

Workday HCM

Basic interface

Home screen = basic interface of Workday

- House icon (upper left) – navigates to Home screen
- Search bar allows for direct navigation to different functions
- Colored icons = “Worklets”
 - o Customized according to areas of responsibility and assigned duties
 - o Worklets include Onboarding, Personal Information, Time, Time Off, Pay, Benefits, and Favorites
- Cloud icon (upper right) – opens menu with options: Home, Inbox, Notifications, Favorites, W Drive, Documentation, and My Account
 - o Customizable photo
 - o Smaller orange icon (upper right of Cloud) indicates new Inbox items

Inbox = items requiring action

- HR user action examples: approving Time submissions, approving a Time Off request
- Other employee action examples: entering benefits information, completing payment election enrollment forms (e.g., selecting Direct Deposit), changing benefits for life event
- Emails may also be sent to user’s primary email account
- Items remain in Inbox until they have been handled
- Completed items are archived, viewable via Archive tab

Notifications = informational messages (action not necessarily required)

- Examples: Confirmation of Time submission, Notification of Time Off Request approved, notification of Hire and onboarding tasks to be completed, Notification of available tax documents, etc.

Favorites = location for saving favorite functions or favorite users

W Drive = not in use by Vassar, creator of the webinar

Documentation = location for file uploads

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Worklets

Personal Information

- Change sub-menu functions: Contact Information, Personal Information, Emergency Contacts, Photo, Legal Name, Preferred Name

- Preferred name requires unchecking Use Legal Name As Preferred Name box, updates upon saving, is used by HR for awards, etc.
- View sub-menu functions: About Me, Addresses, Email Addresses, Address Changes, Name, More (2)

Benefits

- Change sub-menu functions: Benefits, Beneficiaries, Dependents, Retirement Savings
- View sub-menu functions: Benefit Elections, Benefit Elections as of Date

Save for Later allows a user to postpone a task for future completion.