workday. | TEAMBaltimore
Transforming • Engaging • Automating • Modernizing

Website • workday.baltimorecity.gov E-mail • workday@baltimorecity.gov

Getting Started with Workday

Employee Self-Service User Guide

The Job Aids included in the Getting Started with Workday ESS User Guide include the following:

- SSO Logging into Workday on a computer
- Navigating Workday
- Using Workday Search
- Identify Your Place in Your Organization
- Change Your Preferred Name
- Modify Your Personal Information

Do you have questions about workday?
Visit Workday.BaltimoreCity.gov or
Contact your agency HR Practitioner

9/1/2020

Welcome to Workday!

Workday is a state-of-the-art cloud solution designed for human capital management (HCM), financial management, and payroll systems. It will provide the City with the ability to streamline and automate many current business processes across the different agencies and departments. Workday will allow employees to focus their efforts on implementing strategic initiatives and improving services while minimizing the amount of time spent on inefficient manual processes and system workarounds.

As a City employee, you can view your own information in Workday and perform many self-service tasks. Using Workday, you will perform tasks such as entering your time worked, requesting leave, and updating personal information. You will also use Workday to review your compensation, benefits, and more!

Workday will be launched in Three Phases for the City of Baltimore beginning October 26, 2020

Phase I will go-live in two waves beginning October 26, 2020 as illustrated below:

October 26, 2020 **Workday Self-Service = LIVE** You will be able to: ➢ View/Edit personal information. ➢ View team/organizational information (managers). ➢ Become familiar with Workday. ➢ Review current benefit elections and dependent assignments between 10/19/20 – 10/30/20 as prep for Open Enrollment.	**November 2, 2020** **Benefits Open Enrollment = LIVE** You will be able to: ➢ Make your 2021 Open Enrollment selections between 11/2/20 and 11/20/20. *Life Insurance elections will be made through MetLife (not Workday). *Beneficiary designation will be made through MetLife (not Workday).
December 13, 2020 **Absence Management and Time Tracking = LIVE** ➢ Employees enter time through Workday Self Service OR Time Clock/Kiosk (no more paper roll books). ➢ Managers review and approve time entries for direct reports. ➢ Time entries beginning 12/20/2020 will be used for the 1st Workday payroll run in January 2021.	**January 5, 2021** **Payroll = LIVE** ➢ The first Workday payroll run will be the January 5, 2021 payroll check.

This Employee Self-Service: Getting Started Guide is developed to guide you through the Phase I: Wave I go-live launch and only covers the training for the initial go-live launch. You will receive Employee Self-Service manuals for all phases and waves of the Workday project to correspond with the go-live topic launch dates.

Additional Instructor-Led Webinars will be available per the following schedule:

September 14	Citywide Workday Training Launches
September 14 – 22 *ESS = Employee Self Service* *MSS = Manager Self Service*	Instructor-Led Webinars • **ESS - Getting Started in Workday** • **MSS - Manager roles in Workday**
October 19 – 23 *ESS = Employee Self Service* *MSS = Manager Self Service*	Instructor-Led Webinars • **COB Virtual Learning Center – What is it? How to use it!** • **ESS Viewing Benefits & Preparing for Open Enrollment** • **Get Ready for Workday Go-Live**
November 2 – 20 *ESS = Employee Self Service*	Instructor-Led Webinars • **Open Enrollment**
December 1 – 18 *ESS = Employee Self Service* *MSS = Manager Self Service*	Instructor-Led Webinars • **ESS- Absence Management & Time Tracking** • **MSS – Absence Management & Time Tracking**

The detailed training and document approach is available at Workday.BaltimoreCity.gov/training
For up-to-date details, messages, and videos about the City of Baltimore Workday Implementation project, visit Workday.Baltimorecity.gov

City of Baltimore Employee Training Resources

*Self-Guided Training– available 24/7 (beginning 9/21/2020)
https://workday.baltimorecity.gov/training-2

*Self-Paced Training - available 24/7 (available now)
https://coblearninganddevelopment.inquisiqlms.com/

SELF-GUIDED Job Aids (Training Aids)	SELF-PACED Virtual Learning eLearning Videos	INSTRUCTOR-LED Webinars
• Reference Guide • Resource Material • City of Baltimore Website • COB Virtual Learning Center • Workday callouts	• Short Demo/Walk-Throughs • Available 24/7 • Auto-Enrolled • COB Virtual Learning Center	• Available on GoToWebinar • Registration Required • Recorded for future viewing • Available on rotating schedules: Morning, Afternoon, Evening, Night, Late Nite, Wee Hours, and Weekends

Agency / Department / Team / Peer-to-Peer

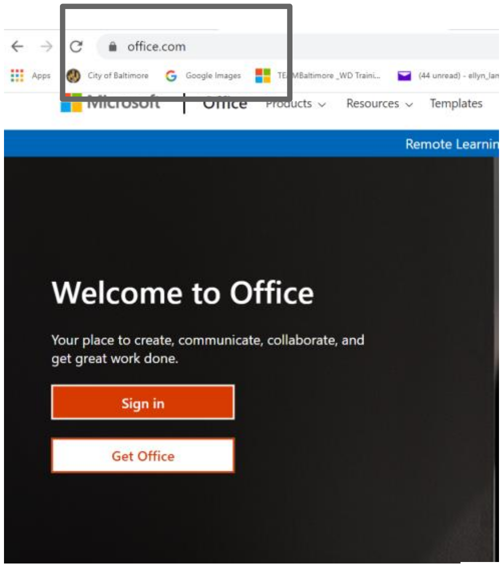
Knowledge Coaching

Agency Readiness Coordinators (ARCs) will serve as Knowledge Coaches within their agency.

ACCESSING WORKDAY THOUGH SINGLE SIGN ON (SSO)

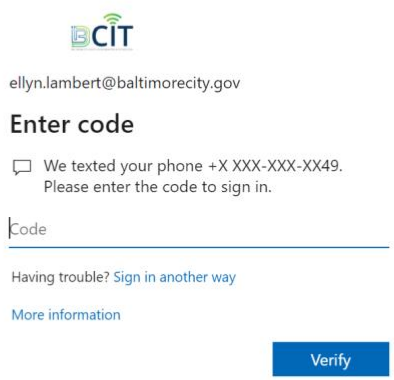
AS A CITY OF BALTIMORE EMPLOYEE, AS LONG AS YOU HAVE A @BALTIMORECITY.GOV EMAIL ADDRESS, YOU HAVE ACCESS TO WORKDAY FROM ANY COMPUTER.

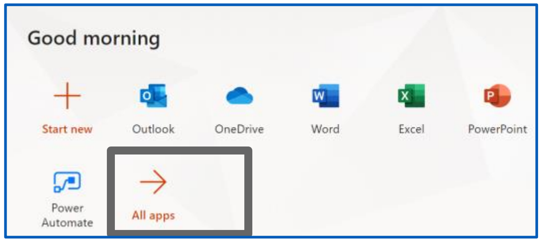
From any web browser, type in **OFFICE.COM**



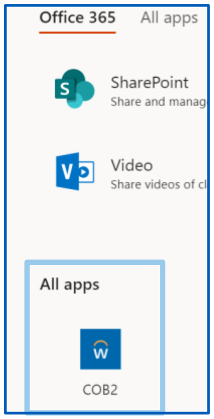
Sign in to Office with your First.Last@Baltimorecity.gov email address and password.

For security, you will receive a secondary authorization notice either by Text or Call.





From the menu, select **ALL APPS**



Scroll through all the apps to bottom, until you see the Workday logo. Click on the Workday logo to enter the workday site.

Once logged in you should see your personal home page.

NAVIGATE THE HOME PAGE

The Workday Home page displays applications that provide access to tasks and reports. The Home page is highly configurable, so the City may display different applications.

Note: Worklets on the Home page are referred to as applications.

CONFIGURE THE HOMEPAGE

You can add, remove, and rearrange applications on your Home page if allowed by the City. From your Home page: **1.** Click the **Configure Applications** icon in the upper-right corner. The Configure Worklets page displays.

2. Click the **Add Row** icon to add a new worklet.

3. Click the **prompt** icon to select from the list of existing worklets.

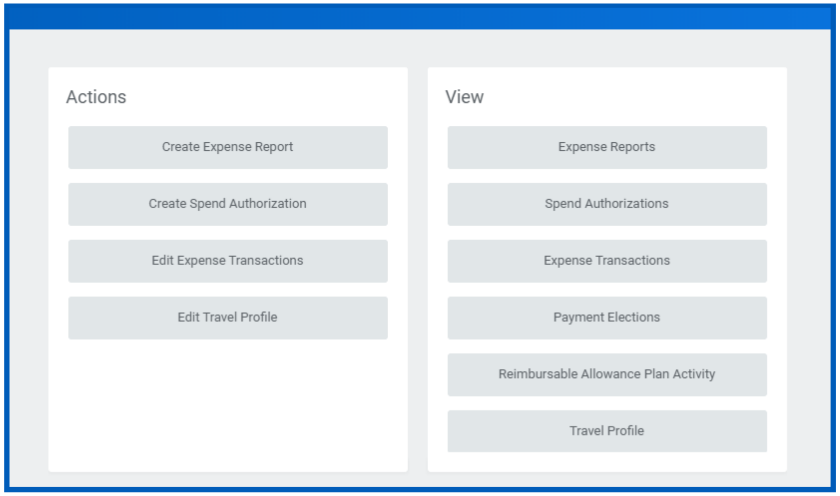
4. Click the **Remove Row** icon to remove a worklet from the Home page.

5. Click the **Move Row Up** arrow ▲ or **Move Row Down** arrow use ▼ to reorder the worklets. To move a worklet to the first or last position, the **Move Row to Top** arrow or **Move Row to Bottom** arrows.

6. Click OK and Done.

APPLICATION LAYOUT

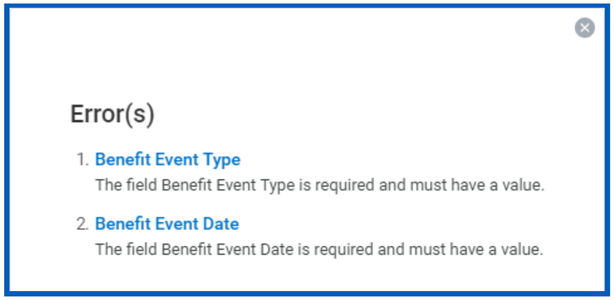
Applications are most commonly organized into Actions and View sections. Buttons in the Actions section link to tasks you can perform. Buttons in the View section link to reports you can view.



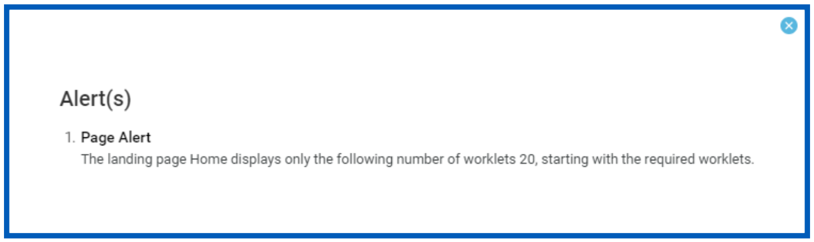
ERROR AND ALERT MESSAGES

Error and alert messages display in red and orange. They typically identify specific fields where information is missing, entered incorrectly, or in conflict with a rule established by the City. Click the message to view the error details.

Errors display in red. You cannot complete a task until you correct all errors.

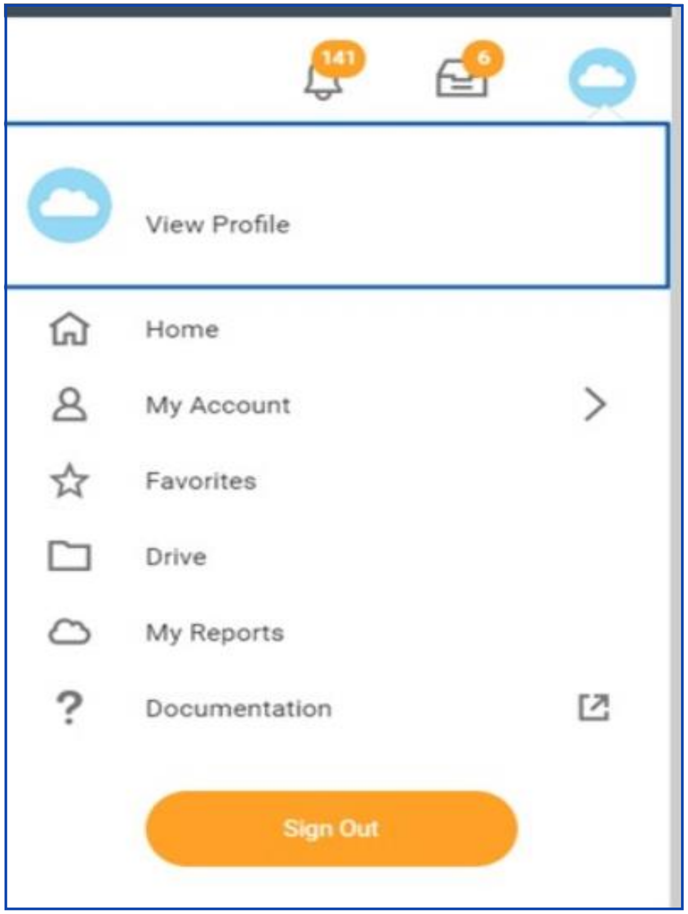


Alerts display in orange. They notify you of potential problems on a page, but do not prevent you from completing the task. Click on the alert message to view the location of missing or problematic information within the task, report, or business process.



RELATED ACTIONS AND THE PROFILE MENU

The Profile menu contains links to the Home page, My Account, and Favorites, to name a few. You can also access Workday Documentation by clicking the Documentation link.

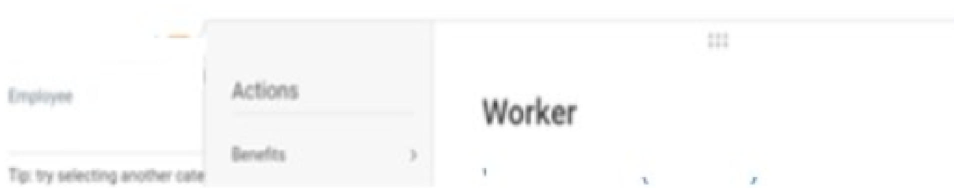


Related Actions display next to an object and can be used to access relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (e.g., viewing or changing your benefits). In Workday, there are multiple ways to navigate to the same task, report, or data. For example, most actions available through Related Actions are also available through applications or the Search box. The following images show three common types of Related Actions:

- Related Actions may appear when hovering your cursor next to a business object or link.

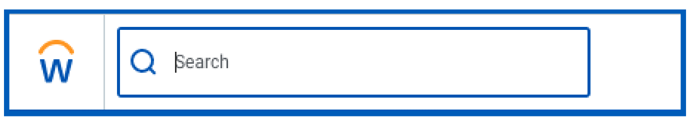
- In your worker profile header, you can access your Related Actions from the Actions button under your name.

Note: You can detach the Related Actions menu from the icon by clicking and dragging the Drag icon at the top of the menu.



NAVIGATE USING SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search box.



For example, to find a worker, type their name into the Search box and press **Enter**. From the search results, click **People** to filter the results to only display workers in the City. Search categories are used to filter your search results for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results. Workday search also favors complete word matches over partial word matches. This is so that search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex”, the results may not display the name “Alexander”.

Though complete word matches are favorable, you can also use partial search to find what you are looking for. For example, if you are searching for the Maintain Candidate List Assignment task, you can use the search string “main can lis”. This method is still effective but may not be a best practice for all searches where there may be multiple results returned.

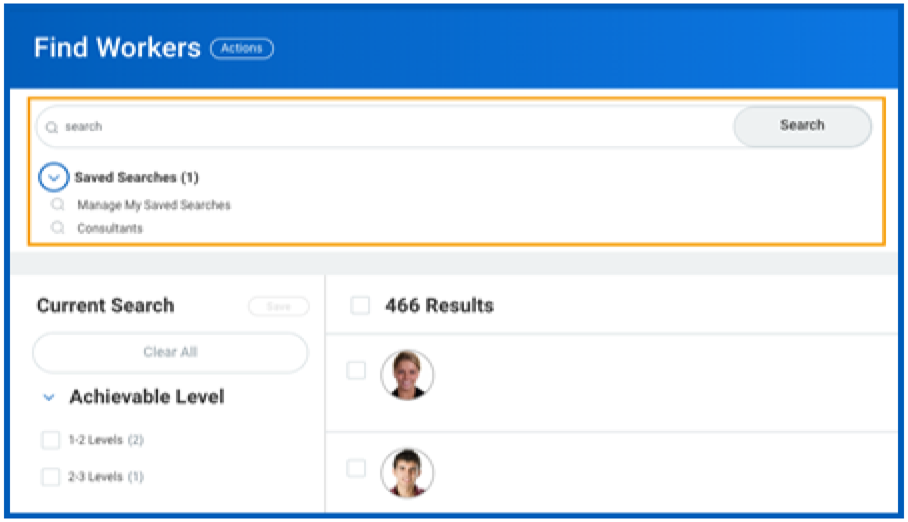
Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the Search box.

In addition to the global Search box, you can use Find pages to filter your results in more detail. For example, use the Find Workers report to search for employees by city, skillset, cost center, and so on. You can also use the faceted search box to tailor your search results using different types of search methods like:

- Boolean search – (sales || marketing) && manager
- Phrase search – “marketing manager”
- Exact Match – specificmail@workday.com

You can then save faceted searches for later use.

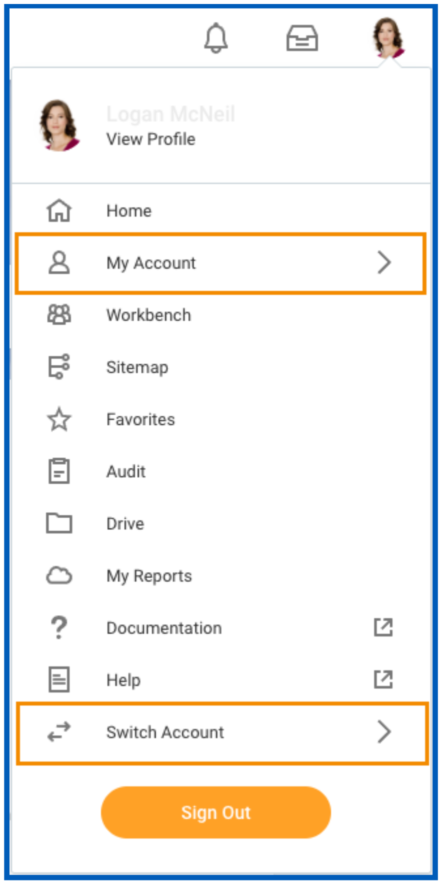
From the search results, click a link for more information or initiate an action from the object’s Related Actions.



CHANGE YOUR ACCOUNT SETTINGS

You can easily change your account settings in Workday. Click your **Profile** icon in the top-right corner of your Home page, then select **My Account**. From here, you can access the City ID, change your password, and manage your account preferences. You can also edit your password challenge questions and view sign-in history.

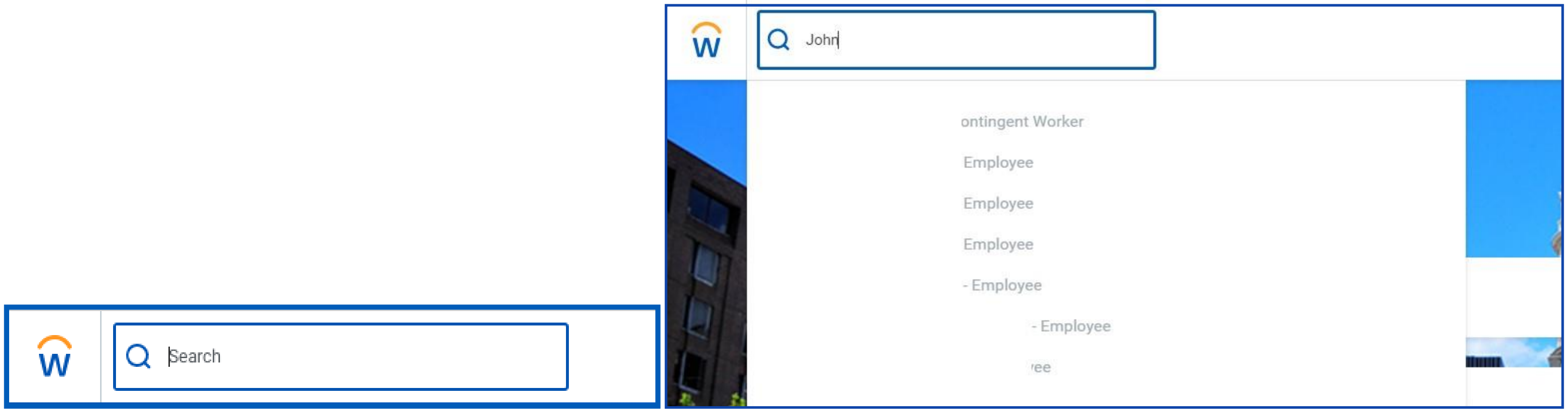
If you are a delegate, click **Switch Account** to switch between accounts.



This job aid outlines the various ways that you can search in Workday. It also provides some tips and tricks to get the most out of Workday Search.

CITY-WIDE SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search field.



For example, to find a worker, type their name into the Search field and press **Enter**. From the search results, click **People** from the Categories list to filter the results to only display workers in the City. You can use Search categories to filter your search for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results. Workday Search also favors complete word matches over partial word matches, so that search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex,” the results may not display the name “Alexander.”

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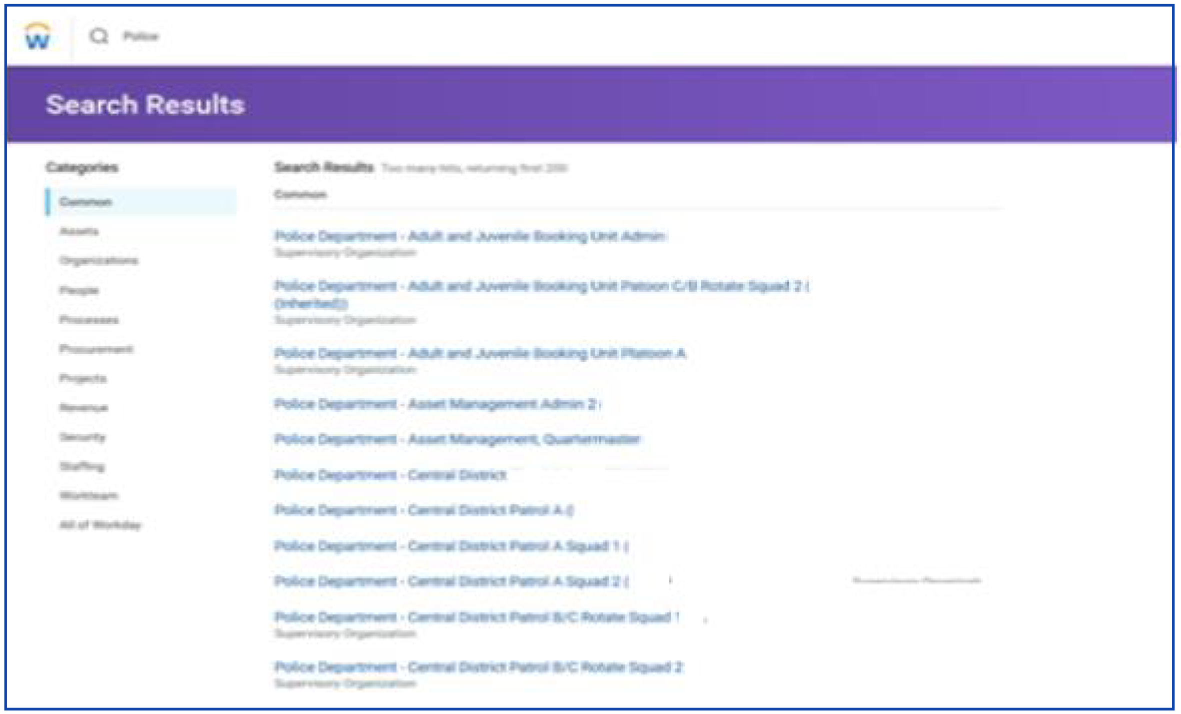
Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the Search field.

WORKER SEARCH

You can quickly look up a worker in global search, reports, and prompts. From the Search field, you can find a worker using a couple different methods:

- Search for a worker by first name only. Workday will sort these results by relevance, showing all workers with a matching first name first.
- Include additional criteria, such as location, along with a first name to narrow down search results.

After searching for a worker, their photo, business title, and supervisory organization display. This identifying information makes it easy to confirm you have found the correct person.

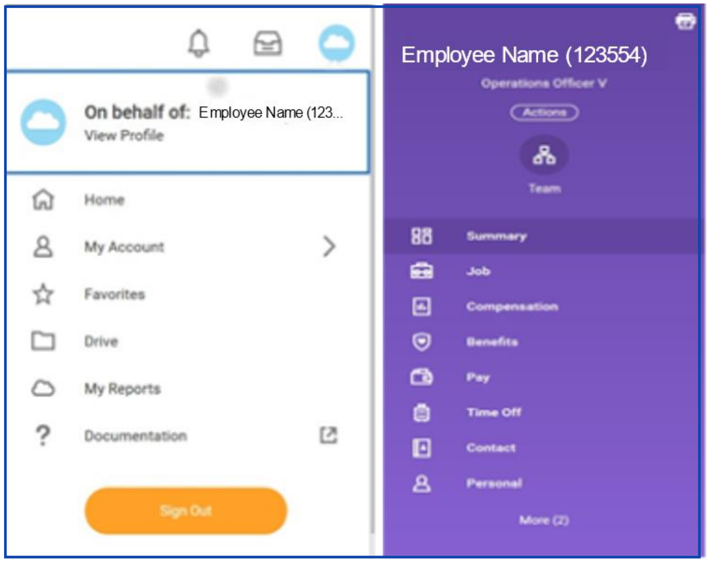


IDENTIFY YOUR PLACE IN YOUR ORGANIZATION

LOCATE YOUR ORGANIZATION

From the Home page:

1. Click your **Profile** icon in the upper right hand corner of your home page > Select **View Profile**.



2. Click the **Job** tab.
3. Click the **Organizations** subtab. Information about the organizations you belong to displays.

Job Details | Employment Data | Manager History | Management Chain | **Organizations** | Support Roles | Worker History

Member of These Organizations 7 items

Organization	Organization Type	Organization Subtype
Mayor and City Council of Baltimore	Company	Company
CC999999 Unmapped Cost Center	Cost Center	Cost Center
1001 General Fund	Fund	
Bi-Weekly (001)	Pay Group	Pay Group
Baltimore City Office of Information and Technology	Payroll Agency	HR Custom Organization
Employee Retirement System	Retirement System	HR Custom Organization
Baltimore City of Information Technology - Director's Office	Supervisory	Department

Manager/Leader of These Organizations 2 items

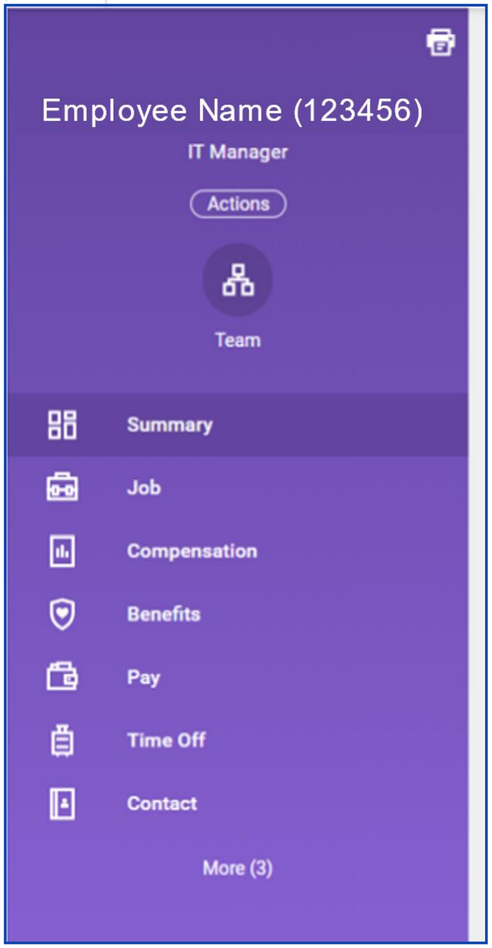
Organization	Type	Organization Role
IT Manage Employee Name (123456)	Supervisory	Manager
IT Manager-108708 JN Employee Name (123456)	Supervisory	Manager

LOCATE YOUR ORGANIZATIONAL CHART

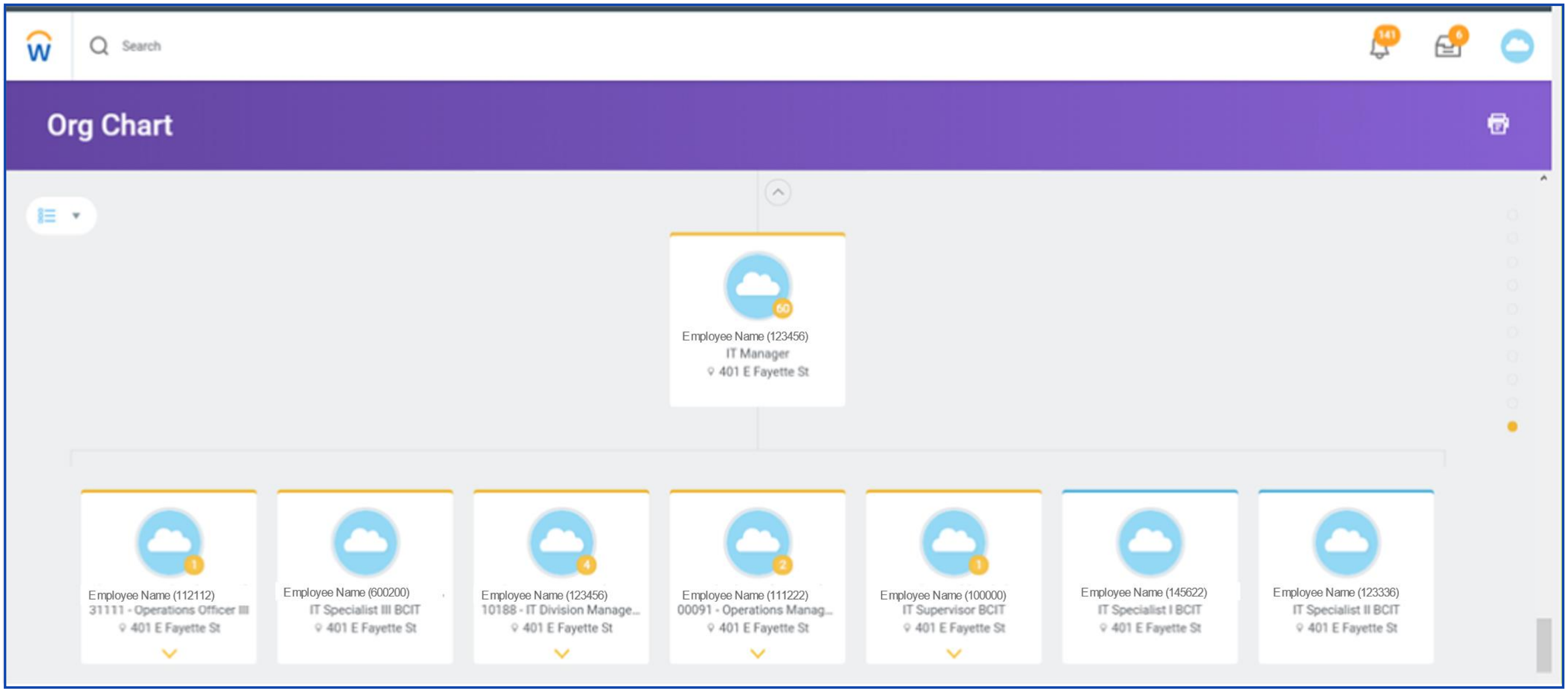
Workday provides a chart of your organization's hierarchy.

From the Home page:

1. Click your **Profile** icon > **View Profile**.
2. Click the **Team** icon. Your org chart includes information about your team, HR support, and your manager's manager.


Employee Name (123456)
IT Manager
Actions
Team
Summary
Job
Compensation
Benefits
Pay
Time Off
Contact
More (3)

3. In the top-right corner of the page, hover over the dots to reveal your management chain. Click the names in the chain to navigate your hierarchy, or use the **arrows** at the top or bottom of the org chart. You can also use the pull-down menu in the top left to view your org chart with or without contingent workers, matrix reports, or open positions.

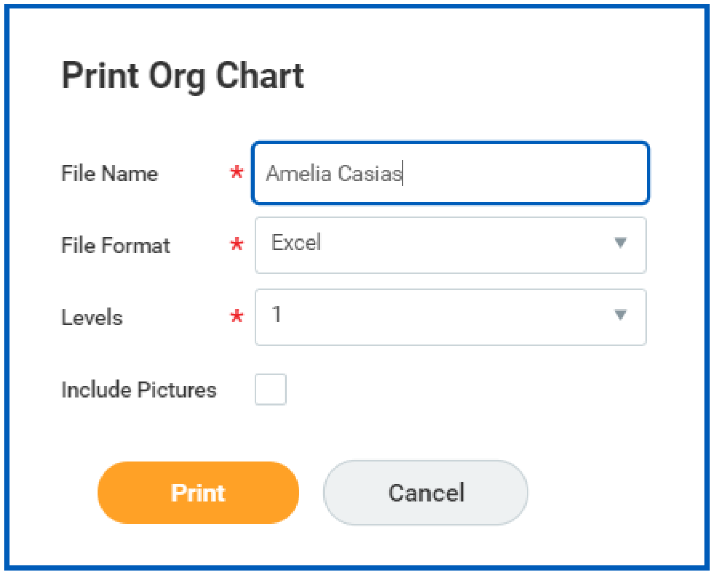


EXPORT YOUR ORG CHART TO EXCEL/VISIO

From the Org Chart:

4. Click the **Print** icon .
5. Enter a **File Name** (your manager's name will auto-populate as the default).
6. Select **Excel** as the File Format.
7. Select how many levels of your org chart you'd like to print.

8. Optionally, select **Include Pictures**. The pictures will download as a .zip file.
9. Click **Print**.



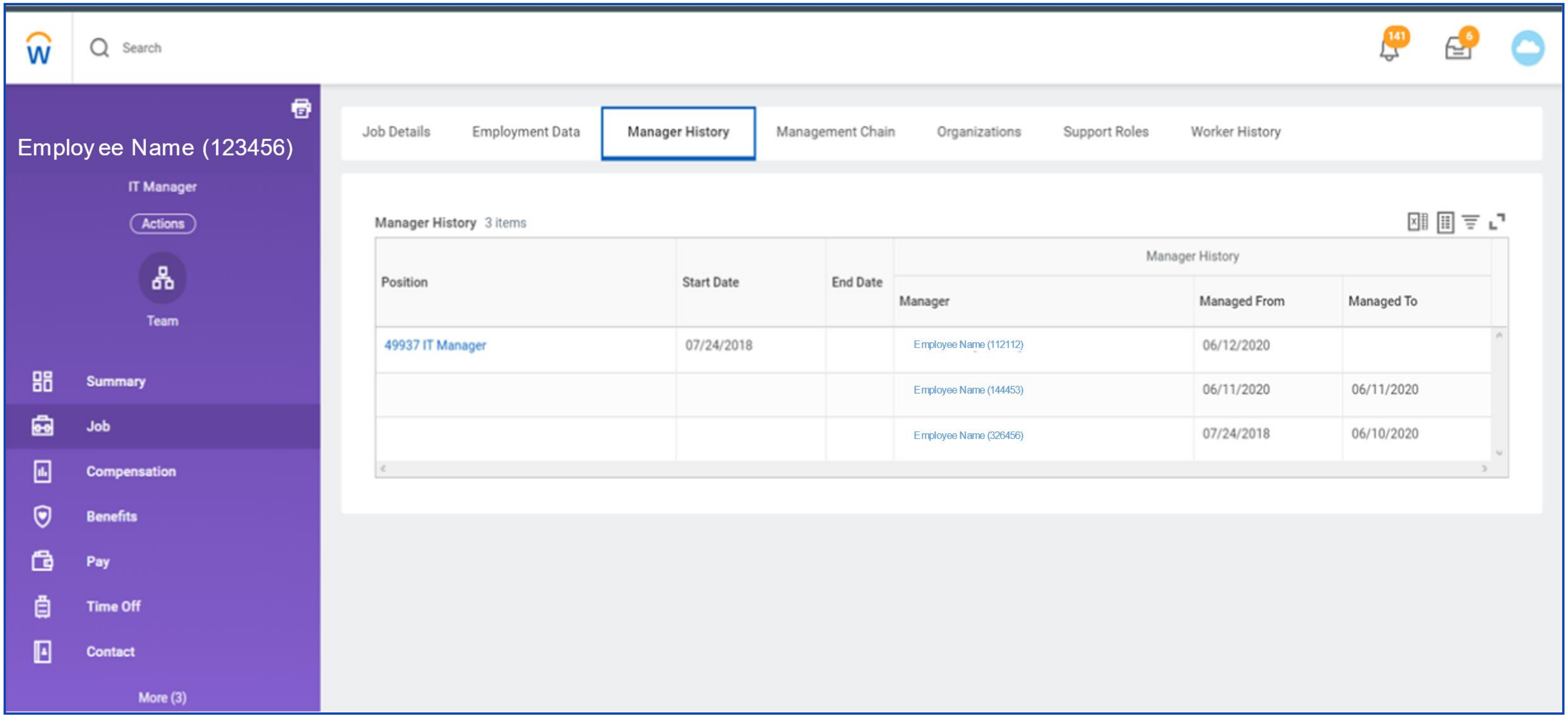
Note: You have the option of importing your Excel Org Chart into Microsoft Visio. Visit the following link on Community for instructional steps: https://community.workday.com/node/243051.

REVIEW YOUR JOB HISTORY

From the Home page:

10. Click your **Profile** icon > **View Profile**.
11. Click the **Job** tab.
12. Click the **Manager History** subtab. Your job history displays. Manager history includes information about your prior job titles, managers, start dates, and end dates.

Identify Your Place in Your Organization

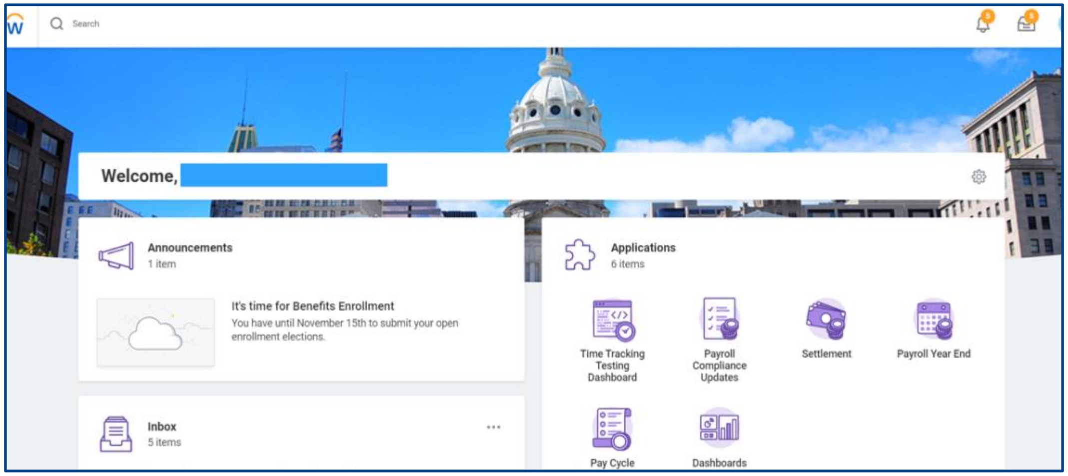


This is the process for when a colleague has applied for an additional job through their career worklet, find jobs.
This is the job aid applies to Recruiters.

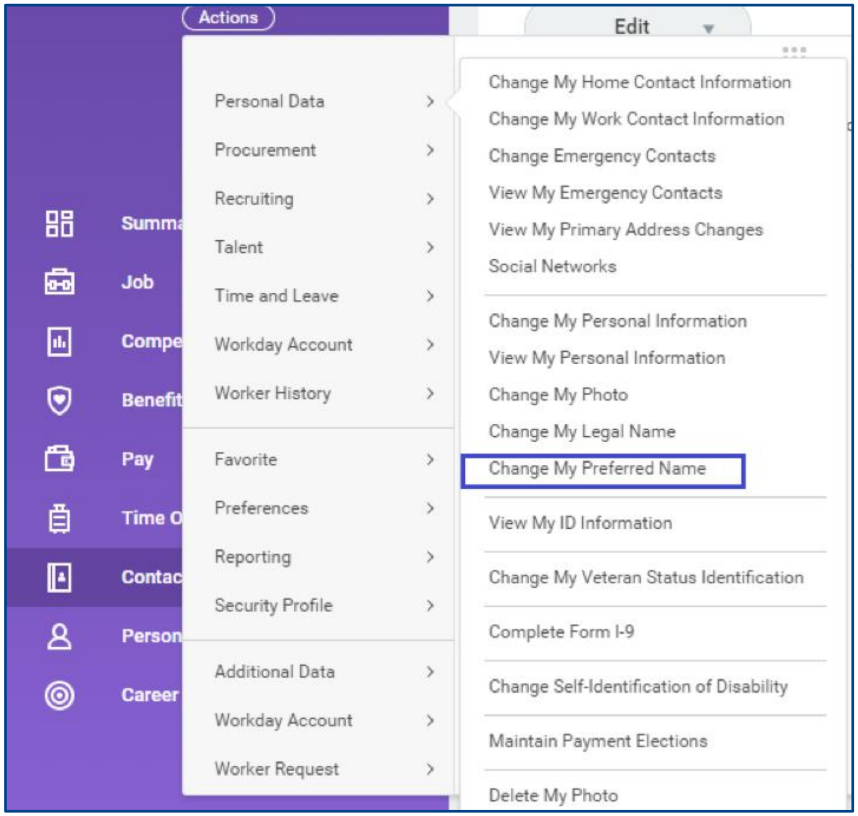
CHANGE PREFERRED NAME

To add additional job:

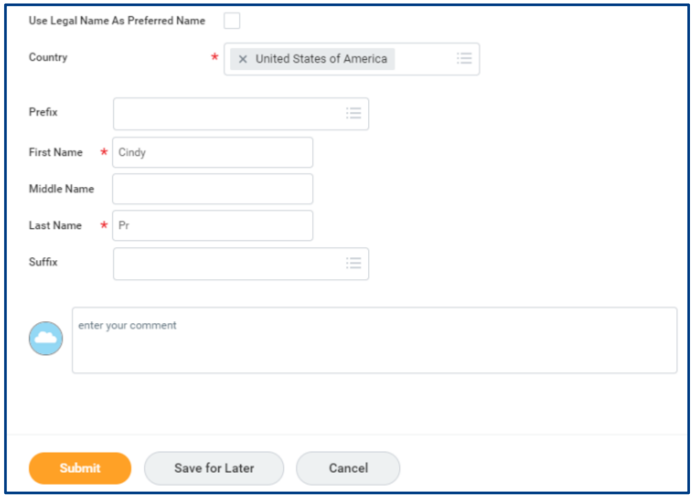
1. Login to **Workday**.



2. From the **Workday Home Page**, open your Profile
3. Click on **Actions** on the Profile Pane
4. Click on Personal Data → Change My Preferred Name

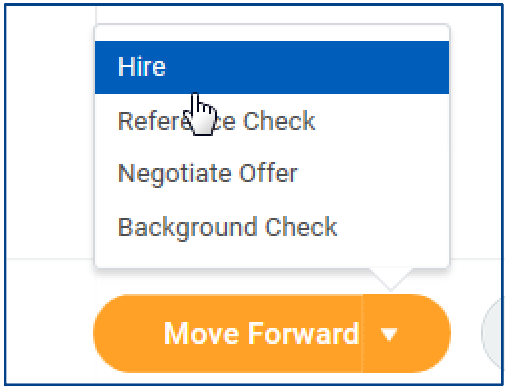


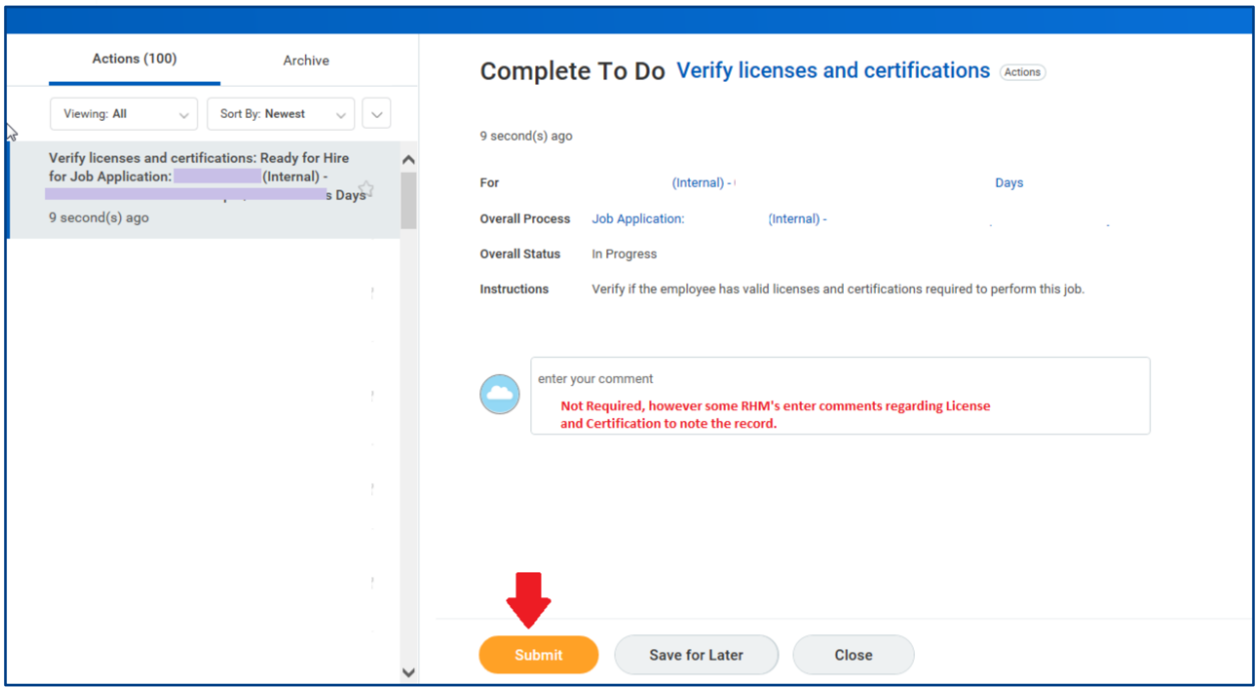
5. Uncheck **Use Legal Name as a Preferred Name**. Edit as desired; First Name and Last Name fields are required; add comments if additional information is necessary. When complete, click Submit.

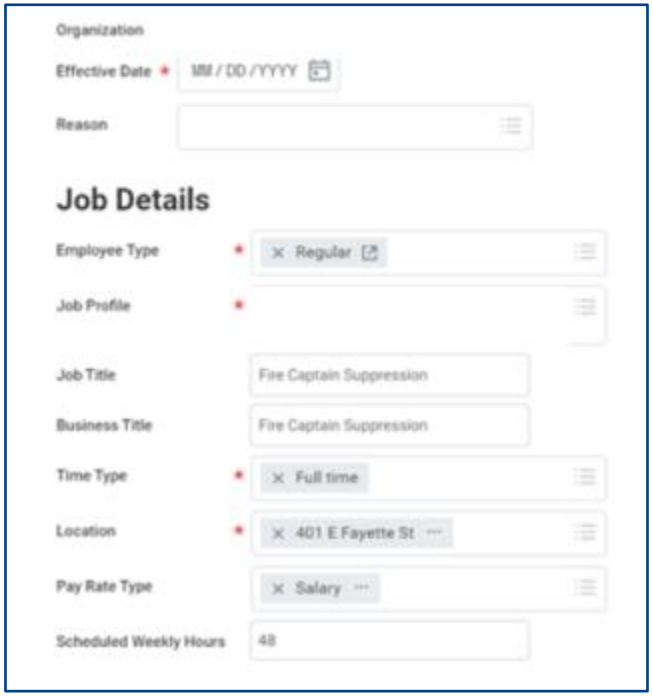


6. Preferred Name change is updated in Workday

7. The recruiter will do the same "**To Do**", **Verify License and Certification**.







8. Click Submit and done.

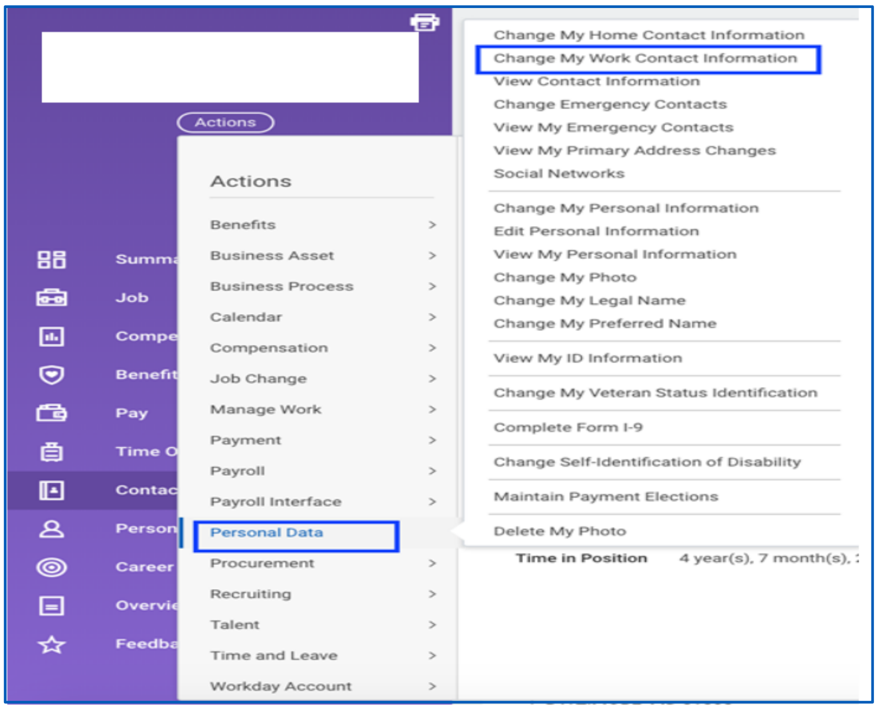
ACCESS YOUR WORKER PROFILE PAGE

Your Worker Profile page displays information about you, including your office location, phone number, and compensation. Note that the visibility of sensitive information is controlled by individual users' security profiles.

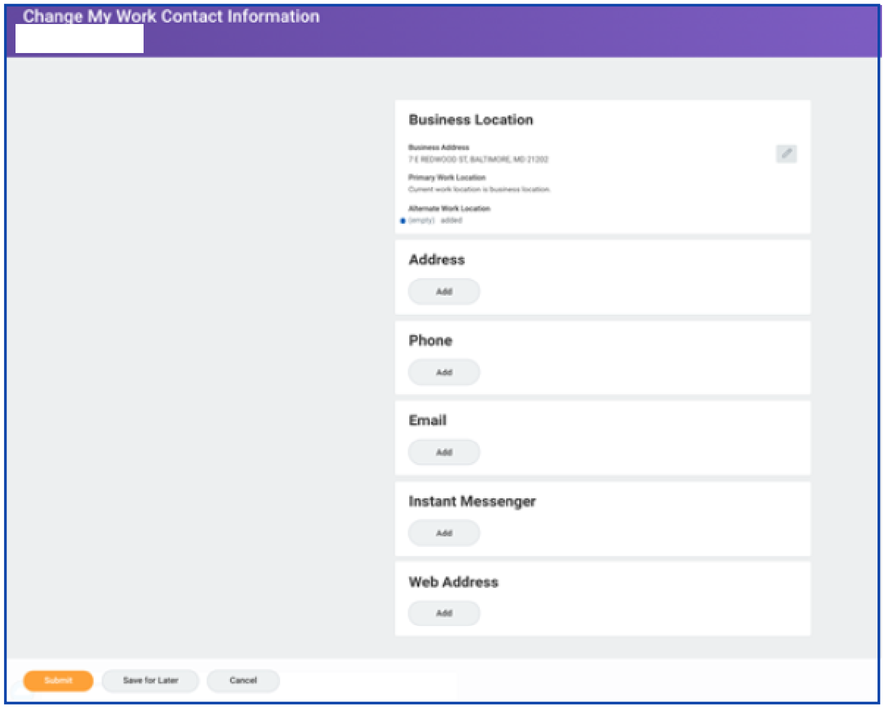
Note: All instructions in this job aid start from the Worker Profile page. To access your Worker Profile page, click your Profile icon, then View Profile.

CHANGE YOUR WORK CONTACT INFORMATION

1. Click your **Actions** Actions button.



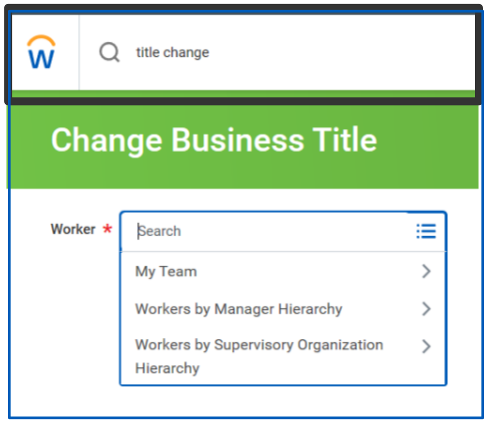
2. Select **Personal Data**>**Change My Work Contact Information**
3. Enter your new information under the Address, Phone, Email, Instant Messenger, Web Address fields.



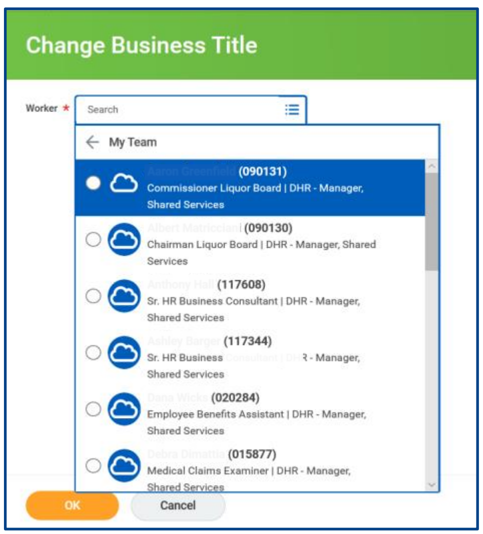
4. Click **Submit** and **Done**

TO CHANGE A TITLE FOR A WORKER

1. From the search bar, begin to type **"Title Change"**

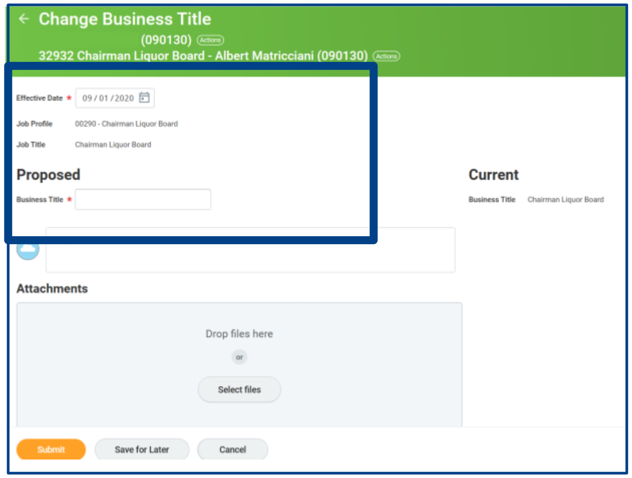


2. Select from the dropdown menu to find the name of the worker than select **OK**



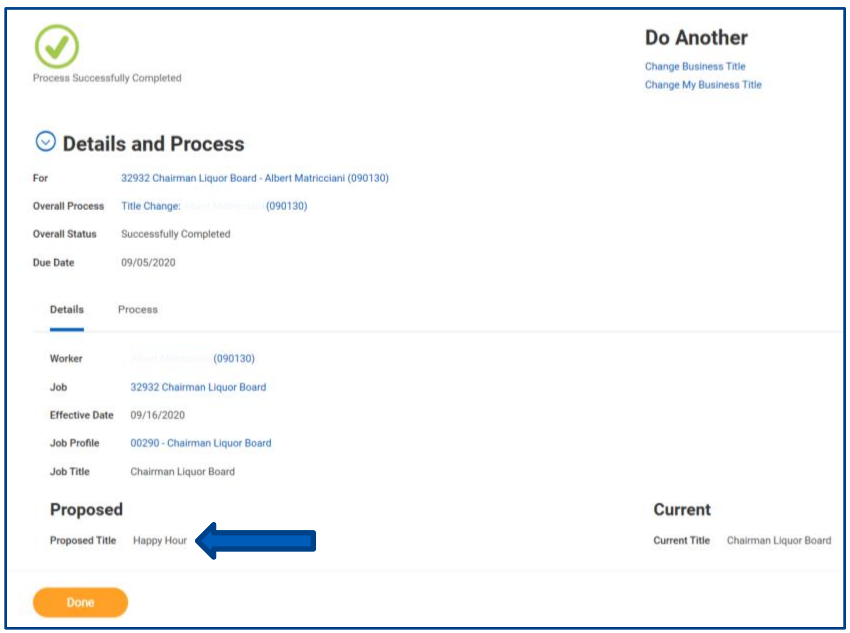
Change Your Business Title

3.



1. Select the date in which the title change will take effect.
2. Enter the new title
3. Click Submit

4.



View the Proposed Title Change for accuracy

If complete, close the window.

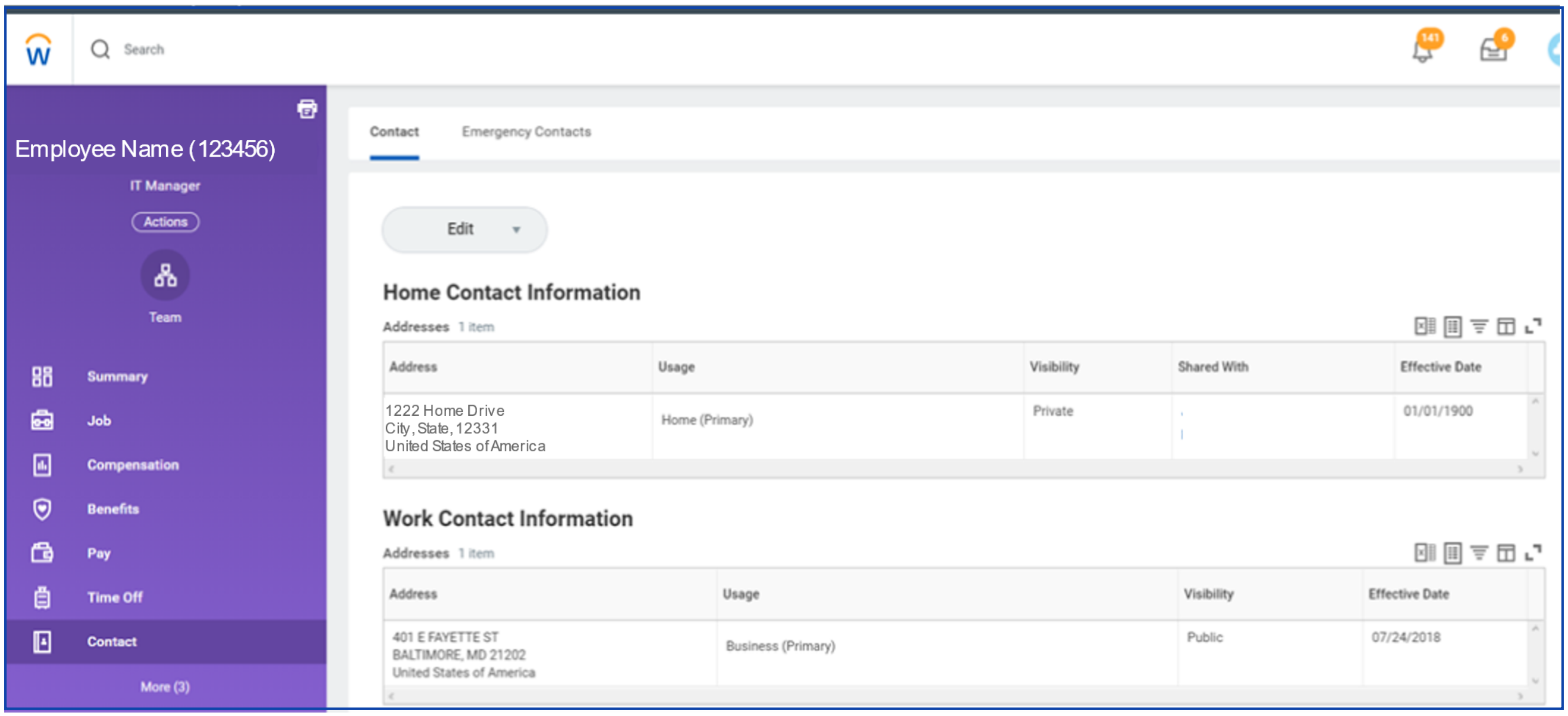
ACCESS YOUR EMPLOYEE PROFILE PAGE

Your Profile page displays information about you, including your office location, phone number, and compensation. Note that the visibility of sensitive information is controlled by individual users' security profiles. This can be found in the upper right side corner.

Note: All instructions in this job aid start from the Employee Profile page. To access your Employee Profile page, click your Profile icon, then View Profile.

ADD OR CHANGE YOUR CONTACT INFORMATION

1. Click the **Contact** tab on the left. The **Contact** subtab displays.



2. Click **Edit** and select **Change My Home Contact Information** to change your personal contact information. Within each section, click the Edit icon to change existing information, or click **Add** to add new information. You can also click within a field to edit.

3. Click **Submit** and **Done** to save your changes.

ADD OR CHANGE EMERGENCY CONTACTS

1. Click the **Contact** tab.
2. Click the **Emergency Contacts** subtab.
3. Click **Edit**. Enter or modify your emergency contacts.
4. Click **Submit** and **Done** to save your changes.

MODIFY YOUR PERSONAL INFORMATION

1. Click the **Personal** tab. The **Personal Information** subtab displays.
2. Click **Edit**. Enter or modify your personal information.
3. Click **Submit** and **Done** to save your changes.

VIEW YOUR IDENTITY PAPERWORK

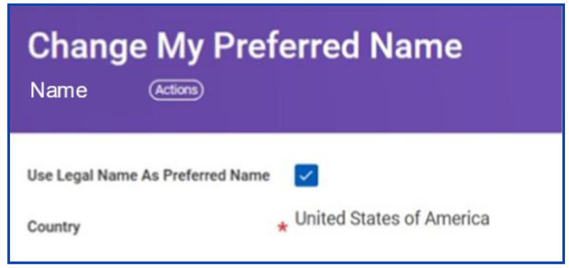
1. Click the **Personal** tab.
2. Click the **IDs** subtab. You cannot make changes to this information; you can only view it.
3. Click the **Documents** subtab. Click the document links to download or view documents. Click **Add** to attach documents to your profile. Depending on your security permissions, you can click **Edit** to make changes to documents, or **Delete** to remove them.

CHANGE YOUR LEGAL NAME

1. Click your **Actions** Actions button.
2. Select **Personal Data** > **Change My Legal Name**.
3. Enter your new information, including any required information.
4. Click **Submit**.
5. Click **To Do** and **Submit** to submit proof of your name change. Or, click **Done** to submit later.

CHANGE YOUR PREFERRED NAME

If you choose, your preferred name will display within Workday instead of your legal name.



1. Click your **Actions** button.
2. Select **Personal Data** > **Change My Preferred Name**.
3. Clear the **Use Legal Name as Preferred Name** checkbox.
4. Enter your new information.
5. Click **Submit** and **Done**.

ADD OR CHANGE YOUR PHOTO

1. Your photo is linked though the Cities Security system. You will not be able to change your photo.

VIEW TRANSACTION HISTORY

View your transaction history to see information such as benefit enrollment or personal data change dates.

1. Click the **Job** tab.
2. Click the **Employee History** subtab. Your business process history displays.
3. Click **View Employee History by Category**. The data is organized into different tabs to make it easier for you to review your history.

CHANGE A BUSINESS TITLE

1. From your **Actions** button, click **Job Change** > **Change My Business Title**.
2. Enter the Effective Date.
3. Enter the proposed Business Title.
4. Click **Submit** and **Done**.

Note: This will be routed for approval.