



# Getting Started with Workday at SCU —For Employees—

## Overview

Welcome to Santa Clara! This job aid covers the basics to get started using **Workday** and the features that will help you use the system. Using standard processes, you can view and edit your information. You initiate changes directly in the system and, when necessary, Workday sends the request for appropriate approval - **all online, all in one place!**

## Worklets/Applications

**Worklets** are a starting place for you to view information and initiate tasks. Depending on your role, and responsibilities your Home LandingPage will include worklets specific to your needs.



Pay

**Pay:** allows you to view your pay. Use this application to access withholding elections and payment elections(direct deposit) and to view payslips, and tax documents. You can opt-out of receiving a paper copy of your W-2.



Benefits

**Benefits:** allows you to edit and view your benefits, including change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.



Career

**Career:** allows you to view your career and apply for internal jobs.



Recruiting

**Recruiting:** for managers only. Used to create job requisitions.



SCU Document Links

**SCU Document Links:** has links to common HR employee documents.



Personal Information

**Personal Information:** allows you to edit and view your personal information, including changing your contact and personal information (addresses, email, phone numbers), emergency contacts, legal name and preferred first name.



Time

**Time:** allows you to edit and view your time, including entering your time and viewing your time off balance. Hourly employees will enter time using this application.



Absence

**Absence:** allows you to edit and view your time off (vacation/sick), including time off correction, leave of absence, view your time off, and time off balance.

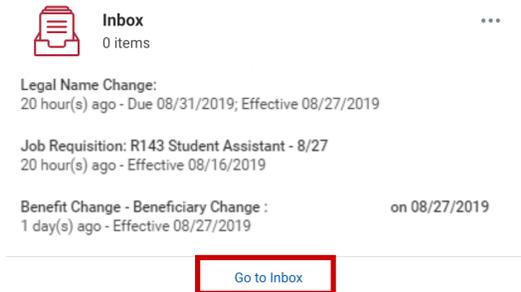


Hiring

**Hiring:** for managers only. Used to hire new employees.

## Workday Inbox

Get to your Inbox by clicking on the Inbox link on your homepage or by clicking the envelope icon in the top right corner of your screen. Open your inbox to view all your pending actions that may be waiting for your approval or action.

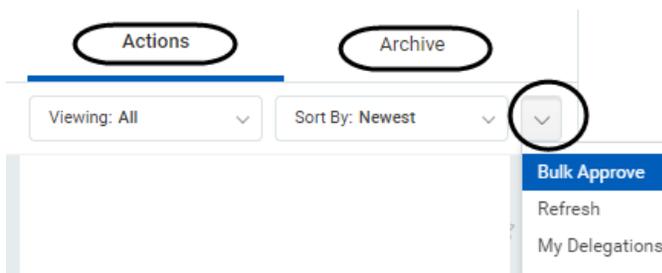


**Notifications:** Notifications can be found by selecting the bell icon in the top right corner. Items in this list do not require action. They are for your information only.

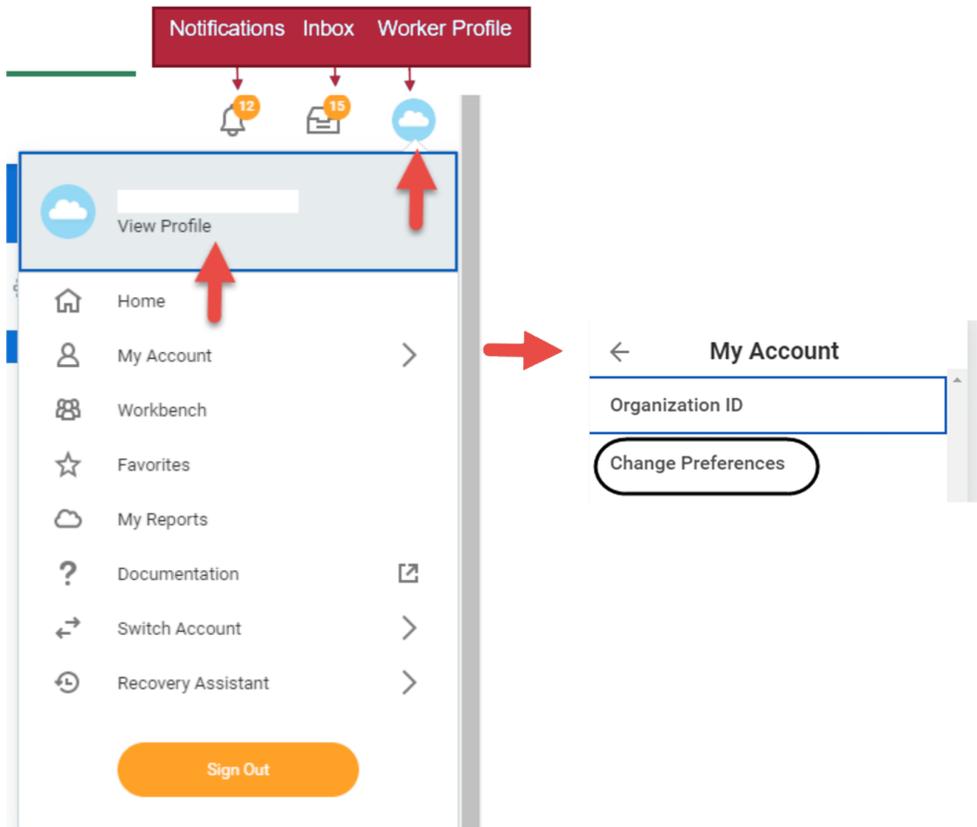
Whenever you want to see an action you've completed, you can view them for up to 30 days in the archive folder in your inbox. To view older items, you can click the down arrow and select View More Processes to run a report.

### Inside Inbox:

- **Actions tab:** has tasks that are in progress and waiting approval. You can click on "Viewing" to filter your tasks, "Sort By" to sort your tasks, or click on the down arrow button to the right of the "Sort By" field to view more actions of Bulk Approve, Refresh, or view My Delegations.
- **Archive tab:** has tasks that you have completed. You can click on "Sort By" to sort your tasks or click on the down arrow button to the right of the "Sort By" field to view more actions of Refresh or View More Processes.



To modify account preferences, select the cloud in the right hand corner and select My Account -> Change Preferences.

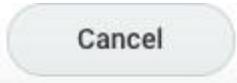


# Icons

Below are some of the **key icons** you will see and how to use them.



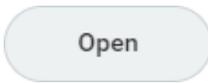
**Santa Clara University Logo:** displays your Workday Home Page.. This icon can also be used to navigate back to your home landing page.



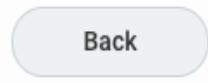
**Cancel Button:** disregards a change.



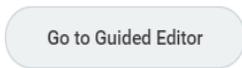
**Add Button:** adds additional information to any task.



**Open Button:** opens the desired task.



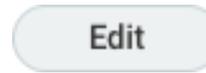
**Back Button:** returns you to the previous page.



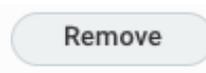
**Go to Guided Editor:** walks you through the fields and sections of a task to assist you in completing it.



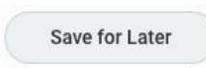
**Guide Me Button:** guides you through the fields and sections of a task toward completion.



**Edit Button:** a button that you can use to change information.



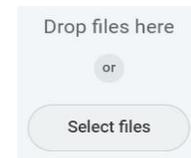
**Remove Button:** deletes an area.



**Save for Later Button:** saves the item in your Inbox until action is taken.



**Details:** opens additional information relating to your task.



**Attachments Icon:** attaches .pdf files, Word, and Excel documents to a task.



**More Button:** displays several additional choices based on the business process.





**Chart:** view a report as a chart.



**Add Row Icon:** adds a row to the current grid.



**Prompt:** presents a list of options for a specific field.



**Delete Row:** removes the current row from a grid.

### Payment Elections

This is the same as direct deposit. You can modify it under the Pay application/worklet.



**Required Field Indicator:** A **field** with a red asterisk indicates you must enter a value for this field before saving or submitting the page.

Continue

**Continue Button:** advances you to the next page or the next step in your task's process.

Done

**Done Button:** closes a confirmation screen.

Next

**Next Button:** advances you to the next page or the next step in your task's process.



**Calendar:** opens a calendar to select a date.



**Edit Icon:** enables the user to add and remove information on the page.



**Arrow:** opens the page to additional areas that can be edited.



**Comments Icon:** leave comments for yourself or other users for a particular task.



**Filter:** used to narrow down data. Clicking this icon will create a row on your report where you can filter data to display from one or more columns.

3 Error(s)

**Error Message:** alerts you when there is a critical error. An error must be corrected to move forward in a process.

1 Alert

View All

**Alert Message:** alerts you about system limitations. Enables you to continue your work without resolving the issue. You can still submit a task.

Save

**Save Button:** saves the item you are working on.

OK

**OK Button:** accepts and saves your changes.



**Progress Bar:** tracks your progress working through a task. It also allows you to move forward or return to a previous page within the task.



**Related Actions:** 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.



**View Printable Version PDF:** used to view a page as a printable PDF file. This can be restricted using the domain, Export to PDF and Excel.



**Excel:** used to view a page as an Excel file. This can be restricted using the domain Export to PDF and Excel.



**Submit Button:** submits your changes, while advancing the business process to the next step.



**Configure Applications:** configures the applications that appear on your home landing page. Some applications may be required, and some optional.



**View Team:** links directly to an organized chart of your team and organization.

### Supervisory Organizations

Supervisory organizations group workers into a management hierarchy and are the primary organization type in Workday's HCM. All workers are hired into supervisory organizations.

***If a new supervisory organization is needed in your area, please contact your HR Representative.***