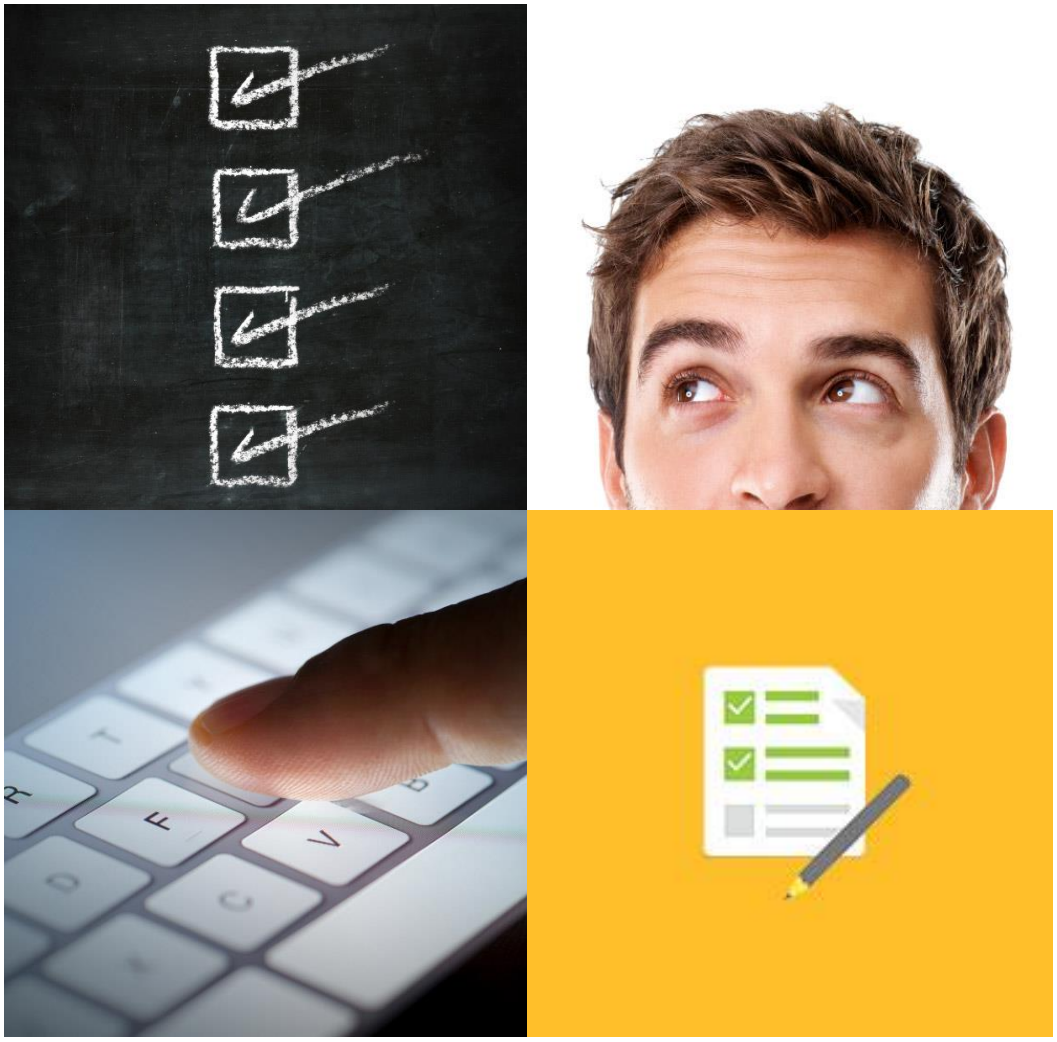
workday. EDUCATION



TRAINING MANUAL

Workday 101 – April 2017

THIS BOOKLET IS FOR THE PERSONAL USE OF ONLY THE INDIVIDUALS WHO ARE PART OF AN ORGANIZATION THAT IS CURRENTLY SUBSCRIBED TO WORKDAY AND THE ADOPTION KIT. YOU MAY MAKE COPIES ONLY AS NECESSARY FOR YOUR OWN USE. ANY DISTRIBUTION OUTSIDE OF YOUR ORGANIZATION IS STRICTLY PROHIBITED UNLESS WORKDAY HAS AUTHORIZED SUCH DISTRIBUTION IN WRITING.

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CHAPTER 1 – NAVIGATE TO WORKDAY WEBSITE

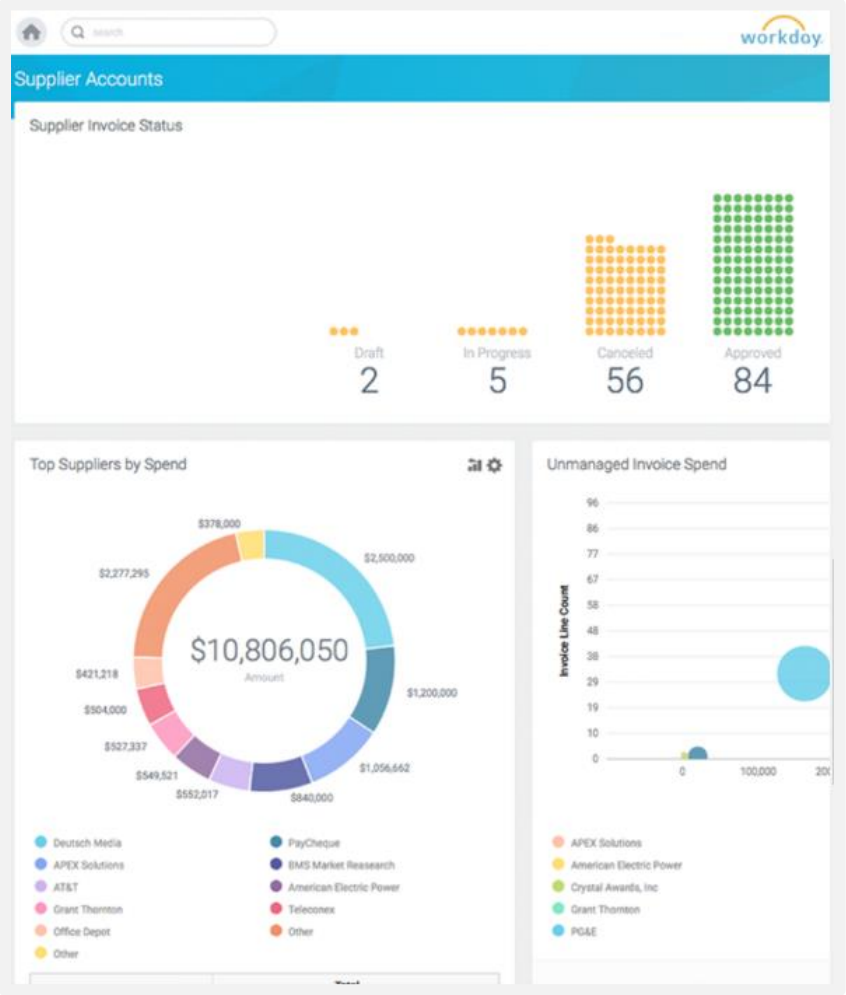
OBJECTIVES

By the end of this chapter, you will:

- Navigate to the Workday website
- Log into Workday utilizing Single Sign On
- Bookmark Workday on your browser and your website

NAVIGATE TO WORKDAY

Workday is GCCCD's new system of record for financial, human resource, and payroll transactions. This single Enterprise Resource Planning (ERP) system will replace IFAS, the San Diego County Department of Education, and numerous paper forms. Now these transactions will be transparent, in real time, and accessible from anywhere that has an internet connection.



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ACTIVITY 1 – FIND WORKDAY WEBSITE

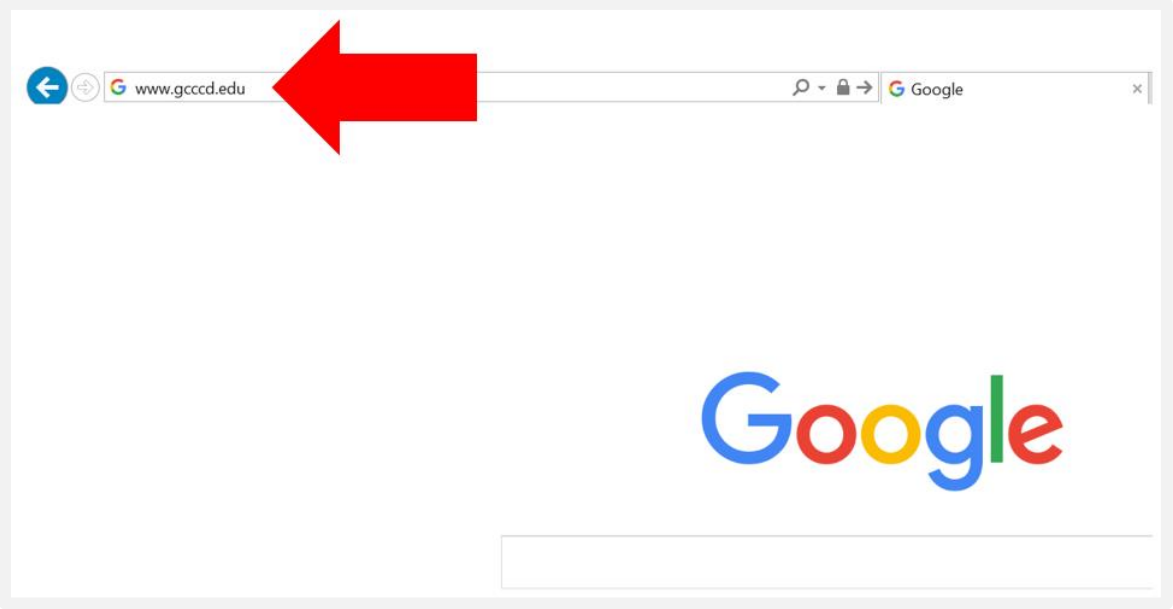
Scenario: Log into your computer as you normally would, using your organizational account and password.

1.1 LOG INTO WEB BROWSER

From the Home screen of your computer:

1. Find the web browser icon of your choice: **Chrome, Firefox, Safari, or Internet Explorer.**

2. **Double-click** on the web browser icon.
3. In the URL field at the top of the screen, type www.gcccd.edu and click **Enter** (The District website will display)**.**



4. Login to the Employee Intranet, through the Intranet link at the bottom of the page.
5. Click on "Workday" in the left menu on the Intranet's home screen.
6. Click on the "Powering Your Workday" image.
7. GCCCD's Workday website will display.

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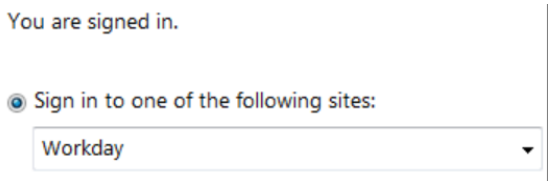
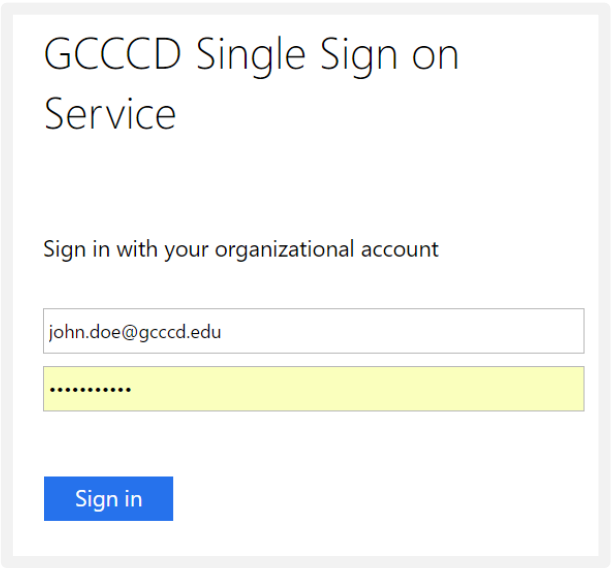
1.2 SIGN INTO WORKDAY

From the Workday sign in page:

1. Type your full email address.
2. Type your normal password.
3. Click Sign in.
4. Use the drop down arrow to ensure that the **Sign in to one of the following sites** field lists **Workday**.



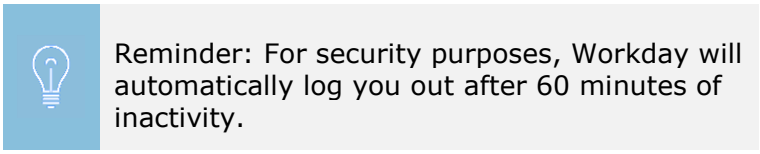


5. Click Sign in.
6. Your Workday Home screen will display.

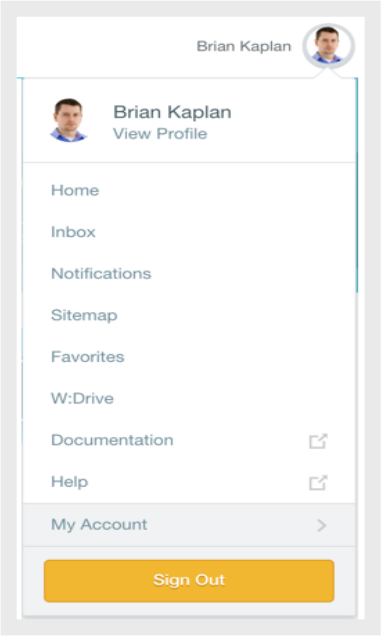
1.3 SIGN OUT OF WORKDAY

From the **Home** page:

1. Click on your name or the cloud (or your picture) in the top right side of the page.
2. Click on the Sign Out icon at the bottom of the pop up.



Reminder: For security purposes, Workday will automatically log you out after 60 minutes of inactivity.



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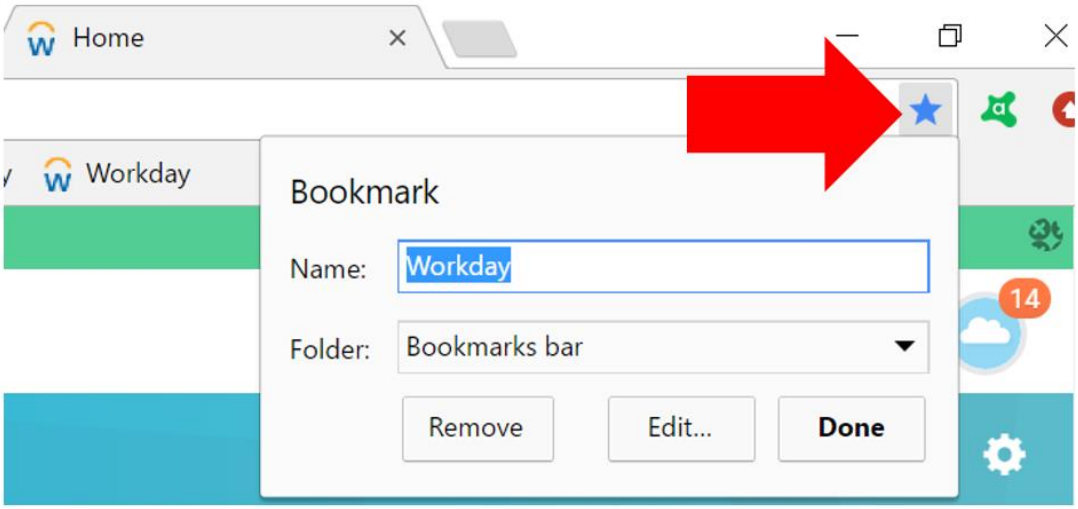
ACTIVITY 2 – SHORTCUTS TO THE WORKDAY WEBSITE

2.1 BOOKMARK WORKDAY USING CHROME

From the **Workday Home** screen:

1. In the URL at the top of the page, select the star icon on the right.
2. Type **Workday** in the name field of the Bookmark popup.



3. Click **Enter** or click **Done**.
4. You will now see the Workday bookmark at the top of your browser every time you start the Chrome browser.

The bookmark will direct you to sign into Workday if this is the first time you have signed into Workday for that day, if you are signing into Workday from an alternate browser, or if you have closed and reopened the browser. Use Activity 1.2 to sign in.

2.2 BOOKMARK WORKDAY USING INTERNET EXPLORER

From the **Workday Home** screen:

1. At the top right of the browser window, select the star icon.
2. Select **Add to favorites.**

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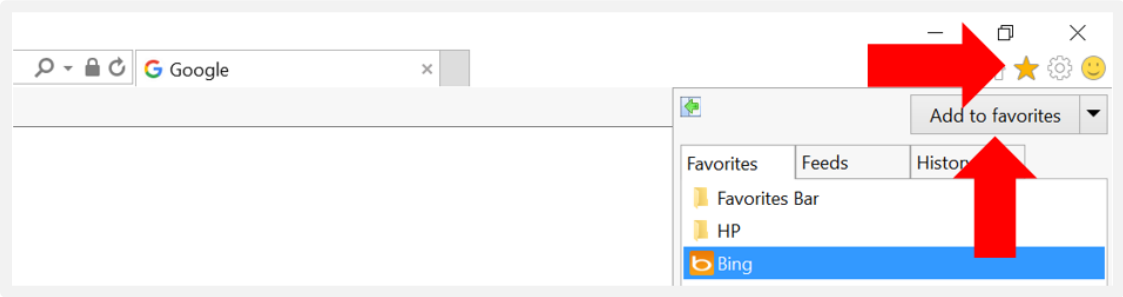
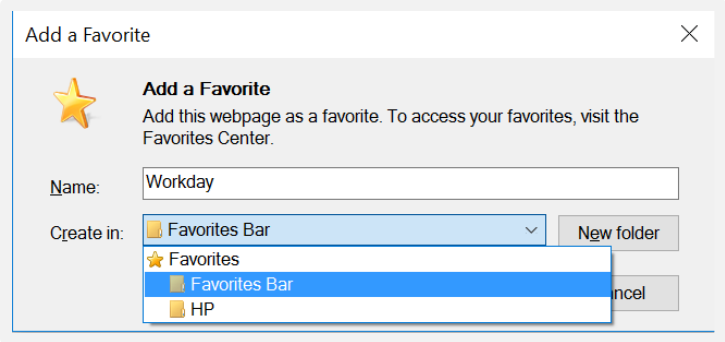


3. Type **Workday** in the Name field.
4. Use the drop down list to indicate **Favorites Bar** in the name field of the Bookmark popup.



5. Click **Enter** or click

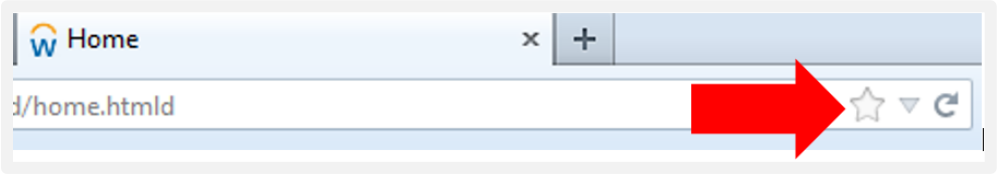
.
6. You will now see the Workday bookmark at the top of your browser every time you start the Internet Explorer browser.

The bookmark will direct you to sign into Workday if this is the first time you have signed into Workday for that day, if you are signing into Workday from an alternate browser, or if you have closed and reopened the browser. Use Activity 1.2 to sign in.

2.3 BOOKMARK WORKDAY USING FIREFOX

From the **Workday Home** screen:

1. At the top right of the browser window, select the star icon.



2. Click on the gold star icon again.
3. Type **Workday** in the Name field.
4. Use the drop-down arrow to select **Bookmarks Toolbar** for the Folder.

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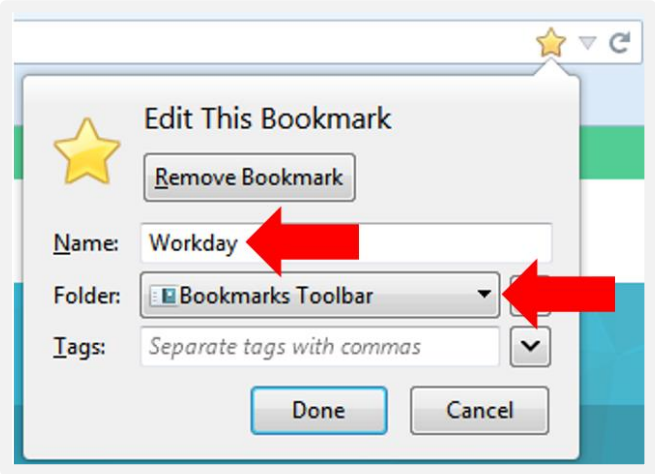


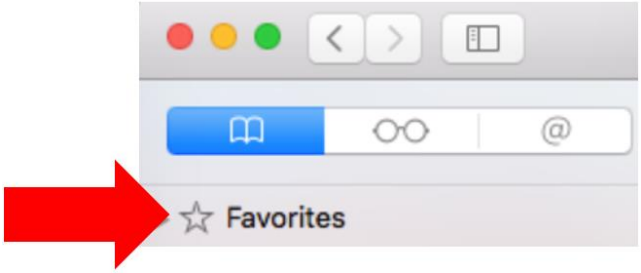
5. Click Done.
6. You will now see the Workday bookmark at the top of your browser every time you start the Firefox browser.

The bookmark will direct you to sign into Workday if this is the first time you have signed into Workday for that day, if you are signing into Workday from an alternate browser, or if you have closed and reopened the browser. Use Activity 1.2 to sign in.

2.4 BOOKMARK WORKDAY USING SAFARI

From the Workday Home screen:

1. At the top left of the browser window, select the star icon.



2. Select **Add Bookmark.**

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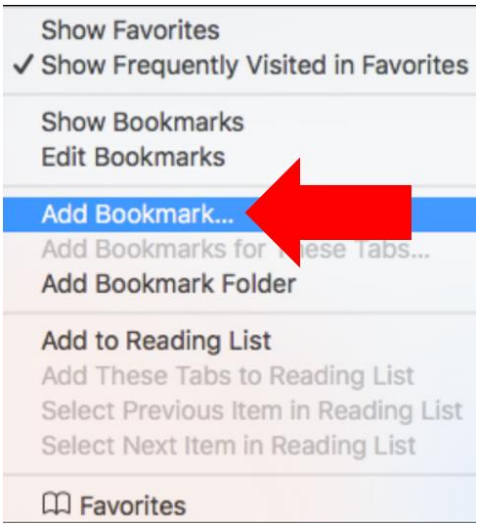
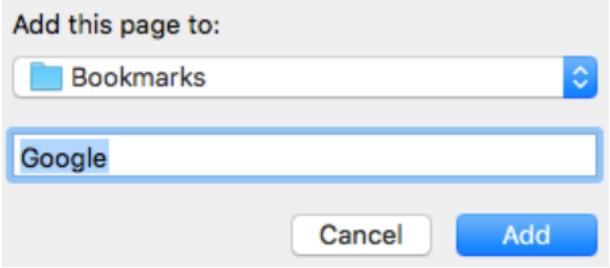


3. Safari may verify that you wish to create the bookmark. Click Create Bookmark.
4. Verify where you wish to add the Bookmark.
5. Type Workday to name the link click **Add.**



The bookmark will direct you to sign into Workday if this is the first time you have signed into Workday for that day, if you are signing into Workday from an alternate browser, or if you have closed and reopened the browser. Use Activity 1.2 to sign in.

2.5 CREATE A DESKTOP SHORTCUT TO WORKDAY

From the **Workday Home** screen:

1. In the URL at the top of the page, highlight the web address text with your mouse.
2. **Right click** on the highlighted text and select **Copy.**

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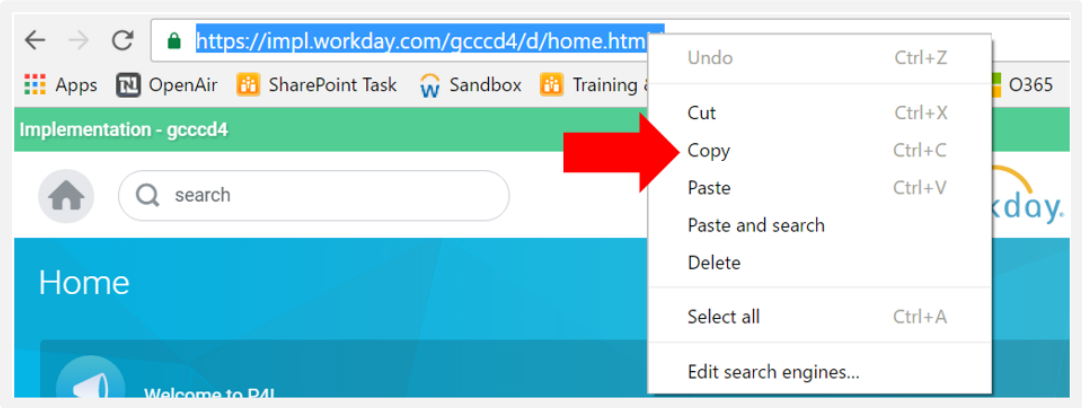
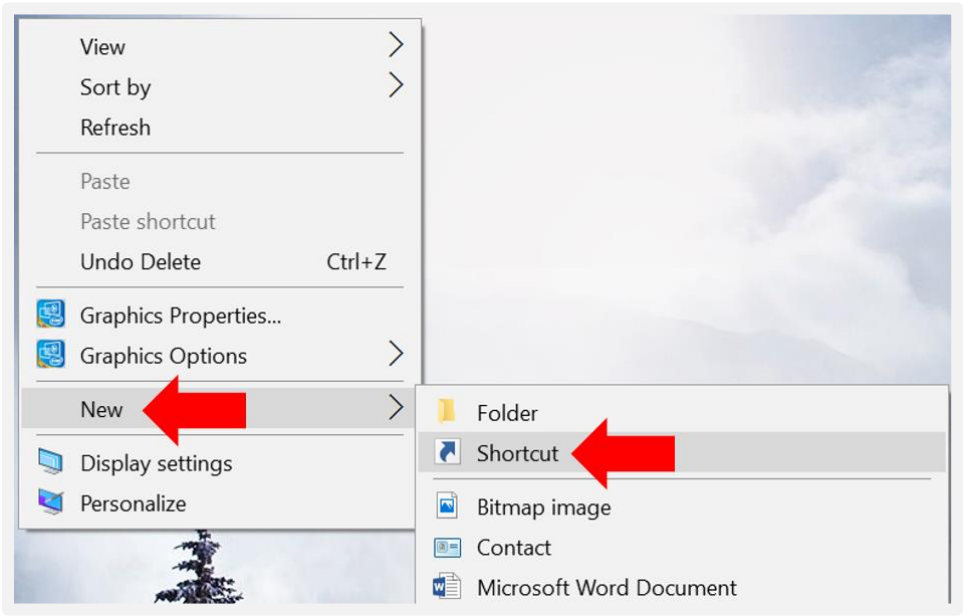


3. Minimize the browser icon by selecting the minus icon at the top right of the browser.
4. Right click on the desktop background.
5. Hover down to **New >** and click on **Shortcut.**



6. Right click on the blank **Type the location of the item:** field.
7. Click **Paste**.

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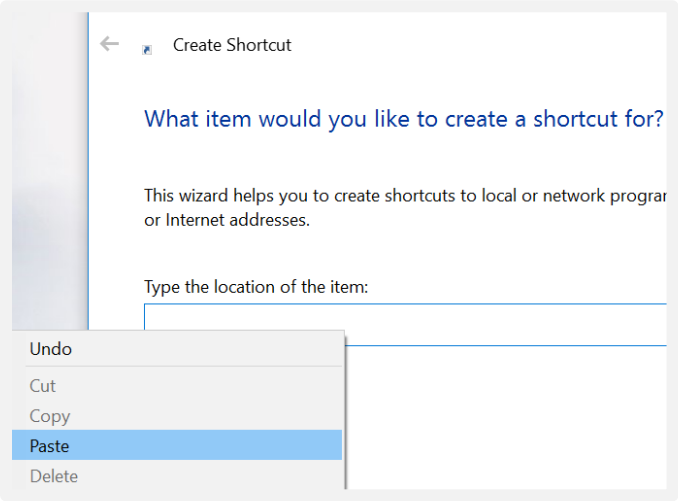
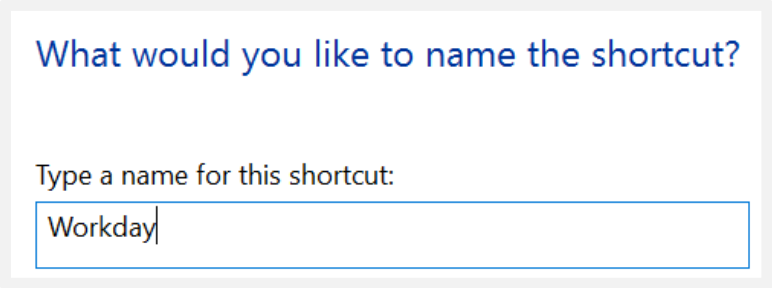
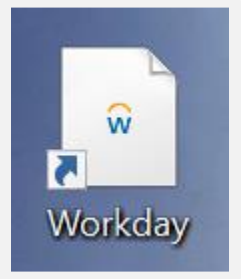


8. Click Next.
9. Type **Workday** in the name field.



10. Click Finish.
11. The Workday shortcut will now display on the desktop.



The shortcut will direct you to sign into Workday if this is the first time you have signed into Workday for that day, if you are signing into Workday from an alternate browser, or if you have closed and reopened the browser. Use Activity 1.2 to sign in.

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CHAPTER 2 – NAVIGATE WORKDAY

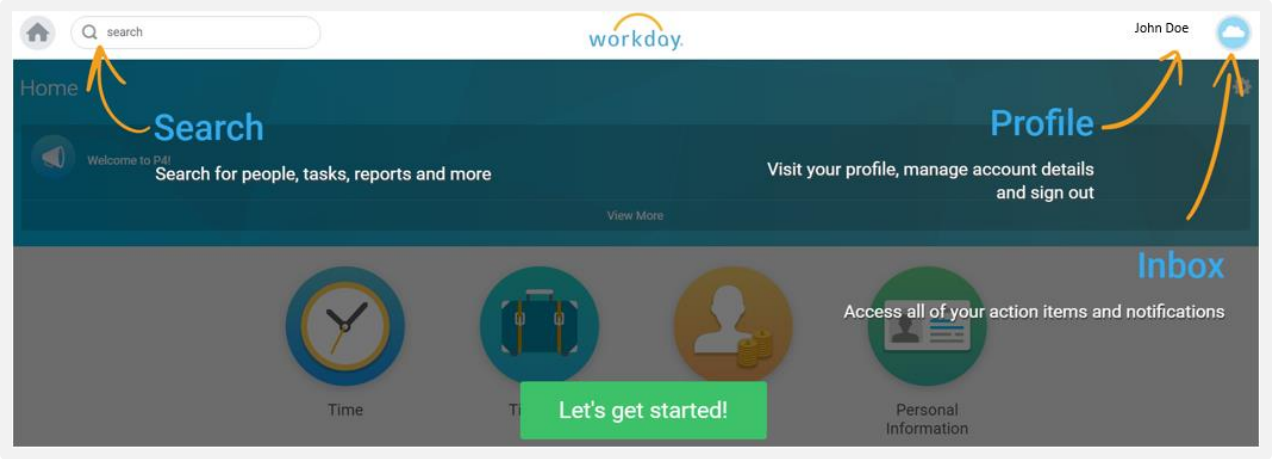
OBJECTIVES

By the end of this chapter, you will:

- Navigate the Home page and distinguish between the associated worklets
- Use the Search function
- Identify the Related Actions icon and define its function

NAVIGATE WORKDAY

When logging into Workday for the first time an introductory page displays an overview of the Workday banner. The banner contains Workday global navigation functions, such as Search, your Profile, and your Inbox. Click **Let's get started!** to advance the Workday application.



HOME

When you log in to Workday, the Home page displays. From the Home page, you can access all personal information, such as emergency contacts, paid time off balances, payment elections, federal tax information, name and address, and much more. The banner contains Workday global navigation functions, such as Search, Home, and your main menu, which provides access to your Inbox, Worker Profile, and Notifications.

The icons on your Home page provide access to worklets – groups of related tasks, reports, and links. These worklets are organized by functional category and represent different tasks or work you can perform.

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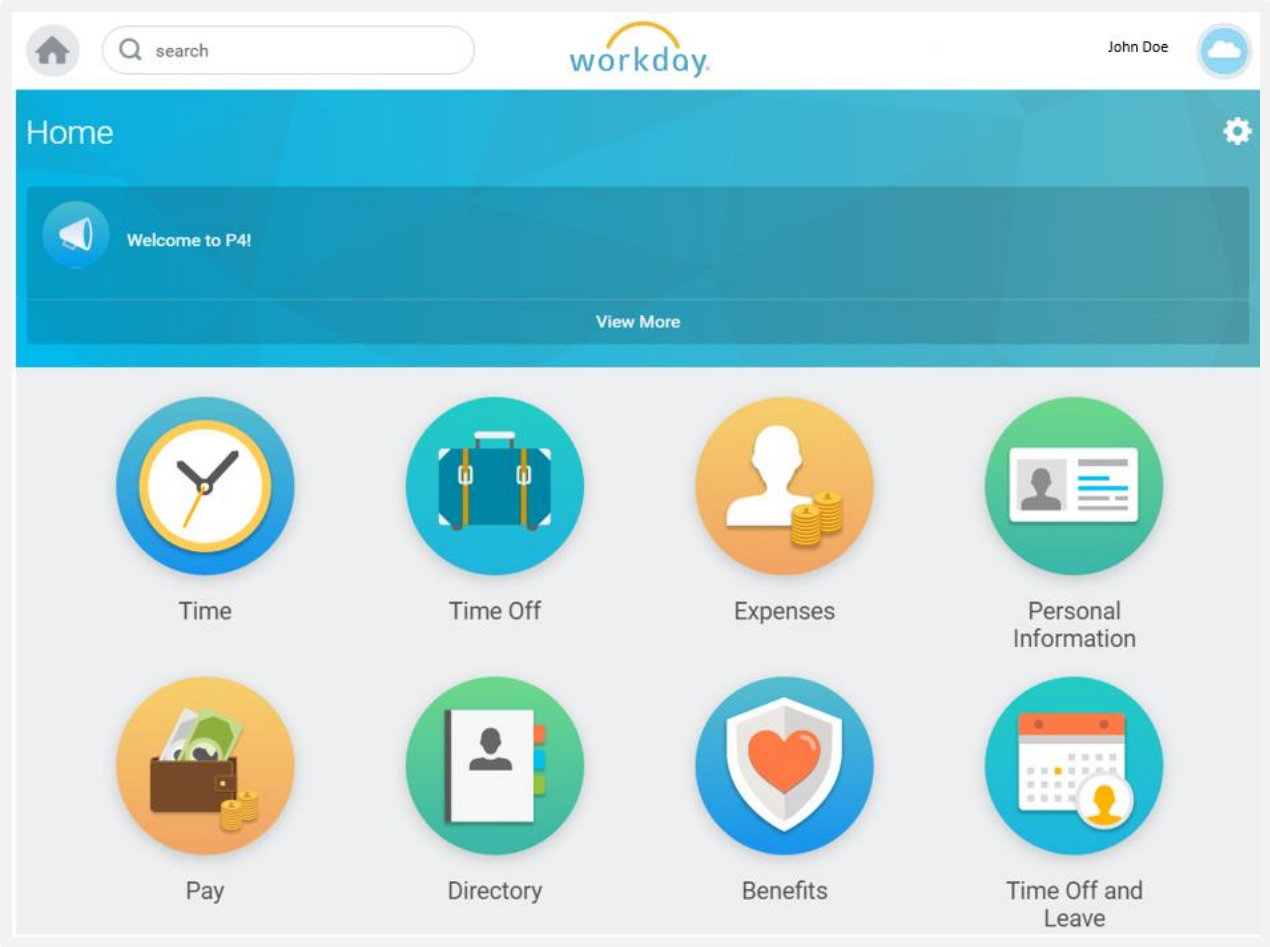
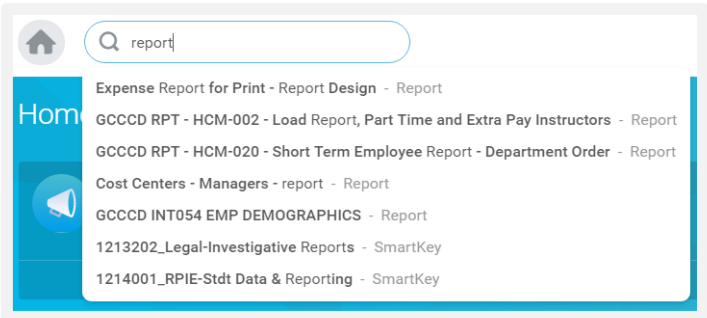
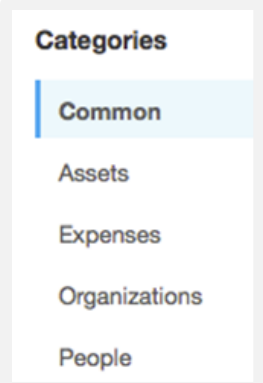


SEARCH

Use the Search box to locate tasks, reports, and views you can access.



If you are not sure where to find information in a particular worklet, type the task name or report you are looking for into the Search box.



As you type, Workday filters your request offering several of the most common search results in a drop down menu. Select one of these results, or click Enter to skip the menu and display the search results on a separate page.

You can perform searches on targeted areas of Workday, or expand them to include all of Workday. By default, the focus of a typical search is on the most common areas of Workday.

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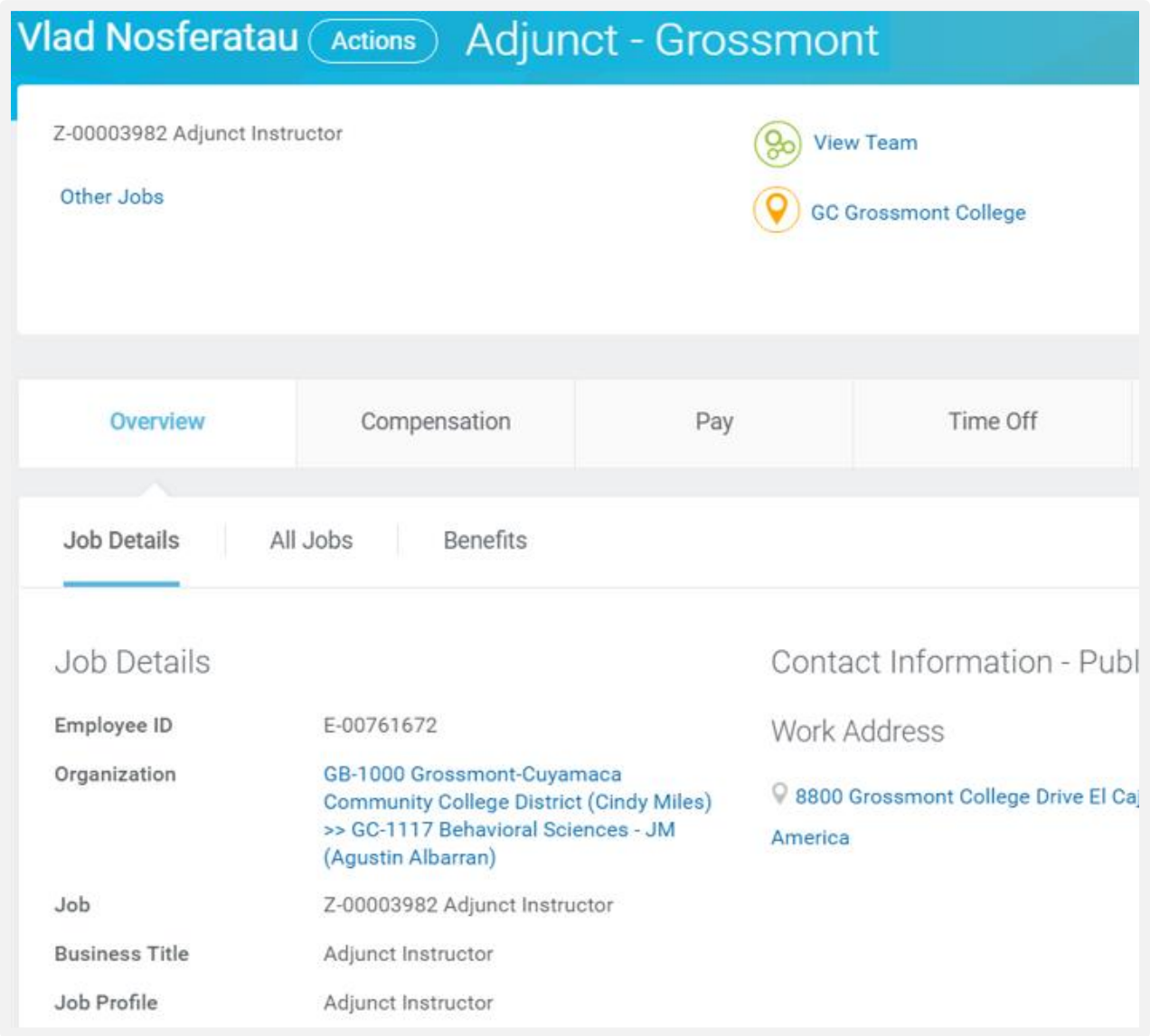
To change the focus of your search, you can select the distinct area of Workday to search from the **Categories** list. Or, you can expand your search by selecting **All of Workday**.

RELATED ACTIONS OR ACTIONS ICON

When a Related Actions icon or or Actions displays next to an object, other actions and tasks are available related to that object. Employees can use the Related Actions and Actions functionality to view data and accomplish tasks related to their own employee records, such as changing a legal name, requesting time off, or submitting an expense report.

Many of these tasks are also available on an employee's profile page, or as individual links within the worklets on the Home page. There is often more than one way to accomplish the same task within Workday.



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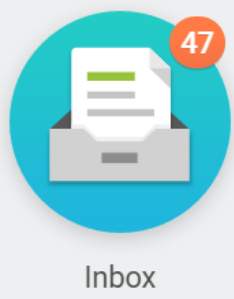
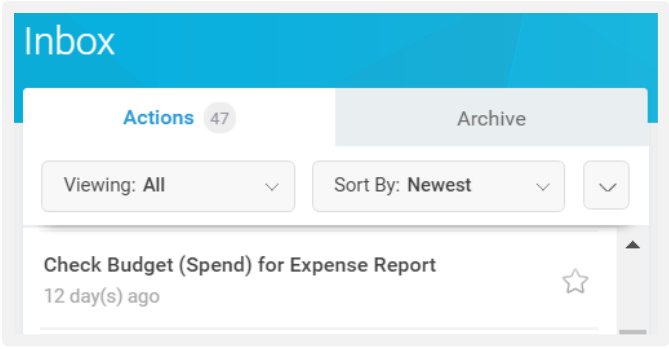
INBOX



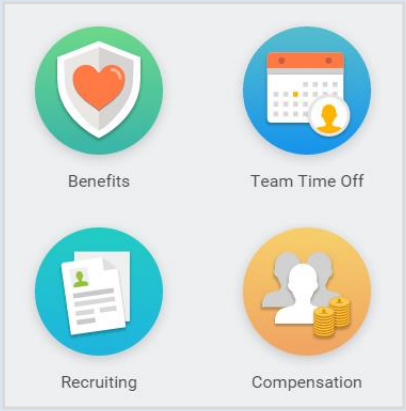
Any actions you are required to take within Workday are sent to your Inbox as tasks to complete. You can view details and take action on these tasks inside of your Inbox. All completed tasks and/or actions you have taken will be stored in the **Archive** tab.

The Inbox is an activity stream that displays business process tasks, approvals, to dos, and notifications. The **Archive** tab displays historical actions and business processes within the last 30 days. You can also choose to add the Inbox as a worklet on the home page.



Each tab of the Inbox displays item totals specific to the tab you're viewing. The **Actions** tab also display filter options based on items in your inbox.

WORKLETS GLOSSARY

Name	Icon	Description
WORKLETS		Access tasks and information you use on a regular basis via a tile on the My Workday page. Worklets link to configured reports and related tasks and links within Workday. Ex. Benefits, Pay, Time, and Expenses worklets
PERSONAL INFORMATION		A worklet linking you to common actions and views related to your personal information, including changing your contact and personal information (such as addresses, email, and phone numbers), emergency contacts, photo, legal name, preferred name, and government IDs.

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Name	Icon	Description
PAY		A worklet linking you to common actions and views related to your pay, including access to withholding elections and payment elections, and viewing payslips, total compensation, bonus and one-time payment history, tax documents, and allowance plans.
DIRECTORY		A worklet linking you to common actions and views related to your organization's directory. You can view a list of your co-workers, information about other workers in the company, including their work address and phone number. Also view your organizational chart, management chain, and organizations to which you belong.
TIME OFF		A worklet linking you to common actions and views related to time off; including time off correction, leave of absence, view your time off, and time off balance.
EXPENSES		A worklet linking you to common actions and views related to expenses including, creating and editing expense reports, viewing expense policies, reports, transactions, payment elections, and recent expenses.

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Name	Icon	Description
BENEFITS		A worklet linking you to common actions and views related to benefits including; change benefits, beneficiaries, and dependents, view your benefit elections and current benefits cost.
COMPENSATION		A worklet linking you to common actions and views related to compensation, including comparing a direct report's pay and salary range to others on the team. Use this worklet for your team to request one-time payments, stock grants, compensation changes, and view their compensation history.

ICONS GLOSSARY

Icon	Description
workday.	Brings you back to your Home page
	Brings you back to your Home page
or	Displays the Related Actions menu for an object (available only if the user has permission to perform additional actions on that object). This list of actions are what is possible to perform on that object. Affectionately known as "the Twinkie".
*	Required Field indicator: must fill in the field before submittal.

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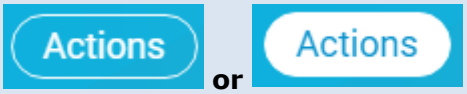
Icon	Description
	Prompt: Click on this prompt icon to see a list of available values sorted in folders (if applicable).
	Calendar: Opens a calendar to select your date.
	Delete Row: Click this icon to remove the current row from the grid.
	Add Row: Click this icon to add a row to the current grid.
	Click to enter information into a field.
	Click to view this page as a PDF file that you can print.
	This is like the Related Actions icon. Click on the Actions icon to take an action on that object.

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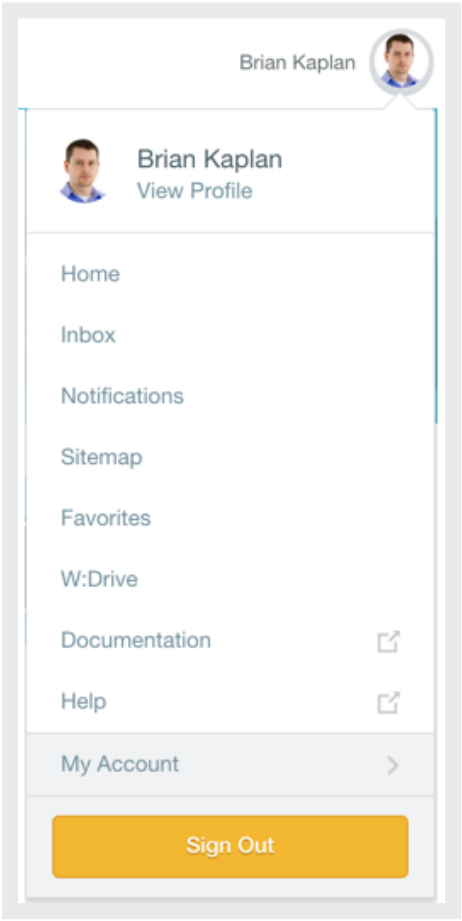
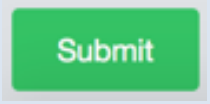
Icon	Description
	The main menu displays your profile photo (or a cloud if there is no picture) and opens to reveal various menu options: • View Profile - displays your worker profile. • Home - displays the Home landing page. • Inbox - displays a count for your action items and takes you to your Inbox. • Notifications - displays a count for your new notifications and takes you to your Notifications page. • Favorites - a configurable list of favorite tasks, reports, business objects, and custom and shared custom reports available to you, sorted by category (secured to the Favorites domain in the System functional area). Use the Manage Favorites task to configure this list. • W: Drive - a virtual drive where you can store generated reports (secured to the W: Drive domain in the System functional area). This is not a mapped drive on your computer. • Documentation - links to the Workday Documentation on Workday Community secured to the Workday Documentation Link domain in the System functional area. Not recommended for self-service users. • My Account - provides access to these account management tasks: - Change Password - Change Preferences - Manage Password Challenge Questions (if enabled) - Switch Accounts (if you are a delegate) • Sign Out
	OK Button: When you click OK, the system accepts your changes.
	Next Button: Advances you to the next page or step of the task.
	Submit Button: Submit accepts your changes and moves you to the next step in the business process.

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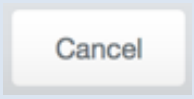
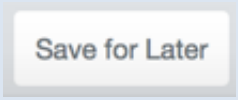
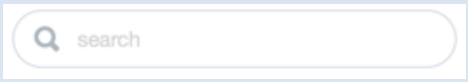
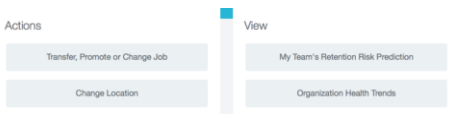
Icon	Description
	Done Button: Done closes a confirmation screen.
	Cancel Button: Click cancel to disregard all changes.
	Approve Button: When you click Approve, you are telling the system and the initiator that you reviewed and agree with all of the information within that inbox task or item.
	Save for Later Button: Saves the item in your inbox until action is taken.
	Appears in the upper right side of worklets and landing pages and acts as a menu or settings option.
	Click to view this page as an Excel file.
	Used to indicate that the report can be viewed as a chart.
	Used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns.
	Opens the associated instance, replacing the current view page (Only available on select view pages).
	Alert: Soft warning message that alerts you about system limitations based on configuration. You may continue your process or configuration.
	Error: Hard warning message that alerts you there is a critical error. An error must be corrected to move forward in a process or to enable your configuration.
	The search field on the home page that enables you to find tasks, reports and people within your organization.
	Actions and View commonly group tasks and reports respectively. Accessed through worklets.

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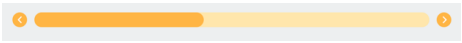
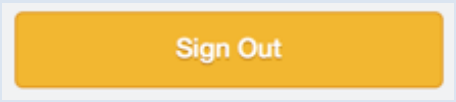
Icon	Description
	The Attachment icon lets you attach pdfs, word, and excel documents to a task.
	The Progress Bar tracks your progress working through a task. It will allow you to move forward or return to a previous page within the task.
	The Sign Out Button allows you to sign out of Workday.

NAVIGATION TIPS AND TRICKS

Do **NOT** click the back button on the browser any time you are ***entering*** or ***changing*** information in Workday.

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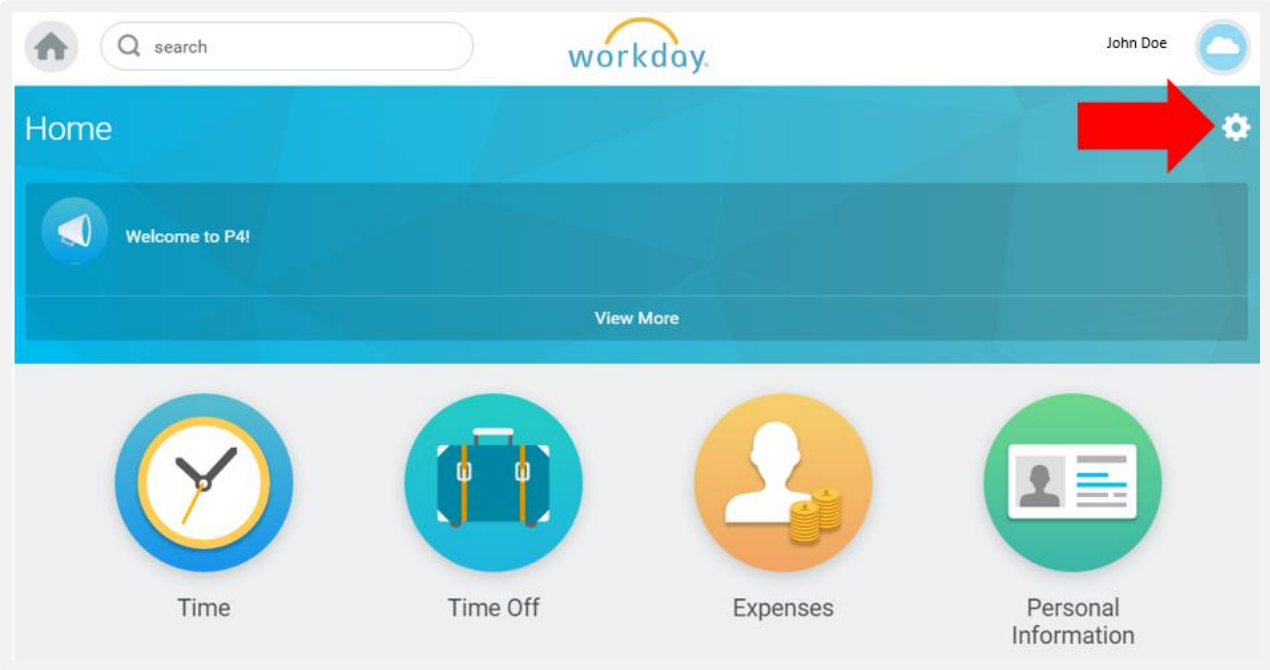
ACTIVITY 3 – CUSTOMIZE HOME PAGE

Your Home page consists of groups of related tasks, reports, and links called ***worklets*** that provide convenient access to employee self-service functionality.

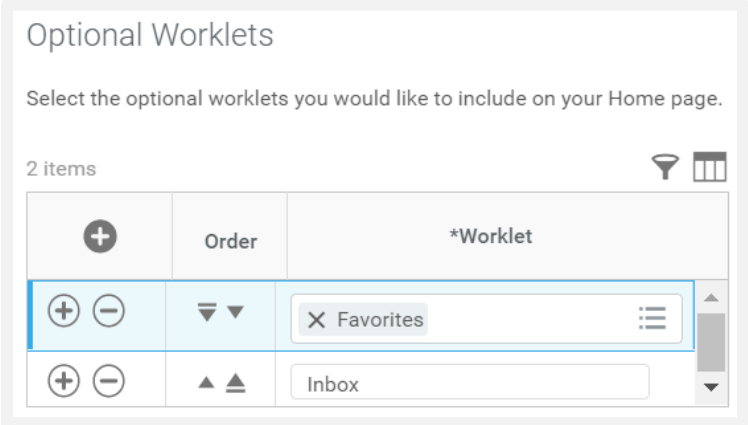
These worklets have titles such as Pay, Benefits, and Expenses. Configure your Home page by removing unused worklets and adding useful ones. This will make your Home page more relevant. Note that your organization may make certain worklets mandatory and may not permit you to add or remove others.

3.1 ADD WORKLETS TO HOME PAGE



From the **Home** page:

1. Click on the **Gear** icon at the top right of the Home page.
2. Two lists of worklets will appear, but only the optional worklets list is editable and can be configured by the worker.
3. Click the **Plus** icon to add lines under the Optional Worklets list.



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4. Use the **Prompt** icon or type to add **Inbox** and **Favorites** and any others to the list.

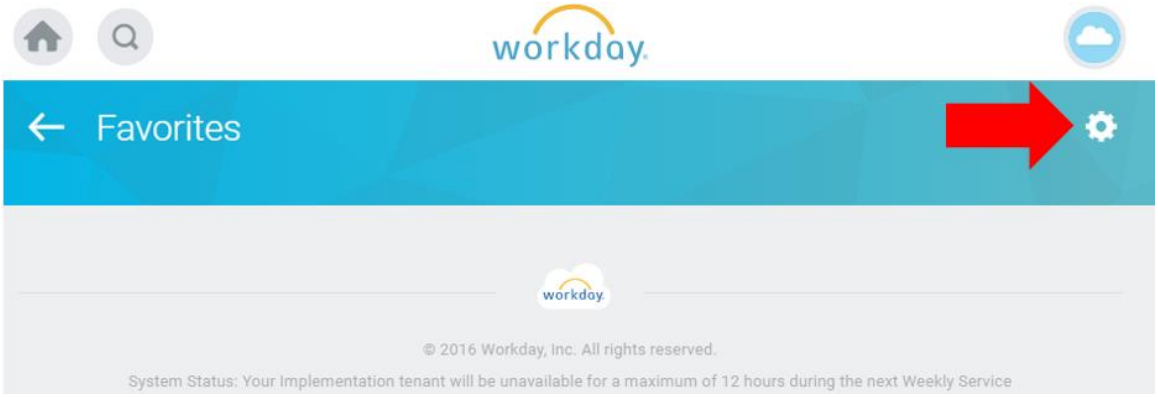
> We recommend for all employees to add the Inbox and Favorites worklets to their Home page.

5. Click OK.
6. Click Done.

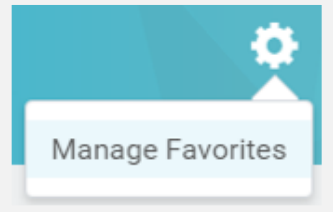
3.2 MANAGE FAVORITES

From the **Home** page:

1. Click on the **Favorites** worklet.
2. An empty worklet will appear.
3. Click on the **Gear** icon at the top right of the Favorites worklet.



4. Click **Manage Favorites**.
5. Use the **Prompt** icon or type to indicate tasks/reports or custom reports that you often use.



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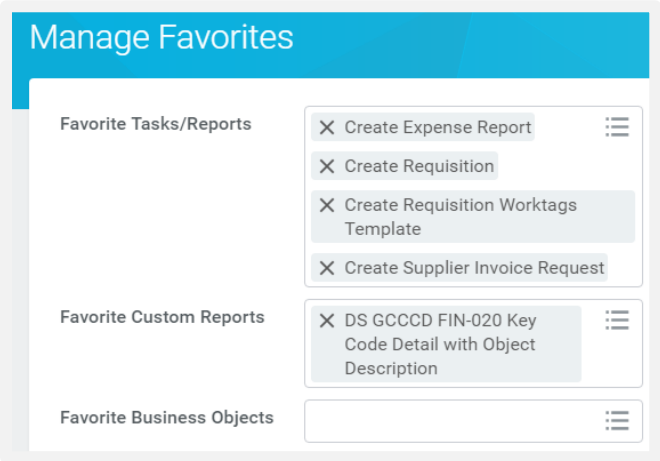
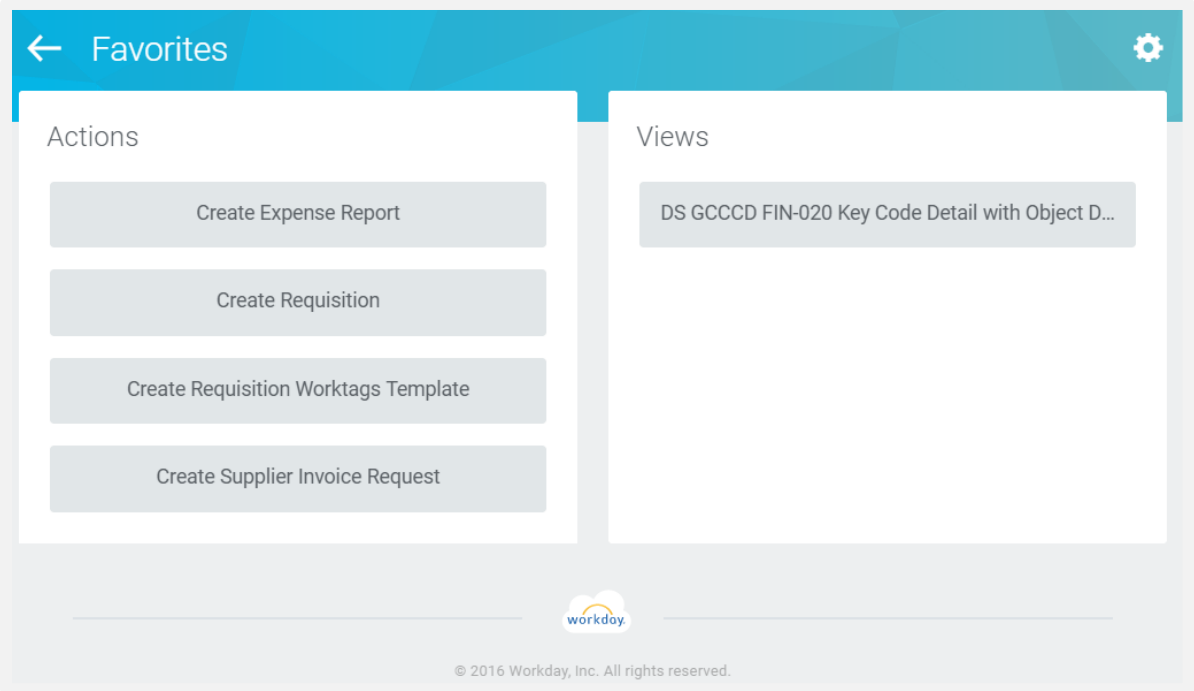


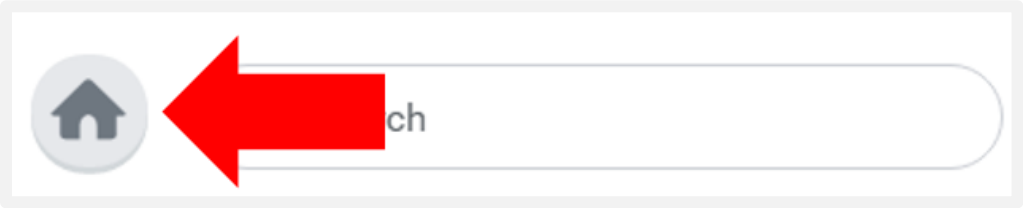
6. Click OK.
7. Click Done.
8. Now the selected tasks and reports will display in the **Favorites** worklet.



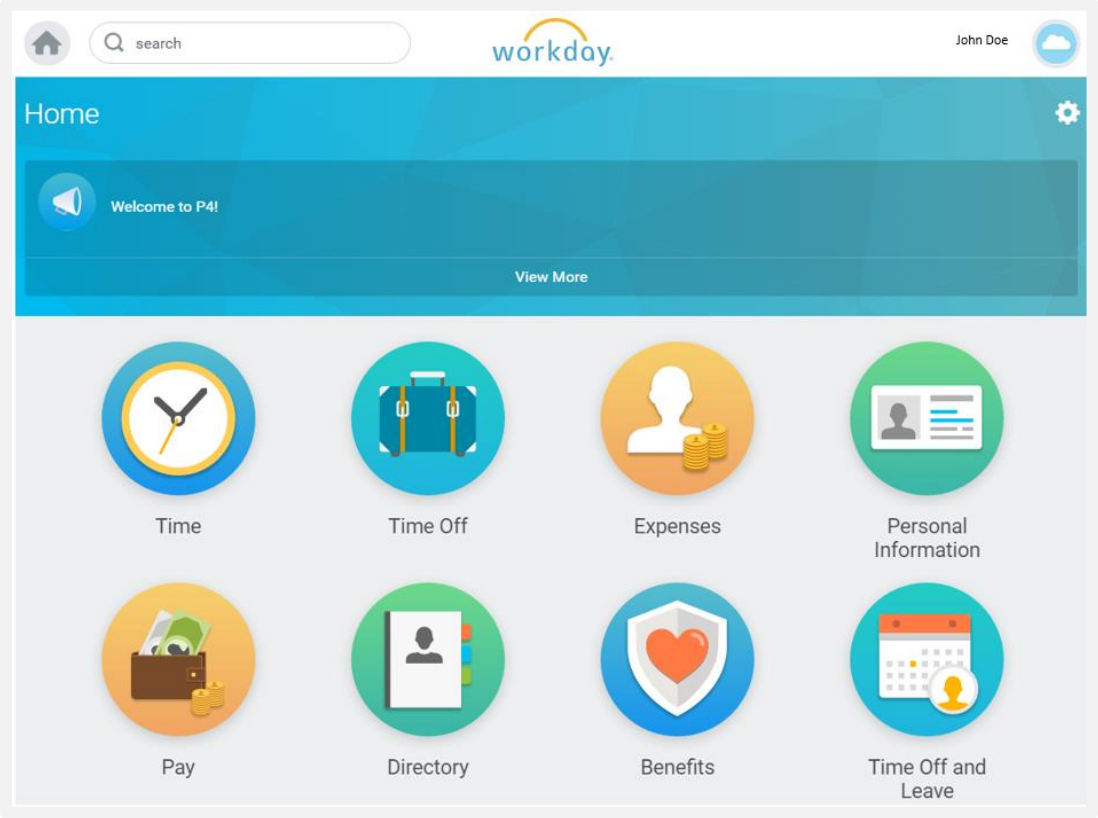
3.3 NAVIGATE BACK TO HOME SCREEN

From **anywhere in Workday**:

1. Click on the **Home** icon or the **Workday** logo at the top of the page.



2. You will immediately leave whatever page or process you are viewing and be returned to the Home screen.



3.4 CONFIGURE SEARCH PREFERENCES

The default Search preference for employees is **Common**; however, results will not display if you are looking for a specific business document number. You will need to change your Search Preferences to **All of Workday.**

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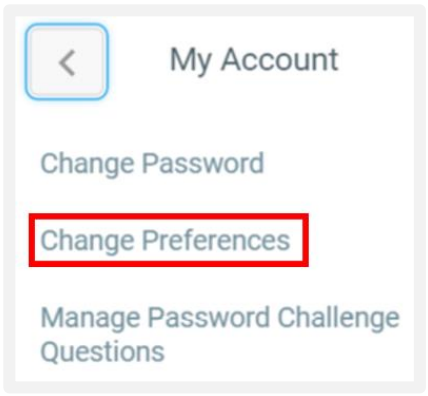
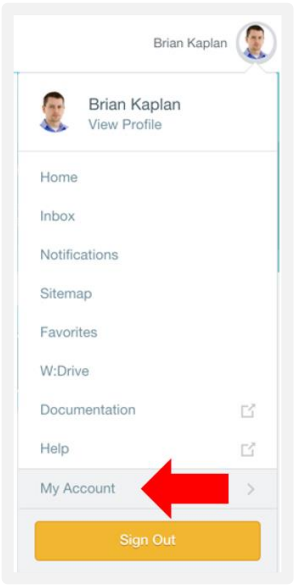
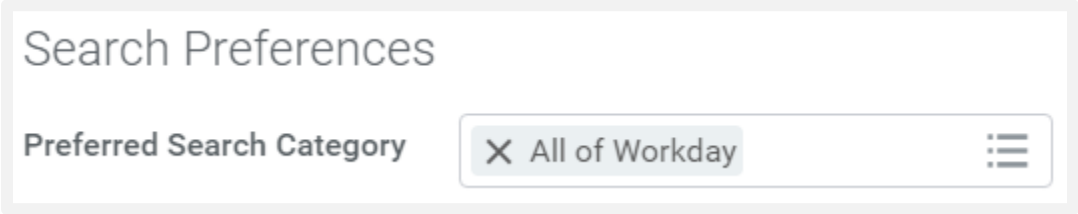
From the **Home** page:

3. Click on the cloud or **your name** at the top right of the page.
4. Click on **My Account** right above the sign out button.
5. Select **Change Preferences**.





6. Scroll down to the Search Preferences section.
7. Use the **Prompt** icon or type to indicate **All of Workday** in the Preferred Search Category field.



8. Click OK.
9. Click Done.
10. Now when you search for a specific business document, all search results will display.

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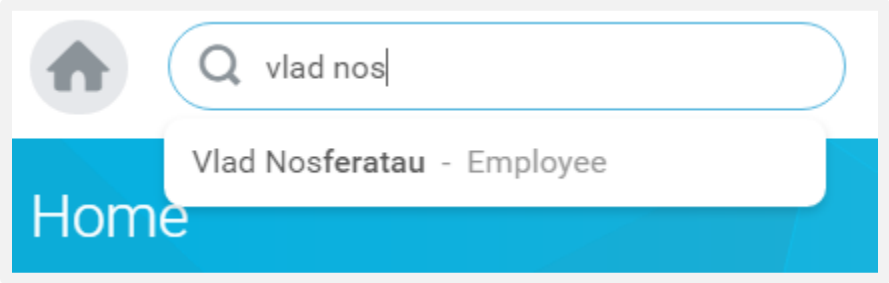
ACTIVITY 4 – UTILIZE SEARCH BAR

4.1 FIND ANOTHER WORKER'S INFORMATION

From the **Home** page:

1. Click on the search bar at the top left of the screen.
2. Type an **employee's name** in the search bar and click **Enter**.



3. All employees with that name or with similar names will display in a list.
4. Click on the desired link to view information about that person.

Workday uses smart search functionality. You do not have to type the entire word of what you're searching for. Simply type the first three letters of each word and the search results will filter.

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ADDITIONAL RESOURCES – NAVIGATE AND CONFIGURE WORKDAY

The following materials are available via the Workday Training Website to augment this training.

1. Job Aid – Use Your Inbox
2. Job Aid – Use Tools and Navigation
1. Job Aid – Set Up Account Preferences

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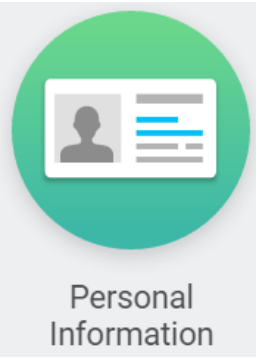
CHAPTER 3 – PERSONAL INFORMATION

OBJECTIVES

By the end of this chapter, you will:

- Navigate the Personal Information worklet
- Review and edit your Contact Information
- Review and edit your Personal Information
- Review and edit your Emergency Contacts
- Review and edit your Legal Name
- Review and edit your Preferred Name

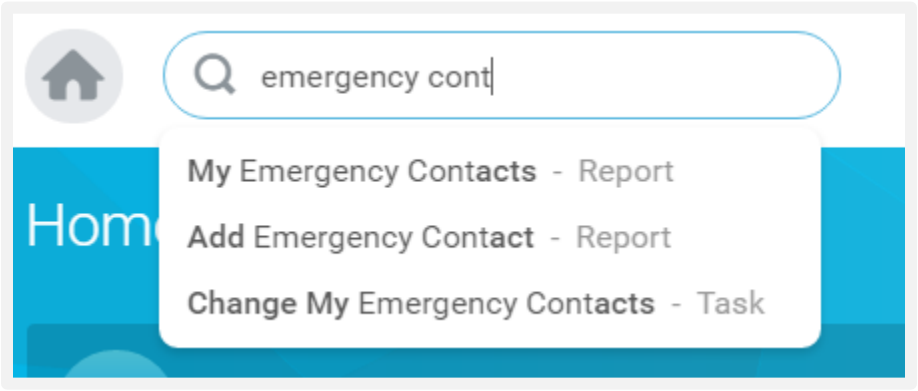
PERSONAL INFORMATION



The Personal Information worklet delivers some of the same functionality as the Name link and the Related Action icon but in a more condensed form. Workers can change their critical information using either method.

The Personal Information worklet contains links that enable you to view and modify personal information such as Name, Marital Status, Address, and more.

Using Search and selecting from the search results yields the same types of tasks and information.



Many of the tasks and links accessed in the Personal Information worklet can be accessed from your Name link, or the Related Actions menu associated with your name.

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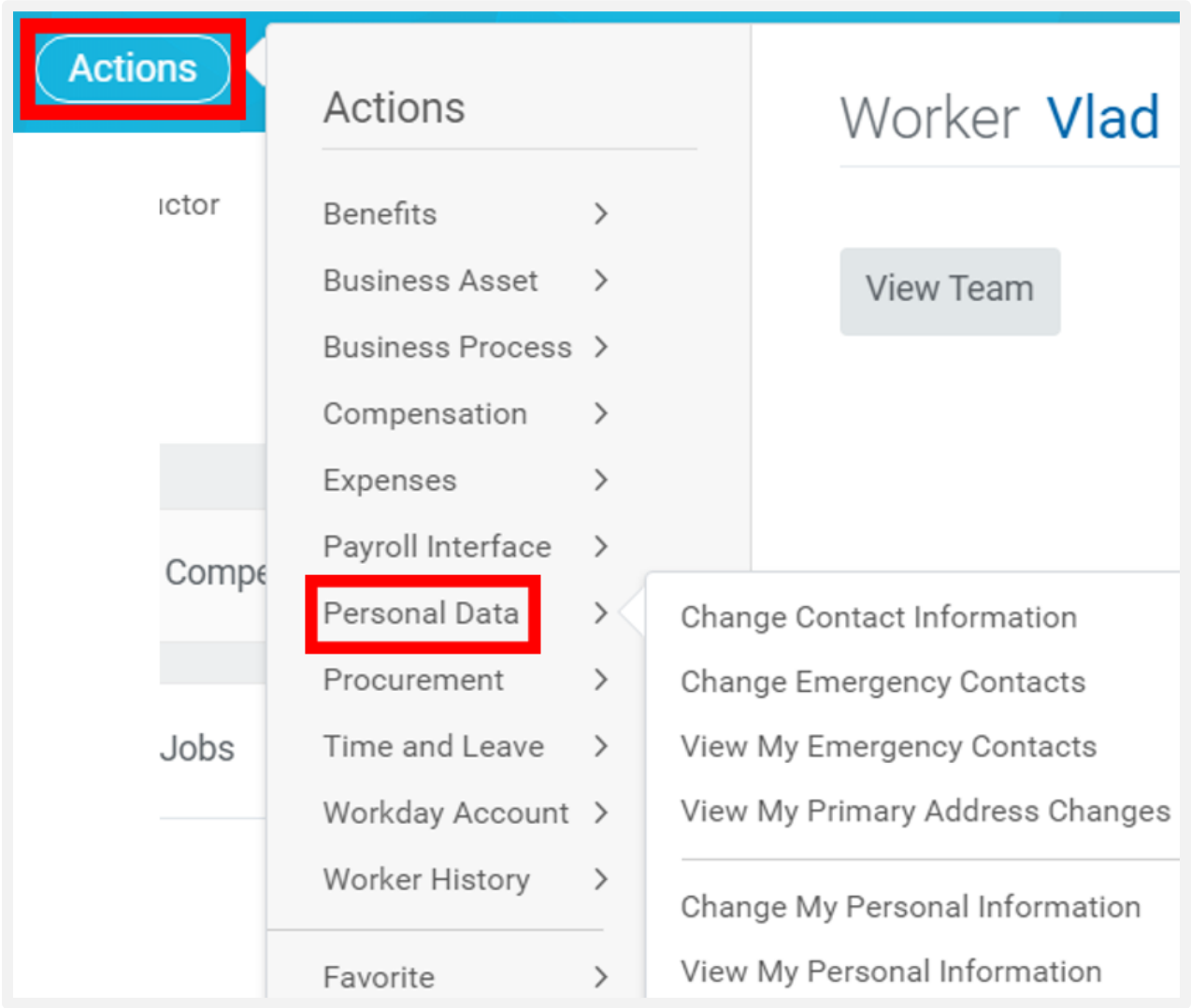
Actions
Actions
Benefits
Business Asset
Business Process
Compensation
Expenses
Payroll Interface
Personal Data
Procurement
Time and Leave
Workday Account
Worker History
Favorite
Change Contact Information
Change Emergency Contacts
View My Emergency Contacts
View My Primary Address Changes
Change My Personal Information
View My Personal Information
Worker Vlad
View Team
Jobs

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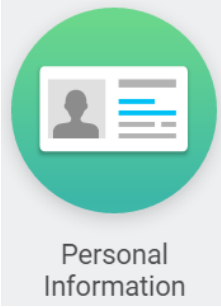
ACTIVITY 5 – MANAGE PERSONAL INFORMATION

5.1 REVIEW YOUR CONTACT INFORMATION



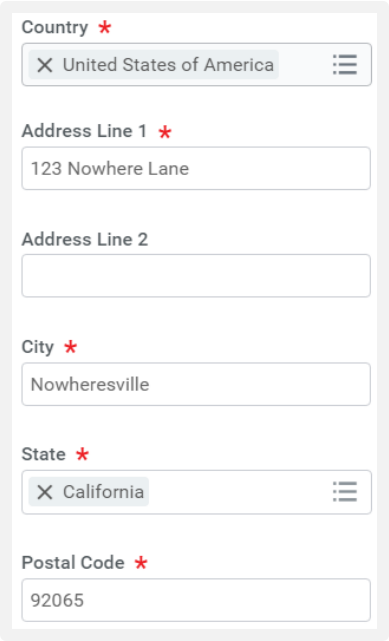
From the **Home** page:

1. Click on the **Personal Information** worklet.
2. Click on Contact Information under the Change section.
3. Your current Home and Work contact information will display in a **My Contact Information** page. This information will include your Address, Phone Number, and Email Address.

5.2 CHANGE YOUR CONTACT INFORMATION

From the **My Contact Information** page:

1. Click the Edit button at the top left of the page.
2. This will take you to the **Change Contact Information** page.

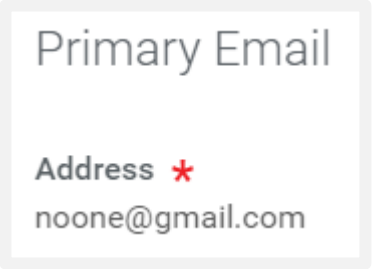


If you are editing existing information:

3. Click on the **Edit** icon next to the information that needs to be changed.
4. **Type** your changes.
5. Click on the **Check** icon at the top right of that information block for the system to accept your changes.

If you are adding new information:

6. If you are adding new information instead of changing existing information, then click the Add button.
7. Type your information.
8. Click on the **Check** icon at the top right of that information block for the system to accept your changes.



If you are removing existing information:

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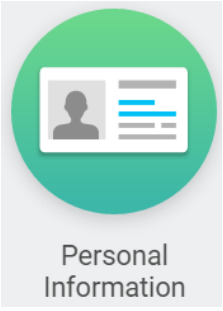
9. If you are removing information, click the button next to the information block that you wish to remove.

10. Once all information has been changed, feel free to type any comments in the comment box at the bottom of the page.

11. Click Submit at the bottom left of the page.

12. Click Done.

5.3 REVIEW YOUR PERSONAL INFORMATION



From the **Home** page:

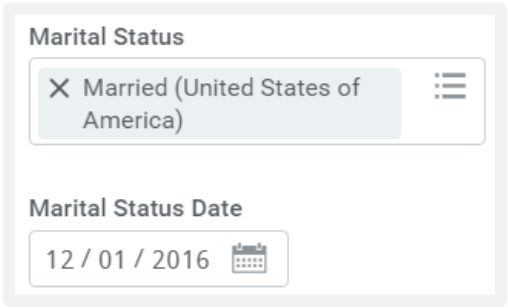
1. Click on the **Personal Information** worklet.
2. Click on Personal Information under the Change section.
3. Your current Gender, Date of Birth, Age, Marital Status, Race/Ethnicity, Citizenship Status, Nationality, Disability, and Military Status will display in a **Change My Personal Information** page.

5.4 CHANGE YOUR PERSONAL INFORMATION

From the **Change My Personal Information** page:

If you are editing existing information:

1. Click on the **Edit** icon next to the information that needs to be changed.
2. Use the **Prompt** icon or type to indicate your changes.
3. Some information sections may require you to use the **Calendar** icon or type to indicate dates.
4. Click on the **Check** icon at the top right of that information block for the system to accept your changes.



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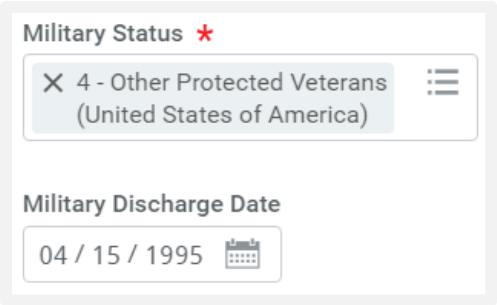
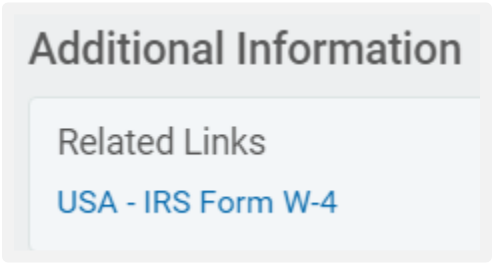
If you are adding new information:



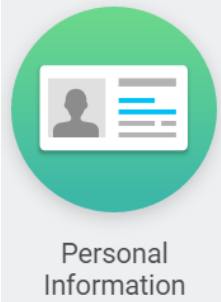
5. If you are adding new information instead of changing existing information, then click the Add button.
6. Use the **Prompt** icon or type to indicate your information.
7. Some information sections may require you to use the **Calendar** icon or type to indicate dates.
8. Click on the **Check** icon at the top right of that information block for the system to accept your changes.

If you are removing existing information:

9. If you are removing information, click the button next to the information block that you wish to remove.
10. Once all information has been changed, feel free to type any comments in the comment box at the bottom of the page.
11. Review the **Related Links** section at the bottom of the page.
12. Click Submit.
13. Click Done.



5.5 REVIEW YOUR EMERGENCY CONTACTS



From the **Home** page:

1. Click on the **Personal Information** worklet.
2. Click on Emergency Contacts under the Change section.
3. Your current emergency contacts will display in a **My Emergency Contacts** page.

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5.6 CHANGE YOUR EMERGENCY CONTACTS

From the **My Emergency Contacts** page:

If you are editing existing information:

1. Click the Edit button at the top left of the page.
2. Click on the **Edit** icon next to the information that needs to be changed.
3. Some information sections may require you to use the **Calendar** icon or the **Prompt** icon or typing to indicate information.
4. Click on the **Check** icon at the top right of that information block for the system to accept your changes.
5. If you are removing information, click the button next to the information block that you wish to remove.
6. Click Submit.
7. Click Done.

If you are adding new information:

8. If you are adding new information instead of changing existing information, then click the Add button.
9. The **Change My Emergency Contacts** page will display.
10. Click on the **Edit** icon next to the information that needs to be changed.
11. Type your information.
12. Some information sections may require you to use the **Calendar** icon or the **Prompt** icon or typing to indicate information.
13. Click on the **Check** icon at the top right of that information block for the system to accept your changes.
14. Complete all applicable information blocks.
15. Click Submit.
16. Click Done.

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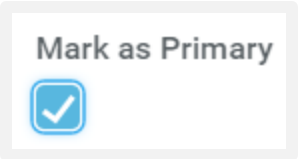
5.7 REPLACE PRIMARY EMERGENCY CONTACT

From the **My Emergency Contacts** page:

1. Click the Edit button at the top left of the page.
2. Scroll down to the Alternate Emergency Contact section and click the Add button.
3. Some information sections may require you to use the **Prompt** icon or typing to indicate information.
4. Click the **Mark as Primary** checkbox.



5. Change the Priority to **1**.
6. Click on the **Check** icon at the top right of that information block for the system to accept your changes.
7. Complete all applicable information blocks. The page should now reflect the primary contact change. The former primary contact becomes the first alternate emergency contact
8. Click Submit.
9. Click Done.

5.8 REMOVE AN EMERGENCY CONTACT

It is recommended that you complete the Replace Primary Emergency Contact activity before completing this activity since a Primary contact cannot be removed.

From the **My Emergency Contacts** page:

1. Click the Edit button at the top left of the page.
2. Scroll down to the Alternate Emergency Contact section and click the button to remove the additional contact.

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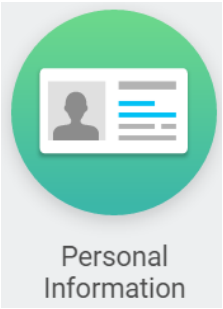
3. Click Submit.
4. Click Done.

5.9 REVIEW YOUR LEGAL NAME



From the **Home** page:

1. Click on the **Personal Information** worklet.
2. Click on Legal Name under the Change section.
3. Your current legal name will display in a **Change My Legal Name** page.

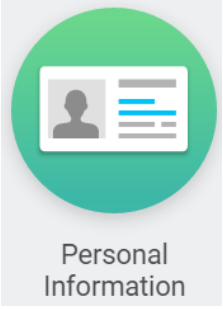
5.10 CHANGE YOUR LEGAL NAME

From the **Change My Legal Name** page:

1. Type to indicate your changes.
2. You may need to use the **Calendar** icon or the **Prompt** icon or type to indicate dates and other information.
3. Once all information had been changed, feel free to type any comments in the comment box at the bottom of the page.
4. Click Submit.
5. Click Done.

You may be required to present other documents (such as a Social Security Card) to necessary District Services departments.

5.11 REVIEW YOUR PREFERRED NAME



From the **Home** page:

1. Click on the **Personal Information** worklet.
2. Click on Preferred Name under the Change section.
3. Your current legal name will display in a **Change My Preferred Name** page.

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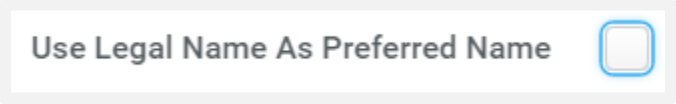
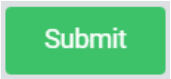
5.12 CHANGE YOUR PREFERRED NAME

From the **Change My Preferred Name** page:

1. Uncheck the **Use Legal Name As Preferred Name** checkbox.



2. The name fields are now editable. Type to indicate your changes.
3. You may need to use the **Calendar** icon or the **Prompt** icon or type to indicate dates and other information.
4. Once all information had been changed, feel free to type any comments in the comment box at the bottom of the page.
5. Click 

.
6. Click

.

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ADDITIONAL RESOURCES – PERSONAL INFORMATION

The following materials are available on the Workday Training Website to augment this training.

1. Job Aid – Modify Your Personal Information

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CHAPTER 4 – WORKER PROFILE

OBJECTIVES

By the end of this chapter, you will:

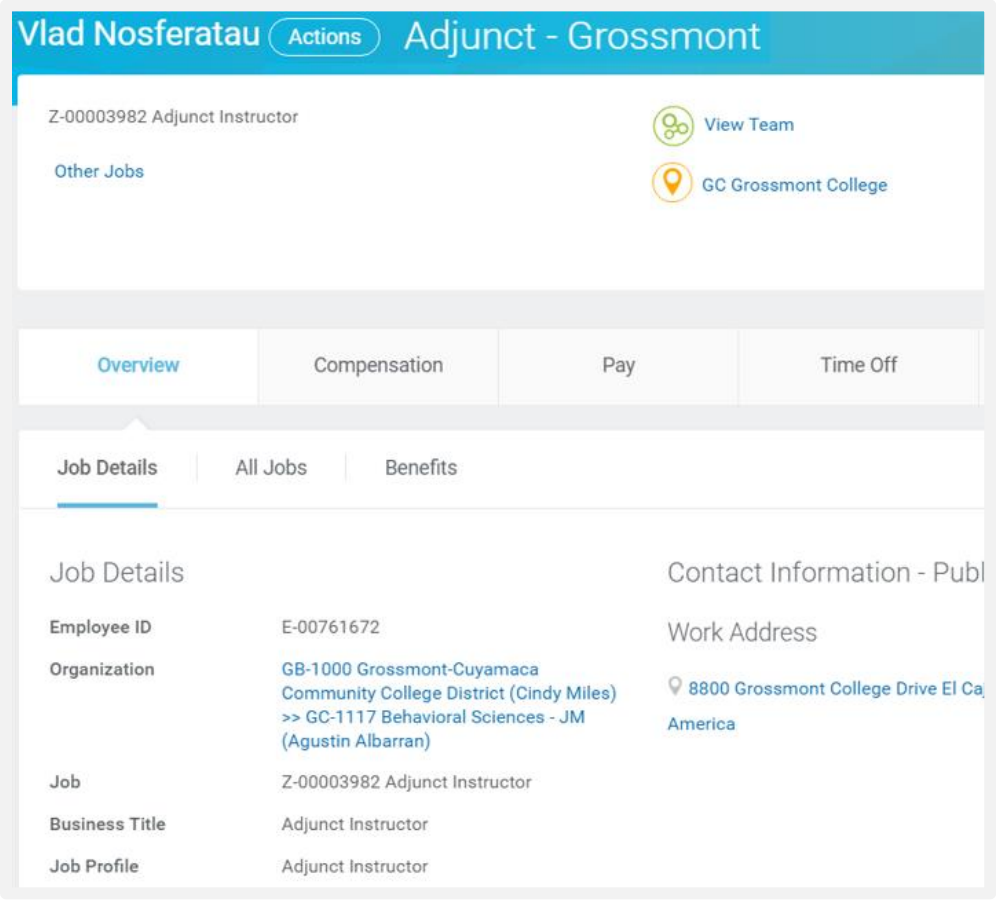
- Navigate the Worker Profile page
- View your Organization Chart
- View your Benefit Elections
- View your Compensation
- Utilize the Related Actions icon (aka the Twinkie)

WORKER PROFILE

Click your profile image and then the **View Profile** link to access your worker profile.

Each tab on your Worker Profile contains text fields and links, organized by category such as Compensation, Pay, Contact, Personal Information, and Time Off. Worker information is arranged in tabs.

OVERVIEW



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Job Details

The Job Details subtab includes details of the Primary job such as Job Title, Supervisory Organization, Time Type, and Location. Details of the employee within the job will also display such as Hire Date, Length of Service, and Time in Position.

All Jobs

If the employee has multiple jobs, then details about the additional jobs will display in the All Jobs subtab. Information regarding any additional positions would include, the start date of the job, position number, supervisory organization, etc.

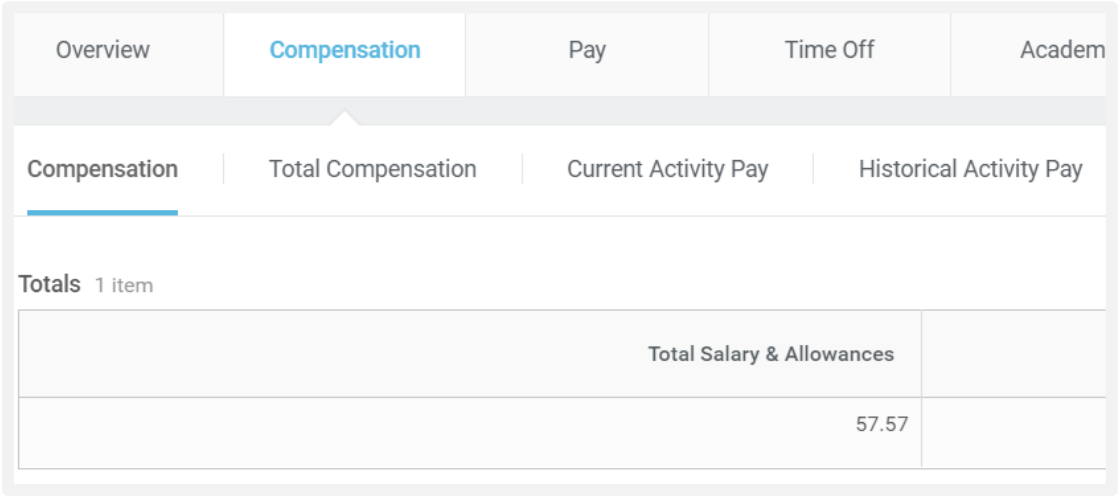
Benefits

The employee's current benefit plans and employee costs will display in the Benefits subtab.

The Benefits tab displays your current benefits, the date coverage began, and coverage level. This level may be a dollar amount for insurance, or a level designation such as "Employee Plus 1 Dependent" for medical or dental.

No changes to benefits are possible from this tab. Benefit changes are normally allowed only during open enrollment periods. You may also access this information from the Benefits worklet by selecting the **Benefit Elections** link.

COMPENSATION



Compensation

The Compensation subtab displays your compensation information, such as salary and allowances. Base hourly or salary rates and frequency are also displayed. The employee's Grade and Step is indicated underneath the hourly rates. This information is view-only and cannot be changed. Hover over sections of the pie graph in order to see more information about each section.

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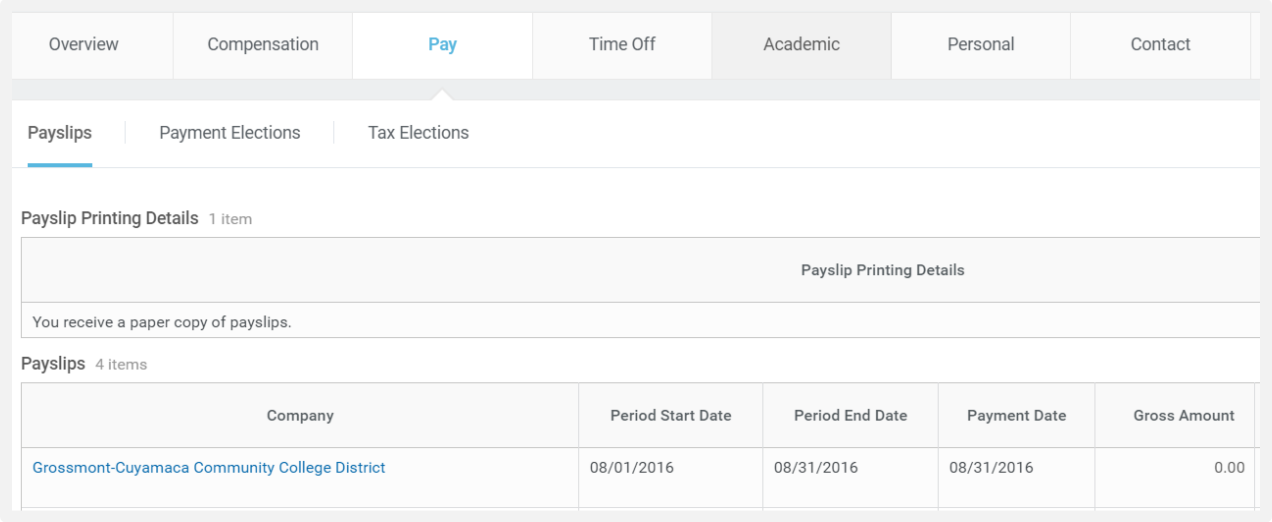
Current Activity Pay
If the employee is a Counselor or Faculty Member, then their current activity pay will display including the Unit Rate and Quantity. Links to payments against the activity pay will display in the table.

Historical Activity Pay
All Period Activity Assignments will display including the Academic Period, Supervisory Organization, and Total Scheduled Amount.

PAY



Payslips

Payslip details including the Start and End Date and Amounts.

Payment Elections

If any Direct Deposits for Payroll Payments and Expense Report Payments have been set up, they will display in the Payment Elections subtab.

Tax Elections

If any Tax Elections have been added, they will display in the Tax Elections subtab.

PERSONAL

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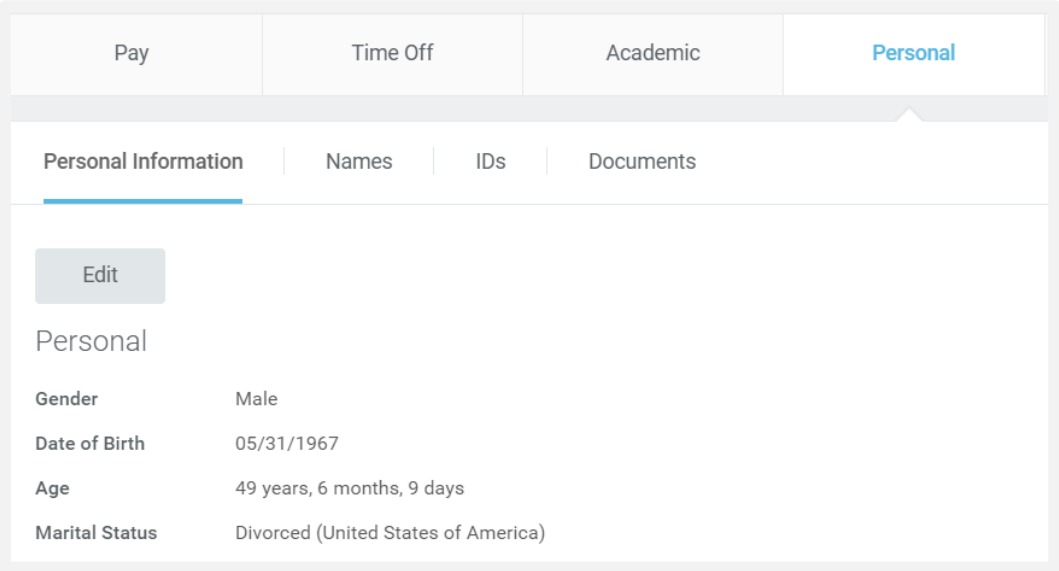

Personal Information

The Personal Information subtab includes gender, date of birth, marital status, race/ethnicity, and more. Some changes to this information may require further processing, notifications, or approvals, based on your organization's business process. For example, marital status changes often trigger additional processes.

To edit this information, click Edit.

Names

Legal Name and Preferred Name will display in the Names subtab.

To edit this information, click Edit.

ID and Documents

View all identification, certification, and licensing information via the IDs link. Passport, driver's license, Social Security information, and other related information display here. This information is "view only".

The Documents link provides easy access to view your worker documents like tax forms, certification and benefits. Click the **Add** button and the worker can upload their documents. After uploading, specify the category and any comments. The worker can also edit and remove their documents. Others can also upload documents on the worker's behalf based on your company's configurations.

CONTACT

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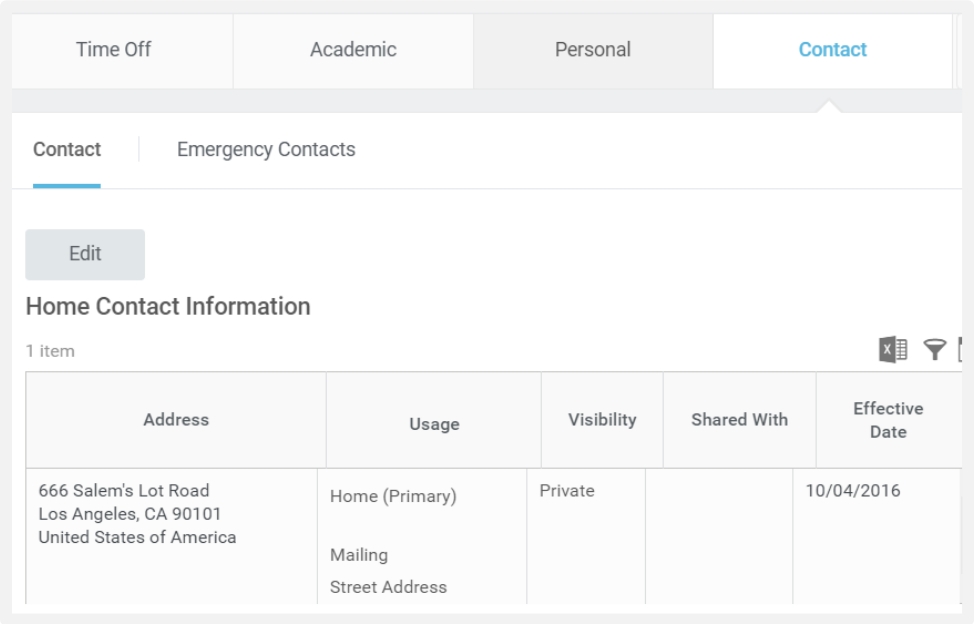

The Contact tab stores your personal and work address, phone, and email information. Some of this information may be visible to other workers. Work contact information is always visible. Home information is never visible unless you wish it to be.

Use the Edit button to add or edit any of your contact information. Changing your address may require approval, depending on your organization's business processes.

Emergency Contacts

You can edit emergency contacts from the Emergency Contacts link. Emergency Contacts are also accessible from a separate link on the Personal Information worklet.

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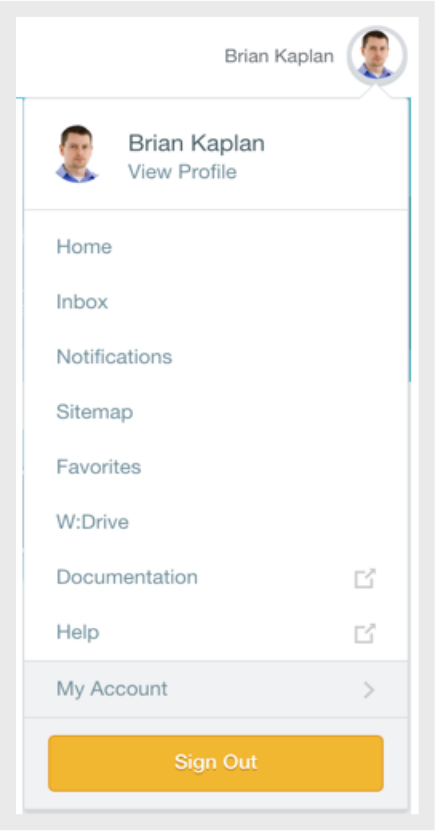
ACTIVITY 6 – NAVIGATE WORKER PROFILE

6.1 FIND YOUR WORKER PROFILE

From the **Home** page:

1. Click on your name or the cloud in the top right side of the page.
2. Click on the **View Profile** link directly underneath your name.
3. Your worker profile will display.



6.2 VIEW YOUR ORGANIZATION CHART

From your **Worker Profile**:

1. In the header of the Worker Profile, click on the **View Team** link.

2. Co-workers and supervisors will display in an interactive chart.

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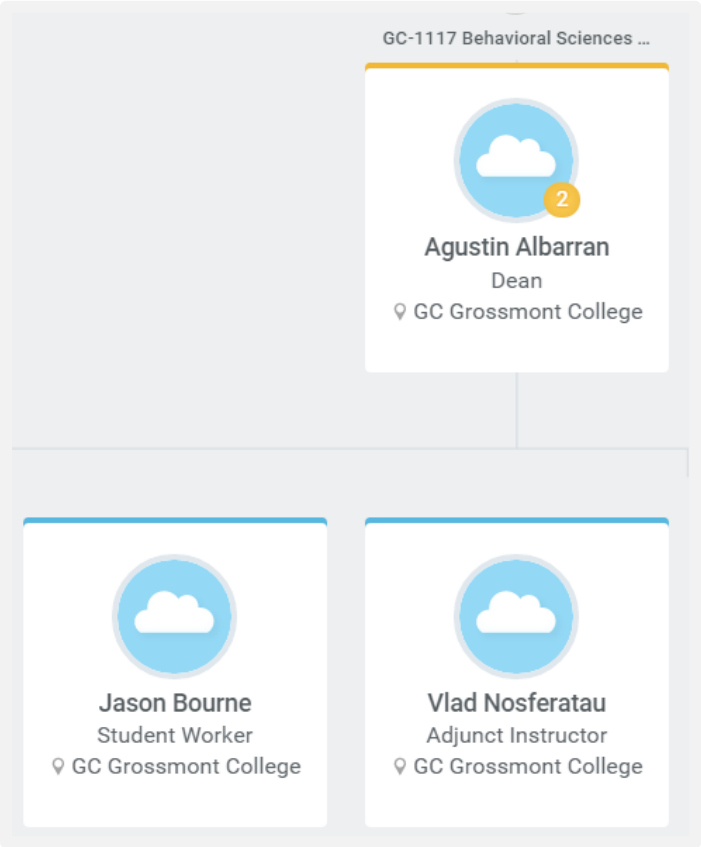
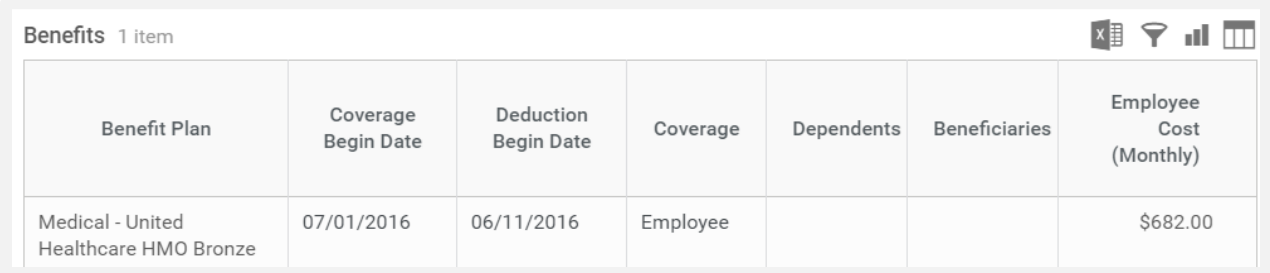
3. Click on the manager's name and notice how the chart will scroll up to display the manager and the manager's manager.



6.3 VIEW YOUR BENEFIT ELECTIONS

From your **Worker Profile**:

1. Under the Overview tab, select the Benefits subtab.
2. View current benefit elections in the Benefits table.



Benefits 1 item

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
Medical - United Healthcare HMO Bronze	07/01/2016	06/11/2016	Employee			$682.00

6.4 VIEW YOUR COMPENSATION

From your **Worker Profile**:

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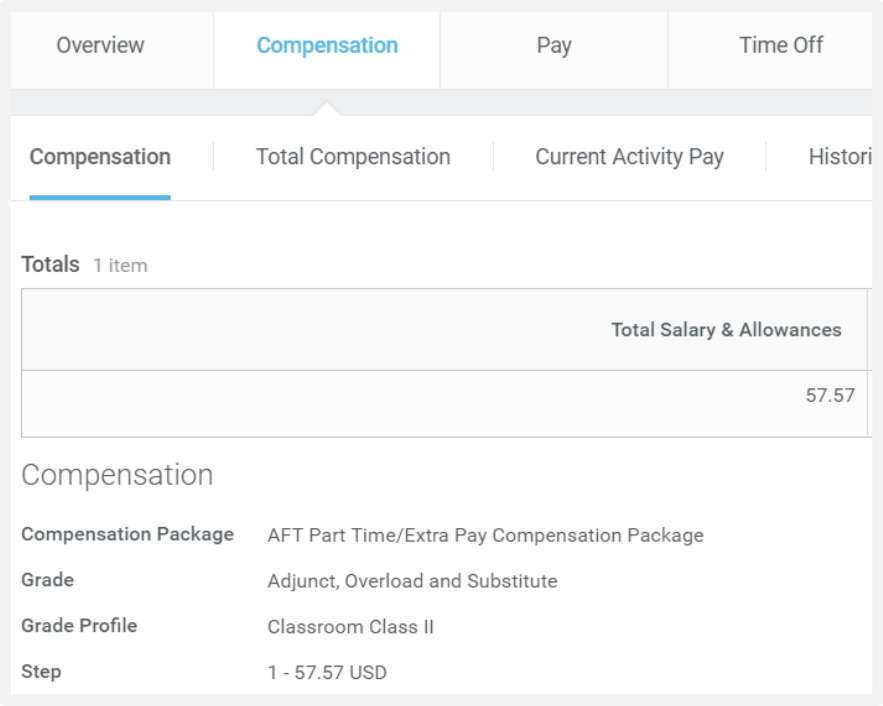
1. Under the Compensation tab, select the Compensation subtab.
2. Scroll down to view your total salary and allowances.
3. Scroll down further to view your current Step and Grade.

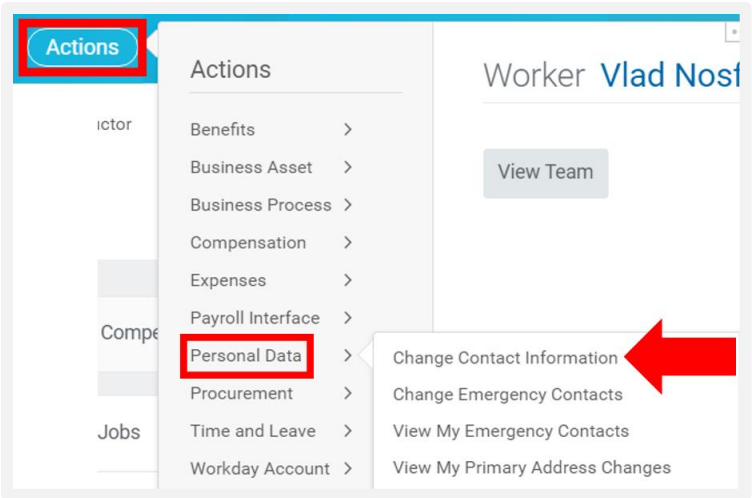


6.5 UTILIZE THE ACTIONS ICON

From your **Worker Profile**:

1. Find your name at the top of the page.
2. Click on the **Actions** icon

next to your name.
3. Hover down to **Personal Data** and click on **Change Contact Information.**
4. Follow the same steps from Activity 5 to make any Contact Information Changes.



The same changes can be made via the Actions icon, the Search bar, or the applicable worklet. You can use whichever method you prefer to initiate a change.

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ADDITIONAL RESOURCES – WORKER PROFILE

The following materials are available on the Workday Training Website to augment this training.

1. Job Aid – Identify Your Place in the Organization

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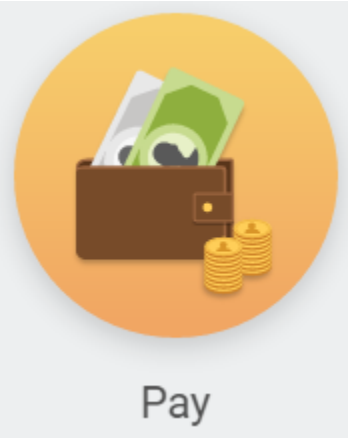
CHAPTER 5 – PAYMENT INFORMATION

OBJECTIVES

By the end of this chapter, you will:

- Complete Federal Withholding Elections
- Complete State Withholding Elections
- Maintain and Change Payment Elections
- View and Print Payslips

PAY



The Pay worklet delivers some of the same functionality as the Name link and the Related Action icon but in a more condensed form. Workers change their critical information using either method.

The Pay worklet contains links that enable you to view and modify payment elections and withholding elections.

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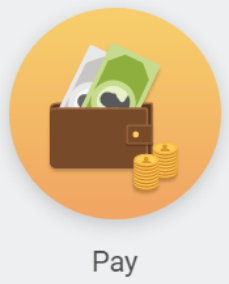
ACTIVITY 7 – MANAGE PAY INFORMATION

7.1 REVIEW YOUR PAYMENT ELECTIONS



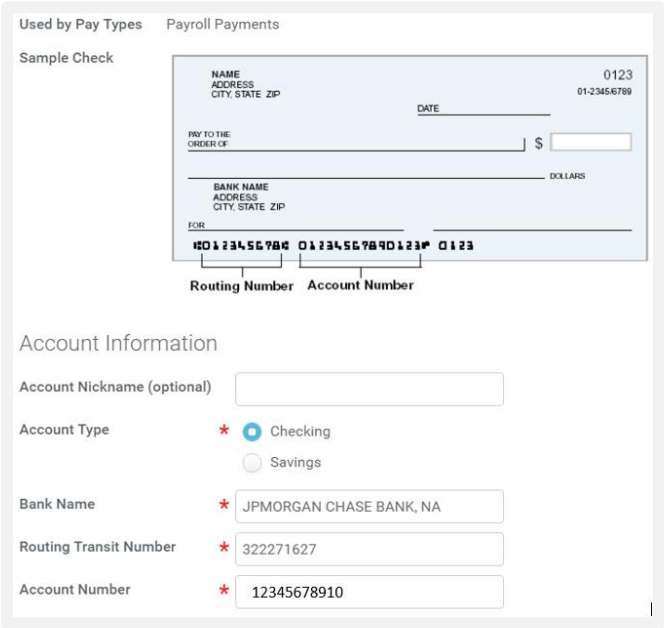
From the **Home** page:

1. Click on the **Pay** worklet.
2. Click on Payment Elections under the Action section.
3. Your current Payment elections will display in the **Payment Elections** page.

7.2 CHANGE YOUR PAYMENT ELECTIONS

From the **Payment Elections** page:

1. Click the Edit button at the top left of the page.
2. This will take you to the **Manage Payment Elections** page.



If you are changing an existing account:

3. Click Change Account next to the account that you wish to change.
4. This will take you to the **Change Account Information** page.
5. Type your changes.
6. Click OK.

If you are adding a new account:

7. Click Add Account under the Accounts table.
8. This will take you to the **Add Account** page.
9. Type in the Bank Name, Routing and Account numbers.
10. Click OK.
11. The new account will display in the Accounts table.

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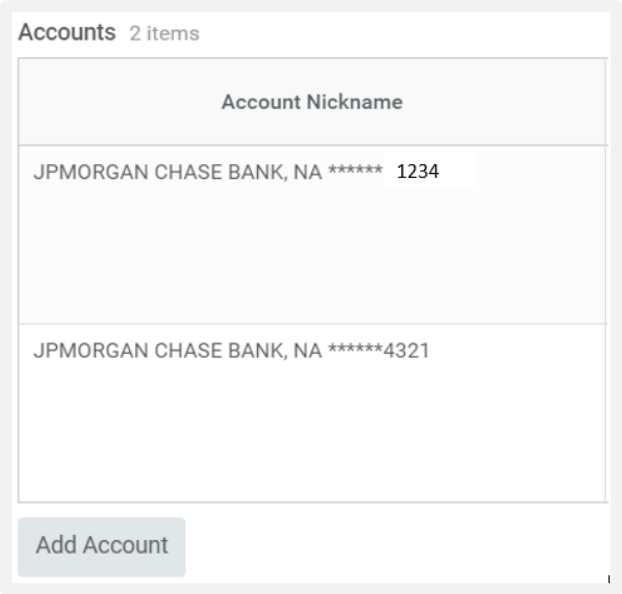

If you are changing the Payment Elections:

12. Scroll down to the Payment Elections section table. The original account will display.
13. Click Change Election.
14. The Payment Election page will display.
15. Remove the old account under the Account column.
16. Use the **Prompt** icon or type to indicate the newly-added account.
17. Click Next.
18. Review your changes and click Submit.
19. Click Done.

If you are deleting an account:

20. Click Delete Account next to the appropriate account. Make sure that this is not the same account that is listed as the Payment Election account. If it is, then you will need to change the payment elections first.

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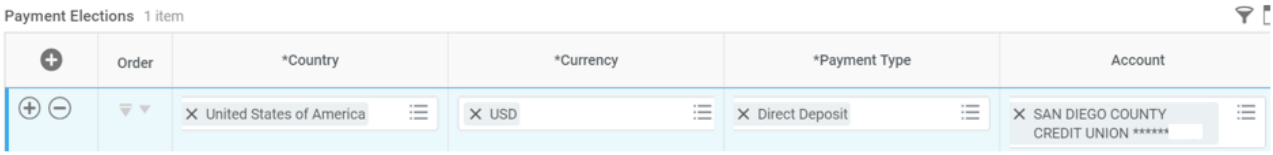
21. Click OK.

7.3 ADD EXPENSE PAYMENT ELECTIONS

From the **Payment Elections** page from the Pay worklet:

1. Scroll down to the **Payment Elections Requiring Setup** table.
2. Click Add Elections.
3. The Payment Election page will display.
4. Use the **Prompt** icon or type to indicate the Country as the **United States of America.**
5. The Currency will default USD.
6. Use the **Prompt** icon or type to indicate Payment Type as **Direct Deposit**.
7. Use the **Prompt** icon or type to indicate the appropriate **Account**.



8. Click the **Balance** radio button.

Expense Payments will only deposit into **ONE** account.

9. Click Next.
10. Review your changes and click Submit.
11. Click Done.

7.4 REVIEW YOUR WITHHOLDING ELECTIONS

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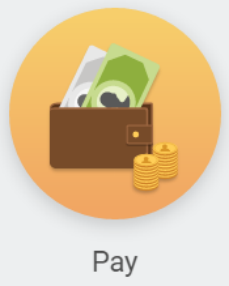
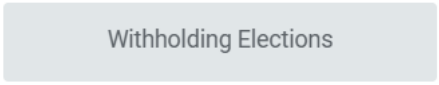


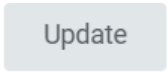
From the **Home** page:

1. Click on the **Pay** worklet.
2. Click on 

under the Action section.
3. Your current withholding elections will display in the **Withholding Elections** page.

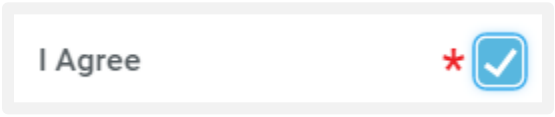
7.5 UPDATE YOUR FEDERAL ELECTIONS

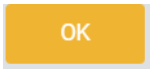
From the **Withholding Elections** page:

1. Click the 

button at the bottom of the **Federal Elections** tab.
2. The **Effective Date** defaults to today's date. Use the **Calendar** icon or type to change the date if needed.
3. Click

.
4. Use the **Prompt** icon or type to change the **Marital Status** field, if needed.
5. Type to change the **Number of Allowances**.
6. Check the **I Agree** checkbox.



7. Click 

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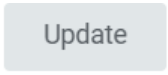
7.6 UPDATE YOUR STATE ELECTIONS

From the **Withholding Elections** page:

1. Click on the **State Elections** tab.
2. Click the 

button at the bottom of the **State Elections** tab.
3. The **Effective Date** defaults to today's date. Use the **Calendar** icon or type to change the date if needed.
4. The State field will automatically default to **California**.
5. Click

.

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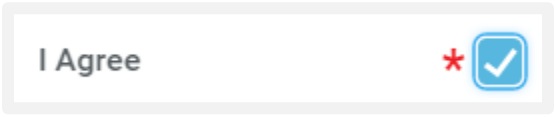
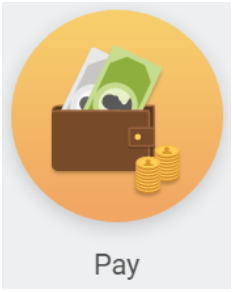
6. Use the **Prompt** icon or type to change the **Filing Status Withholding Allowances** field, if needed.
7. Type to change the **Number of Allowances**.
8. Check the **I Agree** checkbox.



9. Click OK.

7.7 VIEW PAYSLIP



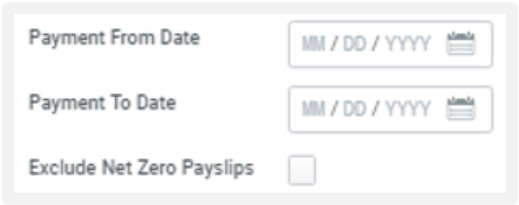
From the **Home** page:

1. Click on the **Pay** worklet.
2. Click on Payslips under the View section.
3. Your Payslip records will display on the **My Payslips** page.
4. Find your most recent record and click View to find more details and view the Payslip page.

7.8 PRINT PAYSLIPS

From the **My Payslips** page:

1. Find your most recent record and click View to find more details and view the Payslip page.
2. To print this single payslip, click Print Payslip Image.
3. To print multiple payslips, click Print Multiple Payslips.
4. If multiple payslips, you will need to use the **Calendar** icon or type to indicate the **Payment From Date** and **Payment To Date.**



5. Click OK.
6. A list of Payslips will display. Check the applicable payslips you wish you print or check the box in grid header to select all.

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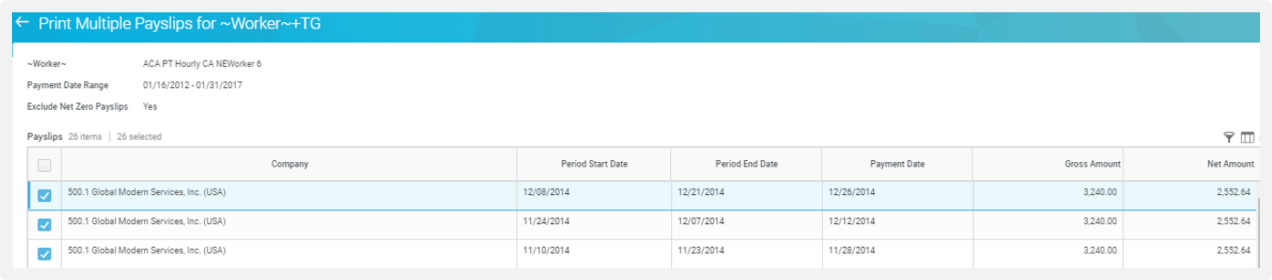

7. Click

to generate a pdf.

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ADDITIONAL RESOURCES – PAY

The following materials are available on the Workday Training Website to augment this training.

1. Job Aid – Manage Payroll Options

2. Job Aid – Change W-4 Withholding Elections

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