



## Workday Functionality Ready at Go-Live on July 23, 2023

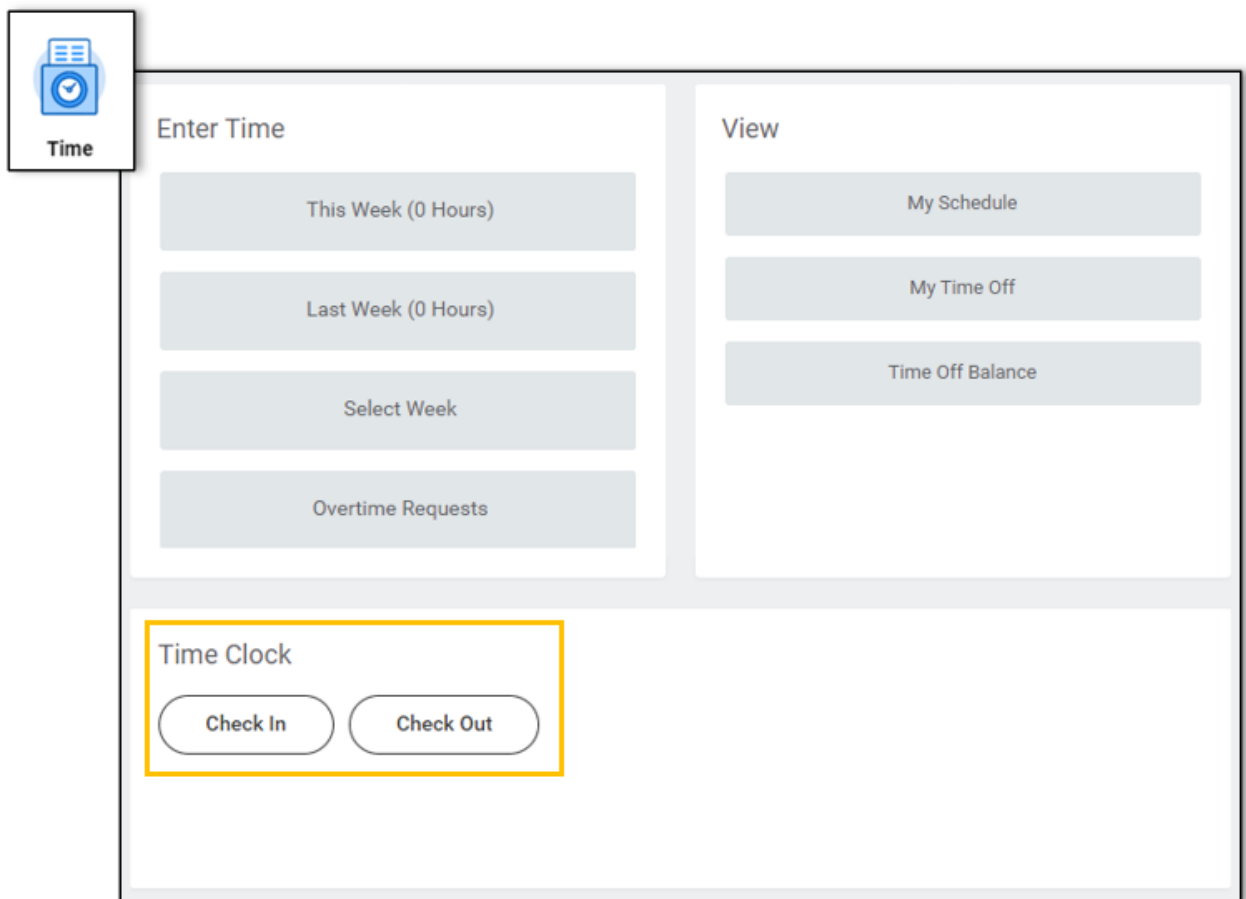
### What Can Faculty and Staff Do in Workday on Day 1?

#### **All Faculty/Staff**

Workday provides quick access to tasks and reports with real-time information and data from anywhere with an internet connection on a desktop, smartphone, or tablet.

#### **Highlights of some of the tasks Workday will provide:**

- Online timesheet that can be completed on a desktop browser, tablet, or smartphone.



*\*Some information presented may be subject to change. Security groups will determine what employees can access in Workday.*



- Online absence/time off request that can be completed on a desktop browser, tablet, or smartphone.

**Absence Calendar** Jill Jones

Click and drag on the calendar or select date range.

Select Date Range View Teams

Balances

Balance as of 03/14/2022

Per Plan

Annual  
0 Hours  
(No Eligible Time Off)

Today	<	>	April 2022	<	>	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	27	28	29	30	31 Apr	1
	3	4 1-Personal Leave	5	6	7	8
	10	11	12	13	14	15
	17	18	19	20	21	22
						23

Request Absence

**Request Absence** Jill Jones

Instructional Text

Reminder: Review the [Leave Policy Document](#) to see if any supporting documents are required for your leave.

Total 1 Day -1-Personal Leave

Request	From	To	Type	Total
1 item	04/04/2022	04/04/2022	1-Personal Leave	1 day

Details

Last Day of Work 04/01/2022

enter your comment

Attachments

Drop files here

Submit Cancel

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- Change withholding for your 457 or 403B accounts on desktop browser.

A screenshot of a web form titled "Change Benefits". The form has a "Change Reason" section with radio buttons for "Birth/Adoption", "Change Beneficiary", "Death of Dependent", "Marriage", "Retirement Savings Changes - ORP" (which is selected and highlighted with a yellow box), and "Retirement Savings Changes - SRA". Below this is a "Benefit Event Date" field with a calendar icon and the date "03/15/2022". A "Submit Elections By" field shows "04/13/2022". A "Benefits Offered" dropdown menu is set to "403(b) ORP" and is also highlighted with a yellow box. At the bottom, there is an "Attachments" section with a "Drop files here" area and three buttons: "Submit" (highlighted with a yellow box), "Save for Later", and "Cancel".

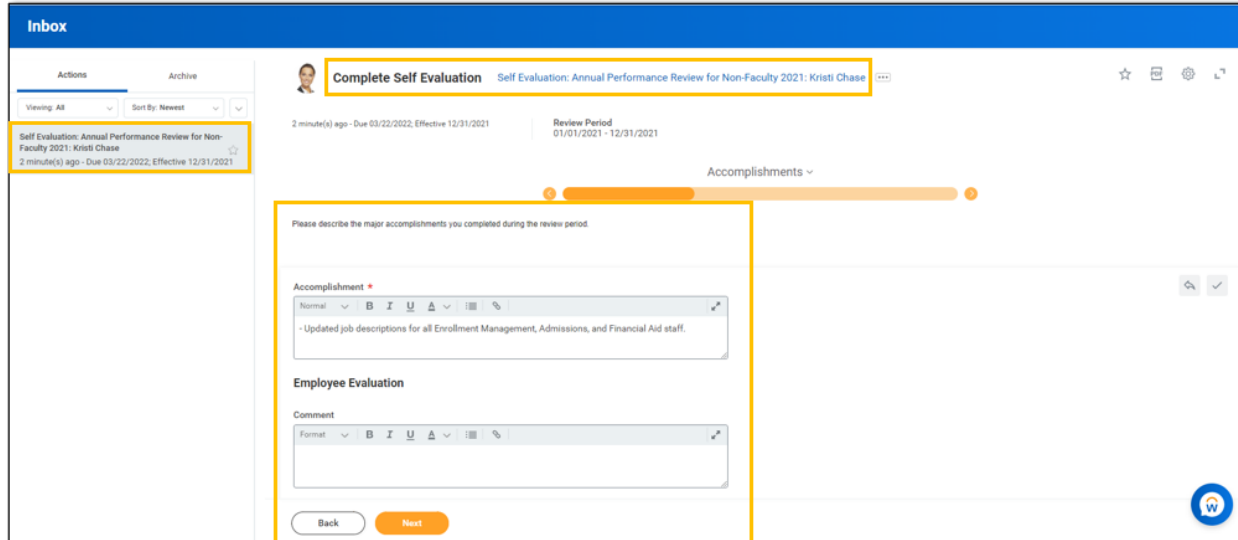
- Online purchasing that may replace purchasing through websites or paper catalogs.

A screenshot of a web form titled "Create Requisition". The form displays the following information: "Company" as "UM29 Salisbury University (SU)", "Requester" as a blurred name, and "Currency" as "USD". Below this is a section titled "Select an Option" with a dropdown arrow. Underneath, there are three options: "Request Non-Catalog Items" with the subtext "Add a good or service that is not in the catalog", "Add from Templates and Requisitions" with the subtext "Select from Requisition templates and past Requisitions", and "Select from My Procurement Favorites" with the subtext "Select from my Favorite items".

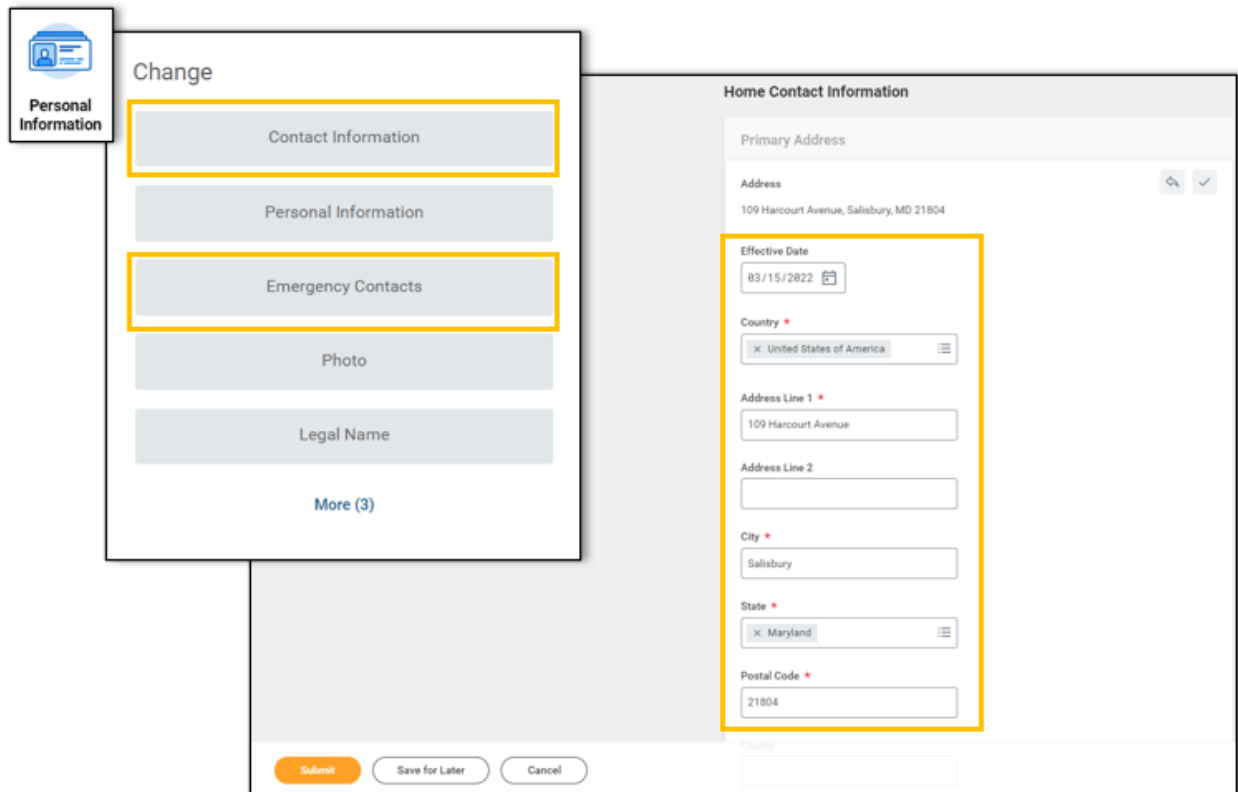
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- Online Performance Management including self-evaluations completed through Workday inbox on a desktop browser, tablet, or smartphone.



- Change Personal Information including address, phone number, or emergency contacts on a desktop browser, tablet, or smartphone.



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## Supervisors and Managers

Highlights of reviewing and approving online inbox items and some available dashboards and reports with real-time data that will be ready to use for managing employees, conducting analysis, and making decisions:

- Employee Management dashboard, such as My Team Management, which is customizable.

The screenshot shows the 'My Team Management' dashboard. It features a 'Recent Activity' section with a performance review for Carmen Harris. Below this are 'My Team' and 'My Matrix Team' sections, each displaying a list of team members with their roles and locations. A 'Team's Learning' section shows a bar chart for team members. On the right, there is an 'Actions' menu with options like 'Start Job Change', 'Report No Show', and 'Terminate', and a 'View' menu with options like 'Compare Team' and 'Organization Directory'.

- Online supplier invoice request for payment awaiting approval or to send back to request more information in inbox. This can be viewed on desktop browser, tablet, or smartphone.

The screenshot shows an 'Inbox' interface with a list of supplier invoice requests on the left and a detailed view of a selected request on the right. The selected request is for 'INVREQ-1010, Staples on 03/15/2022 for \$19.90'. The detailed view includes 'Primary Information' (Invoice Date, Invoice Received Date, Company, Supplier, Remit-To Connection, Currency, Control Total Amount, Supplier's Invoice Number) and 'Additional Information' (Ship-To Address, Payment Terms, Default Due Date, Reference Type, Handling Code, Statutory Invoice Type, Freight Amount, Tax Amount, Memo). At the bottom, there are buttons for 'Approve', 'Send Back', 'Deny', and a menu icon.

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- Online leave of absence requests awaiting approval. This can be viewed on desktop browser, tablet, or smartphone.

The screenshot shows the Workday interface. On the left is the 'Inbox' with a list of items. The first item, 'Absence Request: David Snow', is highlighted with a yellow box and a red arrow. To the right is a detailed view of this request, also with yellow boxes around the 'Review Absence' header, the request details (Last Day of Work, First Day of Absence, Estimated Last Day of Absence, and Type), the 'Process History' section, and the 'Approve' button. On the far right is a 'Success! Event approved' notification for the same request, with yellow boxes around the 'Details and Process' section and the 'Overall Status'.

1. Manager reviews absence request and process history and approves absence request in Workday inbox.

2. Absence request successfully approved by manager.

- Review Team Absence Calendar by month or week for scheduling purposes to help maintain staffing coverage levels when employees submit absence requests.

The screenshot shows the 'Team Absence Calendar' in month view for March 2022. The calendar grid lists employees on the y-axis: Patrick Gregory, Alice Brooks, Charles Creaman, David Snow, Jill Jones, Karen Pommer, and Matthew Fong. Absence requests are shown as colored bars with duration and status: 1 Day (Approved), 2 Days (Approved), 2 Days (Approved), and 5 Days (Approved).

The screenshot shows the 'Team Absence Calendar' in week view for March 20-26, 2022. The calendar grid lists employees on the y-axis. Absence requests are shown as colored bars with duration and status: 2 Days (Approved) for Alice Brooks on Tue, 3/22; 1 Day (Approved) for Karen Pommer on Fri, 3/25; and 5 Days (Approved) for Matthew Fong on Sun, 3/20.

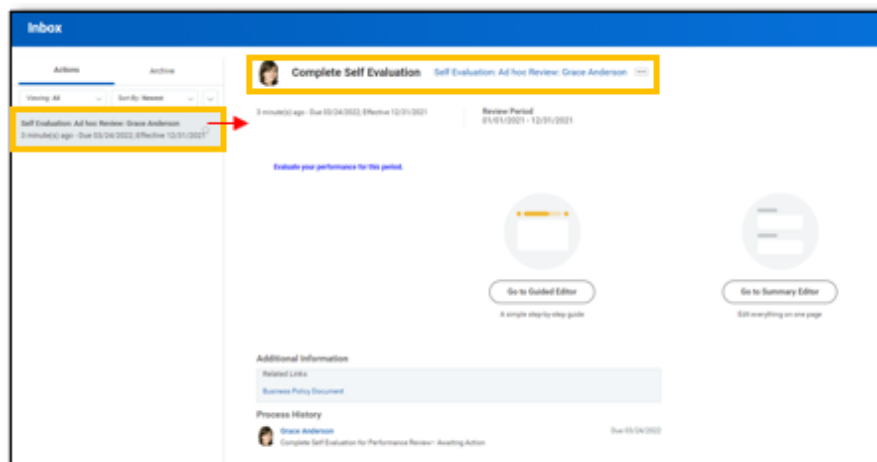
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- Initiate and complete online performance review for employees.

A screenshot of a web form titled "Start Performance Review for Employee". The form contains the following fields: "Employee" with a dropdown menu showing "X Grace Anderson"; "Review Template" with a dropdown menu; "Period Start Date" with a date picker showing "MM/DD/YYYY"; and "Period End Date" with a date picker showing "MM/DD/YYYY". At the bottom, there are two buttons: "Submit" (highlighted in yellow) and "Cancel".

1. Manager initiates Performance Review for employee.



2. Employee completes self-evaluation



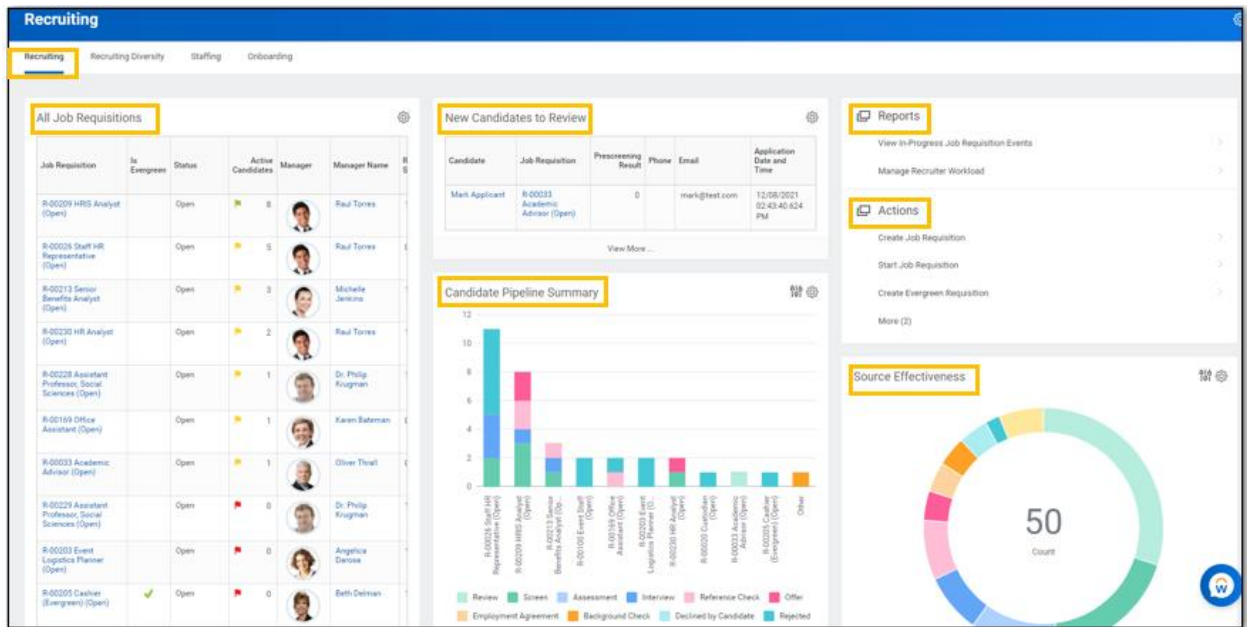
3. Manager reviews employee self-evaluation, completes employee evaluation, and submits it.

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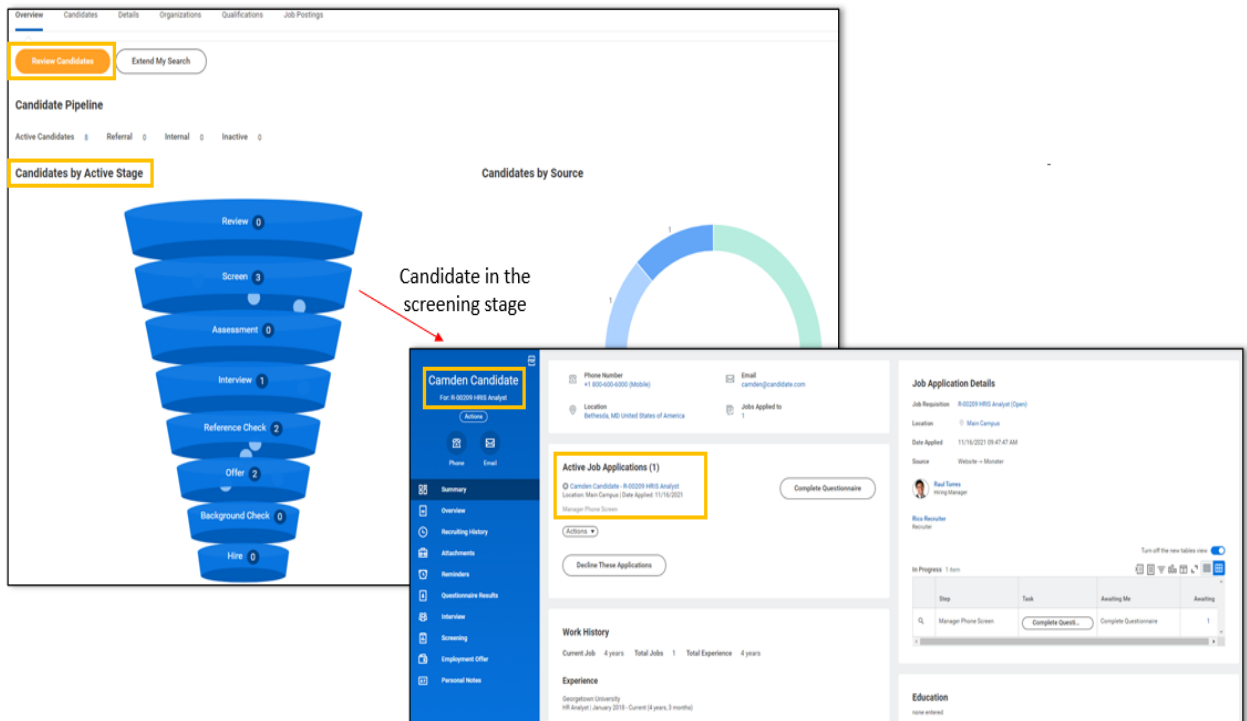


- Online personnel requisition and hiring process.

Recruiting dashboard example that shows open job requisitions, candidates to review, and actions to take. Content on dashboard is customizable.



Overview of candidates by active stage for an open job requisition.



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Hire candidate and track progress of hiring through a transparent workflow process.

1. Hire new employee

2. Track the progress of the new hire through the workflow by viewing process and remaining processes to see due dates and approvers on the workflow

Follow the progress of new hires through the onboarding process using the Recruiting dashboard.

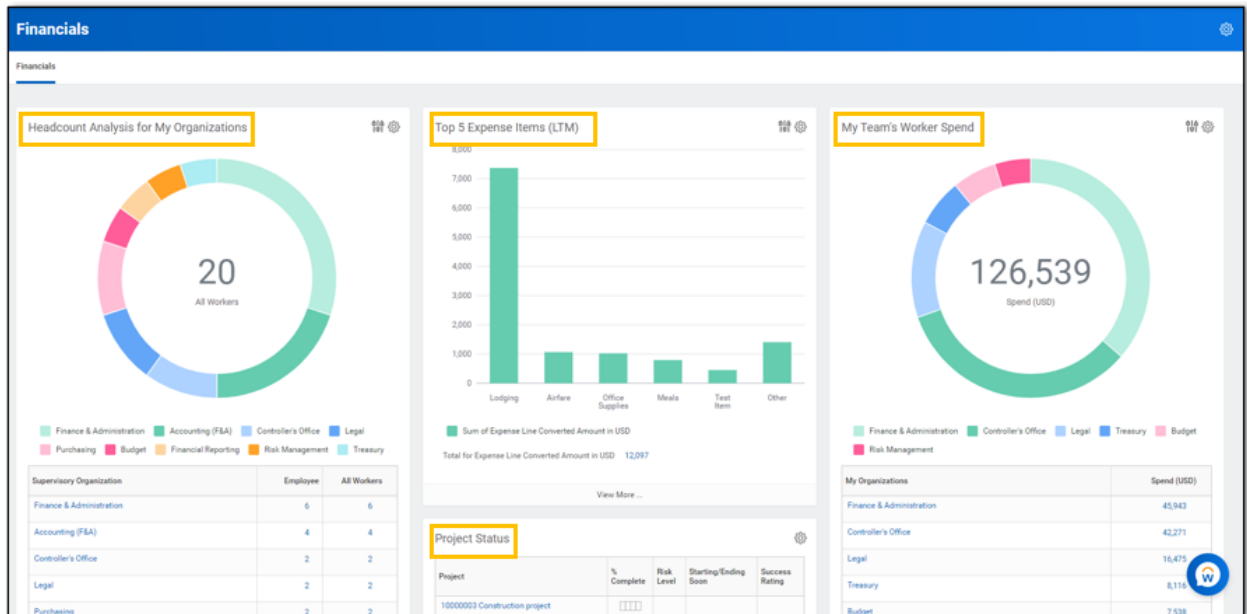
Worker	Rico Recrutler	Jocanna Gaines	Shake Moran	Kat Sandoval	Matt Mahoney
Onboarding Progress	0.8	0.2	0	0.4	
Effective Date	08/24/2021	10/11/2021	11/08/2021	11/15/2021	11/15/2021
Overall BP Reason Category	Hire	Hire	Hire	Hire	Hire
Position	P-00366 Staff Recruter	P-00369 Associate Director: Individual Giving	P-00379 USM Athletics Public Relations Manager	P-00383 USM Assistant Professor, College of Engineering	P-00384 USM Assistant Professor, College of Engineering
Department	Talent Acquisition	Institutional Advancement	Public Relations	Computer Science	Computer Science
Location	Main Campus	Main Campus	Main Campus	Main Campus	Main Campus
Manager	Leslie Wong	Robert Lummis	Nicholas Tillman	Dr. Roger Bickel	Dr. Roger Bickel
Tasks Not Started	Change Benefit Elections Change Emergency Contacts Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections More (7)	Change Benefit Elections Change Emergency Contacts Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections More (7)	Change Benefit Elections Change Emergency Contacts Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections More (7)	Change Benefit Elections Change Emergency Contacts Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections More (7)	Change Benefit Elections Change Emergency Contacts Change Self-Identification of Disability Change Veteran Status Identification Complete Federal Withholding Elections More (7)

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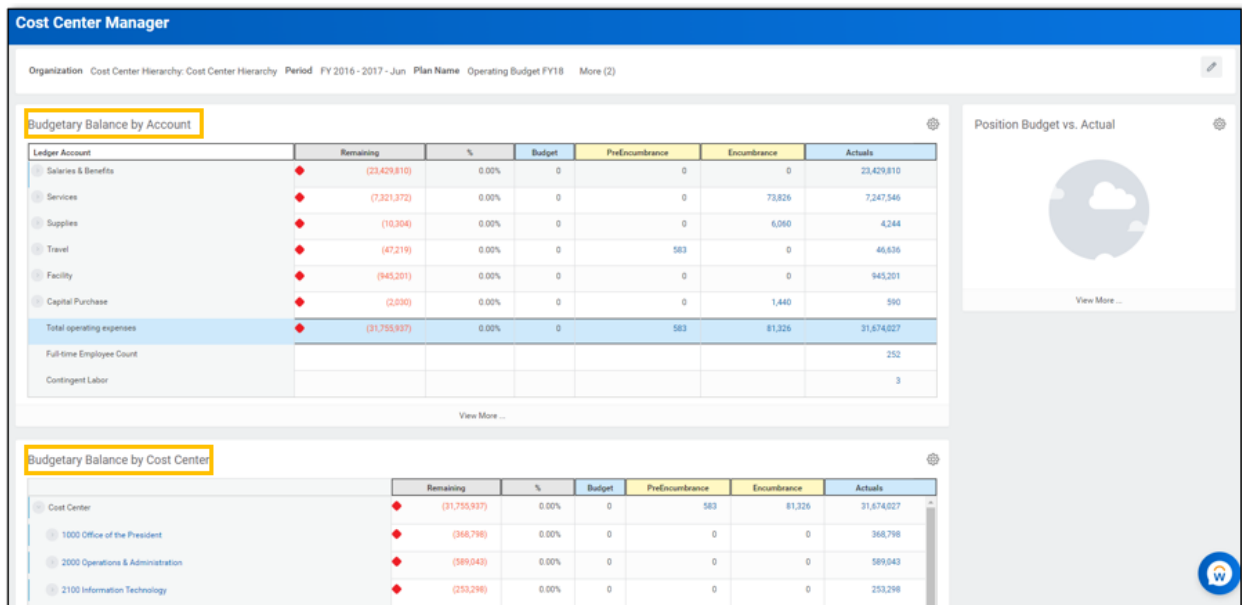


- Examples of other useful Workday dashboards and reports for managers based on a manager's role.

Financials dashboard that is customizable based on what data a manager needs to review.



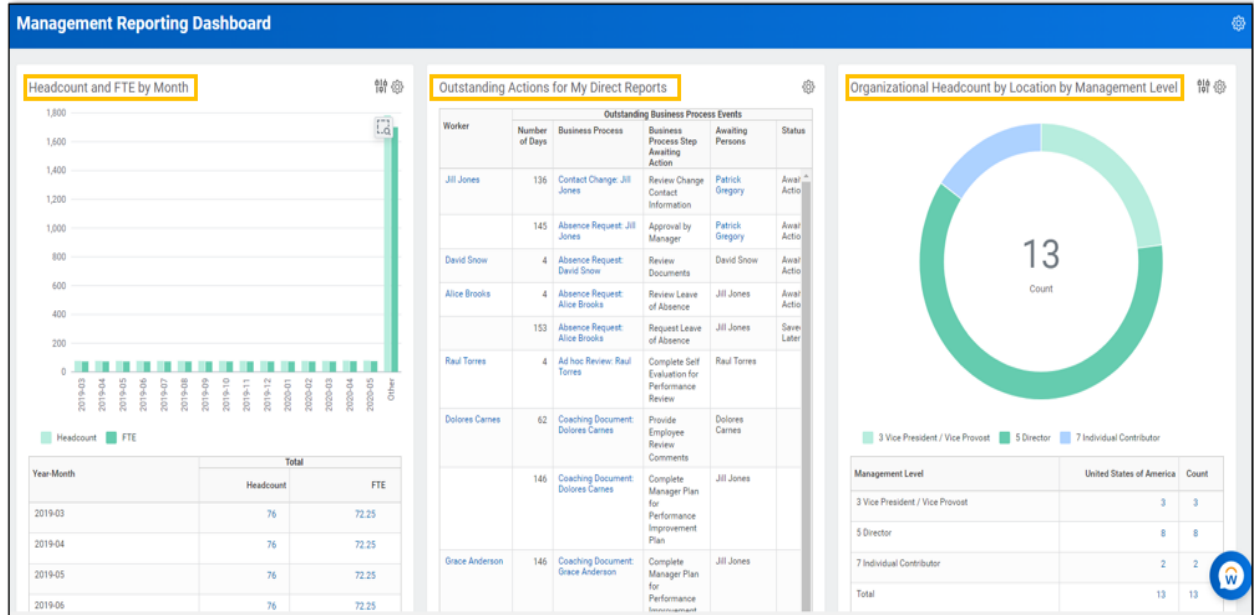
Cost Center Manager dashboard to review budgets.



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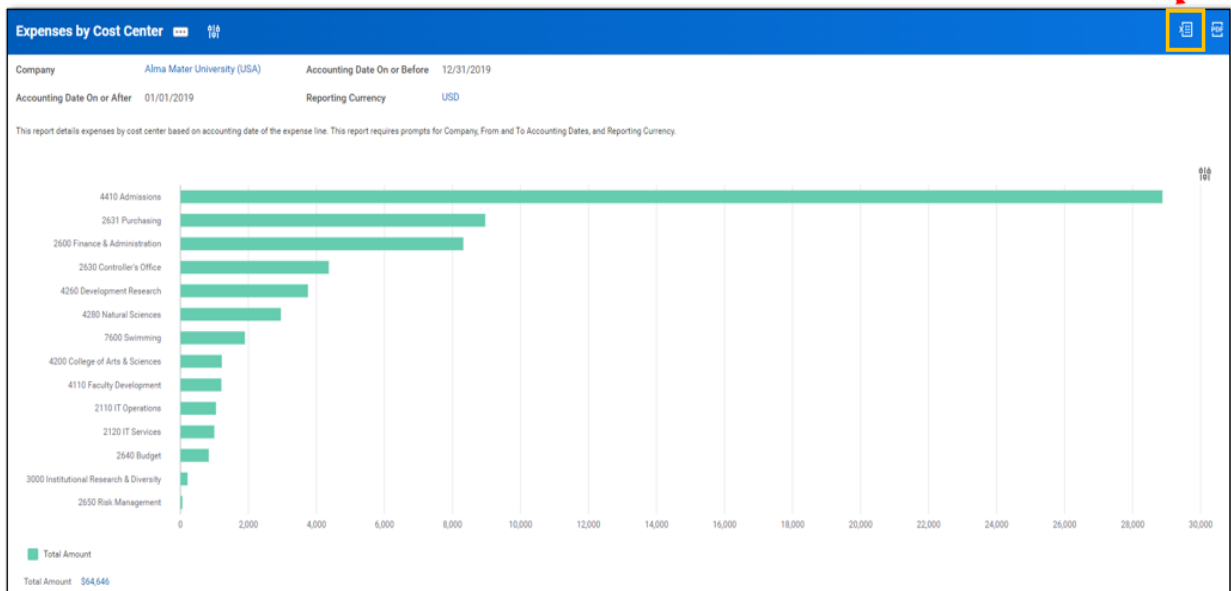


Management Reporting dashboard that is customizable depending on data a manager needs to review.



### Expenses by Cost Center Report.

Export to Excel for further analysis



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