

WorkSmart Workday Foundations Video Transcript

Welcome to WorkSmart's Workday Foundations. In this eLearning we'll walk through, need to know information about Workday, including basic navigation, frequently used features, such as the worker profile, org chart, and worklets you will use as an aspect of employee self-service.

When you login to Workday via OKTA, the workday home page opens in a new web browser on your laptop or desktop computer. The look and feel of the system is similar to a consumer website, which many of you likely use to pay bills or make purchases. Workday has the same user friendly navigation that you'll find on any well designed site. For the first part of this course, I'll demonstrate, basic navigation and useful applications. I'll also guide you through frequently used features, such as the worker profile and the org chart. When you first sign into Workday you see the home page. The home page lists any important announcements the State recently shared. I am logged in as Wanda WorkSmart. Wanda WorkSmart is a new employee, so the announcement shown here tells Wanda that she needs to complete her on-boarding tasks. Another example of an announcement one would find here, could be enrollment and change information. Workday makes it easy for Wanda to know what she needs to do. Inbox items, also display on the home page, providing easy access. The inbox is where you will locate tasks that you need to complete regarding various processes such as updating your address, changing your benefits, due to a life event, and other day to day processes. In addition to being on the home page, the inbox can also be accessed via the mail icon in the top right corner. The bell icon to the left of the inbox, is where notifications are stored This refers to a section for notices of completed business processes that you were a part of and will be housed for your to go back and refer to if needed. I'll now select the inbox icon to access Wanda's inbox. Here I see that Wanda currently has no inbox tasks awaiting action. I could also select the archive tab to see older resolved or in progress items.

To Do's are reminders that also appear in the inbox indicating the need to complete parts of a business process, before the workflow can go to the next step. At any time, you can select the Iowa WorkSmart logo in the top left corner, to return to your home page. Worklets are located in the applications

section of the home page. Worklets organize information into categories or topics, making it easy for you to find common tasks, and reports. Wanda can access the pay, benefits, time and absence worklets.

Worklets can also be added or removed depending on an employee's additional security role or roles in Workday. Another great feature of Workday is the robust search engine. You'll be able to find reports, initiate tasks, look for a person, and find just about anything you need in Workday, by using the search feature. If at any time, you cannot recall the report or worklet you need you can search for it. The search categories on the left side of the page help narrow or broaden my search.

I'll now return to the home page. The worker profile displays detailed information about an employee's job, benefits, time off, contact information, and more. I'll now look at Wanda's worker profile, by selecting her picture in the top right corner and then selecting view profile. The related actions icon, located under an employee's name, is a navigation tool. You can use the related actions icon to access different business processes. Using the related actions menu I can initiate a task within a business process. For example, under benefits, I could select, change benefits. Remember these menu options can vary, depending on your permissions in Workday.

I can also select any of the tabs on my profile, such as, job or contact for more information. From the contact tab, I see my home contact information, as well as my work contact information. From this tab I can easily edit my address if I were to move. Employees will not have access to view other employees' personal contact information. HR Staff within the employee's agency will have access to an employee's personal contact information. In our current systems, HR Staff must update employee's personal information in multiple locations. In Workday employees will be able to initiate the change themselves in one place. This self-service functionality is a key benefit of the Workday application.

For this example, I'm still logged in as the employee and will show you how to update an address. Addresses are stored in the contact tab along with phone numbers and emails. There are two ways to access and update your address. You can select the related actions button, hover over personal data, and then select change my home contact information. Or I can select the contact tab, on the left

side menu, and chose the edit button. I will select change my home contact information. To make changes, I will select the pencil icon. Once I am done, I will select submit and the task will route to HR for review and approval. Once HR approves the address change it will display in Workday as of the effective date selected. This process is similar to other personal information updates. Including updating legal and preferred name or emergency contact. As you can see, this process is pretty intuitive. There will be training materials, such as PDF smart guides, available for employees to use to help them walk through these steps at their own pace.

Now that we are back on the employee's profile, I will select the team icon under their name to show you how to find work contact information about your coworkers. Here I see the org chart where I can view team members and the organization structure. I see my team members along the same row, with our manager above. I'll select the up arrow. Now I can see my manager's team I can keep navigating up to see higher management levels within the organization. If I wanted to take a closer look at any of my coworkers' profiles to find their work email, I could simply choose their name within the org chart. I will now return to the home page.

Let's take a closer look at four important worklets for employees to utilize, the self-service functionalities in Workday. Pay, Benefits, Time and Absence. I'll navigate to the pay worklet. The pay worklet provides employees with a shortcut to view their pay slips, and W-2 tax documents. Employees will also be able to update their State and Federal withholding elections, and change their direct deposit account, as needed. I'll show you how to view and print my pay slips. Select pay slips, under the view section of the pay page. Here I can see a list of recent pay slips. A list of all my pay slips displayed by date. I can view, print a specific pay slip, directly from the page. I can also print multiple pay slips, if needed. Employees can choose up to four accounts to distribute their paycheck. This can be elected by entering an amount or selecting a percentage. This is an improvement from our current allowance, of one plus select credit union deductions.

I'll now return to the home page. I'll navigate to the absence worklet. The absence worklet provides employees with a shortcut to request time off, such as vacation and sick, correct their time off, if needed, and request a return from leave of

absence. Employees can also view their vacation and sick balances. I'll now show you how to view vacation and sick balances. All absence balances, as of current day, are displayed at the bottom of the absence page. Depending on your browser, you may have to scroll down the page to view your current day absence balances. To view absence balances, as of a different day select absence balance. The absence page displays and the as of date, is a required field that can be adjusted as needed. I am going to change the date, by choosing the calendar and selecting a new date, and then selecting the OK button at the bottom of the page. Absence balances display as of the day that was selected.

I'll now return to the home page. I'll navigate to the time worklet. The time worklet provides employees with a shortcut to enter time, view their work schedule, view time off and time off balances. Workday time tracking provides workers with many options for entering time. With Workday, hourly employees, in most agencies, will enter time into Workday. For salaried employees, they will not be required to enter time, unless certain conditions are met, such as the need to enter work reporting codes for projects. We currently have some agencies with external timekeeping systems, such as Kronos. In the future, some agencies will continue to use these external timekeeping systems, which will be integrated with Workday. Time entered outside of Workday will be uploaded to Workday, each pay period. Workday will be the system of record, regardless of whether time is entered directly into Workday or uploaded to Workday via an integration. I'll show you how to view your work schedule. Select my schedule, under the view section of the time page. Your work schedule will display for the month. You can change the month by selecting the down arrow next to the month and year, at the top of the calendar. Select the month that you would like to view.

I'll now return to the home page. I'll navigate to the benefits worklet. The benefits worklet provides employees with a shortcut to change their benefits and dependents, due to a qualifying life event during the year, and retirement savings, also known as deferred compensation. Employees can also view their current benefit elections. I'll show you how to view current benefit elections. Select benefit elections, under the view tab. The benefits elections page displays your current benefits.

I'll now return to the home page. The last worklet I'll navigate to, is the expense worklet. The expense worklet provides a shortcut to create a travel expense

report and travel spend authorization. Employees can view their expense reports, spend authorizations, payment elections and edit expense transactions.

Another great feature of Workday, is the Workday mobile app. The Workday app, provides secure mobile access to select Workday applications and self service functions on the go.

There you have it. This concludes the introduction to Workday. A full lineup of virtual Workday training and on-demand resources, such as job aids, smart guides and video snippets will be provided to help employees use Workday proficiently. Make sure to check your knowledge and take the quiz before closing your browser. Please note, this course is required for all Executive Branch employees. You must take the quiz to record your completion.