

Getting Started with Workday@SCU




For Managers

Overview

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.







Key Applications (Worklets)

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

Worklet	What it Means or How to Use
	Absence An application linking you to common actions and views related to time off (vacation/sick), including time off correction, leave of absence, view your time off, and time off balance.
	Benefits An application linking you to common actions and views related to benefits, including change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.
	Birthdays An application highlighting when your direct reports' birthdays are.







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	<p>Career An application linking you to common actions and views related to your career, including refer candidates and applying for internal jobs.</p> <p>View your certifications, education, languages, job history, and awards. (future release).</p>
	<p>Dashboards An application(s) containing key management reports and actions. Icons will vary.</p>
	<p>Hiring An application, which provides you, links to action items related to position and requisition, “Create Position”, “Close Position”, view your open requisitions and links to new employee onboarding information.</p>
	<p>My Open Positions An application linking you to a summary of all your current open job positions.</p>
	<p>My Team An application linking you to common actions and views related to your team including viewing your direct reports and their employment information.</p>
	<p>Onboarding A visual dashboard providing information to all new hires and internal employees transferring into new positions about their onboarding documents. All onboarding tasks will appear in your inbox to be completed. New hires still need to visit HR to verify their I-9's. All onboarding tasks must be completed (cleared from your inbox via “Submit” button) to prevent any delays with setting you up for payroll and other important system access.</p>

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	<p>Pay</p> <p>An application linking you to common actions and views related to your pay. You can use this application to access withholding elections and payment elections(direct deposit) and to view payslips, total compensation, one-time payment history and tax documents.</p>
	<p>Personal Information</p> <p>An application 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, legal name and preferred name.</p>
	<p>Recruiting</p> <p>An application linking you to common recruiting actions and views, and a list of recent requisitions and positions. The link to the external SCU website is available. You can create requisition and prospects, etc. All recruiting related documents like phone screen questions, compensation guidelines, pre-employment inquiries are available for reference.</p>
	<p>Recruiting Dashboard</p> <p>The Recruiting Dashboard displays common reports and analytics for recruiters and managers.</p>
	<p>Team Time Off</p> <p>An application linking you to common actions and views related to your team's time off, including managing your direct report's time off requests and approving, denying time off requests.</p>
	<p>Time</p> <p>An application linking you to common actions and views related to your time, including entering your time and viewing your time off balance. Hourly employees will enter time using this application.</p>

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Time and Absence

A dashboard highlighting upcoming time off for your team and anyone who is on Leave of Absence.

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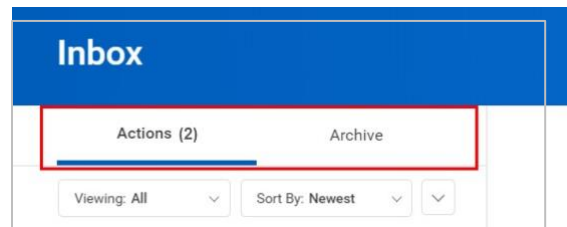
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Workday Inbox

Your **Inbox** is the central location for tasks that require your attention, as well as an archive of recently completed tasks. The **Actions** tab defaults and shows the process status of pending transactions that require an action from you.

Clicking on an item opens the transaction details. Items in your Inbox are not deleted; they move to the **Archive** tab once you have completed or submitted the task.

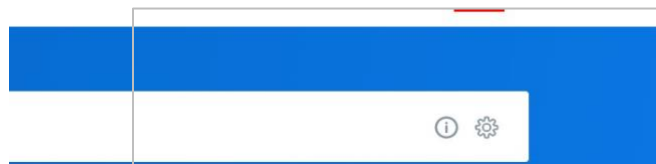
You will receive a Daily Digest Email of your Inbox tasks to your @scu.edu email on a daily basis.



Workday Notifications

Access your **Notifications** by clicking the **Notifications** icon in the upper right corner of your Workday screen.

Notifications are messages that Workday sends automatically as certain tasks and processes are completed. Notifications may impact you, but **do not require any action** (e.g., alerts, process completion status).




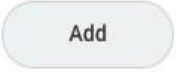



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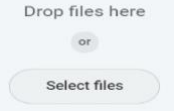


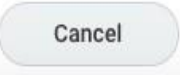
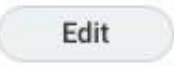
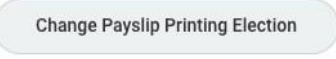



Key Icons

Workday makes it easier for you to track activities, search for answers and fill in responses. Below are some of the key icons you will see and how to use them.

Icon	What it Means and How to Use
	<p>Search</p> <p>A field on the home page that enables you to find tasks, reports, and people within your organization. Search allows you to narrow results by categories including common, organizations, and all of Workday. If you do not see the task, report, or employee you are looking for in the dropdown list, press ENTER to view a full list of items that contain your search term.</p> <p>Note: The Search feature does not accommodate for spelling errors. Try searching through some “keywords” for what you are looking for.</p>
	<p>Workday Logo</p> <p>Displays your Home page. This icon can also be used to navigate back to your home page.</p>
	<p>Actions and View</p> <p>Buttons for commonly grouped tasks and reports. Accessed through worklets.</p>
	<p>Add Button</p> <p>A clickable button that lets you add additional information to any task.</p>
	<p>Alert Message</p> <p>Soft warning message that alerts you about system limitations based on configuration. This message enables you to continue your work without resolving the issue.</p>









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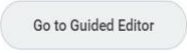
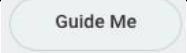


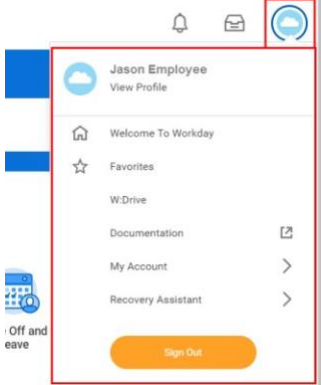
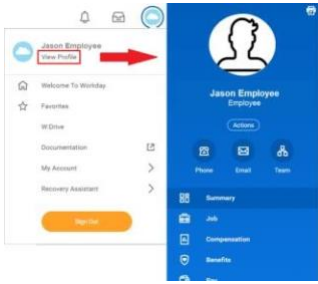

	<p>Arrow A clickable icon that opens the page to additional areas that can be edited. Also referred to as the More icon.</p>
	<p>Attachments Icon A clickable icon that lets you attach .pdf files, Word, and Excel documents to a task.</p>
	<p>Back Button A clickable button that returns you to the previous page.</p>
	<p>Calendar A clickable icon that opens a calendar to select a date.</p>
	<p>Cancel Button A clickable button that disregards a change.</p>
	<p>Edit Button A clickable button from the Payment Elections in the Pay application that you can use to change your account information.</p>
	<p>Change Payslip Printing Election Button A clickable button from the Pay application, where you can change your payslip printing election.</p>
	<p>Chart A clickable icon used to view a report as a chart.</p>
	<p>Comments Icon A clickable icon you can use to leave comments for yourself or other users for a particular page or task.</p>
	<p>Configure Applications A clickable icon on the home page where you can configure the applications that appear on your home</p>

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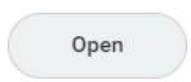
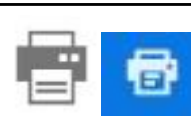




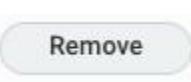

	<p>page. Depending on your organization's configuration, some applications may be required, while others are optional. This icon can also be used as a Settings icon.</p>
	<p>Continue Button A clickable button that advances you to the next page or the next step in your task's process.</p>
	<p>Delete Row A clickable icon that removes the current row from a grid.</p>
	<p>Details A clickable icon that opens additional information relating to your task.</p>
	<p>Done Button A clickable button that closes a confirmation screen.</p>
	<p>Edit Icon A clickable icon that enables the user to add and remove information on the page.</p>
	<p>Error Message Hard warning message that alerts you when there is a critical error. An error must be corrected to move forward in a process or to enable your configuration.</p>
	<p>Excel A clickable icon used to view a page as an Excel file. This can be restricted using the domain Export to PDF and Excel.</p>
	<p>Filter A clickable icon 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.</p>

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	<p>Go to Guided Editor Walks you through the fields and sections of a task to assist you in completing it. (future releases)</p>
	<p>Guide Me Button Guides you through the fields and sections of a task toward completion. (future releases)</p>
	<p>Location, Email icons Located in the Worker Profiles. Location is location of the worker, email is the email address of the worker.</p>
	<p>More Button A button that displays several additional choices based on the business process.</p>
	<p>My Worker Profile Select the cloud to view your Worker profile. You can also access personal information, such as compensation and benefits details, time off information, and more by clicking the View Profile link below your name.</p>  <p>You can also view any Reports you may have access to or waiting for results you ran.</p>
	<p>Next Button A clickable button that advances you to the next page or the next step in your task's process.</p>



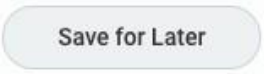




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	<p>OK Button A clickable button to accept and save your changes.</p>
	<p>Open Button A clickable button to open the desired task.</p>
	<p>View Printable Version PDF A clickable icon used to view a page as a printable PDF file. This can be restricted using the domain, Export to PDF and Excel.</p>
	<p>Add Row Icon A clickable icon to add a row to the current grid.</p>
	<p>Progress Bar The bar tracks your progress working through a task. It also allows you to move forward or return to a previous page within the task.</p>
	<p>Prompt A clickable icon that presents a list of options for a specific field.</p>
	<p>Related Actions a.k.a. Twinkie 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. For it to become visible, hover the cursor over the magnifying glass or any “clickable” text and then click the icon to see any actions that you can perform for that object in Workday.</p>
	<p>Remove Button A clickable icon that deletes an area.</p>
	<p>Request Absence Button A clickable button to request absence from the Request Absence worklet.</p>

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	Required Field Indicator A field with a red asterisk indicates you must enter a value for this field before saving or submitting the page.
	Save Button A clickable button to save the item you are working on.
	Save for Later Button A button that saves the item in your Inbox until action is taken.
	Sign Out Button A clickable button to sign out of the Workday system.
	Submit Button A clickable button to submit your changes, while advancing the business process to the next step.
	Tag A clickable icon to insert a CRF into notifications, emails, and other communications.
	View Team A clickable icon that links directly to an organized chart of your team and organization. Can be accessed from the Worker Profile.

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Key Terms

Below are some of the key terms you will see in Workday.

Term	What it Means
Employee Types	<p>Regular Budgeted staff positions and full year faculty positions.</p> <p>Fixed Term A staff position in a fixed term assignment.</p> <p>Temporary On-call or adjunct QPT/Semester positions.</p> <p>Student Student employees.</p> <p>Contingent Worker: Non-employee records, i.e. Agency Temp Worker, Affiliate. These records will have a (C) next to their name.</p>
Payment Elections	This is the same as direct deposit. You can modify under the Pay application
Pre-Hire	In Staffing, an individual you're tracking before employment. In Recruiting, a candidate who is in the Offer or Background Check stage.
Supervisory Organizations	<p>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.</p> <p><i>If a new supervisory organization is needed in your area, please contact your HR Representative.</i></p>
Withholdings Elections	This is the same as W-4 Tax Withholdings and DE-4 State Withholdings. You can modify both under the Pay application.
<div style="border: 1px solid red; padding: 5px; display: inline-block;"> Federal Elections State Elections </div>	