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Introduction

Using This Manual
Welcome to the Workday Manager Self-Service User Guide. You are about to discover exciting technology that is designed for efficient Manager Self-Service (MSS) functions.

Workday provides you with 24/7 interactive access to your information and your team’s information. You will have easy access to employee data, all in one place.

This user guide will teach you how to navigate Workday. It also provides a detailed, step-by-step guide for the most common activities you will perform in Workday (e.g., approvals, making changes to employee roles and compensation, delegating tasks).

Signing in to Workday

1. Open a browser window
2. Type: www.WorkdayatEnsign.com
3. Click on the Sign in to Workday button
4. Enter **User Name (Employee ID)** and **Password** and click **Sign In**

![Sign in to Workday](image)
Workday Icons

Icons in Workday are called **Worklets**. They are located on the **Home** page, allowing managers and supervisors to access and manage important information. Review the chart below to become familiar with the Worklets on the **Home** page:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>The <strong>Recruiting</strong> Worklet allows you to create and manage job requisitions, finding candidates and inviting them to apply.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>The <strong>Dashboard</strong> Worklet allows you to view pre-configured reports for distinct functional areas like Compensation and Talent Management.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>The <strong>My Team</strong> Worklet allows managers to perform job related actions for your team and view team information.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>The <strong>Team Time Off</strong> Worklet allows you to view and manage your team’s time off requests.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>The <strong>Birthdays</strong> Worklet allows you to view team members with upcoming birthdays.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>The <strong>Anniversaries</strong> Worklet allows you to view team members with upcoming employment anniversaries.</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>The <strong>Hiring</strong> Worklet allows you to create and manage positions, view interview results and compare workers.</td>
</tr>
<tr>
<td><img src="image8.png" alt="Icon" /></td>
<td>The <strong>Support/Help</strong> Worklet allows you to view external links for information and Workday educational materials.</td>
</tr>
</tbody>
</table>
## Screen Elements

The elements listed below are common throughout Workday.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue text</td>
<td>Any blue text that becomes underlined when hovering over it is an actionable link to view object details.</td>
</tr>
<tr>
<td></td>
<td>Related Actions allow you to view additional information and take action.</td>
</tr>
<tr>
<td></td>
<td>Filter data based on any column.</td>
</tr>
<tr>
<td></td>
<td>View the page information as a graph or chart.</td>
</tr>
<tr>
<td></td>
<td>View the page information as a PDF file, allowing you to determine what information to include and print.</td>
</tr>
<tr>
<td></td>
<td>Export the page information as an Excel file.</td>
</tr>
<tr>
<td>More</td>
<td>More at the bottom of a menu indicates there are additional selections available.</td>
</tr>
<tr>
<td>Alerts: 1</td>
<td>The yellow alert message warns you that the process has possible errors, but allows you to proceed.</td>
</tr>
<tr>
<td>Errors: 1</td>
<td>The red error message is a hard stop. You will not be able to proceed to the next screen until the issue is resolved.</td>
</tr>
</tbody>
</table>
## Task Elements

These elements are available as you complete processes and change information in Workday.

<table>
<thead>
<tr>
<th>Link</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>✴️</td>
<td>Required field that needs information entered before submitting the page.</td>
</tr>
<tr>
<td></td>
<td>The Prompt icon displays a drop-down menu of available choices.</td>
</tr>
<tr>
<td>✕</td>
<td>Use the Pencil icon to edit existing information.</td>
</tr>
<tr>
<td></td>
<td>Remove the item from the area.</td>
</tr>
<tr>
<td></td>
<td>Delete the current row.</td>
</tr>
<tr>
<td></td>
<td>Add a new row.</td>
</tr>
<tr>
<td></td>
<td>Click to cancel the changes entered.</td>
</tr>
</tbody>
</table>

|   | Submit to confirm changes and move the item to the next step in the review process. |

|   | Save the change for later, but submit nothing. You can return to the task to complete at any time. |

|   | Approve the change and move the task on to the next step. |

|   | Deny any changes and return the task to the individual who initiated the change. |

|   | Send back to have the task initiator revise the information submitted. |

|   | Exit the screen to close the view. |
Home Page
The default page in Workday is known as your Home page. It contains Worklets and maintenance functions. The upper right-hand corner provides access to your employee profile link, which includes a drop-down menu to navigate the system. The upper left-hand corner provides access to the Search function and Home button.

Both the Workday and Home buttons will return you to your Home page from anywhere in the system.
Configure Home Page

The **Home** page includes default Worklets (Required Worklets). Workday users can select optional Worklets to include on their **Home** page. The Optional Worklets will appear on the Home page in the order they are listed on the Configure Worklets screen. The order of the required Worklets is not customizable.

1. To add a Worklet (e.g., Reports Worklet) to your Home page, click the **Gear** icon.

2. Click the **Plus** sign to add a row, then click the **Prompt** icon and **All**.

3. Select the **Worklet** to be added to your home page. Repeat steps 2 and 3 to add additional Worklets.

4. **Click OK**, then **Done** (located at the bottom of the next page).
Birthdays and Anniversaries

The Birthday and Anniversaries Worklets will display an orange circle with the number of employees in your group celebrating a birthday or an employment anniversary in the next two weeks.

1. Click the Worklet to display the employee(s) name and date of the birthday or anniversary. **Note:** Click the up and down arrows to scroll through the list.
Inbox, Actions and Archive

Your Inbox separates your Actions and Archive in Workday. The Actions tab indicates items that require your attention. Once you complete an Action item, it will be stored in your Archive. The Archive tab allows you to view the details and processes of past actions. If you begin a process in Workday but do not complete it, you will access that process through your Inbox.

1. To access your Inbox, click your name in the upper right-hand corner of your Home page and then click Inbox. The orange circle next to the photo placeholder (Cloud) or your photo (if you have added one) indicates how many items are in the Inbox.

2. Click the down arrow next to Viewing and Sort By to control what type or how information appears in your Inbox.
Inbox, Archive (continued)

Click the **Archive** tab. The right side of the screen will display details of the highlighted item in the left column.

Click the **Process** tab (right side of screen) to view the **Process History**; what has been completed and any remaining processes (and due dates).

Click **Remaining Process** to see what steps are upcoming for this action.

<table>
<thead>
<tr>
<th>Process</th>
<th>Step</th>
<th>Status</th>
<th>Completed On</th>
<th>Due Date</th>
<th>Person</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Time Off</td>
<td>Approval by Manager</td>
<td>Approved</td>
<td>01/04/2016 01:17:43 PM</td>
<td>01/06/2016</td>
<td>Mark Jones (Manager)</td>
<td></td>
</tr>
</tbody>
</table>

Business Process notifications will also be sent to your Ensign email address.
Notifications
Notifications are records of actions recently taken. They are informational items only. You do not need to perform any Workday actions on these entries. You will receive a notification when a process you initiated is complete.

1. Click your name in the upper right-hand corner of your Home page, then select Notifications. Note: The grey circle with a number indicates the number of unread notifications. Click the item to view.

2. Click the down arrow next to Sort By to control how your notifications will appear. Click the open circle on the right side of the task to mark as read. Note: Once the notification has been marked as read, it will remain in your notification box but will no longer be highlighted.
Approval Process

1. To approve requests, open your **Inbox** and select the action item to be approved (i.e., Time Off Requests approval action).

2. After reviewing the Time Off Request, you can **Approve** or **Send Back** the request. Once you approve, click **Done**. **Note:** If you **Send Back** (Deny) the request, include a **Reason** in the comment box.
Employee Profile

Your Profile provides access to personal data, worker history, payment elections, compensation and professional information.

1. Click your name located in the upper right corner of your Home page. Click View Profile under employee name.

2. Click View Team to see your team’s organizational reporting relationship. Note:
Click an employee’s name to view their employee profile. Click the Related Actions icon next to their name to view available Actions.

Note: A Blue box indicates this employee has no direct reports. An Orange box indicates the employee has direct report(s). The number of reports is displayed in an orange circle next to their picture.
Change Password

1. Click your name in the upper right corner of the Home page. Click My Account.

2. Select Change Password.

3. Enter Current Password, New Password and Verify New Password. Click OK.

Your new password must not be the same as your current password or user name. Minimum number of characters required: 8. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9, special characters !"#$%&'()*+,-./:;<=>?@[\]^_`{|}~. The password must not have been used within the following number of last passwords: 4.
Time Off Calendar View

View your team’s time off through the Team Time Off worklet.

1. Open the Team Time Off Worklet and select Time Off and Leave Calendar under the View column.

The Time Off Calendar View can be adjusted on the right by clicking the down arrow next to Month. On the left hand side you can move the date forward or backwards by clicking the left and right arrows. The default will be the current month and day.

Once approved, the time will be marked with a green check. For time submitted but not approved, the time will be marked with a grey check.
Time Entry
Time is logged in many ways (i.e., physical time clock, Workday Clock In/Out, or Time Calendar).

Through physical time clocks, employees will finger-punch to clock in and out. Employees will need to submit any TARFs (Time Adjustment Request Forms) to their manager for approval. **Note:** the HR/Payroll Representative will enter these adjustments in Workday.

Hourly employees who do not use the physical time clock, will enter time using the Workday **Time** Worklet found on their Workday Home page, also available through the Workday Mobile Application. Employees will need to submit any TARFs (Time Adjustment Request Forms) to their manager for approval. **Note:** the HR/Payroll Representative will enter these adjustments in Workday.

Salaried employees may choose to record their time in the Time Calendar for reporting purposes only. Time Off requests for full days off can be requested through the **Time Off** Worklet.

Most employees will fall into one of the above scenarios. Contact your **Time Administrator** if you have any questions.
Job Change: Transfer, Promote or Change Job

The Change Job process allows a Manager to perform job changes, from staffing events (transfers and promotions) to simple data changes. The steps and screens may have slight differences depending on the change initiated.

1. Open the My Team Worklet, then click the Related Actions icon next to the employee name.

2. Hover the mouse over Job Change and click Transfer, Promote or Change Job.
3. Click the **Pencil** icon on the far right side of the screen to enter and/or change **Start Details**. Using the **Prompt** icon, answer the required questions (*), then click **Start**.

**Note**: Some fields will not require a change depending on the Reason for the job change i.e., compensation may not change if you are moving an employee to another location.
Job Change: Transfer, Promote or Change Job (continued)

4. Proceed through the **Job Change** process by clicking the **Pencil** icon to open fields and make any changes. Click **Next** to move to the next screen and the **Back** button to return to a previously completed screen.

   **Note**: The status bar on the left of the screen will indicate where you are in the Job Change process. Click any of the tabs under the status bar to go directly to that section.

5. The **Summary** tab will display all responses for each tab. Review for accuracy. Click the **Guide Me** or the **Pencil** icon to open fields to make changes.

6. When the job change is complete, click **Submit** and **Done**.

   **Job Changes will go through a series of HR and manager reviews and approvals depending on the type of change initiated.**
Compensation Change

1. Open the **My Team** Worklet, then click the **Related Actions** icon for the desired employee.

2. Hover over **Compensation** and then select **Request Compensation Change**.

3. Enter the **Effective Date**, then using the **Prompt** icon select the **Reason** for the change. Verify the **Employee** name and click **OK**.
Compensation Change (continued)

4. Click the Pencil icon next to each section to make changes to the compensation. Enter all required information as denoted by the red asterisk (*) and any other available information.

If this is a percentage increase, enter the Percent Change in the field; the other fields will auto-populate.

5. Click Submit and Done.
One Time Payment
One time payments include management awards, referral bonuses, etc.

1. To process a one-time payment, open the My Team Worklet, then click the Related Actions icon for the desired employee.

2. Hover the mouse over Compensation, then select Request One-Time Payment.

3. Enter the Effective Date, Employee and using the Prompt icon, select the One-Time Payment Plan. Click OK.
One Time Payment (continued)

4. Verify the **Effective Date** and the **Reason** for the payment, then enter all required **Payment Details** (*). Currency will auto-populate after the **Amount** is entered. Add a note in the **Additional Information** area if applicable. Click **Submit** and **Done**.
View Standard Reports

1. Open the Reports Worklet and select any of the reports under the View column. Click More to view addition reports.

Click the Spreadsheet icon to export the report to Excel or the Printer icon to print the report. Note: Click the Analytics icon to change the report format.
Scheduling a Report

1. To schedule a report, click **Schedule a Report** under the Tools column. Use the **Prompt** icon to select the **Report** and then choose the **Run Frequency**. Click **OK**.

2. Under the Schedule tab, enter the **Start Date**, **Start Time** and **Time Zone**. Click the **Output** tab to select the **Output Type** (Excel or PDF). Change the number of days until the file is deleted (if applicable) and click **OK**.
Scheduling a Report (continued)

3. When selecting a report to Run Now, you will see a status bar with the percentage complete. Click the Refresh button until the percentage complete equals 100. The completed report will appear in your W: Drive based on the run frequency schedule you selected.

4. Open the W: Drive (located on the drop down menu under your name in the upper right corner of the Home page) to view your report. Click the report shown in blue. To remove the report from your report queue, click the Delete button.
Workday Mobile App Download and Sign-in

Workday provides an intuitive mobile application experience. The Workday mobile apps provide managers the ability to review and approve Time Off Requests and view Dashboards. The current supported devices are the iPhone, iPad and the android devices. **Note:** not all functionality on the website is available on the mobile app.

1. Load the app on your device
2. Enter your **Tenant Name: Ensign**
3. Enter your Ensign **User Name (Employee ID)** and **Password**
4. Click **Sign In**
Mobile PIN Sign-on

You can now sign into your Workday Mobile app using a simple PIN (between 6 and 8 digits) instead of keying lengthy username and password combinations every time.

To Set Up/Change PIN

1. Click the menu/gear button
2. Scroll down and click Settings
3. Click Set Up/Change PIN

Note: If you are unsuccessful at entering your PIN after 3 attempts, you must sign in with your Workday username and password.
Mobile App Notification

To receive a notification on your mobile app:

1. Click the Gear icon
2. Select the General option
3. Select the Notifications option
4. Slide Notifications to on
Mobile Worklets and Dashboard

Click into each Worklet to view the available information. See the sample Dashboard below for viewing reports.
Appendix - Delegating Tasks

Workday allows you to delegate tasks to your superior (e.g., approving time off requests). Delegating temporarily reassigns your task to another user. You are still ultimately responsible for any action taken.

1. Access your Inbox from your employee photo or photo placeholder on your Home page.

   Use Delegation for tasks that need to be addressed while you are out. Note: Everyone you assign delegation rights to can see previously created items.

2. Click the down arrow below the Archive tab, then select My Delegations.

3. Click Manage Delegations.
Delegating Tasks (continued)

4. Enter the Begin and End Date for the delegation. Using the **Prompt** icon, select who you will delegate the task to and which process to **Start On My Behalf**. Choose **All** for Business Process or click the Prompt icon to select which Business Process to delegate.

5. Click **Submit** and **Done**.