. The Time Clock section will now display the time you clocked in at.

1. When your shift is complete, navigate back to the Time app and click **Check Out.** Note: The current date and time will default in and cannot be changed.
2. Select **Reason** for Check Out.
3. Click **OK**.
4. You can then click **Submit** to submit your time entry to your manager.

Note: Check with your manager on how often they would like you to submit your time for approval (i.e. daily or weekly).

SUBMIT TIME

Time must be submitted after it is entered in order to send it to the manager for approval and to pay the employee for those hours. Each time block may be submitted as they are entered, or you can enter time blocks to submit at a later date.

From the **Time** application:

1. Select the appropriate week under Enter Time. Most commonly, you will be selecting **This Week.**
2. Select **Submit**. This option will appear only when there are time blocks that can be submitted.
3. Review the statement that appears and then click **Submit** again. Your time will be sent to your manager for approval.

Note: Time that has been approved will have a green checkmark.

VIEW DETAILS OF SUBMITTED TIME

From the Time Entry calendar:

1. Click a **time block** to view detailed information about your time entry.
2. Click the **View Details** button.
3. Click the **Reported** tab to view reported work time.
4. Click the **Calculated** tab to view calculated time.
5. Click the **History** tab to view the process history of a particular time entry.

MODIFY PREVIOUSLY REPORTED TIME

You can modify unsubmitted, submitted, and approved time. Modifications to approved time will need to be approved.

From the **Time** application:

1. Click **Select Week** under Enter Time.
2. Select a date corresponding with the week.
3. Click **OK**. Your reported time displays on the calendar. Approved items display with a green bar on the left side of the time block and an Approved status.
4. Click the time block then make any needed edit to the details of the time block and click **OK** or **Delete**.
5. Modified time will need to be resubmitted. Click **Submit.**