

# Workday 36 System Update

## March 13, 2021



# Agenda

- Workday Update Methodology
- Feature Highlights
- Communications and Training
- Stay Tuned



# Workday 36: Methodology

- Workday updates functionality 2 times per year
- Each update contains many enhancements to WD functionality that Brown may accept or defer depending on their impact to the community
- Each accepted enhancement is tested prior to being deployed
- Deployment will take place over a weekend update, during which Workday will be unavailable
- The community will be provided with updated information, training and materials depending on the magnitude of the enhancement



BROWN



# Workday 36: Feature Highlights

## *User Experience Changes*

Workday has made a variety of enhancements as it pertains to the user experience including:

- Embedded grids and charts
- Next step of business process and task completion
- Shortcuts available on Home page
- Favorites relocating to profile menu
- Back button changes
- Related actions prioritized
- Mobile interface enhancements
- Scroll through Inbox items for review without returning to Inbox screen
- Questionnaire response view in business processes



BROWN



# Embedded Charts and Graphs

- Any data or business process or task details with multiple rows will be displayed as an embedded grid with multiple pages at the bottom of the display
- You can select your chart options to select your display
- All data displays include options to download to excel or PDF if needed




Time Off Requests 302 items Turn off the new tables view

Time Off	Date	Day of the Week	Type	Requested	Unit of Time	Comment
Q	12/18/2020	Friday	Sick Days (Exempt)	1	Days	
Q	12/17/2020	Thursday	Sick Days (Exempt)	1	Days	

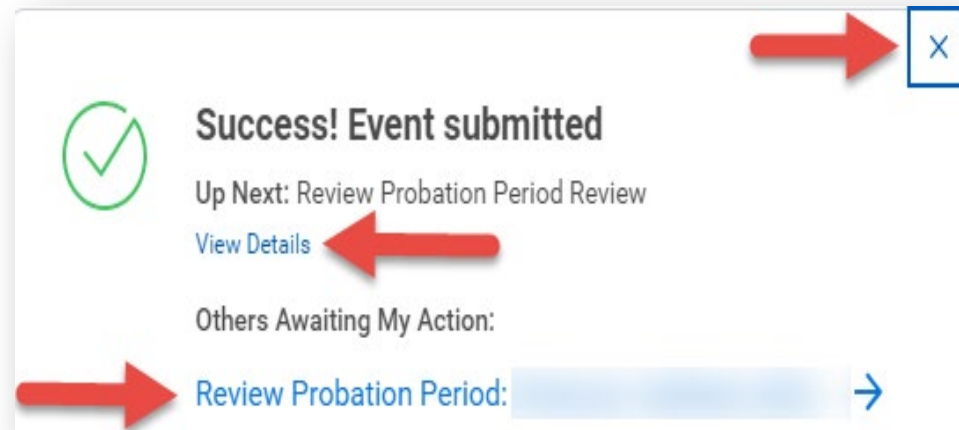
< 1 2 3 4 5 >

Turn off the new tables view

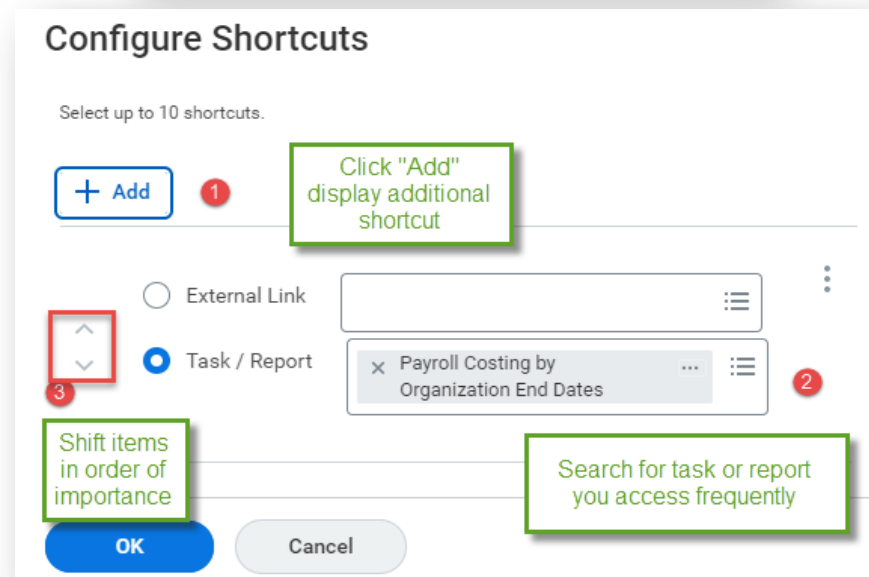
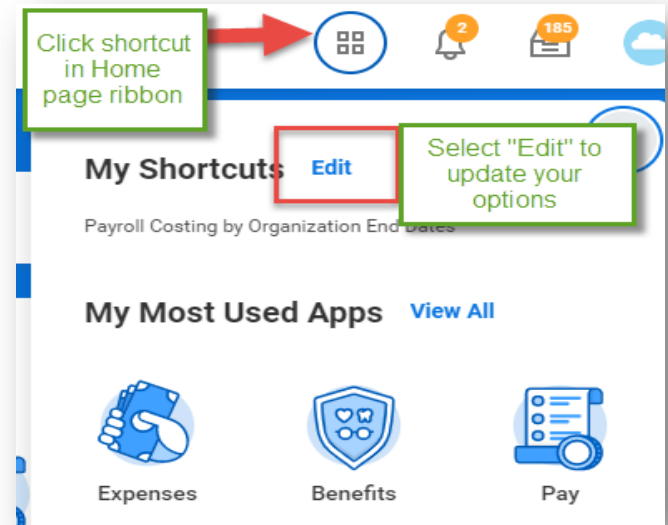
# Advance to Next Process

- Once a process is reviewed or approved from your inbox, you will have a preview of the next step via the *Up Next:* and *View Details* link
- Once a process is reviewed or approved from your inbox, you will have the option to review the next item awaiting your action by clicking on the task under *Others Awaiting My Action:*
- You can also close out the completed confirmation by clicking on *X*



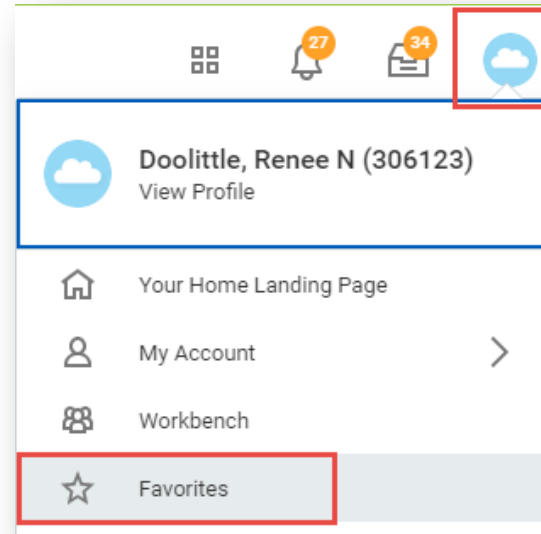
# Shortcuts Available for Users

- Update shortcuts to Home page to easily access tasks or reports that are frequently used
- Click edit to update your shortcuts; up to 10 items are available
- Workday will identify your most used landing page apps to streamline your user experience and present them for ease of use



# Favorites Now in Menu

- Favorites is now easily accessed from profile menu
- Select manage favorites to flag objects, tasks and reports
- Use in conjunction with shortcuts to simplify and streamline your user experience



## Favorite Reports and Tasks

To view a report, click the report name. To start a task, click

[Manage Favorites](#)

## Manage Favorites

### Favorite Tasks/Reports

- × Time Off and Leave Calendar
- × Enter Time for Worker
- × Enter Time Off

### Favorite Custom Reports

- × In Progress Payroll Actuals by Cost Center (By Organization)

### Favorite Business Objects

- × Workday Program (Altomari Cavanagh, Stephanie M (314198)) (Supervisory Organization)



BROWN





# Back Button Update

- When submitting any multi-page process or report prompts, the back button access has changed to re-access a prior page in the process

Configure Profile Summary



Manager Activity Report - Actuals

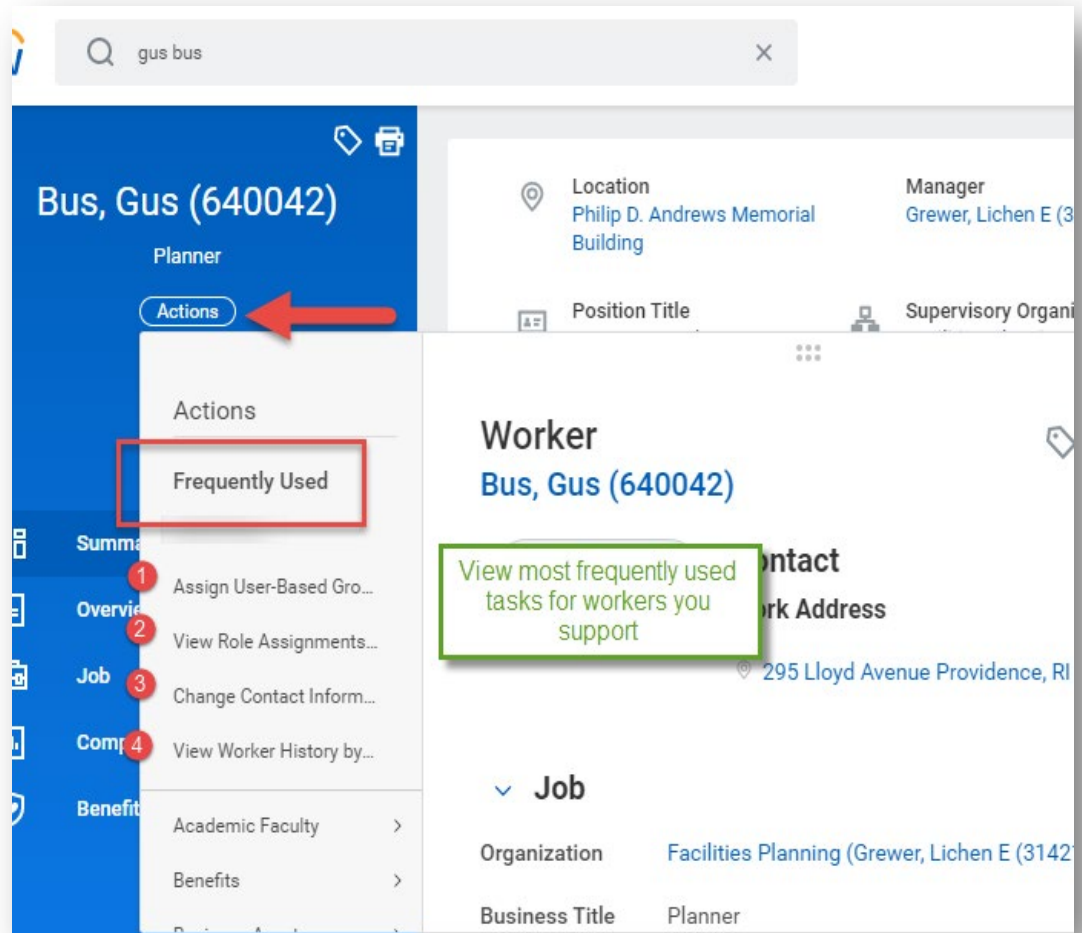


BROWN



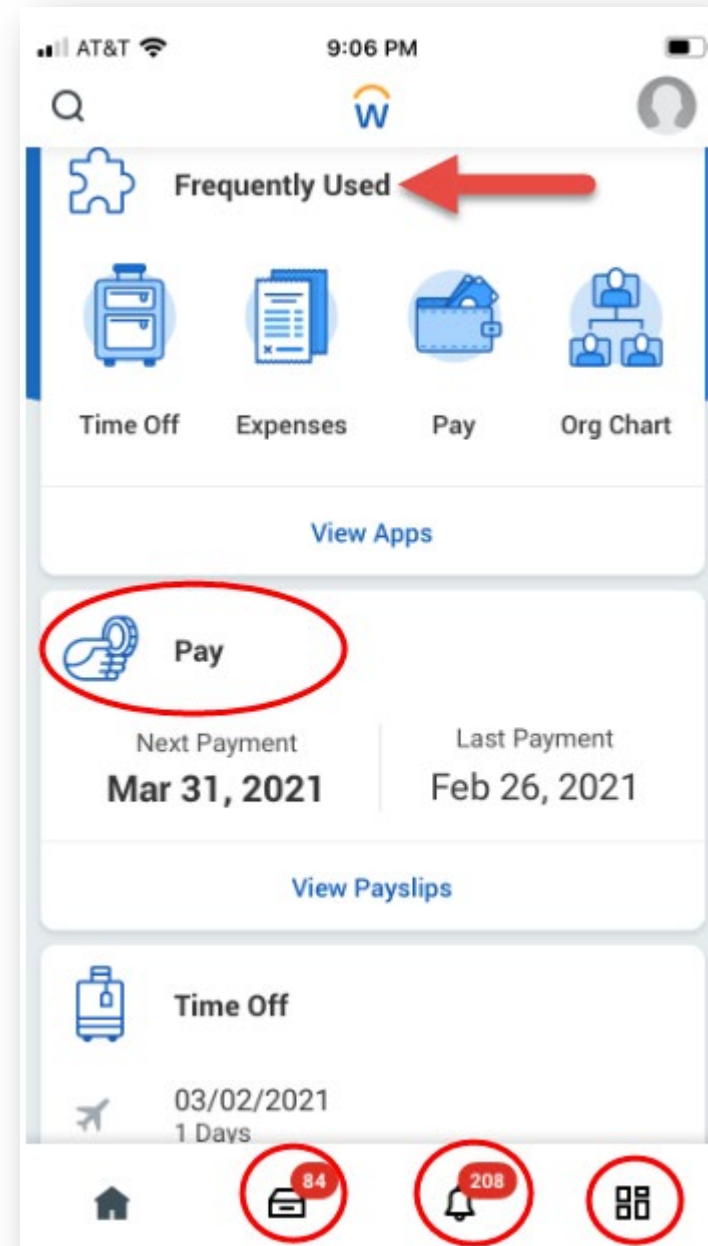
# Related Actions Prioritized

- Frequently used related actions prioritized in view
- Actions most used to support workers will appear at the top of frequently used actions



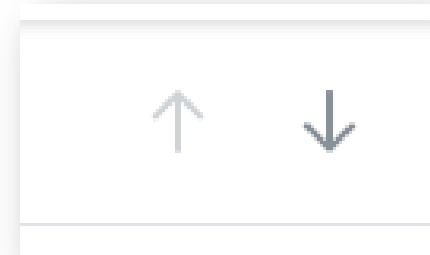
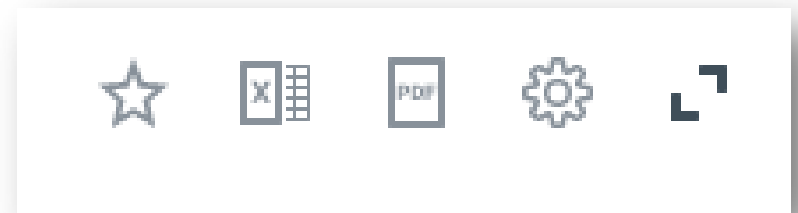
# Mobile Interface

- Responsive design
- Prioritization of frequently used apps or a variety of apps available via your laptop
- Access review and approvals of transactions
- Take action directly from application



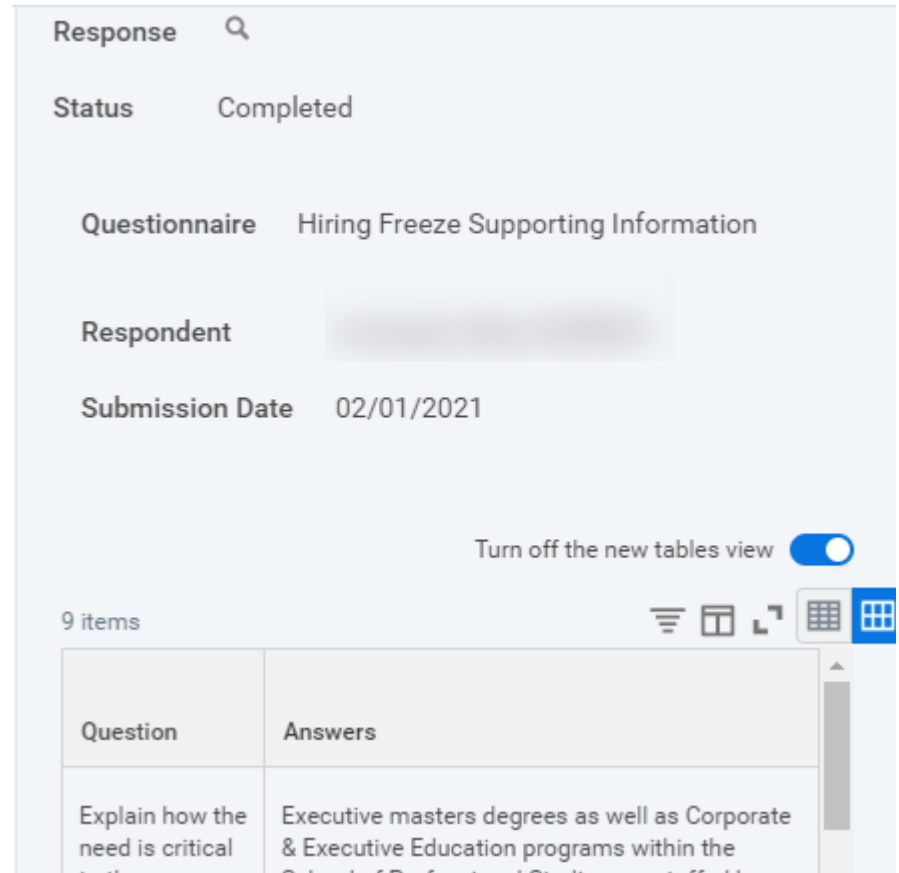
# Inbox Item Access

- Expanding any item in your inbox will provide a full page view of your task
- Use the arrow buttons on the top of the task to scroll to the next inbox item awaiting your action



# Questionnaire Responses

- When clicking into business process, questionnaire response details will be available for view without additional clicks



The screenshot shows a user interface for viewing questionnaire responses. At the top, there is a search bar labeled "Response" with a magnifying glass icon. Below this, the status is shown as "Completed". The questionnaire title is "Hiring Freeze Supporting Information". The respondent's name is redacted with a grey box. The submission date is "02/01/2021". On the right side, there is a toggle switch labeled "Turn off the new tables view" which is currently turned on. Below this, it says "9 items" and there are icons for list, table, and grid views. A table is displayed with two columns: "Question" and "Answers".

Question	Answers
Explain how the need is critical to the	Executive masters degrees as well as Corporate & Executive Education programs within the School of Professional Studies are staffed by

# Workday 36: Feature Highlights

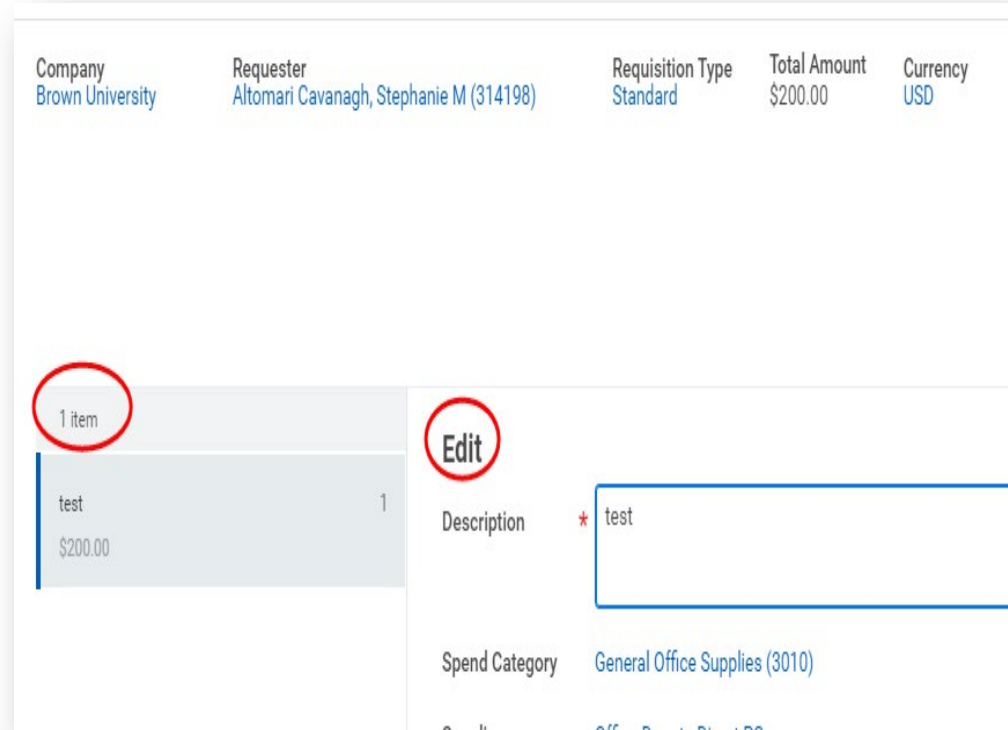
## *Purchasing and Expenses*

Workday is making a variety of enhancements as it pertains to Purchasing, Receipting and Expenses including:

- Streamlined user interface change for purchase requisitions and receipts
- Loading receipts via mobile is made even easier with direct upload from your pictures app
- Updating the user experience for expense report creation and reporting

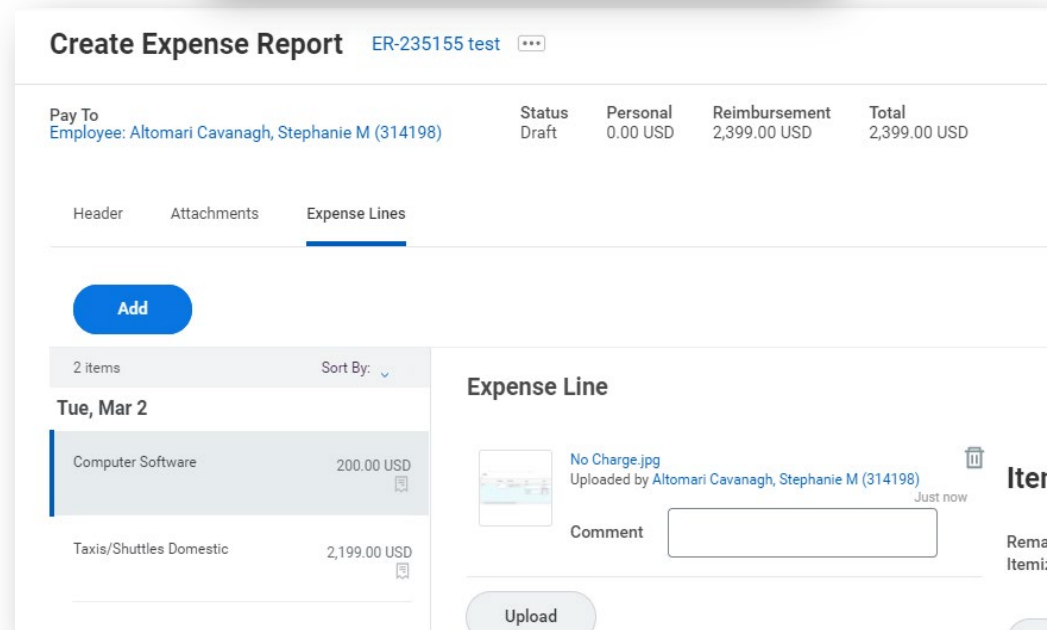
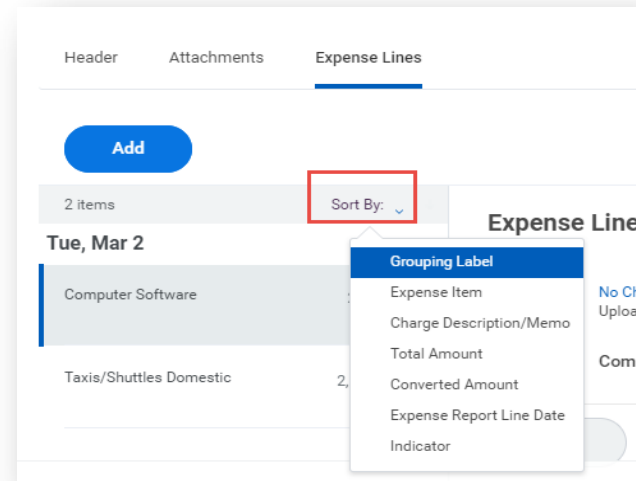
# Streamlined User Interface

- Create requisition now displays items in your cart to mirror expense reports for easy viewing and adjustment
- Access Good Lines and Services lines in the same view
- Receipt interface is streamlined to easily view status and line details



# Expense User Interface

- Sort on expense report lines to help take action on open items
- Expense report view updated
- Re-order lines as needed to help prioritize and organize information for approval





# Locating Expense Reports

- Expenses app includes Recent Expense reports section to identify reports in any status for you as payee
- Includes status in heading of expense description
- Includes reports you have initiated and those initiated on your behalf
- My Expense Reports details all reports and allows you to create or make changes to existing reports that have not been approved

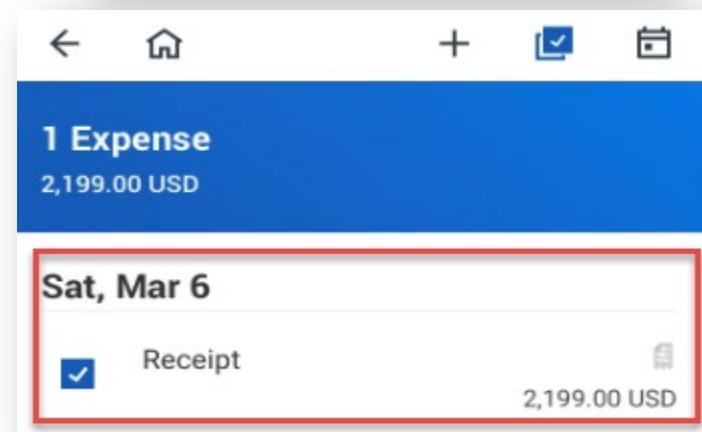
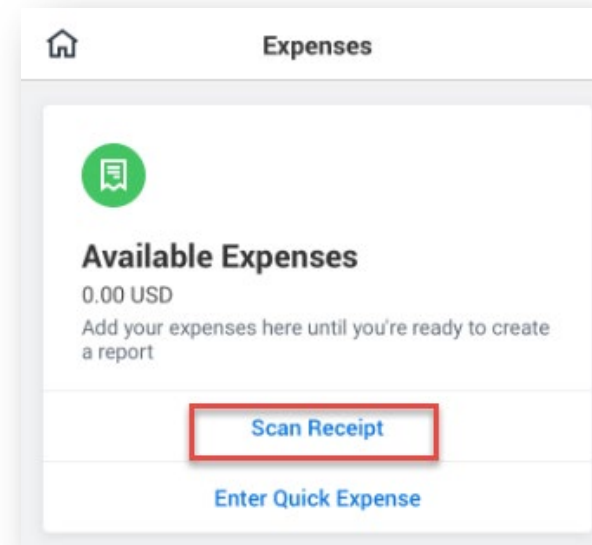
Recent Expense Reports

Draft - 03/02/2021 - test



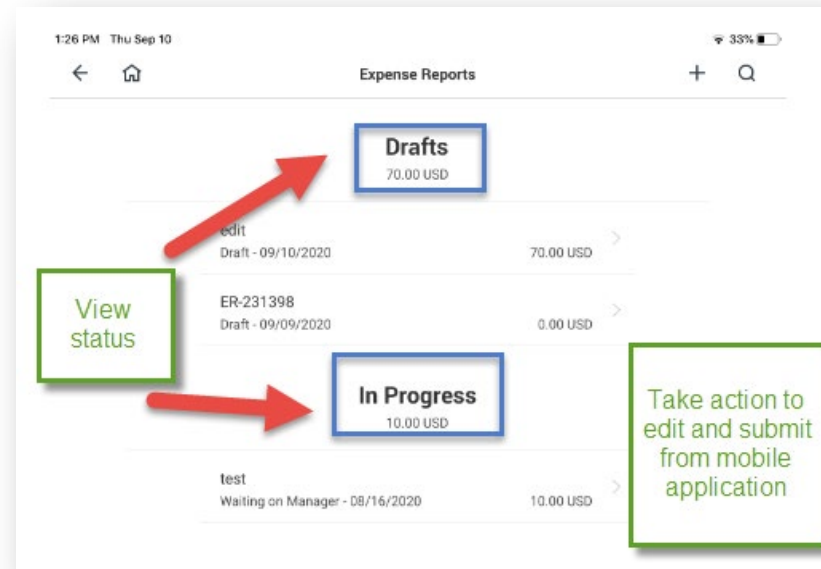
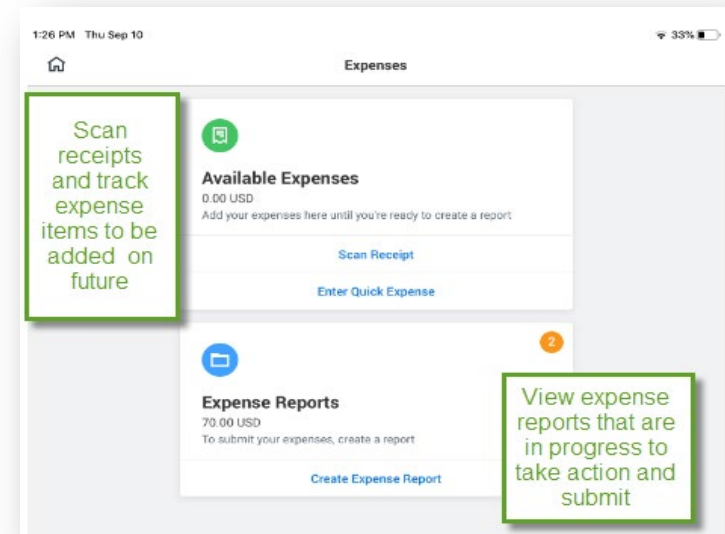
# Receipts from Mobile App

- Receipts loaded from your photo app on your smart phone to Workday mobile app will prepopulate with data from the receipt for your expense report including amount and date
- Receipts loaded to the app are accessible to create a mobile expense report or via your desktop



# Mobile Expenses

- Start, edit, or submit expense reports
- Create expense items and scan receipts to be used in future reports
- Check status of expense reports and payments



# Workday 36: Feature Highlights

## *Recruiting Changes*

Recruiting changes are available for those managing the recruiting process:

- Continued candidate profile updates to support recruiting users
- Updates to candidate grid for ease of use
- Job requisition workspace available for recruiting users to support mass review of requisitions
- Internal Job Alerts to support internal candidates searching for a specific position
- Edits to Career Profile user interface to support internal applicants



# Candidate Profile View for Recruiters

- Summary profile, contact information, job application details, attachments, and other candidate information readily available
- View messages sent to candidate and updates to candidate status
- Mass action supported

**Robin, Danielle**  
For: REQ163427 Artistic Director

Actions

Phone Email Resume

Summary  
Overview  
Screening  
Interview  
Questionnaire Results  
Attachments  
Offer

Phone Number: +1 (401) 8569658  
Email: danirobin@gmail.com

Location: 123 Main Street, ATL, GA 02569, United States of America

**Job Application Details**  
Job Requisition: REQ163427 Artistic Director (Open)  
Location: Granoff Center for the Creative Arts  
Date Applied: 02/21/2020 01:57:15 PM  
Source: Career Site -> Indeed  
Locke, Richard M (606584) Hiring Manager

**Active Job Applications (1)**  
Robin, Danielle - REQ163427 Artistic Director  
Location: Granoff Center for the Creative Arts | Date Applied: 02/21/2020  
Submit Hiring Report  
Offer Decision  
Decline These Applications

**Work History**  
Experience: none entered

**Education**  
none entered

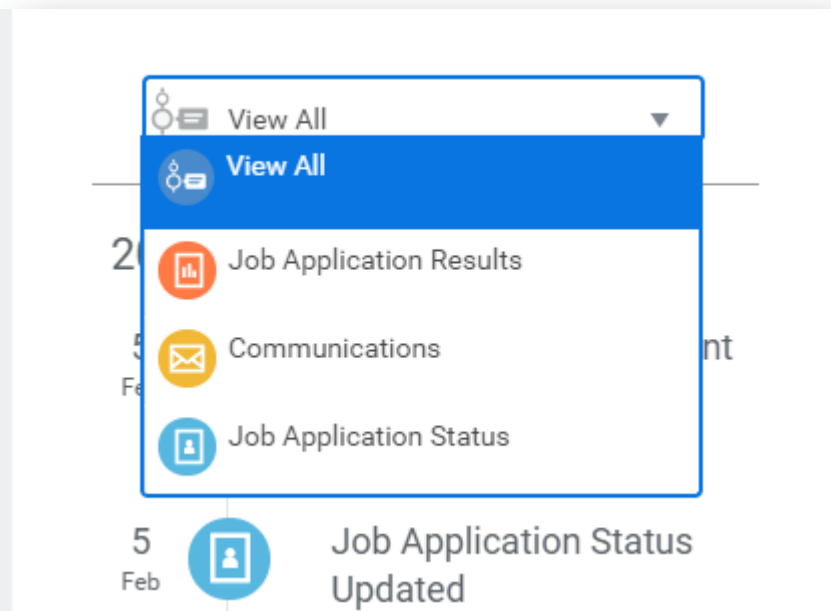
In Progress 1 item

Step	Awaiting M
Submit Hiring Report	Make Offer

Move Forward Decline View All

# Filter on Candidate Activity

- Candidate activity stream displays all the interactions with candidate record view Candidate Profile view.
- Filtering on the activity type will allow you to easily access information for candidates as needed.



# Filter Requisition by Status

- Create filters that can be used across requisitions to identify key information for your department
- Click status at top of grid to view candidates of that status alone

The screenshot shows a requisition management interface with a filter for 'Offer' status. The filter is highlighted with a blue box. Below the filter, a table displays one item with the following details:

Job Application	Step / Disposition	Awaiting Action	Awaiting Me	Date Applied	Current Title	Current Company
<input type="checkbox"/> Cavanagh, Robert	Submit Hiring Report	8	Offer Decision	08/27/2020		

Below the table, there are buttons for 'Move Forward', 'Decline', 'Send Message', and a menu icon.

The screenshot shows a requisition management interface with a filter for 'Job Application' status. The filter is highlighted with a blue box. Below the filter, a table displays 0 of 17 items with the following details:

Job Application	Step / Disposition	Awaiting Action
-----------------	--------------------	-----------------


# Job Requisition Workspace

- Support department, division and central level recruiters in viewing and taking action in job requisitions
- Take action directly from workspace
- Filter by requisition status, manager and location to support your searches

Job Requisition	Status	Hiring Manager	Review ↓	Screen	Referenc
REQ165027 Research Assistant	Posted 183 days ago		163 >	--	--
REQ161987 Research Assistant	Open		93 >	--	--
REQ163446 Lab Assistant	Open		84 >	--	--



# Job Alerts

- Job alerts support internal candidates looking for specific jobs
- Create notifications to interested employees when a job meeting certain criteria is posted
- Provides confidential opportunity to track available positions
- Based on your email settings, alerts may be emailed; they can also be visible in your Workday notification bell 

## Create Job Alert

Search for Create Job Alert and select criteria for positions you would like to be made aware of

Name Your Job Alert \*

Frequency \*

Full/Part-time

Hiring Manager

Job Family

Job Profiles

Job Type

Primary Location

Management Levels

Organization

Skills

# Edit Career Profile

- Workers can update their education, job history, and skills via “Edit Career Profile”
- Career Profile data updated in Workday will be used when applying for jobs internally at Brown via “Find Jobs” report

The screenshot displays the 'Edit Career Profile' interface. On the left, a blue sidebar contains a navigation menu with five items: 'Certifications' (1), 'Education' (2), 'Job History' (3), 'Skills' (4), and 'Summary' (5). The 'Summary' item is highlighted with a red box. A callout box points to the 'Add information to each section' text at the top of the main content area. Another callout box points to the 'Summary' item in the sidebar, with the text 'Use Summary view to display full profile'. A third callout box points to a printer icon at the bottom of the sidebar, with the text 'Download and print if a hard copy is needed'. The main content area shows the 'Edit Job History' section for 'Bus, Gus (640042)'. It includes an 'Add' button and a table with columns for 'Job Title', 'Company', 'Start Date', and 'End Date'. At the bottom of the interface, there are 'Back', 'Next', and 'Close' buttons.

# Workday 36: Feature Highlights

## ***Time Tracking and Absence***

Brown and Workday have made several reporting enhancements to Time Tracking and Absence including:

- Time entry user interface streamlined to provide greater ease of use when submitting time
- Ability to review time more efficiently before it is submitted
- Updated view for approvers to identify submitted time and positions for which they are approving hours
- Mobile time off requests can be added to your Brown or home calendar directly from your smartphone app
- Time off restrictions for weekends has been removed
- Time not entered, not submitted and/or not approved have been consolidated into single report view



BROWN



# Time Entry User Interface

- Access future periods by using arrow by period
- Accessing **Week** will allow you to view day or week view when submitting time
- **Actions** support time entry by week, type, autofill from prior period, and review
- **Summary** allows you to review all time entry for the period in a summarized view prior to submitting

Today < > Mar 7 - 13, 2021 1

Sun, 3/7 Hours: 0 Mon, 3/8 Hours: 0 Tue, 3/9 Hours: 0 Wed, 3/10 Hours: 8 Thu, 3/11 Hours: 0 Fri, 3/12 Hours: 0 Sat, 3/13 Hours: 0

Regular Hours  
8 Hours  
Submitted

Time Period End  
02/28/2021 -  
03/13/2021

**Summary**  
Mar 7 - 13, 2021

Regular	8
Overtime	0
Paid Holiday	0
Time Off	0
Non Worked Hours	0
Shift Differential Hours	0
<b>Total Hours</b>	<b>8</b>

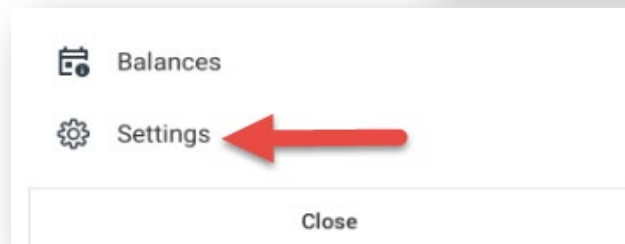
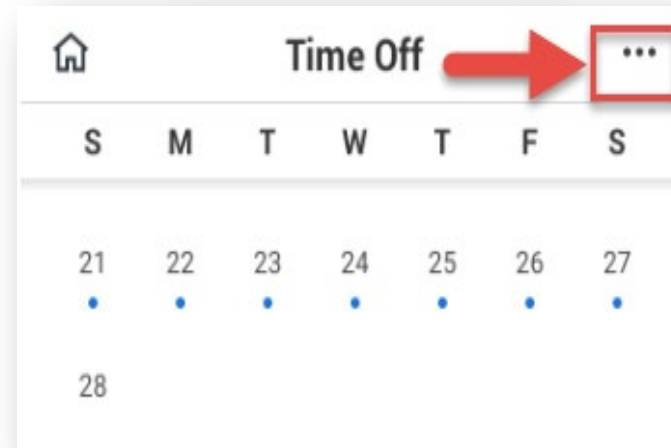
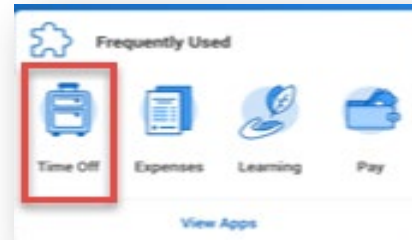
Actions ▾

- Auto-fill from Prior Week
- Clear
- Enter Time by Type
- Enter Time by Week
- Quick Add
- Request Time Off
- Review Time by Week



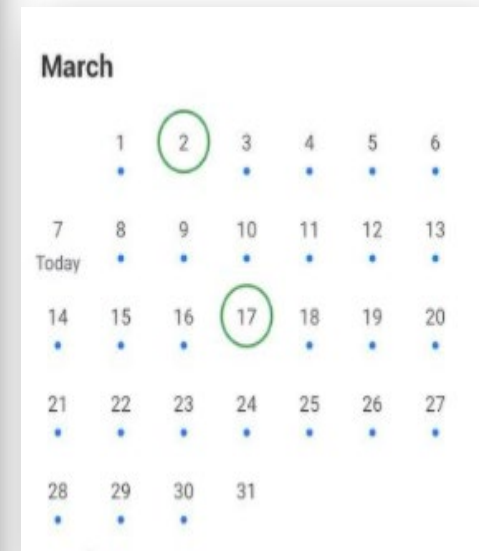
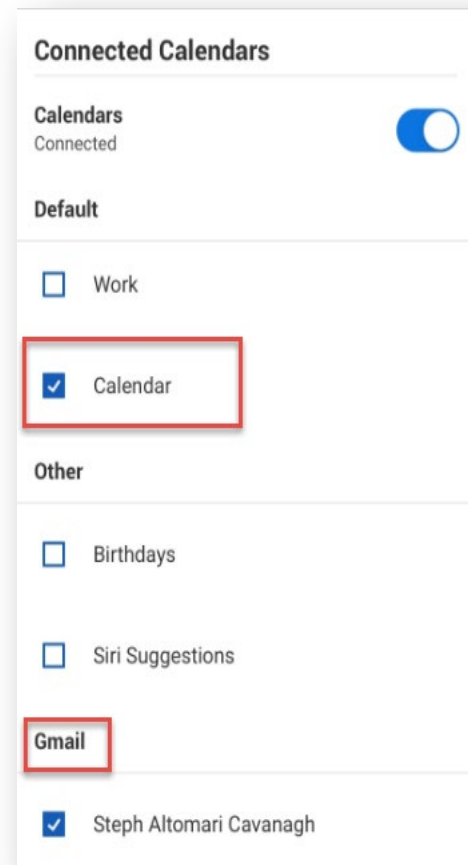
# Time Integration with Smart Phone Calendar

- Accessing **Time Off** from your mobile app will allow you to import calendar details to assist with planning time off requests
- Click ... to access calendar settings
- Click **Settings** to link to your smart phone calendar



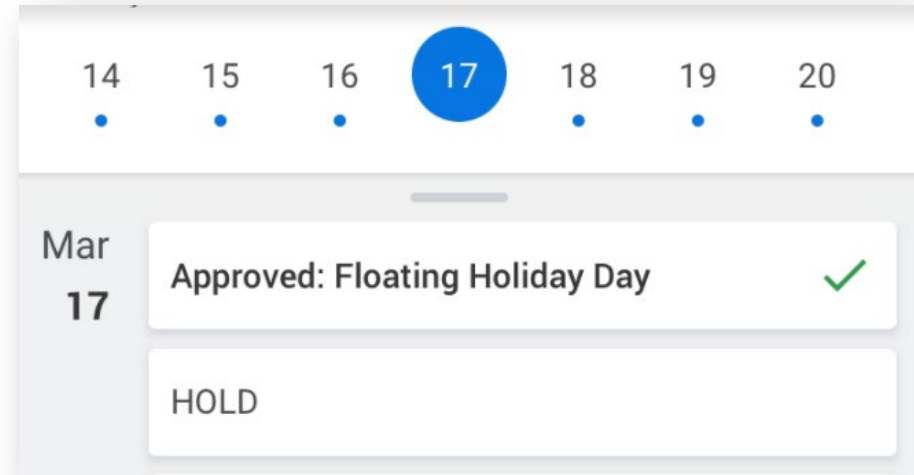
# Time Integration with Smart Phone Calendar

- Select all applicable calendars including Home and Gmail to enable viewing of Brown calendar in application
- Blue dots indicate active schedule item for review
- Green circles signify approved time off



# Time Integration with Smart Phone Calendar

- When clicking on day both in the app and in your smartphone calendar the approved time off will appear



# Time Entry Approval

- View **Total Hours** submitted at a glance and when the entry was submitted
- **Daily Totals** efficiently display overview of time submitted for each day
- **Entries to Approve** will be displayed in the second section of the approval
- **All Current Time** displays all time that has been entered for the period that may have already been approved or is awaiting action by another approver

21 minute(s) ago - Effective 03/13/2021

Regular	Overtime	Paid Holiday	Time Off	Non Worked Hours	Shift Differential Hours	Total Hours
8	0	0	0	0	0	8

Daily Totals 1 item

Date	Type	Hours
Wed, 3/10	Regular Hours	8

Entries to Approve

Turn off the new tables view

1 item

Date	Type	Time Block Reported Quantity	Units	Comment	Details
Wed, 3/10	Regular Hours	8	Hours		🔍



# Weekly Time and Absence Summary - Staff

- Time and time off entries in single report
- Replaces the following reports:
  1. *Time Not Entered – Staff*
  2. *Time Submitted, Not Approved – Staff*
  3. *Time Entered, Not Submitted - Staff*

← Weekly Time and Absence Summary - Staff Actions

Organization: Workday Program Training (Legault, Nicole A (605988)) Start Date: 09/06/2020  
 Include Subordinate Organizations: Yes End Date: 09/12/2020

Returns summary of staff time entries and time off requests for specified date range. For best results, prompt for only one week at a time.

Start date should be a Sunday  
 End date should be Saturday of same week

4 items

Worker	Position	Total								
		Time Not Entered	Time Entered Not Submitted	Time Submitted Not Approved	Unapproved Time Off	Total Reported Hours (All Positions)	Total Time Off for Period	Total Hours for a Period + Time Off	Scheduled Weekly Hours	
Darcy, Fitzwilliam (636746)	POS291520 Training Staff Assistant - Darcy, Fitzwilliam (636746)	✗	0.00	0.00	✗ 7.50	0.00	7.50	7.50	37.50	
Dashwood, Elinor (636745)	POS291521 Training Staff Assistant - Dashwood, Elinor (636745)		✗ 7.50	✗ 22.50	0.00	30.00	7.50	37.50	37.50	
Wentworth, Frederick (636747)	POS291519 Administrative Office Assistant - Wentworth, Frederick (636747)		0.00	0.00	0.00	37.50	0.00	37.50	37.50	
Total		✗	✗ 7.50	✗ 22.50	✗ 7.50	67.50	15.00	82.50	112.50	

# Weekly Time Summary - Students

- Clear summary of total hours worked across all student positions
- Replaces the following reports:
  1. *Time Not Entered – Students*
  2. *Time Submitted, Not Approved – Students*
  3. *Time Entered, Not Submitted - Students*

Worker	Job	Total					
		Count of Student Jobs	Time Not Entered	Time Entered Not Submitted	Time Submitted Not Approved	Approved Time	Total Reported Hours (All Jobs)
Farris, Edward (636740)	POS291768 Workday Student Trainer - Farris, Edward (636740) (+)	1	X	0.00	0.00	0.00	0.00
Victoria, Zoe (629201)	POS291767 Workday Student Demo - Victoria, Zoe (629201) (+)	4		0.00	X 1.50	3.00	4.50
Total		5	X	0.00	X 1.50	3.00	4.50

# Workday 36: Feature Highlights

## *Learning Changes*

Learning updates taken by Brown in this update include:

- Cancel learning enrollment or drop enrollment from a single participant
- Expressing interest in courses with no available offerings or offerings that do not meet your availability
- Learning Programs now support Mass Enrollment to require learning for teams
- Due dates can be set on Mass Enrollments and reported to ensure learning is completed by the assigned date
- Tracking courses in Learning Paths to review and/or register at a later date
- Continue Learning worklet on Learning app will allow you to continue to engage in content that you have not completed



BROWN



# Streamlined View of Content

- Click on learning content and view lesson details
- View available consolidated tasks on learning content
- Display progress of content

Interested in your team doing this course?  
[Enroll My Team](#)

Drop enrollments for others?  
[Drop Learners](#)

No longer want to take this course?  
[Drop Course](#)

Manage your learners' attendance and grades.  
[Manage Roster](#)

View the waitlist for this offering.  
[View Waitlist](#)

← **A is for Apple**  
Course


## test

Attend this live online lesson on the scheduled date using the link below.

DATE	TIME	ENDS AT
Wed, Apr 14, 2021	12:00 AM (GMT-05:00)	9:00 AM

Join Live Lesson  [Copy Link](#)

CONTACTS

 [Tangui, Chantelle L](#)  
Instructor

1 of 2 lessons completed [Show Remaining](#)

# Express Interest

- Click “Express Interest” to track upcoming offerings that meet your requirements
- Interest tracking is available in “My Library” on the Workday Learning app

## Select Offering

Offerings 1 item

Order	Select Offering	Start Date	End Date	Location
1	<input checked="" type="checkbox"/>	03/26/2021 01:00 PM GMT-05:00 Eastern Time (New York)	03/26/2021 02:00 PM GMT-05:00 Eastern Time (New York)	110 Elm Street

Click Express Interest to let your learning administrator know that you're requesting an additional offering.

[Express Interest](#)

# Update Attendance from Roster

- Update attendance for attendees with any of the possible attendance options.

**Overall Grade**

**Enrolled**

Mark selected rows as Attended

1 item | 1 selected

<input type="checkbox"/>	Name	*Overall Attendance
<input checked="" type="checkbox"/>	Altomari Cavanagh, Stephanie M (314198)	<div style="border: 1px solid blue; padding: 5px;"><p>Not Entered</p><p>select one</p><p>Attended</p><p>Partially Attended</p><p>Did Not Attend</p><p><b>Not Entered</b></p></div>

Lesson Title: test

Dates: Wed, Apr 14, 12:00 AM Eastern

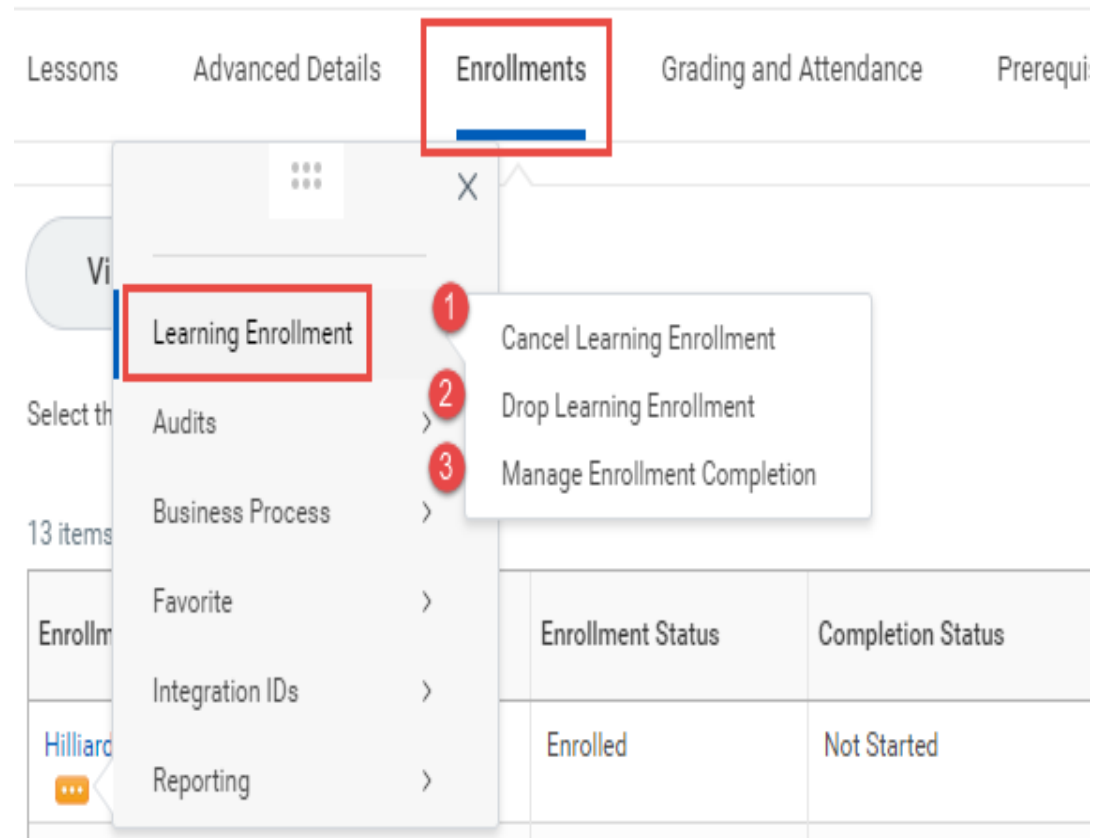
Lesson Type: Instructor Led / Webinar

Track Grades: No

Track Attendance: Yes

# Cancel Learning Enrollment

- Support Learning Coordinators, HR Coordinators, Instructors and managers to cancel learning enrollments as needed
- Navigate to enrollments and select related action, “Learning Enrollment” and “Cancel Learning Enrollment”



The screenshot shows a navigation bar with tabs: Lessons, Advanced Details, Enrollments (highlighted with a red box), Grading and Attendance, and Prerequisite. Below the navigation bar, a dropdown menu is open, showing options: Learning Enrollment (highlighted with a red box), Audits, Business Process, Favorite, Integration IDs, and Reporting. A secondary dropdown menu is open over the 'Learning Enrollment' option, showing three numbered steps: 1. Cancel Learning Enrollment, 2. Drop Learning Enrollment, and 3. Manage Enrollment Completion. Below the dropdown menus, a table is visible with columns 'Enrollment Status' and 'Completion Status'. The first row shows 'Enrolled' and 'Not Started'.

Enrollment Status	Completion Status
Enrolled	Not Started



# Learning Program Mass Enrollments

- Learning Programs group content of different types in a single experience
- Learning Program can now support enrollment either through mass enroll (assigned learning) or direct user enrollment

H is for Hippo

test

Assign as Required Learning


Yes  
 No

Due Date

Due Date Type

select one  
select one  
Date  
Duration

Workers 1 item

<input type="checkbox"/>	Photo	Name	Location
<input type="checkbox"/>		Hilliard, Angel (314800)	South Street Landing

OK Cancel



# Due Dates on Mass Enroll

- During Mass Enroll process, Workday now supports setting due dates for enrolled contents
- Due dates appear in reporting for review

H is for Hippo

test

## Assign as Required Learning

Yes


No

### Due Date

Due Date Type Date

Due Date \* 09/12/2020

Workers 1 item

	Photo	Name	Location
<input type="checkbox"/>		Hilliard, Angel (314800)	South Street Landing

OK

Cancel

# Learning Paths

- Identify courses to view or register for at a later time
- Create groups of courses for action or interest
- Easily create, edit, view and execute on paths

The screenshot displays a user interface for a learning management system. At the top, there are three tabs: "Overview" (selected), "Administrative", and "Enrollments". Below the tabs, the course title "2-Minute Tips for Senior Leaders" is shown, along with a rating of 5 stars (0 reviews) and "3 enrolled". A red box highlights an "Add to" dropdown menu with the following options: "Add to Learning Path", "Add to Watch Later", and "Create Learning Path". Below the course title, there is a "1" in a circle and a "Package" icon. At the bottom of the course card, there are four buttons: "Begin" (orange), "Enroll My Team" (orange), "Edit" (grey), and "Drop All" (grey). Below the course card, there is a "Learn" section with a red box around "My Library" and other options: "Search for Available Learning", "Full Course Catalog (Displays All Learning Content)", and "More (3)".



# Workday 36: Feature Highlights

## ***Effort Certification***

The Effort Certification changes deployed by Workday in this update include:

- Update of effort view to include aggregate tab for consolidated pay period view of effort
- Display link from PAA to effort report for efficient access to data
- Summary Totals enabled PAA initiators to validate changes to ensure grouped details net to zero

# Effort Certification Status Report

- Expand **Details** to view full information on effort process
- Status available throughout view
- Position tab details total current FTE of positions associated with effort report

**Administrative Review** ...

5 day(s) ago - Due 04/01/2021

[Details](#)      Effort Certification Status: In Progress      Changed Status: Unchanged

Summary    Aggregate    Details    **Positions**    Organizations    Process History

Positions 1 item

Turn off the new tables view

Position	FTE
POC - Graduate Research Assistant	0%

# Stay Tuned...

- Next release of Workday functionality in September 2021