MANAGER SELF-SERVICE (MSS) TRAINING

March - 2016

Agenda

• Why Workday?
• Workday General Information
• Manager Self-Service
• Mobile Functionality
• Support/Help
WHY WORKDAY?

Current Module & Vendor Solutions
“The significant problems we face today cannot be solved at the same level of thinking we were at when we created them.”

–ALBERT EINSTEIN

HR & Payroll Requirements

- Changing User Expectations
- Changing Technologies
- Changing Business Landscape

Simpler
Smarter
Faster

WORKDAY
Workday

Workday Functionality

- Personal Information
- Pay
- Benefits
- Hiring
- Time Off
Key Features

• **Employee & Manager Self Service**
  • Employees can update and maintain their personal information
  • Managers have easy access to employee data, all in one place

• **Mobile Solution**
  • Web-enabled devices - smart phone, tablets

• **Support**
  • Bring support expertise in-house
  • Flexibility with configuration and business processes

• **Transparency**
  • Increases efficiency in business decisions
  • Visibility into work force

• **Security**
  • Cloud based SaaS solution
  • Rules based processes
Logging In To Workday

The Workday at Ensign portal contains valuable Workday resources and the link to connect to the Workday application:

www.WorkdayatEnsign.com

1. Click on the Sign in to Workday button.

2. Enter User Name (Employee ID) and Password

Your password for the first time you log in to Workday will be: first 3 of your last name all CAPS+ 4 year DOB + ! e.g. SMI1984!

3. Click Sign In
Navigation: Worklets

Icons in Workday are called worklets and each worklet on your Home Page will allow you to access and manage important information.

Review this chart to become familiar with the worklets available on the Ensign Home Page.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>📁</td>
<td>The Personal Information Worklet allows you easy access to add and change your contacts, email and personal addresses.</td>
</tr>
<tr>
<td>📉</td>
<td>The Pay Worklet allows you to update your withholding and payment elections and view pay slips and payment history.</td>
</tr>
<tr>
<td>💼</td>
<td>The Benefits Worklet allows you to view and manage important information regarding benefits and how to make benefit changes.</td>
</tr>
<tr>
<td>🕒</td>
<td>The Time Worklet allows you to enter time several ways, view your time clock history and correct unmatched clock events.</td>
</tr>
<tr>
<td>🛋️</td>
<td>The Time Off Worklet allows you to request time off and view your time off balances. Workday. The Archive tab is where you can view the status of your processes.</td>
</tr>
<tr>
<td>🌐</td>
<td>The Support/Help Worklet allows you to view external links for information and Workday educational materials.</td>
</tr>
<tr>
<td>📚</td>
<td>The Directory Worklet provides access to co-workers contact information and multiple ways to view and search for workers within the organization.</td>
</tr>
</tbody>
</table>

Screen Functions

The functionality listed here are common throughout Workday.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>🌈</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>⌘</td>
<td>More at the bottom of a menu indicates there are additional selections available.</td>
</tr>
<tr>
<td>⚠️</td>
<td>The yellow alert message warns you that the process has possible errors, but allows you to proceed.</td>
</tr>
<tr>
<td>⚠️</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>
## Tasks and Actions

These tasks and actions 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>Cancel</td>
<td>Click to cancel the changes entered.</td>
</tr>
<tr>
<td>Submit</td>
<td>Submit to confirm changes and move the item to the next step in the review process.</td>
</tr>
<tr>
<td>Save for Later</td>
<td>Save the change for later, but submit nothing. You can return to the task to complete at any time.</td>
</tr>
<tr>
<td>Approve</td>
<td>Approve the change and move the task on to the next step.</td>
</tr>
<tr>
<td>Deny</td>
<td>Deny any changes and return the task to the individual who initiated the change.</td>
</tr>
<tr>
<td>Send Back</td>
<td>Send back to have the task initiator review the information submitted.</td>
</tr>
<tr>
<td>Done</td>
<td>Exit the screen to close the view.</td>
</tr>
</tbody>
</table>

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**Manager Self-Service**
Manager Self Service

Manager Worklets
- Birthdays and Anniversaries
- Approval Process
- View Team Time Off Calendar
- My Team
  - Transfer, Promote or Change Job
- Compensation
  - Request Compensation Change
  - One-time Payment
- Reporting

Manager Worklets

Icons in Workday are called worklets and each worklet on your Home Page will allow you to access and manage important information.

Review this chart to become familiar with the manager worklets available on the Ensign Home Page.

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<th>Icon</th>
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</tr>
</thead>
<tbody>
<tr>
<td>📝</td>
<td>The Recruiting Worklet allows you to create and manage job requisitions, finding candidates and inviting them to apply.</td>
</tr>
<tr>
<td>📊</td>
<td>The Dashboard Worklet allows you to view pre-configured reports for distinct functional areas like Compensation and Talent Management.</td>
</tr>
<tr>
<td>🧑‍💼</td>
<td>The My Team Worklet allows managers to perform job-related actions for your team and view team information.</td>
</tr>
<tr>
<td>🕒</td>
<td>The Team Time Off Worklet allows you to view and manage your team's time off requests.</td>
</tr>
<tr>
<td>🎂</td>
<td>The Birthdays Worklet allows you to view team members with upcoming birthdays.</td>
</tr>
<tr>
<td>🎉</td>
<td>The Anniversaries Worklet allows you to view team members with upcoming employment anniversaries.</td>
</tr>
<tr>
<td>🕵️‍♂️</td>
<td>The Hiring Worklet allows you to create and manage positions, view interview results and compare workers.</td>
</tr>
<tr>
<td>📜</td>
<td>The Support/Help Worklet allows you to view external links for information and Workday educational materials.</td>
</tr>
</tbody>
</table>
Home Page

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.

The Workday, House and Home buttons will return you to your Home page from anywhere in the system.

Inbox, Actions & Archive

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, Actions & Archive

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.

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 (Deny) the request. Once you approve, click Done.
3. If you Send Back (Deny) the request, include a Reason in the comment box.
Notifications

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 open circle on the right side of the task to mark as read.
3. Click the down arrow next to Sort By to control how your notifications will appear.
4. Click the down arrow on the right to mark all notifications as read or to refresh your Notifications box.

Note: Once the notification has been marked as read, it will remain in your notification box but will no longer be highlighted.

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.
View Team Time Off Calendar

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.

Job Change: Transfer, Promote or Change Job

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.
Job Change: Transfer, Promote or Change Job

4. Using the Prompt icon, answer the required questions (*)
5. 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.)

6. Proceed through the Job Change process by clicking the Pencil icon to open fields and make any changes.
7. 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.
8. 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
9. Click Submit and Done.

Note: 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 next to the employee name.
2. Hover the mouse over Compensation and then select Request Compensation Change.
3. Enter the Effective Date, then using the Prompt icon select the Reason for the change.
4. Verify the Employee name and click OK.
5. Click the Pencil icon next to each section to make changes to the compensation.
6. If this is a percentage increase, enter the Percent Change in the field; the other fields will auto-populate.
7. Click Submit and Done.
One Time Payment

1. Open the My Team Worklet, then click the Related Actions icon next to the employee name.
2. Hover the mouse over Compensation and then select Request One-Time Payment.
3. Enter the Effective Date, then using the Prompt icon select the One-Time Payment Plan.
4. Verify the Employee name and click OK.

5. Verify the Effective Date.
6. Using the Prompt Icon, select the Reason for the payment.
7. Select the One time Payment Plan and Amount.

Note: Currency will auto-populate after the Amount is entered. Add a note in the Additional Information area if applicable.

8. Check Send to Payroll if payroll is to prepare the payment.
9. 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 additional reports.
2. 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. Open the Reports Worklet and click Schedule a Report under the Tools column.
2. Use the Prompt icon to select the Report.
3. Choose the Run Frequency.
4. Click OK.
Scheduling a Report

5. Under the Schedule tab, enter the Start Date, Start Time and Time Zone.
6. Click the Output tab to select the Output Type (Excel or PDF).
7. Change the number of days until the file is deleted (if applicable)
8. Click OK.

9. When selecting a report to Run Now, you will see a status bar with the percentage complete.
10. Click the Refresh button until the percentage complete equals 100.
11. The completed report will appear in your W: Drive based on the run frequency schedule you selected.
12. 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.
13. Click the report shown in blue.
14. To remove the report from your report queue, click the Delete button.
### General Information

#### COMMON WORKDAY ACTIVITIES BY ROLE

<table>
<thead>
<tr>
<th>Activity</th>
<th>Employee</th>
<th>Manager/Supervisor</th>
<th>HR/Payroll Representative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Personal Information</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request Time Off</td>
<td>☑️</td>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td>Manage Dependents and Beneficiaries</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Pay Slips</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Payment Elections</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Federal and State Withholding Elections</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enroll in Time Clock</td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>View Team Birthdays &amp; Work Anniversaries</td>
<td>☑️</td>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td>Perform Approvals</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Employee Job Changes</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Compensation Changes &amp; One Time Payments</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run Reports</td>
<td>☑️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Job Profile</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire/Rehire Employee</td>
<td>☑️</td>
<td>☑️</td>
<td></td>
</tr>
<tr>
<td>Assign Pay Group</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Corrections/Adjustments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place/Return Employee from Leave</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Terminate an Employee</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Workday Mobile

Loading the App and Signing on

Easy Sign On

Time Off – View, Request, Correct

Benefits
  – Add Dependents
  – Change Dependents
  – Add Beneficiaries
  – Change Beneficiary Information
  – View Benefit Elections

Pay
  – Payment Elections – Direct Deposit
  – Federal and State Withholding Elections
  – View Payslips

You can use your mobile device to complete and/or approve tasks, view reports and view employee information.

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

You can 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. Once you have created your Workday PIN, you will enter that PIN and click the checkmark to access Workday Mobile.

To Set Up/Change PIN

• Click the menu/gear button
• Scroll down and click Settings
• Click Set/Change PIN

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

Workday Mobile App Notifications

To receive a notification on your mobile app

• Click the gear icon
• Select the General option
• Select the Notifications option
• Slide Notifications to on
Mobile Worklets & Dashboard

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

Support / Help

- Workday Educational Materials Available
  - User Guides
  - Quick Reference Guides
  - Demo Videos
  - eLearning Module
THANK YOU