Human Resource Management System

Workday Job Aid
Workday Getting Started

This Job Aid shows you how to get started using the basic, important features of Workday.

- ● Employees
- ○ People Managers
- ○ Human Resources

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1. Login

1. Start the process from the Workday Login screen. Here you will click on the SSO button. (See Figure– 1).

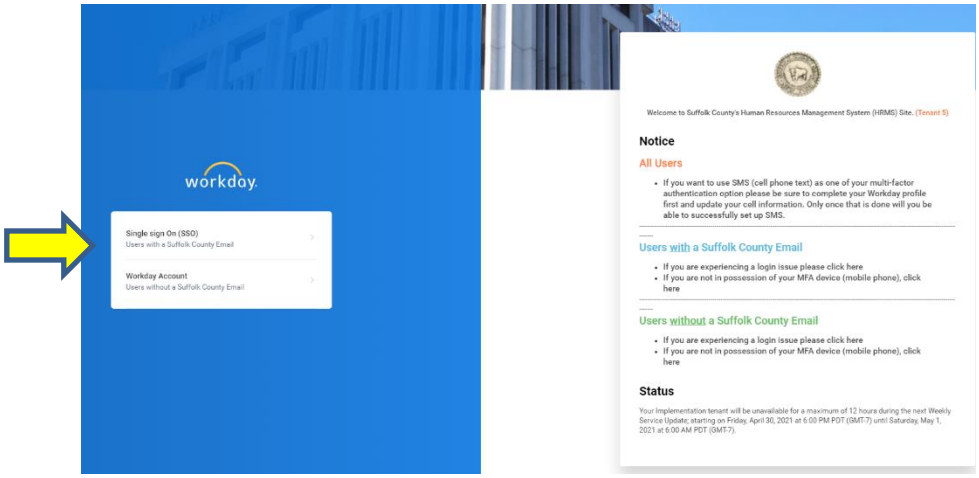
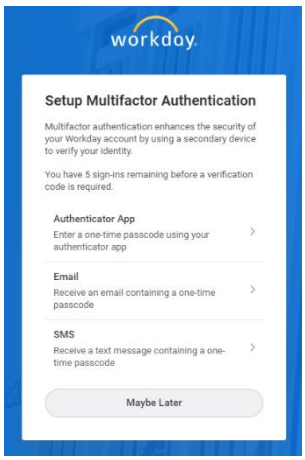


Figure - 1

2. The County's Login screen will appear with your credentials already filled in. Click the **Sign In** button.
   Note: If you have not set up Multi-Factor Authentication at this point you will be presented with the Setup Multifactor Authentication screen.



- One by one, click on each option and follow the instructions provided.

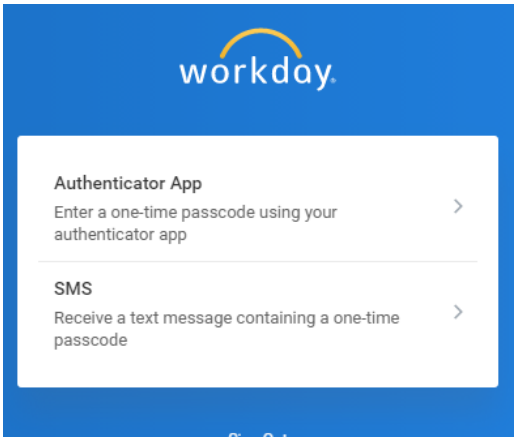
  Note: For each option, you will be asked to enter a unique 6-digit code that will be provided to you to complete that option's setup.

  Note: A checkmark will display to the right of each option that has been successfully set up.

  Important: Do NOT click the **Finish** button until you have set up **ALL** the MFA options you intend to use.

- Once you do click the Finish button you will be logged into Workday and taken to the Homepage.

3. For all subsequent Workday Logins, you will be presented with the MFA available options screen.



4. Select the option of your choice and enter the unique six-digit code it returns to you.
5. Workday will then display the Home Page (See Figure 2), which is your jumping-off point for all Workday functions.

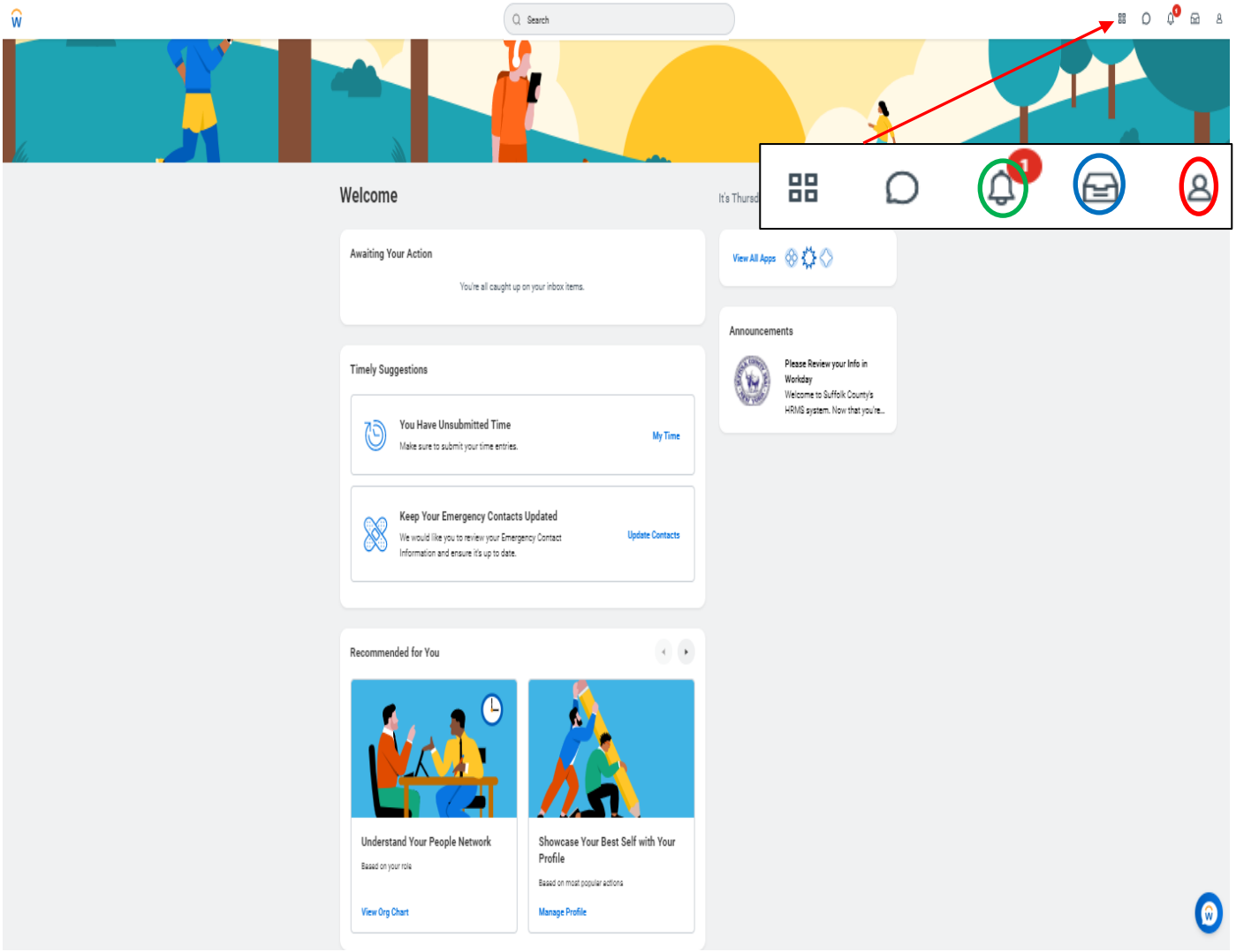

Search
Welcome
Awaiting Your Action
You're all caught up on your inbox items.
Timely Suggestions
You Have Unsubmitted Time
Make sure to submit your time entries.
My Time
Keep Your Emergency Contacts Updated
We would like you to review your Emergency Contact Information and ensure it's up to date.
Update Contacts
Recommended for You
Understand Your People Network
View Org Chart
Showcase Your Best Self with Your Profile
Manage Profile
View All Apps
Announcements
Please Review your Info in Workday
Welcome to Suffolk County's HRMS system. Now that you're...

Figure - 2

2. Key Functionality

Many tasks can be accomplished from the profile option on the main screen. To access the profile click on the employee photo icon circled in red above and then click on the **View Profile** link located directly under the employee's name on the ensuing pop-up window.

Note: The employee photo icon will display as a cloud image or a Silhouette if a photo of the employee has not been uploaded. (See Figure 2).

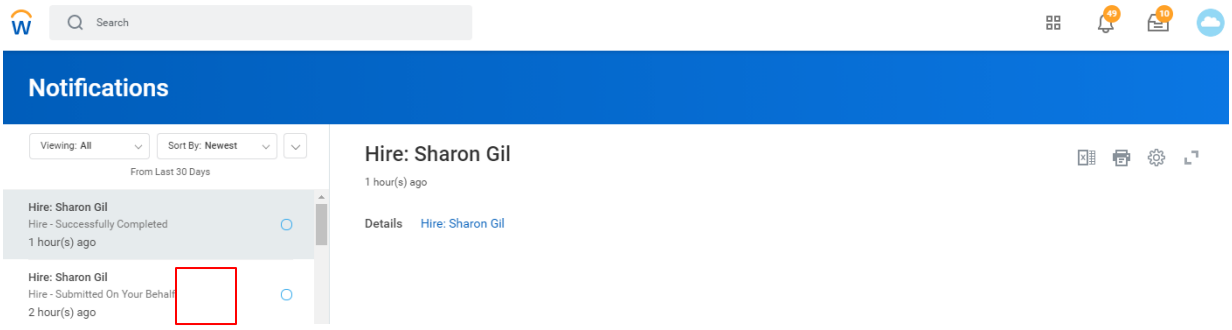
Here are some of the Key functions available from the Employee Profile page. Many of these options can be found by clicking the Actions button and then selecting the corresponding menu item:

- Change address and contact information
- Change personal information such as business title (approvals will be needed)
- Change the legal and preferred name (there may be some limitations)
- Change marital status
- Add or update emergency contact information
- Request or update time off and leave of absence
- View time off balance
- Add and maintain profile picture
- View tasks, requests, and notifications
- View Directory

3. Notifications

Tasks that require your attention will be listed under Notifications (See bell-shaped icon in Figure-2 above). The number displayed above the icon denotes the number of unread notifications you have. When tasks have been approved, denied, completed, canceled, or rescinded, you may receive a notification. To review and mark the notifications as "read", first go to your Notifications page by clicking on the bell-shaped icon (Figure-2 Circled in Green). With the page displayed (See image below), click on the radio button next to the notification you wish to mark as read.

Note: The count above the Notification icon on the Home page will be decremented for each notification you mark as read.



4. Basic Navigation

From the Home Page (See Figure - 2), navigation is accomplished by selecting Applications, searching for tasks in the search bar, or selecting one of the other icons on the page.

1. The Navigation Bar runs across the top of the page and is available all the time.
2. Use the Workday icon in the upper left to return to the Home Page at any time.
3. Click on your Employee Photo to access your profile (Figure-2 Circled in Red).
4. Click on the tray icon to access your inbox. (Figure-2 Circled in Blue).
5. Click on the bell icon to access your notifications (Figure-2 Circled in Green).
6. Click the View All Apps link to access the Workday Applications. These are used to navigate to a related set of tasks or information.
7. The gear icon on the page that displays when the View All Apps link is clicked is used to modify the list of Applications available to you. (See Adding Applications).

Common Navigation Icons

ICON/ELEMENT	DESCRIPTION
Blue text	Any blue text is hyperlinked and is an actionable link to view object details.
	Display the related actions menu for the item. This allows you to view more information and take action.
	Filter data based on any column in a report.
	View the data as a graph or chart.
	View reports as a PDF file, allowing you to determine what information to include and print.

	Export the page information as an Excel file.
	Prompt for a dropdown of available options for a field.
Details Process	View details and workflow status for a business process.
Address * wendyworkday at yahoo dot com Error -	The red error message is a hard stop. You will not be able to proceed to the next step in the process until the issue is resolved.
Alert The employee is in a pending merit review. Please note that this transaction may be overwritten by changes from the merit review effective 05/01/2018. Alerts: 1	The yellow alert message will warn you that the process has possible warnings but will allow you to proceed.

Additional Icons

ICON	DESCRIPTION
*	A required field that needs information entered before submitting the page.
	Click this button to edit existing information.
Remove	Remove the item from the area.
	Delete the current row.
	Add a new row.
Cancel	Click to cancel the changes entered.
Submit	Submit to confirm changes and move the item to the next step in the business process.

Save for Later	Save the change for later, but nothing has been submitted. You can return to the task to complete it at any time.
Approve	Approve the change and move the task on to the next step.
Deny	Deny any changes and return the task to the individual who initiated the change.
Send Back	Send back to have the individual who initiated the task revise the information submitted.
Done	Exit the screen to close the view.
	Sends you back to the previous screen to enter different criteria, or allows you to make an alternate selection such as a different chart or graph for a report.
Turn off the new tables view	When viewing the results of a report, there is a new toggle (above the set of icons that let you print or export the results) called 'Turn on the new tables view'. If you choose to switch this on, it will add two additional options to view the table in Collapse or Expanded Row. This allows each user additional flexibility in how they prefer to view their report data. Note that doing so will also break the report into pages to limit the content on one screen. You can navigate between pages at the bottom of the screen.

5. Upload Employee Photo

One way to personalize Workday is by adding your photo to your profile. The photo will replace the Cloud image that represents the employee profile on the home page.

Note: To complete this process you will need access to a file that contains a headshot photo of yourself. This would be similar to a passport photo.

The steps required to upload your photo in Workday are as follows:

1. Click the Profile icon on the Home Page. (Figure-2 Circled in Red).

Note: If the employee has never uploaded a picture the icon displayed will be a cloud or Silhouette.

2. Click the **View Profile** link listed under the employee's name.
3. Click the **Actions** button listed on the left side of the page.
4. Scroll down to the **Personal Data** menu item. Place your cursor over that menu item and then click on the **Change My Photo** item listed in the sub-menu displayed.
5. At this point, you can either drag and drop onto the page the file containing your photo or click the **Select Files** button and use the file explorer tool to find and select your photo.
6. The photo selected will appear. With your mouse move the circle to crop the photo.

Note: This will show what portion of the image to display on the Workday Homepage.

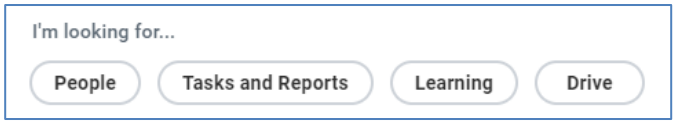
7. Click the **Submit** Button.

Note: You may need to sign out and back in again for your picture to replace the Cloud icon.

8. Click **Done**.

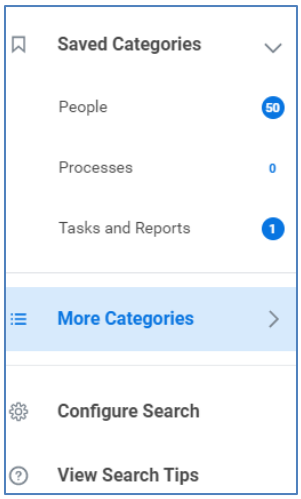
6. Using the Search Bar

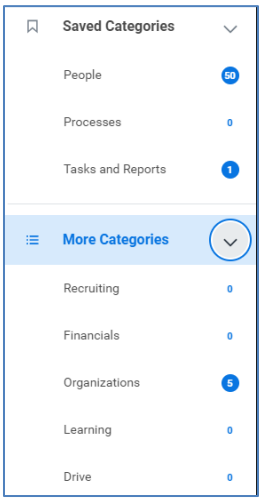
The search capabilities built into Workday allow you to perform both broad and narrow, or targeted searches. By placing your cursor on the search bar (located at the top of all Workday pages) you are immediately provided with filters that can be used to narrow your search. These filters include People, Tasks and Reports, Learning, and Drive. For example, by clicking on the filter bubble "People" any additional search parameters submitted will only bring back people-related items.



You could also perform a broad search initially, and then use the categories listed on the left to drill into those items based on the category they are affiliated with.

The categories on the left of the page are broken into two categories; Saved Categories and More Categories. The **Saved Categories** section typically houses your most used categories. That section is always expanded when search results are returned. The **More Categories** section displays collapsed when results are returned, but can be easily expanded by clicking on the right-pointing arrow next to the title.





The numbers listed next to each category represent the number of that particular type returned in the latest result set. By clicking on a category the result set listed to the right will be filtered to only show those items that represent that category. Clicking on the different categories will alter the contents of the result set listed to the right.

The categories listed under the Saved and More Categories headings can be swapped from one to the other using the **Configure Search** option. By dragging items from one section to the other and then clicking **Save**, you can define which items display in the Saved and More categories. The typical approach toward setting this up is to have your most commonly used categories in the saved category section, as this section always displays in an expanded state and therefore makes it easily accessible.

In the **View Search Tips** section, you will learn of additional ways in which you can narrow or target your search. As you become more familiar with Workday, the information in this section can help you refine your search results even further and allow you to quickly find the item you are seeking.

Now let us take a closer look at actually performing a search and what is returned when we do.

By entering information on the search bar (minimum of three characters) and <u>not</u> hitting **Enter**, Workday will provide a dropdown list of the first seven items it found. One can click on any of those items and be taken directly to the selected item.

To be provided with a more detailed result set, and one that is broken up by category, you should hit **Enter** after entering the search criteria. By performing a search in this manner, you will be presented on the main section of the page with a list (by category) of the returned results. These results will be displayed based on their associated category and the order in which that category is listed on the left side of the page (Saved and More Categories section). The categories listed down the left side of the page will list the number of items in the result set that are associated with that given category. By clicking one of the categories on the left the result set on the main section of the page will be filtered to only show items from that selected category.

For all categories, the items listed serve as links that will take you directly to the item selected. It should be noted that for results listed under the People category, a right-facing arrow will display next to each name listed. Clicking on that arrow will expand and provide additional details about that employee.

7. Adding Applications

There is a default set of applications that are assigned to an employee based on their role within the County. There may be times when an employee will be provided access to additional Workday applications beyond the defaults. When that situation occurs the employee can add an application to display when they click on the **View All Apps** link located on their Homepage.

If an optional application is no longer needed by the employee they can remove it from displaying as well. Also, the employee can dictate the order in which the optional applications display.
Note: On the **View All Apps** page the Required Applications display first, followed by the optional Applications.

The steps required to manage the applications an employee has access to in Workday are as follows:

1. Click the View All Apps link on the Homepage and then click on the Gear icon on the Next Page.
   Note: This will display the **Configure Worklets** page. Please note that in Workday the terms **Application** and **Worklet** mean the same thing.

   Note: To add or remove an application from the employee's Homepage The **Optional Worklets** section of the page will be used.

   Remove Application (Worklet)

   1. Scroll through the list of Optional Worklets to find the application you wish to remove.
   2. Click the minus sign on that row to remove that application from the listing.
   3. Click OK.
   4. Click Done. This will return you to the HomePage.

      Note: Click on the **View All Apps** link to see that the application removed is no longer listed on the page.

Add Application (Worklet)

1. Click the plus sign located at the top of the Optional Worklets grid.
2. On the empty row provided search the **Worklet** (Application) list to find the item, you wish to add.
3. Click OK.
4. Click Done.

   Note: Click on the **View All Apps** link to see that the added application is now listed on the page.

Change Display Order of Optional Applications (Worklets)

Note: The up and down arrows located in the **Order** column of the Optional Worklets grid will be used to adjust the display order of the **Optional Worklets** (Applications).

1. Scroll through the list of Optional Worklets to find the application you wish to adjust their display order.
2. Click on the up and down arrows to adjust the display order of any items listed.
3. Click OK.
4. Click Done.

Note: Click on the **View All Apps** link to see that the applications are now showing in the designated order.

8. Using Your Inbox (Filters, Notifications, Approvals, Delegation)

Using Filters

1. To access your Inbox from the Home Page, click on the Inbox icon (Figure-2 Circled in Blue).
2. The Inbox will tell you how many items you have.
3. On the **Actions** tab, click **Viewing All** to view default filters. They are listed as **All**, **Favorites**, and **Overdue**. You will also find the **Edit Filters** Option that will allow you to create your filter.
4. On the Actions tab, there is three basic Sort By options. They are listed as **Newest on Top**, **Oldest on Top**, and **Due Soonest on Top**). Select the option for the way you want your Inbox items to be listed.

Using Notifications

1. Tasks that require your attention will be listed in your Inbox. When tasks have been approved, denied, completed, canceled, or rescinded, you may receive a **notification**. This will be dependent on how the Workday system has been configured for any given task.
2. To review and mark the notifications as "read", go to your **Notifications**.
3. Access your Notifications from the Home Page by clicking on the bell-shaped icon (Figure-2 Circled in Green) in the upper right portion of the page.
4. Click each line to display the Notification on the right of your screen.
5. Click the radio button to mark the Notification as read.

Using Approvals

Note: Approvals are generally done by Managers and HR only.

1. Tasks that require your attention will be listed in your Inbox. Tasks will remain in your Inbox until they have been completed or submitted.
2. Access your Inbox from the Home Page. Click on the Inbox icon (Figure-2 Circled in Blue).
3. Click each line to display the Inbox items on the right of your screen.
4. Click the Inbox item you wish to complete.
5. Follow the on-screen instructions to complete your assigned task. Tasks will vary and you will often see Submit, OK, Approve, or Done at the bottom of each task. After completing the task, click the appropriate button to submit and finalize the task.

Using Delegation

Your Inbox can be delegated to another Employee when you need someone to act on your behalf – usually for a defined period, such as a vacation. From this area, you can either add a delegation or cancel one that is already defined.

Add a delegation

1. Access your Inbox from the Home Page. Click on the Inbox icon (Figure-2 Circled in Blue).
2. From the Actions tab, click the "More" button. This is the Down Arrow box located to the right of the Sort options.
3. Click the "My Delegations" task.
4. To add a delegation to another Employee, select the Manage Delegations button.
5. Enter the beginning and end date for the delegation period to be effective.
6. Click in the delegate field to select the name of an employee to delegate to.
7. Optional: The purpose of the Start On My Behalf field is to also allow processes to be initiated by the delegate, To use, click in the box, and select the business processes you wish to allow to be initiated on your behalf.
8. On the "Do Inbox Tasks on my Behalf" column, select whether to delegate all business processes, specific business processes, or none of the above.
   - Select **For all Business Processes** to allow the Delegate to perform ALL business processes.
   - Select **For Business Process** to select only certain business processes of your choosing.
9. Mark the Retain Access to Delegated Tasks in Inbox check box to view and modify your Inbox while delegated.
10. Click the Submit button to complete the delegation.

End a delegation

1. To end delegation before the End Date, select My Delegations.
2. Click Manage Delegations.
3. Either click on the End Date calendar icon or change the End Date directly and set the date to the day you wish the delegation to end.

9. Business Processes

Business Processes have been referred to as 'the heart of Workday'. A business process is made up of a collection of tasks that are completed in a specific order using pre-defined routing to accomplish the desired business objective. The routing of a business process is conditional on attributes (eg: employee type, supervisory organization, and job family). Notifications can also be created to let a Workday user know that a step has begun, completed, or that a particular review response was selected. Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee, etc. The search prefix for a Business Process is "bp:". Entering that value in the search bar will provide you with a complete list of the business processes you have access to.

10. Key Terminology

Term	Definition
Actions	Appear in your inbox under the actions tab and are items that are pending your input, review, or approval for the business process to continue through its steps.
Approval Chain	In a business process, a hierarchy of managers can be defined to approve a process, one after the other. The process will designate how many levels up the management hierarchy the approvals will need to route.
Application	A collection of information grouped together for viewing and tasks.
Approver	The role responsible for approving business processes in Workday.
Archive	Appears in your inbox and lists historical actions.
Business Process (BPs)	All transactions in Workday will be executed through the completion of Business Processes. A business process is made up of a collection of tasks that are completed in a specific order using pre-defined routing to accomplish the desired business objective. The routing of a business process is conditional on attributes (for example: employee type, supervisory organization, and job family). Examples of business processes are hire, change job (promote), add additional job, and terminate.
Business Process History	Historical record of actions associated with a specific business process. Includes information on the task, step, status, completed on date, due date, and the individual/role on which the process is awaiting action.
Checklist	A checklist step is a collection of To-Dos that are grouped together and must all be submitted before that one step will be completed.
Consolidated Approval	Consolidates all of the steps in the main business process as well as any sub-processes into a single view for the approver to evaluate and approve.
Initiator	The role that is responsible for initiating a business process. Each business process can have multiple possible initiators.
Job Family	Groups similar job profiles into families.
Location	A worker's location reflects his or her actual work location. This field tracks where employees are physically located across the County.
Notifications	Appear in your inbox under the Notifications tab to notify you when a business process has been completed.
Org Chart	A visual depiction of the structure of an organization. It outlines the roles, responsibilities, and relationships between individuals within an organization.

Position	Made up of attributes that define a position. An employee cannot be hired without a position. Attributes include: supervisory organization, worker/employee type, time type (full time vs. part-time status), job family, availability date. A position will exist with or without an employee assigned to it (i.e. there are filled and unfilled positions in Workday).
Reason Codes	Pre-defined reason codes allow users to select why they are initiating a process in Workday, and that selection often determines the path the rest of the process will go until it completes.
Related Actions	A clickable icon that enables the user to perform additional actions for an object. Possible actions include viewing your current benefit elections, editing your contact information and requesting time off.
Review vs. Approval	Reviewers and approvers have all the same approval authorities except that a reviewer can also edit values before approving.
Roles	Each Workday user is assigned a role or roles in Workday. Professionals in the HR community have been assigned the role of HR Partner, and financial professionals have been assigned the Budget Partner role. Every employee is assigned the Employee as Self role.
Security Groups	Security groups are a collection of users or of objects that are related to users. Allowing a security group access to a securable item in a security policy grants access to the users associated with the security group.
Staffing Event	Any event that changes your position or job, such as a hire, transfer, or promotion. Staffing events usually trigger an opportunity to edit/modify benefit elections.
Supervisory Organization	Supervisory organizations group workers into a management hierarchy and are the primary organization type inWorkday's HCM. All workers are hired into supervisory organizations. Organization assignments such as company, cost center and region can be configured for supervisory organizations, and unique business processes can be configured forthem as well.

Task	A business process step must be completed for a workflow to go to the next step.
To Do	Steps in the business process that act as reminders to the user to complete or update data in a section of Workday that is outside of the business process.
Validation Rule	Rules that prevent the entry of a business process and instead triggers an error or warning message upon submission and prompt for further action.
Worker Profile	Your continuously updated page which provides a quick view of your position and contact information.

11. Data Privacy

Workday takes the responsibility of protecting your data seriously. Their security model (Power of One) was specifically designed to run in the Cloud and was built to be an integrated part of the Workday platform and not added on as an afterthought. All clients run off of the same version of the software, so a benefit to one client means a benefit to all clients. As an added security measure, all data stored in Workday is encrypted. Also, there are comprehensive audits in place to track what takes place in Workday and by whom. To further demonstrate their commitment to properly securing their client's data, Workday has achieved many Information Security certifications by third-party auditing firms. Security is a priority at Workday, and their focus toward achieving excellence in that area is a testament to that fact.

Change Log				
Revision Number	**Date of Change**	**Affected Lesson**	**Action**	**Initials**
1.1.1.1	09/15/2021		Log Created	RK