Workday Basics & FAQ

What Is Workday?
Workday is a cloud-based system that The Texas A&M University System uses to manage the Human Resources, Benefits and Payroll functions for all employees. Workday is built on three basic fundamentals:

- **Organizations**: Organizations are used to group people, resources, workers and their institution or agency. They provide management, visibility and reporting structures for resource allocation.

- **Business Process**: A business process is a set of tasks used to accomplish a specific goal such as posting a position. Workday will automatically route specific steps in a workflow to those responsible for them. Certain processes may require multiple approvals within Workday and may also have additional approvals outside of Workday.

- **Security Roles**: Security roles determine what you can see and do. Initiation of a business process is determined by the employee’s security role in the Workday system. The same business process may be initiated by multiple security roles.
  - Security roles are not job titles. The roles provide Workday users access to appropriate data within the assigned organization structure. The roles also determine functional responsibilities, routing of actions in a business process and access to reports.
  - Workday users will be assigned a security role based on the access they will need in the system. Some users may be assigned to multiple security roles depending on their duties and responsibilities.

Navigating Workday

Accessing Workday

All A&M System employees will access Workday through Single Sign On (SSO).

Workday Home Page

The Workday Home page provides an icon-rich user experience much like what exists on your smartphone or tablet. These icons, called worklets, enable you to quickly access tasks as well as the links to pages that will provide additional resources for you.
Worklets

A worklet is an icon found on the Home page to access information needed on a routine basis. Some examples of tasks that you can access through worklets include:

- View paystubs or benefits elections
- View reports
- Enter time or request time off
- Access your Inbox
- Use the Gear Icon to add/delete the worklets on your home page.

Workday Inbox

- All approvals, reviews, to-dos and other action items are accessed through your Workday Inbox
- Action items remain in your Inbox until you (or someone with the same security role) takes the action
- Access your Inbox by clicking the Inbox worklet on your Home page
Worker Profile

The Worker Profile provides you with basic information about workers in the A&M System who are in Workday. Your security role determines how much information you can see. The Worker Profile displays information such as the organizations employees belong to, who their managers are, and an overview of their education and work experience. Other potential information includes contact, career, personal, performance, feedback, and pay information; once again, the type and level of information displayed depends on your security role.

Delegate

Delegation temporarily reassigns tasks to another user, enabling that user to perform individual actions on the delegator’s behalf. Users can delegate a task in their Inbox, such as Review, Approval and To Do steps, to another person, if that task allows delegation. Use for a quick one-time need when you are not available to complete a step in a business process or a task, or to delegate a task for up to 12 months.

Delegated tasks show as “On behalf of:” in the delegate’s Inbox. The delegate will use Switch Account to complete the delegated tasks. Step
From the Workday Home page:
1. Click the Inbox worklet
2. Click the action item you would like to delegate
3. Click the gear icon on the top right hand corner of the screen that displays
4. Click Delegate Task
5. Select Proposed Delegates
6. Enter any comments, as needed
7. Click Submit
This completes the Delegate Task process

F.A.Q.
1. How can I edit information in my profile that may not be current?
   a. Click Personal Information worklet. You can update any info that is not current. Some changes may route for approval and require additional documentation (i.e. legal name change)
2. How do I view my pay slips and deductions?
   a. You can find this information in the Pay worklet or go to “view profile” and click on Pay
3. How do I add multiple accounts to my direct deposit?
   a. You can add up to 5 accounts. Go to the Pay worklet and add the accounts you want, then select them as direct deposit options. Direct Deposit option must be enabled by completing appropriate Direct Deposit Declaration. Contact your HR Liaison if you need to set up direct deposit option.
4. What is delegation and what does that have to do with me as an employee?
   a. Delegation is used to ask you, the employee, to do something on behalf of someone else. If you receive a delegation, you will see it in your Inbox and you will receive a notification in your email.
5. How do I request time off now?
   a. Navigate to the Time Off worklet. Choose the Time Off option and from the calendar, select the dates you want to take off. You will only enter the number of hours you will be gone, not the actual time (8am – 5pm); however you can add the actual time off in the comments.
6. How do I enter my hours worked as an hourly paid employee?
   a. Use the Time worklet. You can enter time for the current week, the prior week or select a week. You can even make a correction to previously submitted time that was already approved. Corrections can be made to entries in the previous three pay cycles.
7. How does Workday change the way I manage my benefits now?
   a. Employees can make changes to their benefits elections, beneficiaries, and dependents via self-service.
8. Managers: How do I view information about my direct reports?
   a. You can add the My Team worklet on your home page. My Team is composed of windows that provide different views into your direct reports.
9. How often should I check my Workday Inbox?
   a. It is a good idea to check your inbox at least once per day, but you will also receive email notifications of things waiting for you.
10. What are Notifications?
   a. Notifications are alerts that something has occurred. You may or may not have to take action in Workday based on notifications.

11. How do I delegate to others in Workday?
   a. You can delegate anything that is not an initiation step. To delegate, type “My Delegations” in the search bar, click “manage delegations”, and fill in the information required. We recommend clicking the “Retain Access to Delegated Tasks” box. The “Alternate Delegate” is only sent the delegation if your primary delegate is not allowed to take action.

12. How can I delegate the approvals for my employees who submit time sheets?
   a. When you view the submitted timesheet in your Workday Inbox, click on the gear icon at the top right and choose delegate task. It is a good idea to talk to the person you are going to delegate to so they are expecting the task.

13. How do I approve time off request?
   a. Time off requests appear in your Workday Inbox for review and approval

14. How do I view the Time Off balances?
   a. To view employees’ time off balances, navigate to the employee, click on the related actions button, and choose Time and Leave → Time Off Balance. You can view the balances for your team.

15. How do I use Workday to manage leaves for my team?
   a. You can use the Time and Absence worklet to manage any absence needs for your team. The worklet’s dashboard shows your team’s upcoming time off, scheduled weekly hours, etc.

16. What if an employee did not enter hours? Can I enter for them?
   a. Yes, a manager can enter time on behalf of an employee. To do this, locate the employee, click on the related actions menu, click time off and leave, and choose enter time.

Business Process FAQ

Additional Jobs

- **How do we see/access the total number of jobs an employee has in within TAMUS?**
  - You can see all jobs for an employee from the employee Worker Profile > Overview and then access the All Jobs - TAMUS tabs. Additionally, you can see that an employee has more than just a Primary Job from the reversed arrows symbol next to their name in Worker Profile. You can then see the list of jobs by clicking on the reversed arrows symbol.

- **If someone’s primary job is with my department, but he also holds an additional job elsewhere, can I still terminate the employee’s job with my department?**
  - Workday gives you an error that you cannot terminate the employee because he holds additional jobs. Contact your HR Liaison to switch primary job and change the additional job to the primary job, so the employee can be terminated from the primary job.
Background Check

- **How will the Background Check process work?**
  - When a candidate is moved to the Background Check step of the Job Application process, the Recruiting Partner will trigger the integration with SterlingTalent Solutions to initiate background check. Upon receipt of the data, Sterling will email the candidate, the candidate will provide their information to Sterling, and Sterling will run the background check. When the background check process is complete, the Recruiting Partner will inform the HR Liaison of background check result, and move candidate to appropriate recruiting stage.

Business Processes

- **If we begin a business process (for instance, terminating an employee) and submit it for approval – then realize it was a mistake – how do we stop the process from going forward? Is there a method for “recalling” the process? Or canceling it?**
  - Click the gear icon in the upper corner and select “cancel” if that option exists. Or, the person who is next in the approval process can send back or deny. Deny cancels the process entirely.
  - Not all BPs can be cancelled once submitted without action by an administrator at the System level.

- **Who should initiate Business Process?**
  - Many BPs can be initiated by multiple security roles including Manager. The primary initiator should continue to be the HR Liaison (HR Contact, Recruiting Coordinator, Absence Partner, Timekeeper, Talent Analyst).

Delegations

- **If a manager or department head delegated leave approval to someone else, can that person approve their own leave? If not, who would the leave approval be done by, the alternate delegate? And how is the alternate delegate notified to do this?**
  - Business processes delegated to another person will not trigger to the delegate if the delegate is the subject of the business process; rather the step will trigger to the alternate delegate which defaults to the delegator’s manager. Delegators are encouraged to have conversations with their manager and the persons they intend to delegate business processes to in order to clarify expectations and the delegated work.

- **Can a manager delegate timesheet approval to someone in their supervisory org?**
  - Yes.

- **Will whoever the time sheet approval is delegated to see everyone in that same supervisor org?**
  - Yes.
Time Off

Workday does not currently have functionality to restrict time off approval steps to only the primary manager. For employees who have multiple positions, the request will be sent to all managers. Only the manager of the "time off eligible" position should approve. If the manager of the non-time off eligible position approves the time off before the appropriate manager does, it will be removed from their inbox. Managers can still view their employee's time off request through the employee's profile and can correct or delete the time off if it is not approved.

- **Who should initiate a termination in Workday?**
  - HR Contacts in Workday should initiate the termination process, instead of the Manager, for any employees including student workers. If the employee’s Manager initiates the termination, the off-boarding tasks that are triggered in Workday will route to HR Partners at HROE, rather than to the HR Liaison, which may delay the completion of tasks. Be sure to follow your usual off-boarding checklists and please remind Managers, including those who supervise student workers, that the HR Liaison should be the one initiating the termination process.

Supervisory Organizations, Moving Employees

- **How do I make an employee supervisor?**
  - When an active employee will begin supervising others for the first time or a new employee being hired into a newly created position will be a supervisor, a new supervisory organization must be created so the employee can have the manager role assigned to them. Please contact your HR Liaison to have this set up in Workday. This is a multi-step process in Workday requiring action from payroll, so please allow sufficient time for the business process to complete. When the new supervisory organization is ready and the new manager is assigned to that supervisory organization, the HR Liaison can then move workers to the new supervisory organization.

Payroll

- **How do vacation accruals work with faculty?**
  - If an employee is faculty and less than 12 months, vacation will not accrue at all. If an employee is faculty and is in a 12 month annual work period, vacation will accrue. If a staff employee is in an 11 month annual work period, time off will accrue for the 11 months in that period. No time off (sick or vacation) will accrue for the month not in their work period.

Inbox Management

- **When you click on "save for later" - how can others access the action to keep moving in process if the person who saved for later is absent and unable to delegate from their inbox to someone?**
  - If one person uses Save for Later, that person then has the item and it is no longer available for other people in the same role. Any security role with access to the history of the business process can see the status "Saved for Later" and
the person who saved it. If that person can no longer perform the remaining duties for some reason, a Business Process Administrator at the system level can reassign the step to another person in the business process security group for that step.

**Sick Leave Pool**

- Sick leave pool hours will be handled by the same way as they currently are. The department will submit the sick leave pool withdrawal form, along with the supported documentation from the physician to HRPR. HROE will review the medical documentation and the sick leave pool request. Once approved, HRPR will add the appropriate number of sick leave pool hours needed to the employee’s leave balance in Workday. The sick leave pool hours will appear and be available for use once their other paid leave balances are exhausted.

**Time Off/Leave**

- Will Workday know to suspend accruals when a Leave of Absence is approved, and restart them automatically when a Return from Leave of Absence is approved?
  - Once an employee’s leave of absence (unpaid leave for more than 30 days) for an entire given month is approved, the accruals for that month, will automatically be suspended in Workday. When the employee’s request to return from the Leave of Absence is approved, the accruals for the month that they return to work in, will be added automatically.

**Student Worker**

- How do you create a position under someone who is not currently a manager?
  - Contact your HR liaison so that a request can be submitted to make the person a manager (Move to New Manager) first and then create position in their supervisory org.

**Hiring**

- Reminder: An employee may not start work before completion of a background check.
- Candidates must be moved through stages of the Job Application process in the following order: Interview => Reference Checks => Offer => Background check

*** Managers, please do NOT move the candidates through the process using the candidate grid. Doing so bypasses a critical step for the Recruiting Partner to review for duplicates.
<table>
<thead>
<tr>
<th>Name</th>
<th>Worklet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td>![heart]</td>
<td>A worklet linking you to common actions and views related to benefits, including change benefits, beneficiaries and dependents. You can use the worklet to view your benefit elections and current benefits cost</td>
</tr>
<tr>
<td>Favorites</td>
<td>![star]</td>
<td>A worklet containing favorite reports and tasks for easy access</td>
</tr>
<tr>
<td>Inbox</td>
<td>![paper]</td>
<td>A worklet showing your action items, To Dos, and approvals; required for all users and is required on the Home page</td>
</tr>
<tr>
<td>My Team</td>
<td>![people]</td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their employment information (transfer, promotion or change of job). This worklet is being retired in 2018</td>
</tr>
<tr>
<td>My Team Management</td>
<td>![people]</td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their recent activity. For example you can Promote, or Change Job, Add Job, Terminate and Place Worker on Leave here. Finally, you can view important information such as a team comparison, the Organization Directory, Headcount, Management Chain and Timeline</td>
</tr>
<tr>
<td>Pay</td>
<td>![wallet]</td>
<td>A worklet linking you to common actions and views related to your pay, including accessing withholding elections and payment elections and viewing payslips, total compensation, bonus and one-time payment history, tax documents and allowance plans</td>
</tr>
<tr>
<td>Personal Information</td>
<td>![id_card]</td>
<td>A worklet linking you to common actions and views related to your personal information, including changing your contact and personal information (such as your addresses, e-mail and phone number), emergency contacts, photo, legal name, preferred name and government IDs; required for all users and cannot be removed from the Home page</td>
</tr>
<tr>
<td>Safety</td>
<td>![warning]</td>
<td>A worklet enabling employees, managers and safety partners to report safety incidents</td>
</tr>
<tr>
<td>Time</td>
<td>![clock]</td>
<td>A worklet linking you to common actions and views related to your time, including entering your time and viewing your time-off balance</td>
</tr>
<tr>
<td>Time Off</td>
<td>![suitcase]</td>
<td>A worklet linking you to common actions and views related to time off, including viewing your time-off correction, leave of absence, time off &amp; time-off balance</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
<td></td>
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<tr>
<td>-------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Benefit Event</td>
<td>An event that gives you the opportunity to change your benefit elections.</td>
<td></td>
</tr>
<tr>
<td>Business Object</td>
<td>A set of related fields. Instances of a business object include rows in a table or a spreadsheet, with each instance representing a unique occurrence of that type of object. A business object can have no instances, one instance or many instances. Workday automatically links related business objects together. For example, supervisory organization details are linked to a supervisory organization; the supervisory organization is linked to positions; positions are linked to employees; etc.</td>
<td></td>
</tr>
<tr>
<td>Business Process</td>
<td>A task that you can initiate, act upon and complete to accomplish a desired business objective. Business processes are created using a combination of actions, approvals, approval chains, To Dos and/or checklists. An action can be a single task or sub-process. Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee etc.</td>
<td></td>
</tr>
<tr>
<td>Drill-Down</td>
<td>A feature to view more data in a matrix report. When you click a drillable element (such as a drillable field in the table view), a context menu appears that enables you to select a new View By field. If the Enable Drilldown to Detail Data check box is selected on the Advanced tab of the report definition, you can also select details associated with the selected report element</td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td>A transaction that occurs within your organization, such as hiring or terminating a worker</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>An area that contains data related to a particular primary or related business object</td>
<td></td>
</tr>
<tr>
<td>Filter</td>
<td>A clickable icon 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</td>
<td></td>
</tr>
<tr>
<td>Full Time Equivalent (FTE) %</td>
<td>The ratio of a worker’s scheduled weekly hours to the weekly hours for the business site. If a worker works 20 hours a week and the business site weekly hours are 40, then the worker’s FTE% is 50%</td>
<td></td>
</tr>
<tr>
<td>Functional Area</td>
<td>A group of tasks, reports and objects. For example, the HCM solution includes functional areas such as Benefits, Talent &amp; Performance, Absence and Manager/Employee self-service. Each of Workday’s solutions is grouped into distinct functional areas</td>
<td></td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of workers in an organization</td>
<td></td>
</tr>
<tr>
<td>I-9</td>
<td>An employment eligibility verification. A document all workers must complete to verify their identity and employment authorization</td>
<td></td>
</tr>
<tr>
<td>Life Event</td>
<td>A benefit event that occurs in your personal life, such as getting married or having a child</td>
<td></td>
</tr>
<tr>
<td>Open Enrollment Event</td>
<td>A type of enrollment event that typically occurs once per year system wide. Unlike benefit event enrollment, which is triggered by a life event or job change, an open enrollment event applies to an entire employee and retiree population</td>
<td></td>
</tr>
<tr>
<td>Org Chart</td>
<td>A visual depiction of how an organization is structured. It outlines the roles and responsibilities of and relationships among individuals within an organization</td>
<td></td>
</tr>
<tr>
<td>Performance Review Process</td>
<td>The formal process to establish annual worker goals and conduct the performance evaluation process, which includes review and rating of goals, competencies and position responsibilities</td>
<td></td>
</tr>
<tr>
<td>Pre-Hire</td>
<td>A term used in Staffing to identify individuals (candidates) before employment and used in Recruiting to identify candidates who are in the Offer or Background Check stage</td>
<td></td>
</tr>
<tr>
<td>Roles</td>
<td>A group of people with specific responsibilities and permissions. When a business process runs, the role for each step includes all of the workers in that role in the business process target organization</td>
<td></td>
</tr>
<tr>
<td>Staffing Event</td>
<td>Any event that changes your position or job, such as a hire, a transfer or a promotion</td>
<td></td>
</tr>
</tbody>
</table>
**Supervisory Organization**  
Workers grouped into a management hierarchy. Supervisory organizations are the primary organization type in Workday. All approvals and checklists are established for the supervisory organization hierarchy, with possible variations for particular organizations within that hierarchy.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>An action you must take in a business process, unless you reassign or delegate the task. For example, notifications or inbox alerts are triggered by steps in a business process.</td>
</tr>
<tr>
<td>To-Dos</td>
<td>Reminders to do something. They can be part of business processes and must be marked complete before the workflow will go to the next step.</td>
</tr>
<tr>
<td>W-4</td>
<td>A withholding allowance certificate. This will inform an employer of how much income tax to withhold from your paycheck.</td>
</tr>
<tr>
<td>Worker</td>
<td>A person who is either an employee hired by a company or a contingent (contracted) worker.</td>
</tr>
<tr>
<td>Worker Profile</td>
<td>A continuously updated page that provides a view of an employee’s experience, skills, education, etc.</td>
</tr>
<tr>
<td>Worklet</td>
<td>A compact report displayed as an app on your Home page, providing easy access to tasks and information you use on a regular basis, including: Pay, Time Off, Personal Information, and Benefits.</td>
</tr>
</tbody>
</table>