Employee Self-Service in Workday
Contents

Overview

Getting Started in Workday

Configuring Workday for You

Employee Self-Service Processes

Summary
Employee Self-Service in Workday

Overview

Getting Started in Workday

Configuring Workday for You

Employee Self-Service Processes

Summary
What is Workday?
Workday is a new generation of enterprise applications that work the way you work. It is integrated, intuitive, and accessible wherever you are. Workday looks and feels like your favorite consumer website and is designed for speed, usability and flexibility.

Workday will replace the need for the following systems:
- HRIS (Human Resources Information Systems), including the HREM (Human Resources Employee Module)
- HR Connection
- TMS (Talent Management System) - Position Module
- PRS (Payroll Roster System)
- ADP for Payroll (outsourced Payroll processing)
- Green Paper Time Sheets
- Shadow Systems (Excel spreadsheets, Word documents, etc.)
Course Objectives

By the end of this course, you will be able to:

- Understand basic navigation and elements in Workday
- Understand how to set your preferences and favorites, including notification frequency, in Workday
- Complete employee self-service processes in Workday
Getting Started in Workday

Overview
Getting Started in Workday
Configuring Workday for You
Employee Self-Service Processes
Summary
Getting Started in Workday

The purpose of this section is to provide you with basic navigation skills and familiarity with the features that you will utilize in Workday as you complete your daily tasks in the future.
Getting Started in Workday

- How Do I Access Workday?
- Your Workday Home Page
- Your Inbox
- Your Worker Profile
- The Search Bar
- Self-Service Bubbles
How Do I Access Workday?

You will need 3 things:
• Access to a computer with internet
• The Workday URL
• Your Andrew ID – *this will be the same as your Workday username*
How Do I Access Workday?

You can access Workday by visiting http://www.cmu.edu/my-workday-toolkit/index.html

You will be directed to Web Login. Enter your Andrew username and password.
Your Workday Home page is configurable and houses all of your important information. The first time you log in, Workday will walk you through each of the items in the header (as shown below). This header stays constant in Workday and you can access these items at any time on any page. You can then access areas like your Inbox, your Profile, and all of the Bubbles on your home page. If you want to return to your home page at any time, just click the Workday logo in the middle of the header.
Your **Inbox** displays the action items that require your completion and the notifications you have received. You can also view the processes you have previously completed in your archive.

You can use your Inbox to take action on any outstanding processes and to view any notifications for any processes that you may be a part of. The **Inbox** allows easy access to outstanding and/or completed processes.
The visibility of business process steps and progress is one of the most powerful features of the Workday system. At any time, you can identify the status of a process under the **Archive** tab of your **Inbox** by finding the task and clicking the **Process** tab.
Your Worker Profile

You can view your **Worker Profile** by clicking your picture next to the Inbox icon and then clicking **View Profile**. Your worker profile displays your personal information including Job, Compensation, Benefits, and Pay. You can also view your job history, support roles, and worker history.
Your Worker Profile displays information about you and your job(s) across multiple tabs.
The Search Bar

You can use the Workday search bar to navigate many different functions. You can search for people, organizations and locations, initiate tasks, run reports, and much more. You can also locate any information to which you have access. For example, you can type “Address” to bring up multiple tasks and reports pertaining to addresses – home, work, and email addresses.
Self-Service Bubbles

When you first log in, Workday will display a set of “Bubbles.” When you click on a Bubble, you can see each available action, as well as information you can view.
True or False: All items requiring your actions will be found in your Workday inbox.

True

False

Note: You may have to double click to view the answer
Knowledge Checkpoint

**True or False:** All items requiring your actions will be found in your Workday inbox.

**True**

* Your Inbox displays the actions items that require your completion and the notifications you have received. You can also view the processes you have previously completed in your archive.

**False**
Knowledge Checkpoint

True or False: The Workday navigation header is only viewable from the home page when you first log into Workday?

True

False

Note: You may have to double click to view the answer
True or False: The Workday navigation header is only viewable from the home page when you first log into Workday?

True

False

* The header stays constant in Workday; you can access items on the header at any time, on any page. The first time you ever log in, Workday will walk you through each of the items in the header.
Which of the following are included on the Workday header?

I. Inbox
II. Worker Profile
III. Self-Service Bubbles
IV. Search Bar

A. I only
B. I and III
C. I, II and III
D. I, II and IV

*Note: You may have to double click to view the answer*
Which of the following are included on the Workday header?

I. Inbox
II. Worker Profile
III. Self-Service Bubbles
IV. Search Bar

A. I only
B. I and III
C. I, II and III
D. I, II and IV

* The Inbox, Worker Profile and Search Bar are all on the Workday header, while the Self-Service Bubbles are only on the homepage.
Configuring Workday for You
Configuring Workday For You

Workday gives you the ability to configure your own favorites, preferences, and inbox filters, allowing you to organize and prioritize notifications and actions to fit your individual needs.
Configuring Workday for You

- Setting Your Workday Favorites
- Setting Your Workday Preferences
- Setting Your Workday Inbox Filters
Setting Your Workday Favorites

For tasks and reports that you run on a regular basis, you can create a shortcut beneath your Favorites Bubble.

1. Click the Favorites Bubble.
2. Click the Gear icon.
3. Click the Manage Favorites button.
Setting Your Workday Favorites

1. The Manage Favorites page is displayed.

2. Click the prompt icon in the Favorite Tasks/Reports field and type the report or task you wish to add to your Favorites Bubble and select.

3. Click the OK button.
Setting Your Workday Favorites

When you return to your Workday Home page and click your Favorites Bubble, you will now notice that a shortcut is available to the task or report you selected.
To maintain your favorites, you simply click the **Manage Favorites** button, under the gear icon.

Type the name of the task or report of select it from the drop down menu in the **Favorite Tasks/Reports** field.

To remove a current task or report, click on **X** next to the task or report title.

Click **OK**
Setting Your Workday Preferences

You can use the Notification Delivery Preferences under **Change Preferences** to update the frequency with which you receive different types of notifications including tasks, To-Dos, approvals, and business process notifications, as well as anniversaries and birthdays.

1. Click your Profile.
2. Click Change Preferences.
Setting Your Workday Preferences

1. Click the prompt icon.

2. Select the desired email frequency.

3. Click the OK button.
Setting Your Workday Inbox Filters

You can use filters to help organize and prioritize inbox tasks.

1. Click your Inbox.
2. Click View Inbox.
3. Click down-down.
4. Select the radio button for your desired filter.
Knowledge Checkpoint

True or False: You can create shortcuts to tasks and reports on your Workday Home page.

True

False

Note: You may have to double click to view the answer.
True or False: You can create shortcuts to tasks and reports on your Workday Home page.

- **True**
- **False**

* You can create shortcuts to tasks and/or reports that you use on a regular basis that will be displayed beneath your Favorites Bubble on the Workday Home page.
True or False: Notification Delivery Preferences is located beneath the Change Preferences Bubble on your Workday Home page, and allows you to modify the frequency of email notifications.

True

False

Note: You may have to double click to view the answer.
True or False: Notification Delivery Preferences is located beneath the Change Preferences Bubble on your Workday Home page, and allows you to modify the frequency of email notifications.

True

False

*While you are able to modify the email frequency of notifications under the notification delivery preferences, it is a section that is accessed through Change Preferences via clicking your profile on the Workday navigation header.
Employee Self-Service Processes

Overview

Navigation: Logging into Workday

Configuring Workday for You

Employee Self-Service Processes

Summary
Employee Self-Service Processes

Workday has streamlined several processes that were previously completed outside of the system and often involved multiple manual steps. Workday allows you to complete these actions in a convenient process.
Employee Self-Service Processes

- View/ Update Personal Information
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
In Workday, you can update your personal information including legal name, preferred name, contact information, and emergency contacts. You can also update what Workday terms your personal information, including your gender, date of birth, martial status, ethnicity, citizenship status, and more.

In order to change any of your information, start by typing “change my” in the search bar on the Workday navigational header. This will display an action list of the different tasks you can use to when changing your information.

For further actions on completing an information change, reference the corresponding quick guide and/or screencast. A list of corresponding quick guides and screencast is provided under Additional Resources at the end of this training.
Your preferred name is the name you prefer to see when accessing Workday. This task does not legally change your name for benefits or payroll purpose and does not change your name in other CMU systems.

Selecting Change My Preferred Name through the search bar displays Change My Preferred Name page. You can change your first and last name, or check the checkbox to indicate your preference to use your legal name when accessing Workday. Steps on how to change your preferred name are listed in the Change My Preferred Name quick guide.
Selecting Change My Legal Name through the search bar displays Change My Legal Name page. In order to change your legal name in Workday, you must provide at least one form of proof of legal name change (e.g. passport, marriage certificate/license, court order, birth certificate, state issued ID or SSN card.) Steps on how to change your preferred name are listed in the Change Legal Name quick guide.

It is important that you verify your legal name in the Legal Name fields below. If your legal name is incorrect, please update as necessary.

Country  ★ United States of America
First Name  ★ April
Middle Name
Last Name  ★ Kelly
Suffix

enter your comment
Submit  Save for Later  Cancel
Selecting Change Personal Information through the search bar displays **Change My Personal Information** page. Personal Information includes Date of Birth, Citizenship Status, Martial Status, etc. In order to change your citizenship status in Workday, you must provide at least one form of proof (e.g. passport, birth certificate or SSN card). Steps on how to change your personal information are listed in the **Change Personal Information** quick guide.

It is important that your birth date and citizenship status (employees only) are accurately entered and maintained as this information may have an affect on items such as taxing, benefits eligibility, etc.

The following personal information fields are required: Gender, Date of Birth, Ethnicity (US Employees only) and Citizenship Status.

<table>
<thead>
<tr>
<th>Change Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
</tr>
<tr>
<td><strong>Date of Birth</strong></td>
</tr>
<tr>
<td><strong>Marital Status</strong></td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
</tr>
<tr>
<td><strong>Citizenship Status</strong></td>
</tr>
<tr>
<td><strong>Disability</strong></td>
</tr>
<tr>
<td><strong>Military Service</strong></td>
</tr>
</tbody>
</table>
Selecting Change My Contact Information through the search bar displays page. You can change your home contact information (e.g. home phone number, home address, personal email address). Steps on how to change contact Information are listed in **Change Contact Information** quick guide.

Your primary home address is used for taxation. You can add additional addresses for Mailing. Please refer to the FAQ on addresses for further information (link to be added).

You cannot edit your work contact information. If you see any discrepancies, please contact your department administrator.

Review your contact information and enter any changes or additions.

## Home Contact Information

<table>
<thead>
<tr>
<th>Primary Address</th>
<th>Address</th>
<th>Usage</th>
<th>Visibility</th>
<th>Private</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Additional Address</strong></td>
<td>123 Strawberry Lane, Pittsburgh, PA 15213</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Additional Phone</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Email</td>
<td>Address ⭐ <a href="mailto:akelly@ncemail.net">akelly@ncemail.net</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Email</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address ⭐ <a href="mailto:akelly1@yahoo.com">akelly1@yahoo.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Selecting Change My Emergency Contact through the search bar displays **Change My Emergency Contact** page.

The page displays your emergency contacts and allows you to change your primary emergency contact and add an alternate emergency contact.
Employee Self-Service Processes

- View/ Update Personal Information
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
In Workday, you will be able to view and update your benefit elections, including your retirement savings, during open enrollment periods and after a qualifying life event. For more information on changing your benefit elections please refer to the Change Benefit Elections quick guide and/or contact the CMUWorks Service Center.

You can access the Change Benefits page here.

You view your current benefit elections here.

Once you have made your benefit elections, your total cost will display here.
Selecting view Benefit Elections displays your current benefit elections.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Begin Date</th>
<th>Deduction Begin Date</th>
<th>Coverage</th>
<th>Calculated Coverage</th>
<th>Dependents</th>
<th>Beneficiaries</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Contribution (Monthly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - HealthAmerica HMO Local 95</td>
<td>09/01/2014</td>
<td>08/25/2014</td>
<td>Employee</td>
<td></td>
<td></td>
<td></td>
<td>$259.42</td>
<td>$1,037.70</td>
</tr>
<tr>
<td>Basic Life - SunLife Local 95 (Employee)</td>
<td>09/01/2014</td>
<td>08/25/2014</td>
<td>1.5 X Salary</td>
<td>$201,000.00</td>
<td></td>
<td></td>
<td></td>
<td>$15.66</td>
</tr>
<tr>
<td>Optional Life - SunLife Local 95 (Employee)</td>
<td>09/01/2014</td>
<td>08/25/2014</td>
<td>$11,100</td>
<td>$11,100.00</td>
<td></td>
<td></td>
<td></td>
<td>$0.54</td>
</tr>
<tr>
<td>Long Term Disability (LTD) - Lincoln Financial Local 95 (Employee)</td>
<td>09/01/2014</td>
<td>08/25/2014</td>
<td>60% of Salary</td>
<td>$3,500.00</td>
<td></td>
<td></td>
<td></td>
<td>$63.36</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>$259.96</strong></td>
<td><strong>$1,106.76</strong></td>
</tr>
</tbody>
</table>
Employee Self-Service Processes

- View/ Update Personal Information
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
Complete Your Federal Withholdings

In order to update your current federal withholdings, you will log into Workday and locate the Withholding Elections link beneath the Pay Bubble on your Workday Home page. This will redirect you to CIC Plus, the online W-4 e-form management provider. For more information, please contact the CMUWorks Service Center.
Withholding Elections

Selecting Withholding Elections links you to your university sponsored EForm Library. The site enables you to view your current withholding elections and update your primary home address to be presented with the accurate tax information.
Employee Self-Service Processes

- View/ Update Personal Information
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
View/Update Your Payment Elections

To view or update your current payment elections (direct deposit information), click the Payment Elections shortcut, listed under Actions, beneath your Pay Bubble on the Workday Home page. You can specify how you would like your payroll payment distributed, including maintaining multiple bank accounts, changing routing information, and dividing your paycheck between multiple bank accounts. For more information on creating or updating your payment elections in Workday, please refer to the Change Payment Elections quick guide.
View Payment Elections

The Payment Elections link will direct you to view your payment election, make changes to your account, or delete an account when needed.

Designate how to receive payment for each type of pay. For direct deposit be sure to add accounts prior to changing elections.

<table>
<thead>
<tr>
<th>Worker</th>
<th>Kelly, April (akelly1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Country</td>
<td>United States of America</td>
</tr>
<tr>
<td>Default Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Status</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accounts</th>
<th>2 items</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Account Nickname</th>
<th>Country</th>
<th>Bank Name</th>
<th>Account Type</th>
<th>Account Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Savings</td>
<td>United States of America</td>
<td>Chase Bank</td>
<td>Savings</td>
<td>*****3210</td>
<td>Change Account, Delete Account</td>
</tr>
<tr>
<td>Checking</td>
<td>United States of America</td>
<td>Chase Bank</td>
<td>Checking</td>
<td>*****7890</td>
<td>Change Account, Delete Account</td>
</tr>
</tbody>
</table>
Employee Self-Service Processes

- View/ Update Your Payment Elections
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
You are able to view your payslip in Workday beneath the Pay Bubble on your Workday Home page. For more information on viewing your payslips please reference the View Your Payslip quick guide.

You will be able to quickly access five of your most recent pay period’s payslips here.

You can access your My Payslips page to view and/or print your payslips here.
The **Payslips** link will take you to **My Payslips** page where you can view your recent pay period’s payslips.

---

<table>
<thead>
<tr>
<th>Company</th>
<th>Period Start Date</th>
<th>Period End Date</th>
<th>Payment Date</th>
<th>Gross Amount</th>
<th>Net Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carnegie Mellon University</td>
<td>05/05/2014</td>
<td>05/19/2014</td>
<td>06/23/2014</td>
<td>3,384.62</td>
<td>2,328.79</td>
</tr>
</tbody>
</table>

**View**
Employee Self-Service Processes

- View/ Update Personal Information
- View/ Update Your Benefit Elections
- Complete Your Federal Withholdings
- View/ Update Your Payment Elections
- View Your Payslip
- Manage Your Delegations
Manage Your Delegations

Workday makes it easy to manage and delegate tasks. You may decide to delegate your inbox tasks when you will be out of the office. Please note that delegation does **NOT** remove responsibility (ownership) for the task from the user it was initially assigned to. When the delegation period ends, any incomplete delegated tasks revert to the original owner. For further information on delegating your inbox tasks, please refer to the **Manage Delegation** quick guide.
Knowledge Checkpoint

**True or False:** You can choose to have varying percentages of your pay check be deposited in multiple bank accounts.

- True
- False

*Note: You may have to double click to view the answer.*
Knowledge Checkpoint

**True or False:** You can choose to have varying percentages of your paycheck be deposited in multiple bank accounts.

**True**

* You can specify how you would like your payroll payment distributed, including maintaining multiple bank accounts, changing routing information, and even dividing your paycheck between multiple bank accounts.

**False**
Knowledge Checkpoint

True or False: You will complete your federal withholdings in Workday?

True

False

Note: You may have to double click to view the answer.
True or False: You will complete your federal withholdings in Workday?

True

False

*You will access the portal to your federal withholdings in Workday via the Pay Bubble, however, your W-4 e-form will be managed by CIC Plus.
Employee Self-Service in Workday

Overview

Configuring Workday for You

Employee Self-Service Processes

Summary
Course Review

Now that you have completed the Employee Self-Service course, you should be able to:

- Access Workday with the URL and your Andrew ID
- Navigate your Workday Header, Inbox, and Profile
- Maintain your Favorites, Notification Preferences and Inbox Filters
- View and update your self-service processes
Tips and Tricks

- Use the **Back**, **Next**, and **Cancel** buttons in Workday; **DO NOT** use your browser’s back button for navigation in Workday.
- Use the **Archive** tab to see recently performed tasks as well as to check a task’s process status.
- Use your browser’s refresh button to see if additional tasks appear in your inbox.
- Workday is compatible with keyboard shortcuts (e.g. Control V = paste).
- If you right-click on a field that is a link, you can choose to “open in a new window;” this opens a new tab and allows you to keep your place on the original if you want to look up additional information to reference.
Summary
Additional Resources

Quick Guides
- Change Personal Information
- Change Legal Name
- Change Preferred Name
- Change Business Title
- Change Contact Information
- Manage Delegations

Screencasts
- Change Personal Information
- Change Legal Name
- Change Preferred Name
- Change Emergency Contact
- Change Contact Information
- View Payslip

- View Dependents
- Review Pay Slip
- Update Retirement Savings Elections
- Change in Benefits due to Life Event
- Change Payment Elections
- Maintain Workday Inbox Filters and Notifications
Contact the **CMUWorks Service Center**

- **Phone:** 412-268-4600
- **Toll Free:** 844-625-4600
- **Fax:** 412-268-4444
- **Email:** cmu-works@andrew.cmu.edu
- **Website:** www.cmu.edu/hr/cmu-works
Congratulations!

You have successfully completed the Employee Self-Service course.