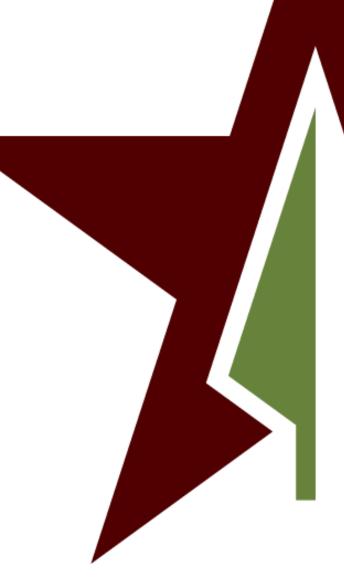
Workday

Employee Training

TEXAS A&M FOREST SERVICE



What is Workday?

 Manages the Human Resources, Benefits, and Payroll functions for all employees

 It is replacing Timetraq, Leavetraq, HRConnect, iBenefits, Great Jobs

• Go LIVE is December 17th!



Workday Fundamentals

• Organizations

- used to group people, resources, and workers to an the agency, department, or program
- Business Process
 - set of tasks used to accomplish a specific goal
 - automatically route specific steps in a workflow
- Security Roles
 - determines what you can see and do
 - these are not job titles but functional responsibilities



Accessing Workday

• Access will be through Single Sign On (SSO)

SINGL	ERSITY SYSTEM E SIGN ON					PHELP
.ogon						
in in to your account	1					
		The Texas A&M University System con applications and your personal informa		'phishing" schemes by par	ties wishing to gain	
	Therefore, verify the address and the certi	ficate of the site before entering your u	iserid and password. <u>Site</u>	es authorized to collect yo	ur SSO userid/password.	
	Visit the <u>SSO news page</u> for updates, to <u>p</u>	rotect yourself from phishing, or to view	<u>v a phishing email</u> and <u>a</u>	nother.		
	with You're going to need a bigger r	ecycling bin! With Workday our HR. r	avroll, and benefits pap	er-based processing will b	e minimized. Learn More	
	······································	,,,,,,,,,,,,,				
	UIN Logon	Campus or Ag	ency Logon			
	UIN:	You can now logon usin	g a Campus or Agency L	ogon like NetID or Island.	ID. More information	
			14			
				ХIЙ		
	Password:	AM		HEALTH SCIENCE CENTER		
		TAMU NetID	Island ID	HSC	TAMUCT	
	Submit	<u> </u>		12		
	Trouble Logging In?		TEXAS A&M	Toron And	ĀŇ	



NAVIGATING WORKDAY



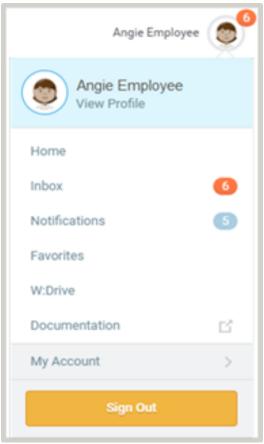
Workday Home Page





My Workday Account

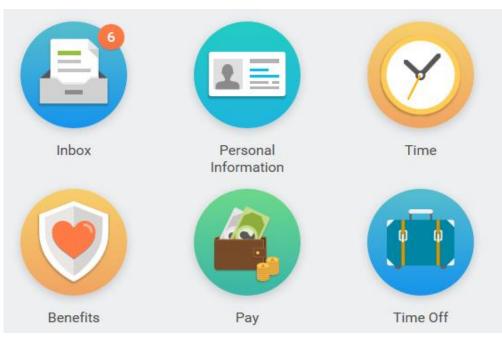
- Provides access to the drop-down menu for access to:
 - Your worker profile
 - The home page
 - Your inbox and notifications
 - Favorites you have saved
 - Account settings
 - Access to sign out of Workday





Worklets

- Icons found on Home page to make it easier to access information needed on routine basis based on your security
 - Paystubs
 - Benefit elections
 - Enter time
 - Request time off
 - Access you inbox





Adding a Worklet

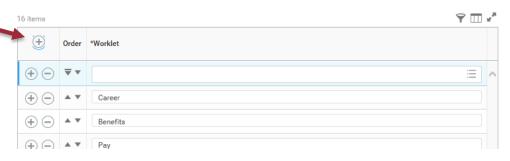
• All monthly employees must add the <u>Time</u> worklet to their Home page

1) Select the gear on your Home page

2) Click the plus sign under optional worklets

Optional Worklets

Select the optional worklets you would like to include on your Home page.





THE TEXAS A&M

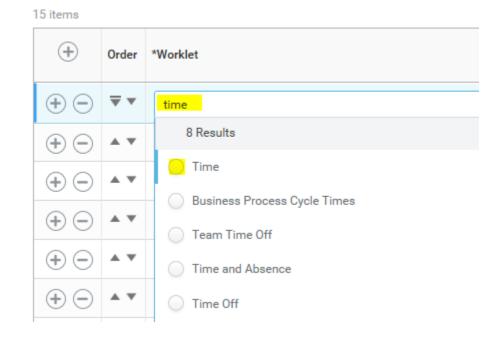
UNIVERSITY SYSTEM

Kristen Suehs

Adding a Worklet

3) Enter Time in the worklet search bar and press enter

4) Select Time and press OK, then Done



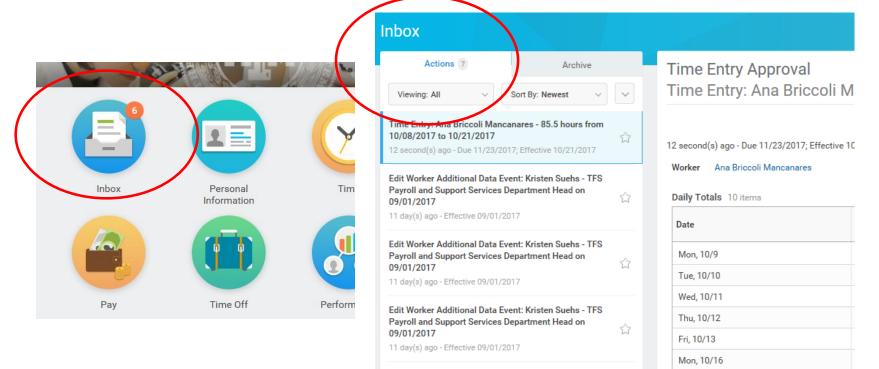
5) Time Worklet is now added to your Home page





Workday Inbox

 Action items to approve, review, and to-dos are accessed through your Workday inbox



Edit Worker Additional Data Event: Kristen Suehs - TFS



Tue. 10/17

Workday Inbox

 Action items will remain in your inbox until appropriate action is taken

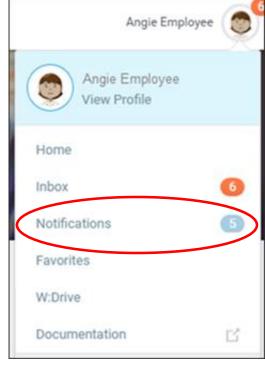
Inbox Filter actions Sor	t actions					
Actions & Archive	Review Abs	ence Request: I	Karen Employee 🔎	tions		02
Viewing: All 🖌 🗸 Sort By: Newest 🗸 🗸	39 minute(s) ago - Du	e 05/27/2017; Effective 05/	30/2017			
Absence Request: Karen Employee 39 minute(s) ago - Due 05/27/2017; Effective 05/30/2017		laren Employee Ibsence Request: Karen Em	ployee			
Update Glacier: Personal Information Change: Angle Employee 2 day(1) ago	Due Date 0	n Progress 15/27/2017 ns as favorite	es to help find t	hem later		
Enter Visa: Personal Information Change: Angle Employee	1.tem				Unit of Time	P 🖽 🖌
Upload Documentation: Dependent Event: Angle Employee - Chief Executive Officer, Bush Foundation on 05/21/2017 3 day(s) ago - Effective 05/21/2017	Date 05/30/2017. 4.	Day of the Week.	Type 4- Unpaid Time Off	Requested 8	Hours	Non-Disciplinary
Complete State Withholding Elections (If your state is not listed please contact your payroll partner): Angle Employee & 6 day(s) ago - Effective 05/18/2017	View Balances The action buttons display at the bottom of the page					
Benefit Change - Birth/Adoption : Tom Employee on 05/08/2017 On halhalf of Karan Employee	Approve	Send Back Deny	Cancel			



Notifications

- Messages letting you know about tasks that have been completed or may require additional attention
 - Request for time off is approved
 - Job requisition was created

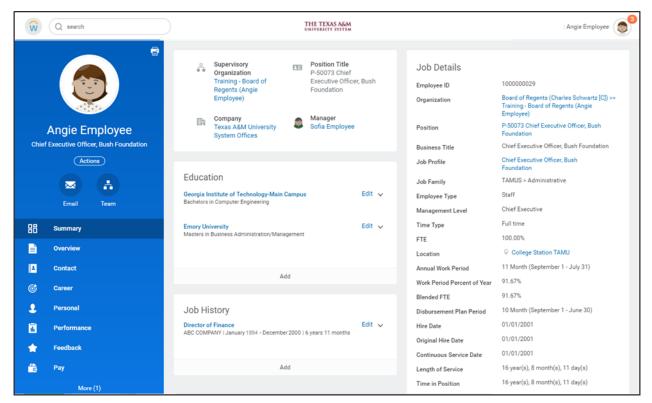
- To view Notification:
 - Click the my account icon
 - Select Notifications from the menu





Worker Profile

• Basic information about workers - organization, manager, contact, pay information, performance, education, etc.



• The level of information displayed depends on your security role.



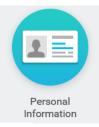
EMPLOYEE SELF SERVICE



To make changes to your contact information, citizenship status, military service, emergency contacts, preferred name, etc.

Change

1) Click on the Personal Information Worklet.



2) In the Change section, click on the appropriate box.





3) Click the Edit icon in the section you wish to change.

Change Personal Information	
Gender	\frown
Gender Female	

Observe Developed Informetter

4) Make the change and click the check box icon.

Gender			\sim
Gender			6 1
Female	~		
select one			\cup
Female			
Male			

5) Click Submit. If required, the change request will route to manager for approval.

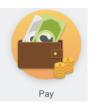


- Photo Change
 - Do not make any photo changes.
 - All photos will be the same as currently in Epstar.
 - Contact Employee Development to change photo.
- Preferred Name Change
 - This name is displayed on your profile and in the search directory.
 - It will not be used in place of your Legal Name.
 - Use only for a preferred name change and not nicknames.
 For example, the employee's legal name is Mary Jane Meyer.
 She prefers to be called Jane. Therefore, she can make a preferred name change in Workday to read Jane Meyer.



Changes to Withholding Elections (W-4)

1) Click on the Pay Worklet.



Actions

Withholding Elections

2) In the Actions section, click on Withholding Elections box.

 Select the type of elections to update and click the update button.

	Federal Elections	State Elections Local Elections
of	Company Texas A&M For	rest Service
е	Effective Date	11/27/2017
	Lock In Letter	
	Payroll Withholding Status	Single
	Number of Allowances	0
	Additional Amount	0.00
	Exempt	
	Nonresident Alien	
	Last Name Differs from SS	
	Last Updated	11/27/2017 05:44:02.286 PM
	Last Updated By	Kristen Suehs
	Update	



4) Your name, company, and effective date appears on the screen. Click OK.

 Marital Status	* X Single
 Number of Allowances	If married, but legally s
 Additional Amount	Total number of allowa
 Exempt	Additional amount, if a
	l claim exemption from * Last year I had a right * This year I expect a re If you meet both condit
LEGAL NOTICE	Your Name and Passw 1. Under penalties of pr 2. You understand that
	3. You understand that If you do not wish to us The form is not valid wi
 l Agree	*

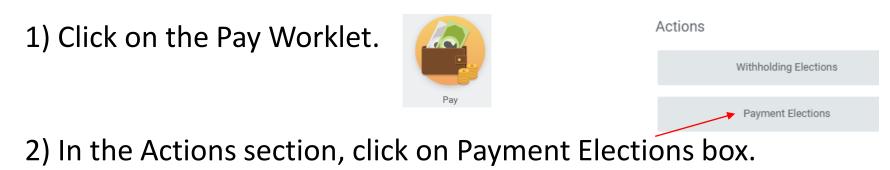
Cancel

Worker	Kristen Suehs
Company *	× Texas A&M Forest Service
Effective Date ★	11 / 27 / 2017 🛗
ОК	Cancel

5) Update your current elections and click the I Agree check box. Then, click OK.

Changes will take effect on your next pay date.

Changes to Payment Elections (Direct Deposit)



3) Current banking accounts are listed along with the current payment election type.

Accounts 1 item										
Account Nickname	e Country Ba		Bank Name		Account Type Account Number					
Bank ****	United States of America Ba		Bank		Checking *****		Change Account			
							Delete	Account		
4										
Add Account Payment Elections 2 items										
				F	Payment Elections					
Pay Type	Payment Type		Account	Account Number Dis		Distribution				
Payroll	Direct Deposit		Bank *****	****		Balan Yes	ce			Change Election
Expense	Direct Deposit		Bank *****	****		Balan Yes	ce			Change Election
4										

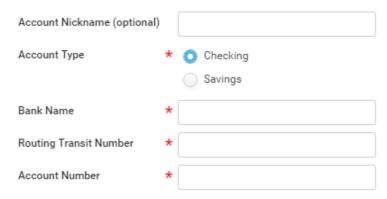


4) To update your list of banking accounts, click the change, delete, or add account box.

ccount Nickname	Country	Bank Name	Account Type	Account Number	\frown
ank ****	United States of America	Bank	Checking	****	Change Account Delete Account

5) Select the Account Type.
Enter the Bank Name,
Routing Transit Number,
and Account Number.
Click OK.

Account Information





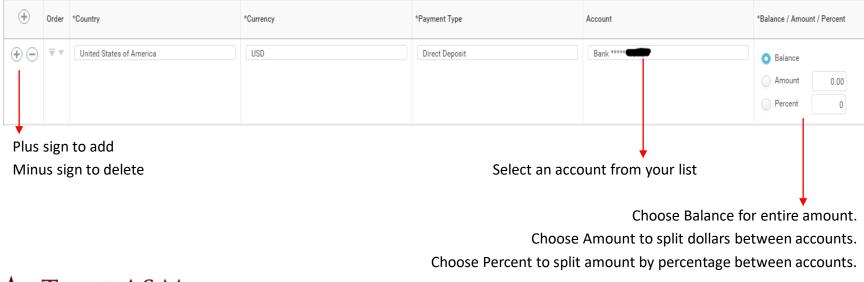
6) To update your payroll or expense payment elections, click the Change Election button for the specific pay type.

Payment Elections 2 items

		Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution		
Payroll	Direct Deposit	Bank *****	****	Balance Yes		Change Election
Expense	Direct Deposit	Bank *****	****	Balance Yes		Change Election
4						

7) Make changes and click OK. Up to 5 elections are allowed.

Payment Elections 1 item





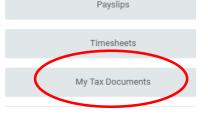
Changes to Tax Documents (W-2)

1) Click on the Pay Worklet.

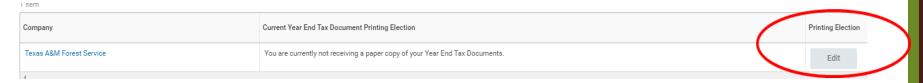


View

2) In the View section, click on My Tax Documents.



3) Click Edit to change tax document printing election. Click OK.



4) Choose your new elections. Click OK.

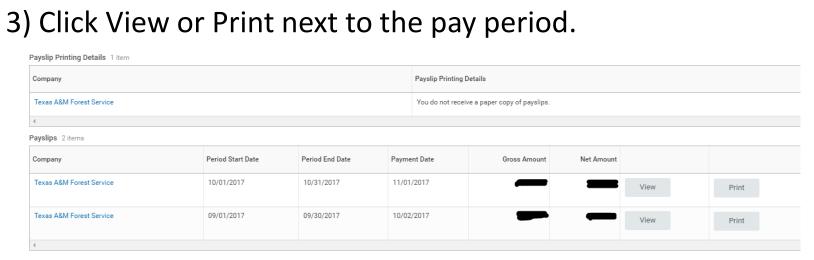
Current Year End Form Printing Election You are currently not receiving a paper copy of your Year End Tax Documents.

New Election

- Receive both electronic and paper copies of my Year End Tax Documents
- Receive electronic copy of my Year End Tax Documents



Payslips

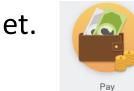




1) Click on the Pay Worklet.

2) In the View section, click on Payslips box. View

Payslips Timesheets



Other Employee Self Service

Benefits

- Life changing event
- Annual enrollment (July)

Contact Dorithie Thomas 979-458-9337 Dorithie.thomas.@ag.tamu.edu

TDA/RTH/ORP Changes

• Enroll, change, or remove

Contact Kristen Suehs 979-458-6623 ksuehs@tfs.tamu.edu



ENTERING TIME



Entering Time

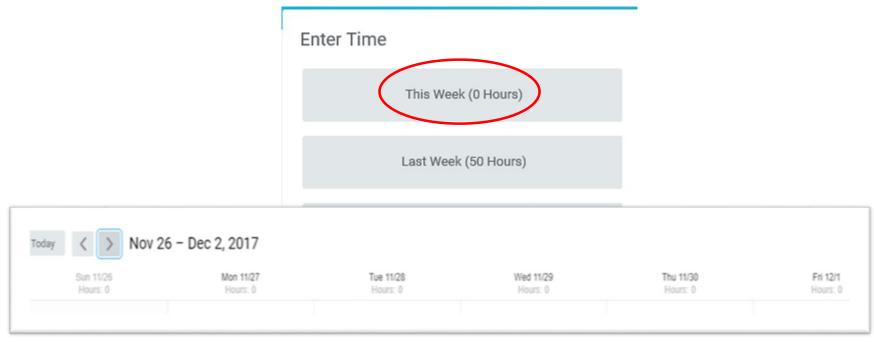
- Hourly Employees:
 - Time will be entered, certified, and submitted by the employee and approved by their manager.
 - Two completed work weeks will be submitted each pay period by every other Monday.
- Monthly Employees:
 - Time will be entered, certified, and submitted by the employee and approved by their manager.
 - One completed work week will be submitted each week by the following Tuesday.
- If an employee is unavailable to enter, certify, and submit time,
 - the manager may on behalf of the employee, or
 - the timekeeper may on behalf of the employee but the timesheet will not route to the manager for approval. Timekeepers must retain documentation from the employee and manager certifying the time. This may be an email, a signed printed copy of the timesheet detail, or a manual timesheet.



1) Click on the Time Worklet.



2) Click This Week and the time calendar will display.



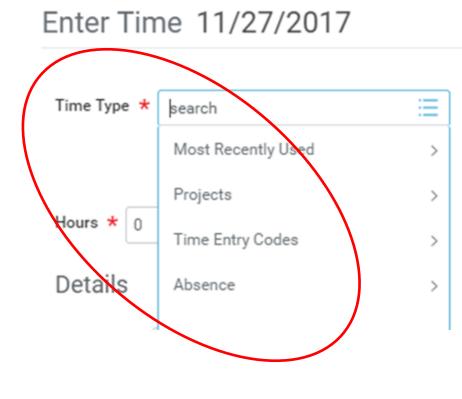


3) Click the date where you want to add hours. A blue Enter Time box appears and a pop-up will display.

ter Time Kristen Suehs Actions	Enter Time 11/27/2017
	Time Type *
Today < > Nov 26 - Dec 2, 2017	
Sun 11/26 Mon 11/27 Hours: 0 Hours: 0	Tue 11/2: Hours * 0 11/ Hours: 0
Enter Time	Details
	Comment
	OK Cancel



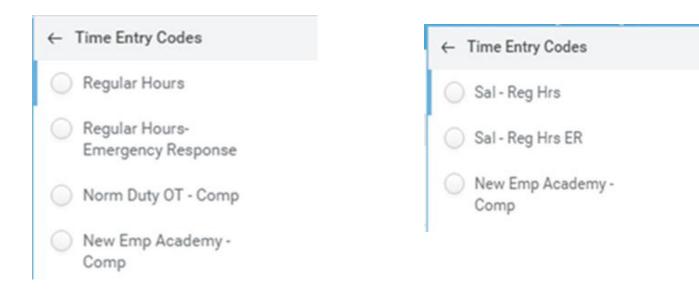
4) Under Time Type, click on the list icon 📃 to select time entry codes, projects, or absences.





Time Entry Codes

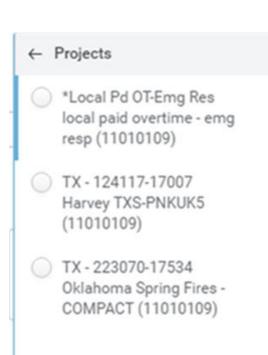
- Based on your employment type
 - Budgeted: Hourly, Salaried, Law Enforcement
- Includes all regular hours and comp time





Projects

- Based on your assignment
 - Budgeted
 - Local paid overtime
 - In/Out State Incidents (TX numbers)
 - Special Projects (GLO, Eqip, etc.)
 - Temporary/Casual or Student Worker
 - List of project account numbers



- You will only see what you are assigned to
- Contact your Timekeeper if a project is missing



Absence

- May select from the time off types listed
 - Vacation
 - Sick
 - Comp Time FLSA
 - Comp Time State

• You will only see what is available for you to use.



5) Under Hours, enter the number of hours worked on the time type. Press OK.

	Enter Time 11/27/2017
	Time Type * X Sal - Reg Hrs
(Hours * 8
	Details
	Comment
$\left(\right.$	ОК Cancel

35



6) Hours for that day have been added for the time type chosen.

Nov 26 - Dec 2, 2017





Sal - Reg Hrs 8 Hours

- If additional hours under a different time type for the same day is needed, repeat steps 3 to 5 until the day is complete.

- Continue to repeat steps 3 to 6 until each day worked for the period is complete.



How to Enter Time

7) Once the time period is complete, press the green Submit button.

Sun 11/19 Hours: 0	Mon 11/20 Hours: 8	Tue 11/21 Hours: 8	Wed 11/22 Hours: 8	Thu 11/23 Hours: 0	Fri 11/24 Hours: 0
	Sal - Reg Hrs 8 Hours () Not Submitted	Time Period Lockout 11/05/2017 - 11/18/2	Pay date 11/05/2017 - 11/18/2	Thanksgiving	Thanksgiving
		Sal - Reg Hrs 8 Hours O Not Submitted	Sal - Reg Hrs 8 Hours O Not Submitted	Paid Holiday 8 Not Submitted	Paid Holiday 8 ⓒ Not Submitted



How to Enter Time

8) The certification statement will appear. Click the green Submit button again. The timesheet is complete and waiting for approval by manager.

omit Time	
clicking submit. I certify that the hours reported on this timesheet are true and co	prrect to the best of my knowledge and that work times and absences are in accordance with Syster
llowing date range will be submitted for approval.	
ovember 19 - December 2, 2017 : 24 Hours Total	Total for November 19 - December 2, 2017
	Regular 24
	Federal Overtime Paid 0
	Straight/State Overtime Paid 0
	Straight/State Overtime Banked 0
	Time Off 16
	Total 40
enter your comment	
ubmit Cancel	
exas A&M	22
	38

TIME OFF/LEAVE OF ABSENCE



What's Changing

- Absences are divided into Time off and Leaves of Absence
 - Time Off is short in nature and using accrued leave
 - Leave of Absence is *unpaid* leave for more than 30 days
- To indicate a paid time off and also an FMLA absence, users will request FMLA time off concurrently with their paid time off
- Employees can cancel or update their time off requests themselves
- Time Offs do not include the specific hours the employee will be out (e.g. 2 hours) We prefer the employee notes in the comment section the actual hours they were off
- State Comp time hours will expire the first of the month earned instead of actual date



View Time Off Balances

1) Click on the Time Off Worklet.



2) Click the Time Off Balance button.





View Time Off Balances

3) View each Absence Plan balances.

← Time Off Balance Sherri Noack (Actions)

Balance As Of Date 11/10/2017

Values displayed are based on the Balance As Of Date entered. To view details drill down on Year to Date values

Salances Tracked in Hours 5 items										◨҇Ҏ╟ӏ] ×1		
Absence Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date		Beginning Period Balance	Accrued in Period	Absence Paid in Period				As of Period	
Administrative	Hours	0		0	0	0	0	0	0	0	0	11/01/2017 - 11/30/2017 (Monthly)	^
FLSA Comp Time	Hours	0.2		0	0	0.2	0	0	0	0.2	0.2	11/01/2017 - 11/30/2017 (Monthly)	
Sick	Hours	1128.5		8	0	1128.5	8	0	0	1136.5	1136.5	11/01/2017 - 11/30/2017 (Monthly)	
State Comp Time	Hours	4	4	0	0	4	0	0	0	4	4	11/05/2017 - 11/18/2017 (Bi-Weekly Period Schedule (SUN - SAT))	
Vacation	Hours	388		15	48	345	15	0	0	360	360	0 11/01/2017 - 11/30/2017 (Monthly)	
										Total: 1500.7	1500.7		V
<												>	



4

View Time Off Balances

To view State comp time expiration date, click on the hours in the Carryover Balance column in the State Comp Time row.

Balance As Of Date 12/03/2017

Values displayed are based on the Balance As Of Date entered. To view details drill down on Year to Date values.

alances Tracked	in Hours 5	items								_					
Absence Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events	As of Period			
Administrative	Hours	0		0	0	0	0	0	0	0	0	12/01/2017 - 12/31/2017 (M	onthly) 🔨		
FLSA Comp Time	Hours	0.2		0	0	0.2	0	0	0	0.2	0.2	12/01/2017 - 12/31/2017 (M	onthly)		
Sick	Hours	1127		16	8	1128.5	8	0	0	1136.5	1136.5	12/01/2017 - 12/31/2017 (M	onthly)		
State Comp Time	Hours	8	8,	13	0	21	0	0	0	21	21	12/03/2017 - 12/16/2017 (Bi	Weekh		
Vacation	Hours	388		30	71	31	Expiration	Date		Associated Balar	nce Period			Units	Unit of Time
<						-	09/01/201	8		09/01/2017 - 09/30/2017				4	Hours
							10/01/2018			10/01/2017 - 10/31/2017				0	Hours
							11/01/201	8		11/01/2017 - 11	/30/2017			4	Hours



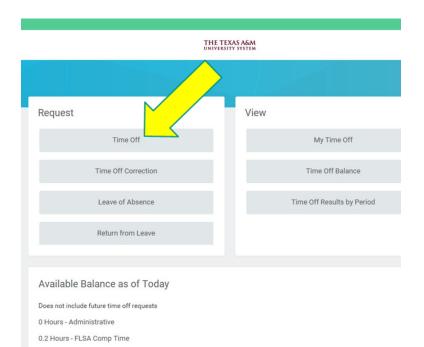
Accrual Chart and Carry Forward Balances

Employees With Total State Employment of:	Hours Accrued per Month for Full-time Employment	Maximum Hours Carried Forward From One Fiscal Year to the Next for a Full-time Employee
less than 2 years	8	180
at least 2 but less than 5 years	9	244
at least 5 but less than 10 years	10	268
at least 10 but less than 15 years	11	292
at least 15 but less than 20 years	13	340
at least 20 but less than 25 years	15	388
at least 25 but less than 30 years	17	436
at least 30 but less than 35 years	19	484
35 years or more	21	532



1) Select the Time Off Worklet





2) Click the Time Off box



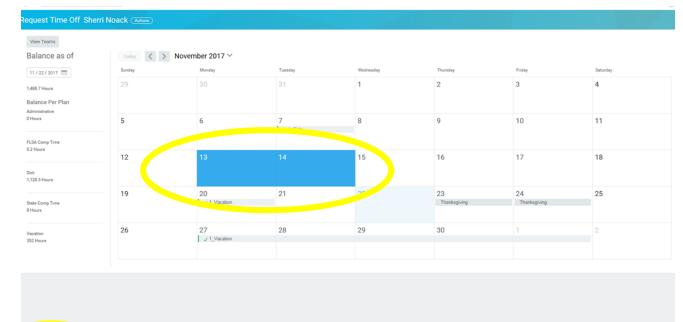
1,136.5 Hours - Sick 4 Hours - State Comp Time 360 Hours - Vacation

3) The Time Off Calendar View appears. The left side shows the balance available per leave plan.

/ 22 / 2017 🛗	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8.7 Hours	29		31	1	2	3	4
ance Per Plan							
inistrative uns	5	6	7	8	9	10	11
			✓ 1_Sick				
A Comp Time Hours							
	12	13	14	15	16	17	18
8.5 Hours							
	19	20	21	22	23	24	25
e Comp Time xurs		✓ 1_Vacation			Thanksgiving	Thanksgiving	
ation Hours	26	27 ✓ 1_Vacation	28	29	30	1	2
nours		•					



4) Select the days you would like to take off, then submit your request. The days selected will appear blue.



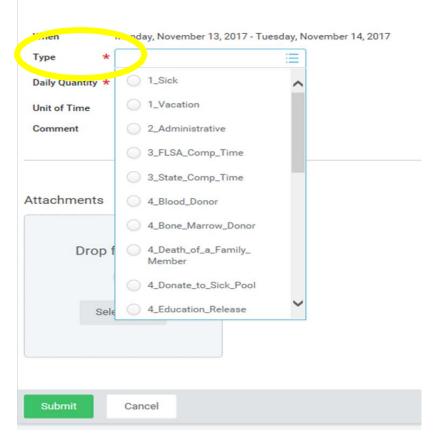
- By holding down shift key, you can request more than one day at a time.
- Must be requesting the same leave type and quantity of hours each day.



5) Select the Type of leave you are requesting off.

- You will only see what is available for you to use.
- Educational Activities is listed as it's own leave type.
- Leave that requires Director's approval, continue to use Request for Personal Leave Form

(i.e. death of a family member, leave without pay, bad weather days, etc.)



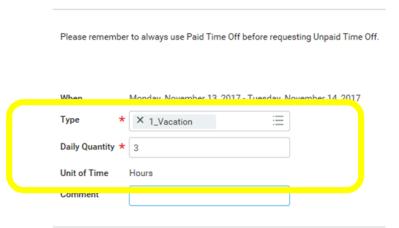


Please remember to always use Paid Time Off before requesting Unpaid Time Off.

Total: 6 Hours

6) Enter the Daily Quantity you are requesting off.

- Requesting leave for multiple days, the total hours must be the same for each day (e.g. physical therapy)
- Requesting leave for multiple days and the hours are different, a separate entry needs to be made per day
- Requesting several weeks of leave at one time, make one entry per week
- In the comment section, note the hours actually taken (8–9:30 am)
- Do NOT attach any files.



Attachme	ents	
D)rop files here	
	or	
	Select files	
Submit	Cancel	
		49



7) Click Submit.

- The request will routed to the manager for approval.
- Once approved, the time off request will appear on your Time Off Calendar, which is visible to you and your manager.

When	Monday, November 13, 2017 - Tuesda	y, November 14, 2017
Туре *	× 1_Vacation	
Daily Quantity *	3	
Unit of Time	Hours	
Comment		

Attachments	
Drop files her	e
Select files	

Cancel

If an employee is unavailable to enter time off,

- the manager may on behalf of the employee, or
- the absence partner may on behalf of the employee but the time off request will not route to the manager for approval. Absence Partners must retain documentation from the employee and manager certifying the time off request. This may be an email, a signed printed copy of the request or signed copy of timesheet.



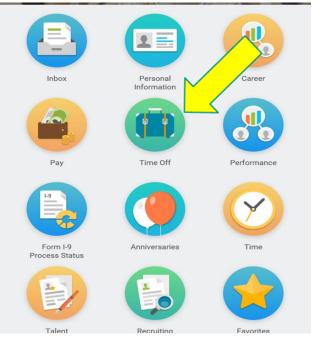
Correct Time Off

- Used to change the time off type, length of time off, or dates taken for time off.
- Employees can correct their own time off and mangers can approve corrections.
 - Only approved time off request can be corrected
 - Unapproved time off requests can be cancelled and re-entered
- After making a correction, a manual timesheet must be sent to Payroll. Payroll will review for overtime rules.
- If the Absence Partner makes the correction, it's a one and done deal. The manager does not see or approve the change. Make sure the Absence Partner has approval/documentation to backup the entry.



How to Correct Time Off

1) Select the Time Off Worklet



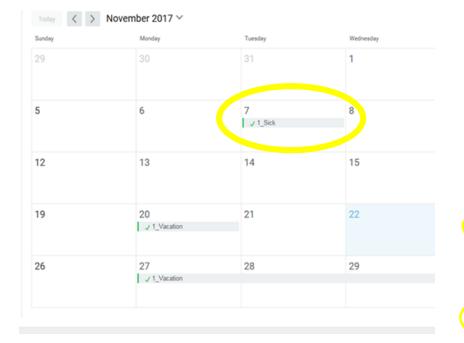
Request Time Off Time Off Correction Leave of Absence Return from Leave

2) Click the Time Off box



How to Correct Time Off

3) Select date to correct.



4) Make necessary changes then Submit.

Tuesday, November	r 7, 2017		
Select All 🗸	1 selected		
1 item			
⊡ ☑	Tuesday, November 7, 2017	1_Sick	8 Hours
<			
Type *	× 1_Sick		
Quantity per Day	8		
Unit Carrime	Hours		
Reason *	× 1 - Personal Illness/Injury/Dr. Appt		
Comme			
Details			
Dotuno			
Submit	Cancel		



Leave of Absence

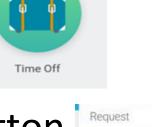
- Used only for a very specific kind of absence that meets all of the following criteria:
 - Unpaid
 - Continuous for 30 days or longer
 - Full days
 - open-ended until action taken to return from leave

• Everything else is TIME OFF.



Leave of Absence

1) Click the Time Off worklet.



Time Off

Time Off Correction

Leave of Absence

Return from Leave

2) Click the Leave of Absence button.

3) Complete fields, click submit. Do not upload documents.

▲ Texas A&M

Last Day of Work	06 / 20 / 2017	
First Day of Absence *	06 / 21 / 2017	
Estimated Last Day of Absence ★	08 / 25 / 2017	
Туре *	× Parental Leave	∷⊟

Leave Without Pay

Leave of Absence

- 30 days or longer
- Continuous, full days of unpaid leave
- Form 500 process must be followed
- Needs Director approval
- Employee Development will process leave of absence request

Time Off

- Less than 30 days
- Not continuous or partial days of unpaid time off
- 3 days or Fewer
 - Employee enters unpaid time off request
 - Manager approves
- 4 to 9 days
 - Complete Request for Leave form
 - Manager and Associate Director approves
 - Associate Director's office sends copy of form to Employee Development and Payroll
 - Employee Development will process time off request
- 10 to 29 days
 - Complete Request for Leave form
 - Manager, Associate Director, Director approves
 - Director office sends copy to Employee Development and Payroll
 - Employee Development will process time off request



Questions?



