Workday 40 System Update

Feature Highlights| March 2023

Agenda

- Workday Update Methodology

- Feature Highlights

- Stay Tuned

Workday 40: 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

Workday 40: Feature Highlights

User Experience Changes

- Workday App Navigation

- My Tasks Features

- Landing Page Enhancements

- Workday Assistant updates

- Introducing Hubs

- Recovery Assistant Update
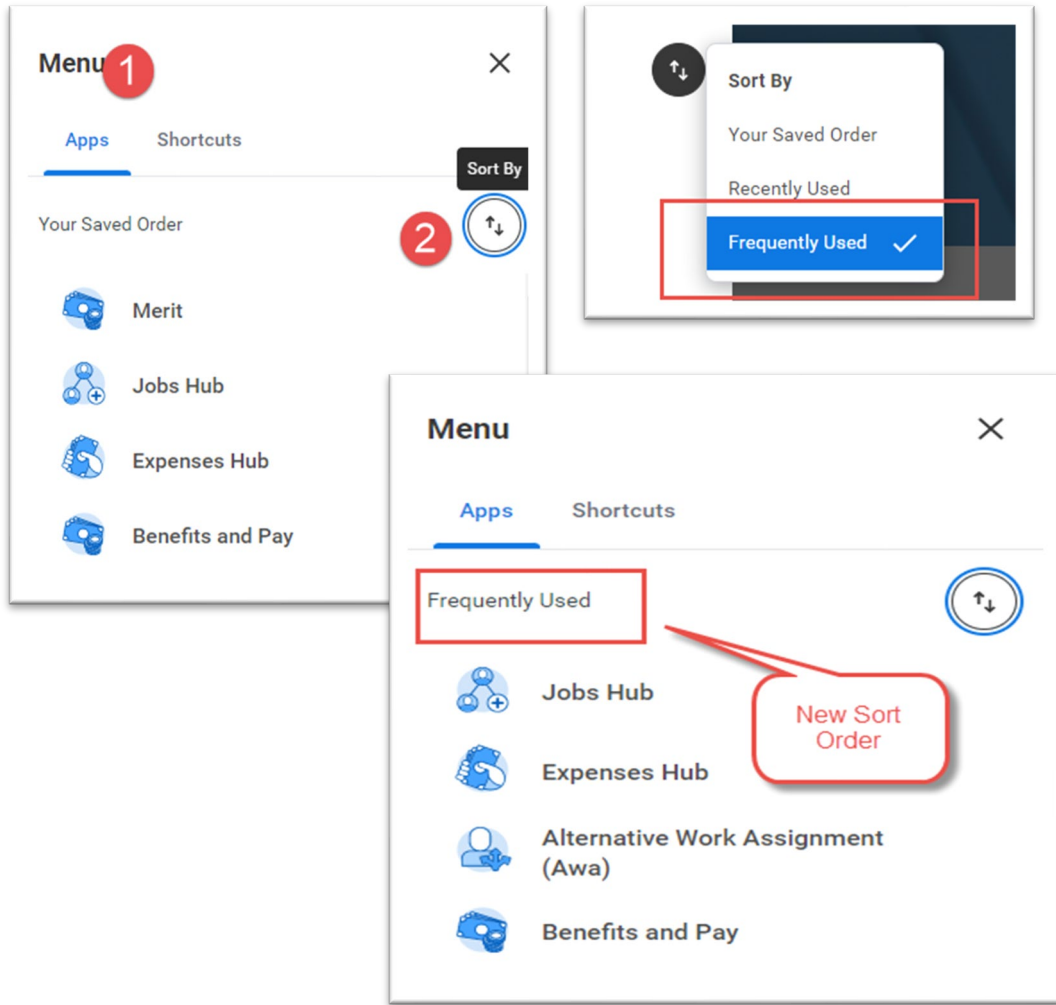
- Sort can be reset in menu to view Apps. From "Menu", use the arrow icon to re-order your Apps

- Select to sort App using the following options:
  - Your Saved Order - Apps displayed as currently saved in Menu
  - Recently Used - Apps displayed in order of most recently used
  - Frequently Used - Apps displayed in order of most frequently used

- Once sort order is selected, all future menu engagement will use selected sort. Sort can be updated at any time.

# Global Menu and Sorting Apps

- Advanced Search in "My Tasks" supports searches by task type, step and date range

- Once search is set, it can be edited, removed or saved

- To remove saved search, select arrow icon to return to all results

My Tasks Advance Search
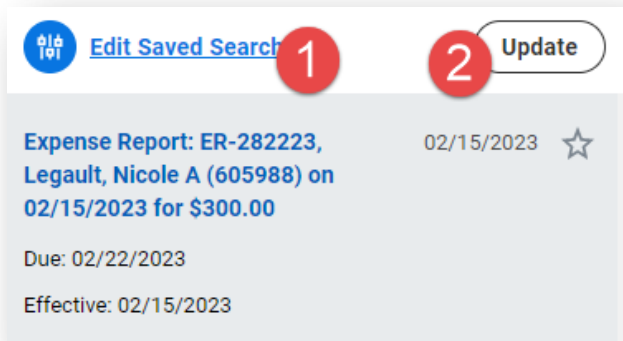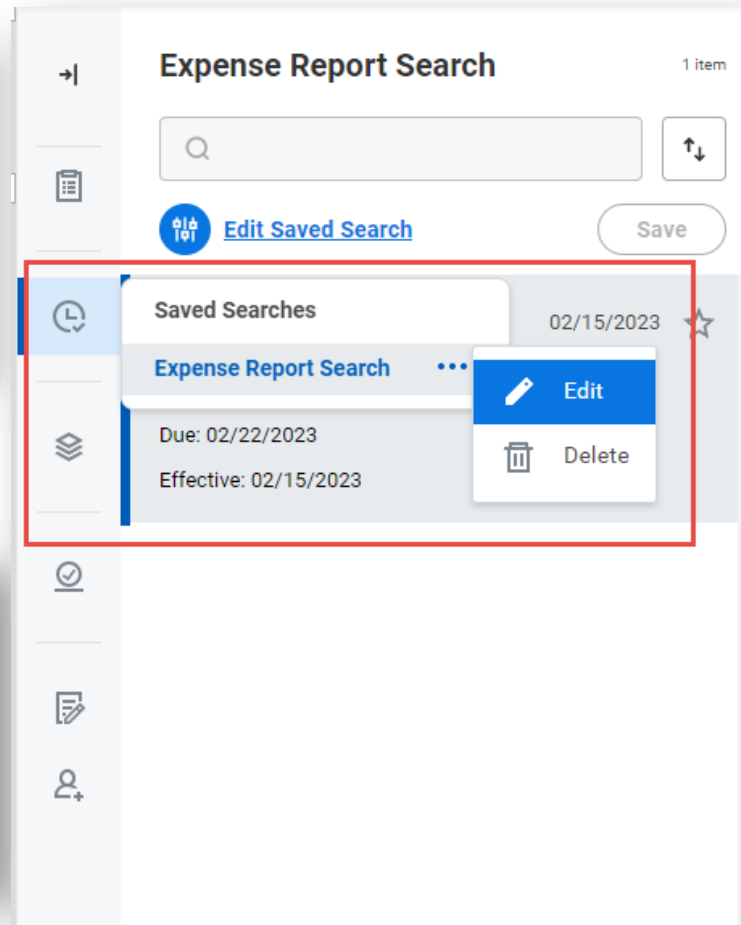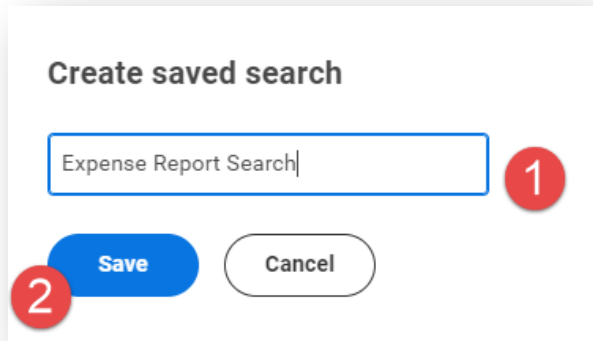
- Once search is set, it can be saved to identify critical tasks on an ongoing basis

- Saved searched can be updated as need to include additional criteria

- Saved searches can also be deleted and managed through your tasks toolbar

My Tasks Advance Search
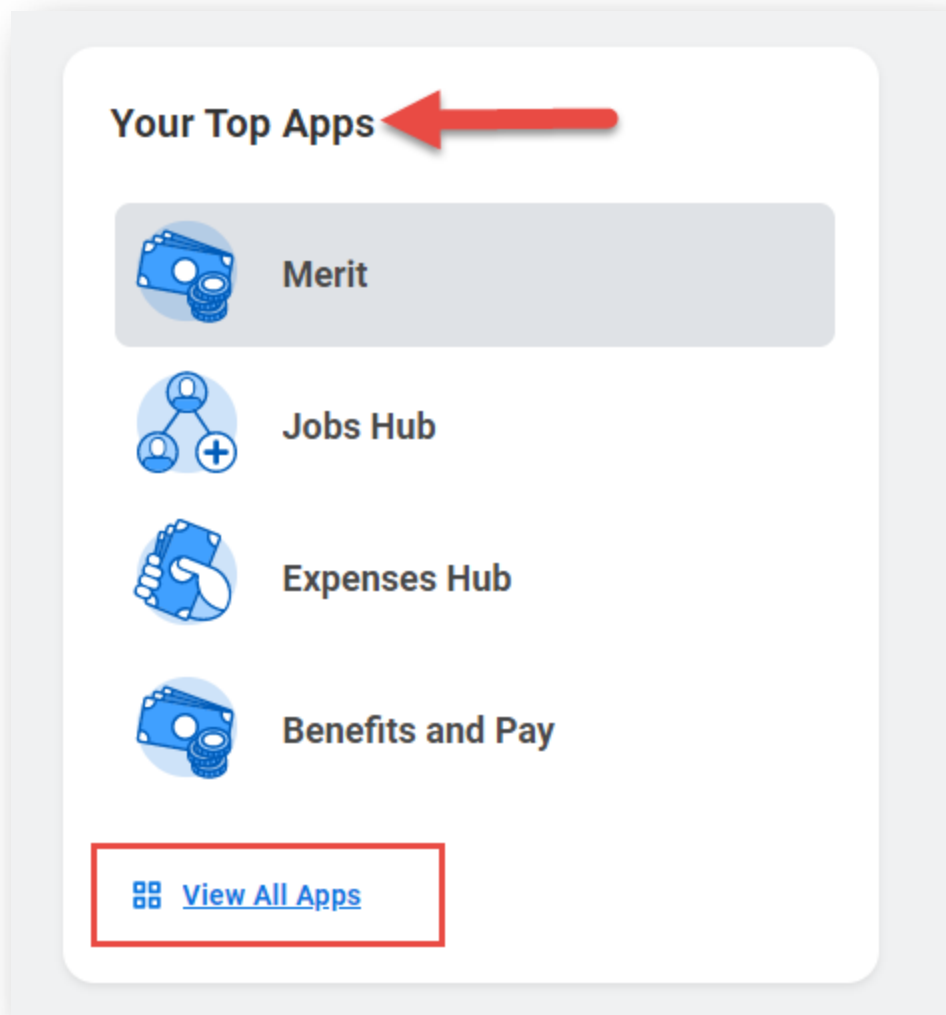
- "Your Top Apps" links to your "Menu" of Apps page

- Lists Apps in "Menu" Based Order

- Changing the sort order to "Your Saved Order" of the Apps will impact your top App view

Landing Page Enhancements
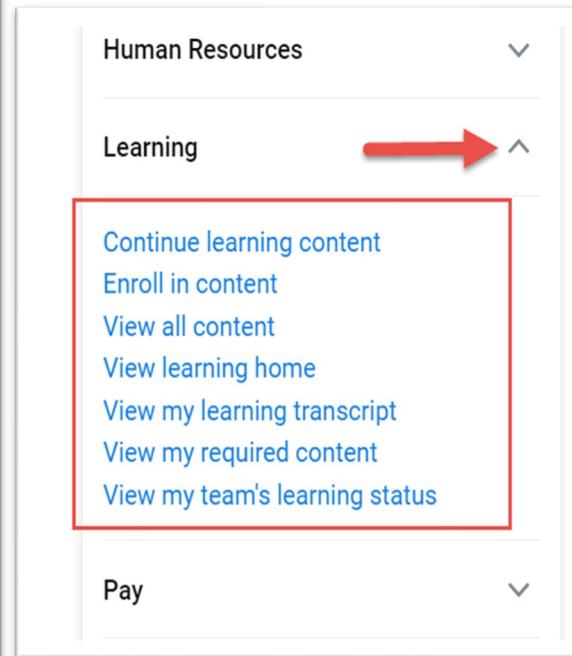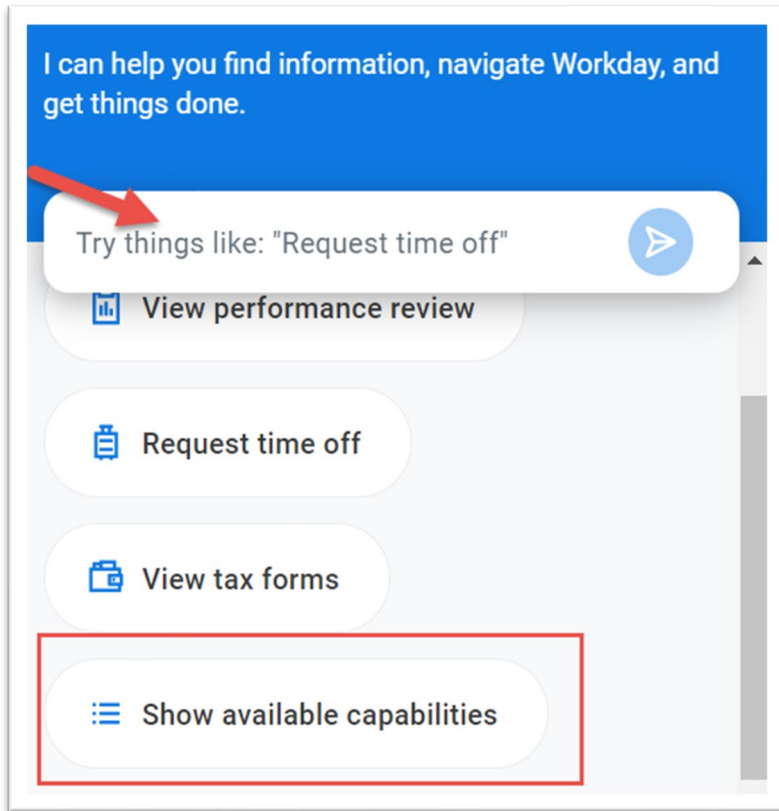
- Workday Assistant supports self service tasks such as requesting time off, viewing performance reviews, enrolling in learning content or updating contact information

- To get started, use search, select from the list of topic options or use "show available capabilities"

- Once on the topic heading, select from a list of items that Workday Assistant can support
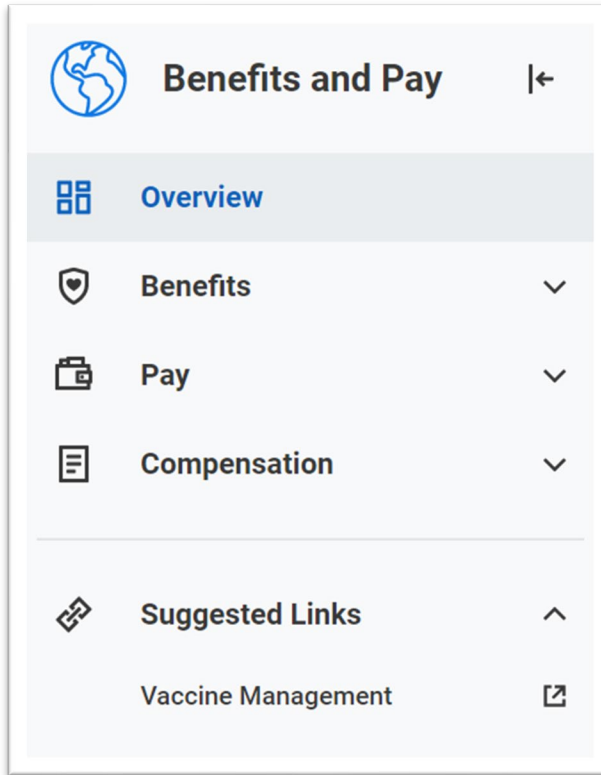
Workday Assistant

- Hubs consolidate tasks, reports and data in a single place

- Expenses Hub, Job Hub, Pay and Benefits Hub and Time and Absence Hub are phasing in beginning March, 2023

Introducing Hubs
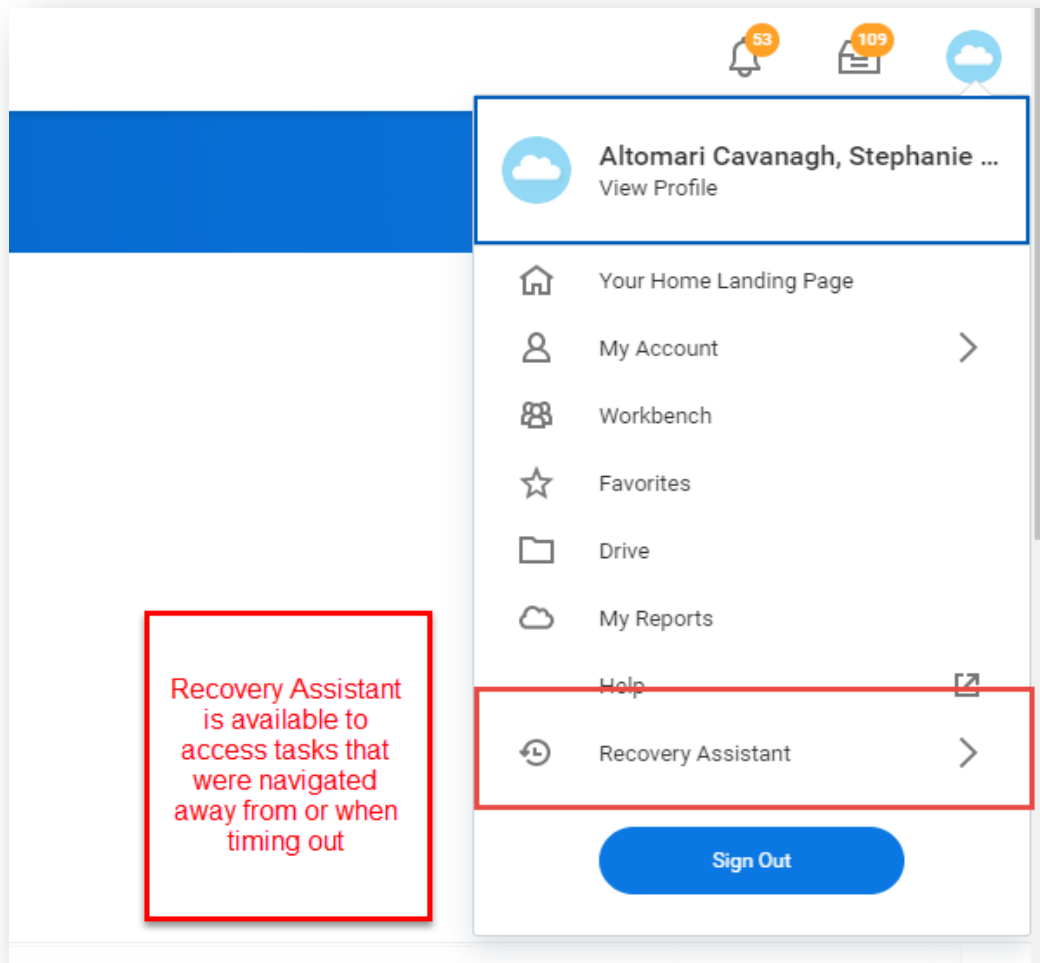
- "Recovery Assistant" available for tasks begun and navigated away from within 24 hours of last interaction

- Available via worker profile cloud

Recovery Assistant

- View your prior pay slips, most recent pay and deductions, make changes to payment elections (direct deposit), and update tax elections

- View and make changes to benefit elections, view ACA forms, and view and update beneficiaries and dependents

- View compensation and one time payment history as well as merit statements

Pay and Benefits Hub

- View available positions and prior application status. Use Brown Jobs to search and apply to staff positions

- View in progress applications and withdraw application as needed via "My Applications"

- Setup job alerts to be notified of job of interest based on profile, job family and manager

Jobs Hub

- View expense reports awaiting action

- Create and view expense report status and history

- View expense transactions awaiting expense report assignment

- *Coming spring, 2023*

Expenses Hub

Workday 40: Feature Highlights

Recruiting, Staffing and Payroll

- Employee Contract Tracking

- Internal Job Application changes

- Notes on Candidate Profiles and Job Requisitions

- Job Change from Worker Profile

- Create Job Alert

- Inclusive enhancements including Sexual Orientation, Pronunciation and Pronoun

- Model My Pay
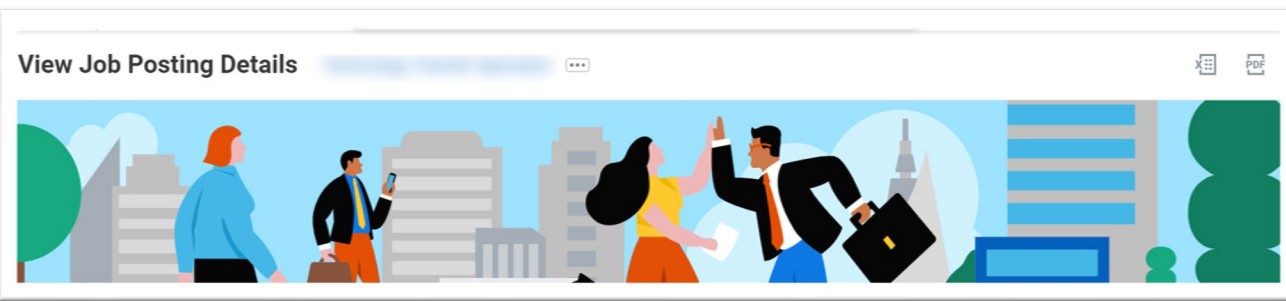
- Ability to create employee contracts in UHR

- Used to track offer details and administrative notes requiring action during contract review and renewal

Employee Contracts

- Streamlined view of job description

- Access to view position organization relationship

- View similar jobs and create alert directly on posting

- Defaulting contact information for Workday during application process

Internal Job Applications
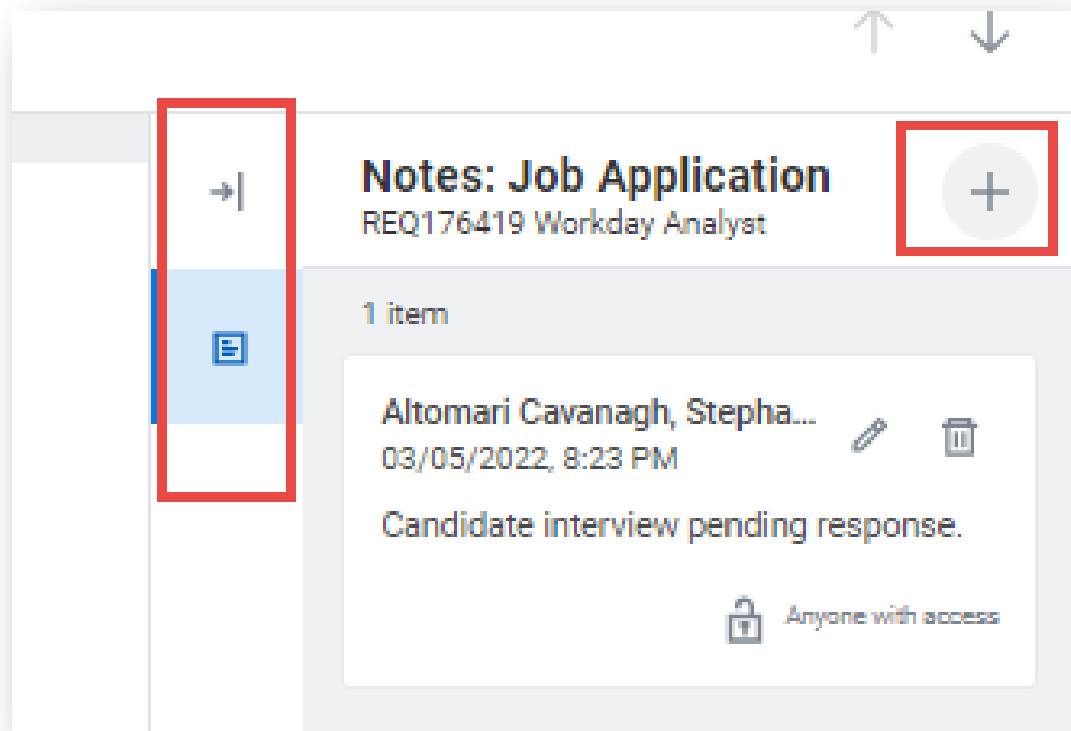
- "Candidate Notes" on job applications allow those reviewing applications to communicate and coordinate on status

- Notes are visible to all that have access to requisition internally

Candidate Notes

- "Requisition Notes" enable those working on requisitions to collaborate and coordinate on status

- Notes are visible to all that have access to requisition internally

Requisition Notes

- Change Job now appears on worker profile

- Available to begin transfer process as needed to those with access
- Location changes to be deployed to HR Coordinators via Change Job **spring, 2023**

Change Job from Worker Profile

Create Job Alert

Name Your Job Alert *

Frequency *

Full/Part-time

Hiring Manager

Job Family

Job Profiles

Job Type

Primary Location

Management Levels

Organization

Skills

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

- Job alerts support internal candidates looking for specific jobs and create notifications 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 notifications

Create Job Alerts from Job Hub

- Employees have the option to include visual phonetic name pronunciation in Workday.

- Use the "Change My Name Pronunciation" task in Workday to update pronunciation

- Pronoun is available for update via Update Personal Information. Pronoun as well as name pronunciation is available to be viewed on the Overview tab under the Employee Directory section

- Sexual Identity is another optional field available for employees to support inclusivity. Use this field for identity beyond Legal Sex. This information is not shared in the directory or employee profile.

Inclusive Updates

- Model My Pay can be used to review your taxation elections and project potential changes prior to making them in Workday

- Federal and/or state taxation updates are available for review by choosing the respective adjustment and then model

Model My Pay

Workday 40: Feature Highlights

Purchasing and Supplier Accounts

- My Requisitions
- Supplier Contracts from Requisitions
- Draft Receipt Warning
- Exclude from Mass Close
- Buyer Hub
- Expense Distance Calculation
- Supplier Account Analytics
- Supplier Management

- "My Requisitions" report has been changed to easily identify requisitions you have initiated

- "My Requisitions" also supports the initiation of requisitions for Financial Coordinators

My Requisitions

- Requisitions Initiated from "My Requisitions" will have a streamlined look but same behavior as requisitions created outside of "My Requisitions"

- Requisition sections highlight different components of requisition for update and submission

Requisitions Initiated from My Requisitions

- Requisition process can be used to initiate supplier contracts

- Process will route and be sourced to create a contract

- Contracts can then be used to generate obligations and track balances

Supplier Contracts from Requisitions

- When creating a receipt, Workday displays an alert when a receipt draft is in progress

- The initiator will be presented with an option to edit receipt currently in draft

Identify Receipts in Draft for Edit
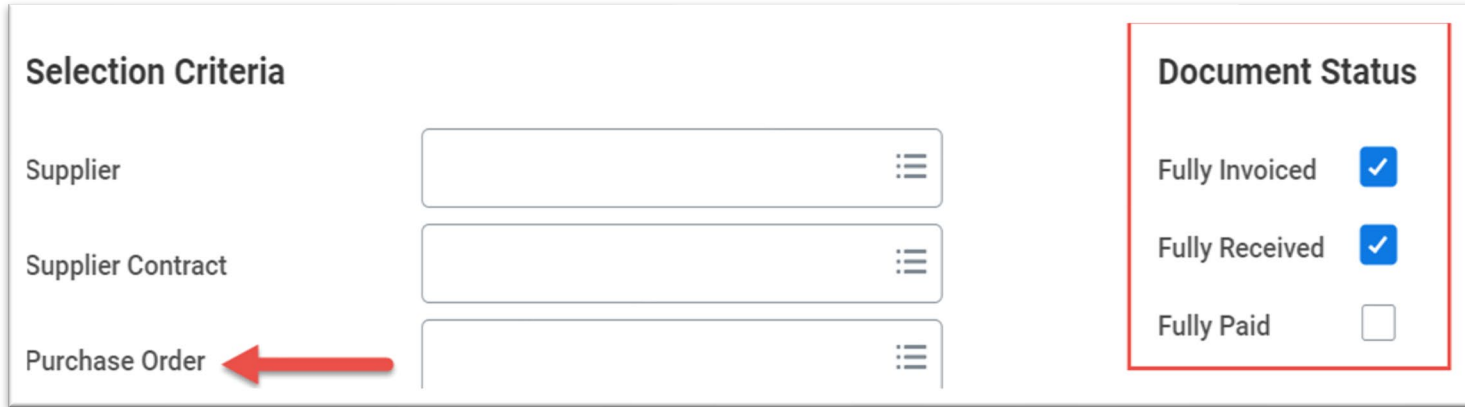
- Google maps is available to calculate mileage distance in expense process

- Round trip calculation can automatically be assessed by selecting "Round Trip". **Available spring, 2023**
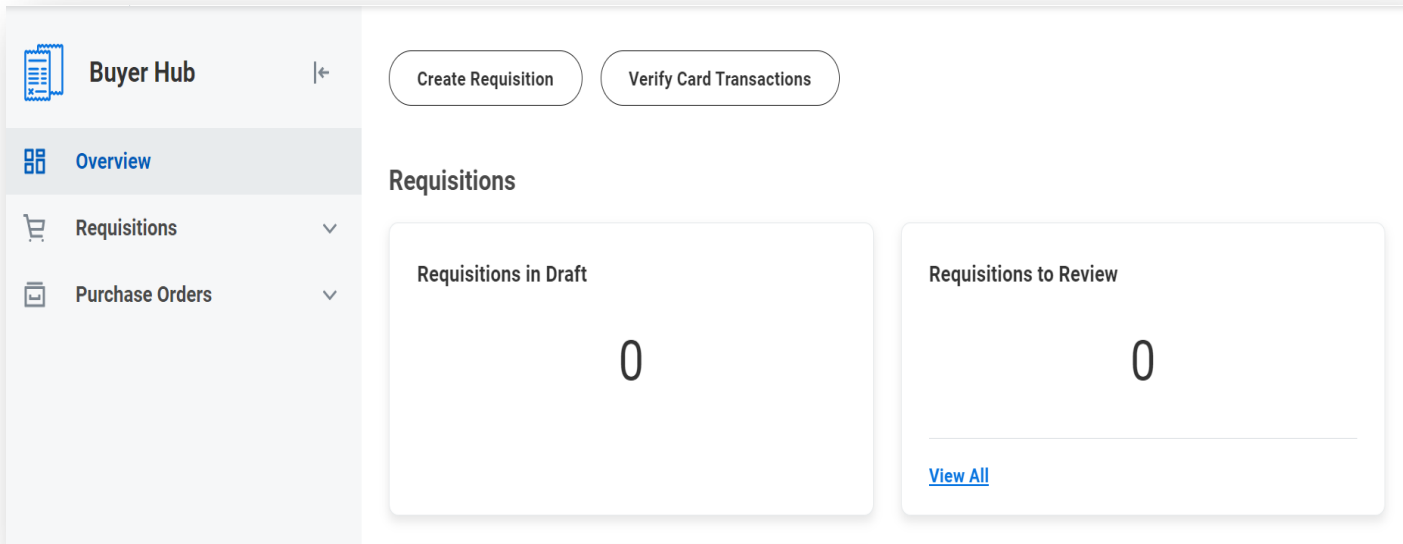
Distance Calculation

- When running mass close procurement document business process, you can prevent users from executing mass close of POs

- Document status prompts as well as specific purchase orders can now be exempted from the mass close process

Exclude from Mass Close

- "Buyer Hub" supports centralized buyers in a single space to review, update and report on requisition and PO activity

- Additional reports can be added to "Buyer Hub" as needed

Buyer Hub
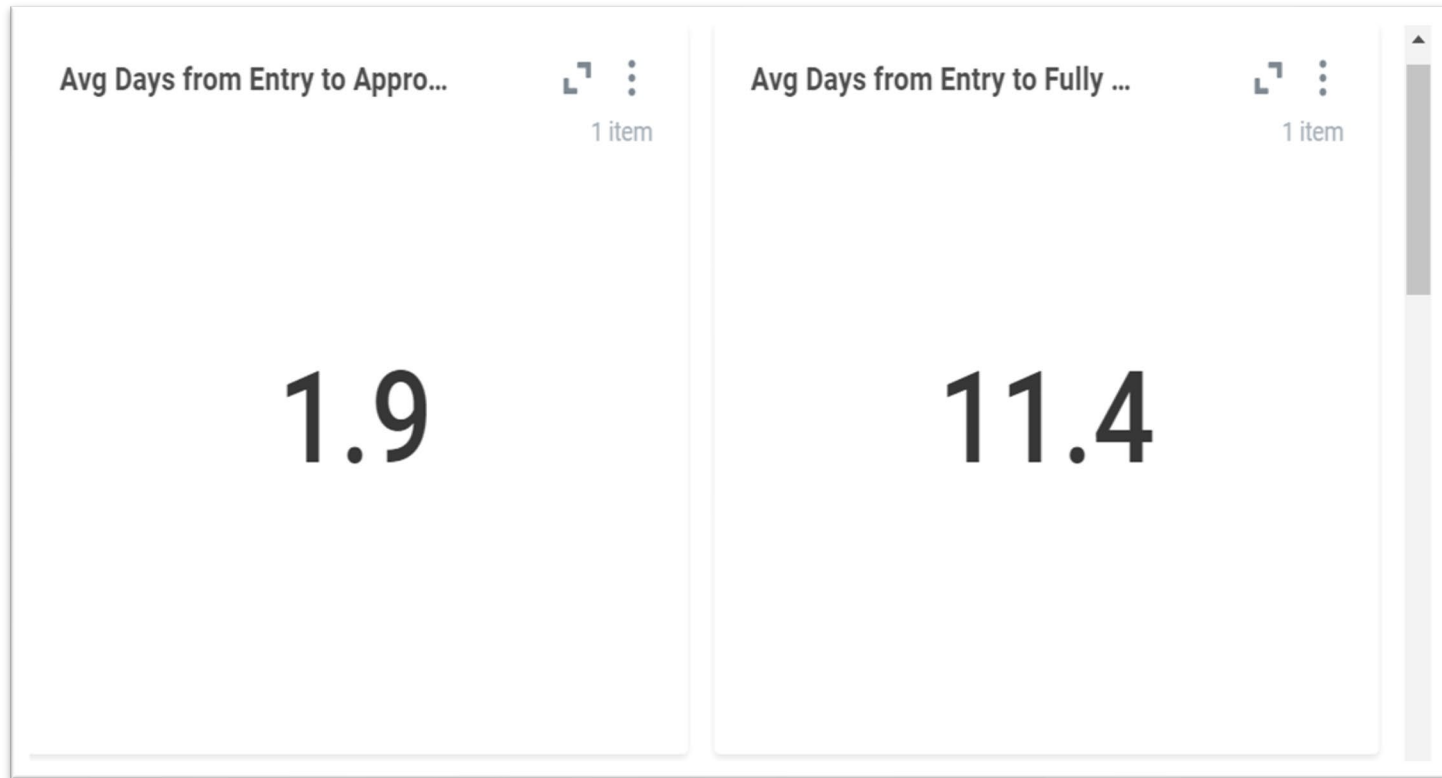
- Supplier transaction summaries, supplier creation and days to complete available to Accounts Payable

- Other KPIs also available

Supplier Account Dashboard

- Supplier registration is moving to the Workday platform in **spring, 2023**

- Suppliers will be sent a registration link and integrated to Workday once approved by AP

- Miscellaneous payments are also being deployed in **spring, 2023** to support non-suppliers

Upcoming Supplier Management Changes

Workday 40: Feature Highlights

Learning and Skills

- Access Learning Dashboard from Content

- Share Learning Paths

- Learning Recommendations on Content

- Learning in Workday Assistant

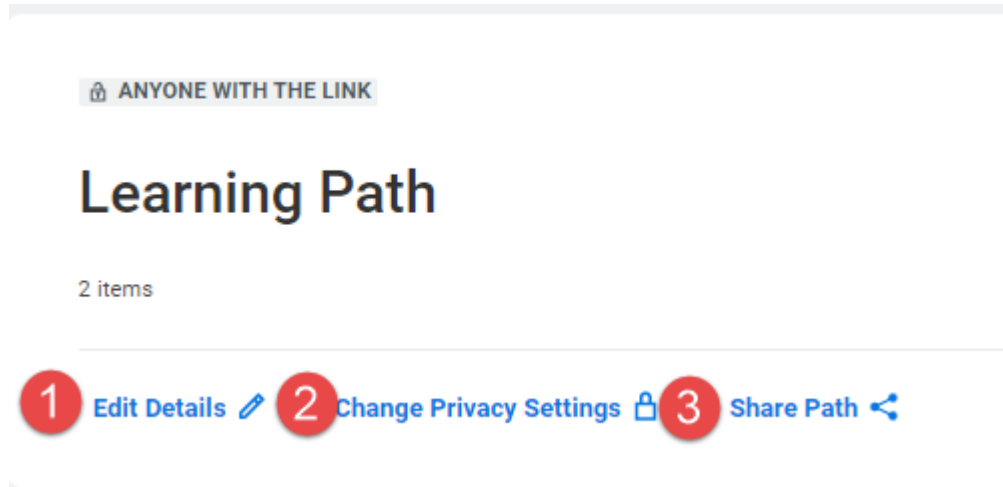- View and Retake courses

- Skills available
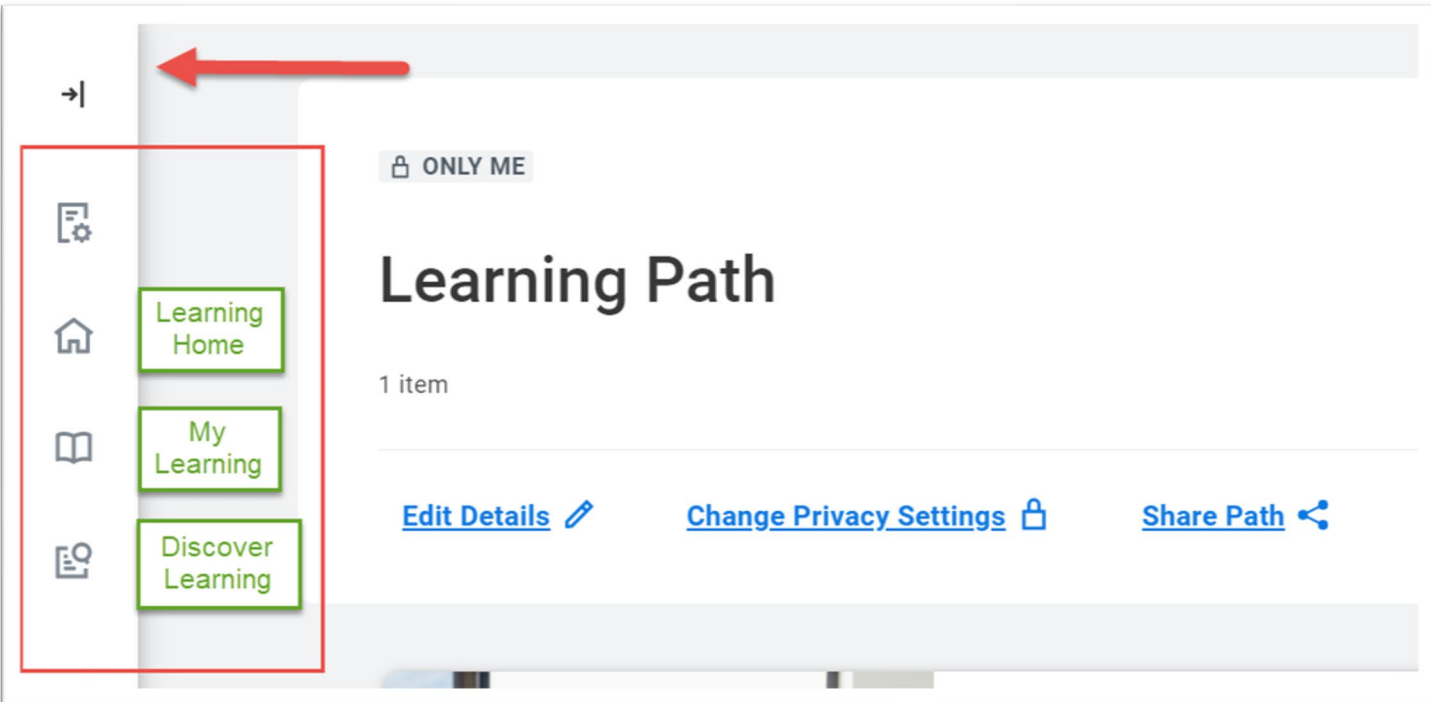
- When accessing any learning content or dashboard page, access to Learning remains active

- Launch the Learning dashboard tool bar to return to view additional content

Learning Dashboard
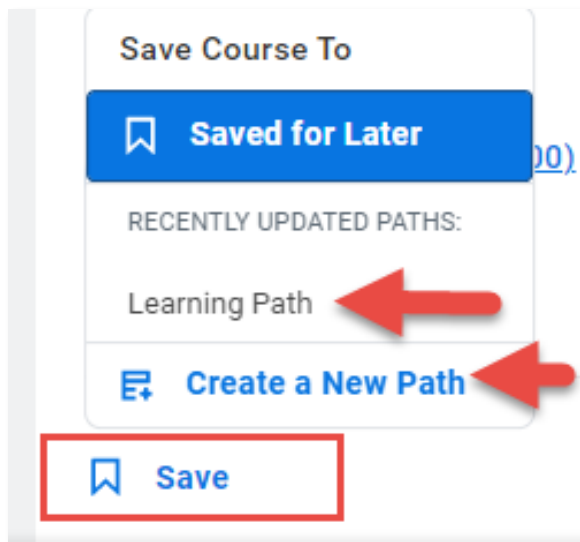
- Learning Paths are groupings of training content that can be created by saving learning pages

- Once a path is created, it can be shared, edited or updated to be made private to the learner only

- Once **Share Path** is selected, the link has been copied and can be sent to any other learner

# Sharing Learning Paths

- When reviewing content, recommendations for similar content may be available

- Review "You Might Also Be Interested In" to tab through related content

Learning Recommendations
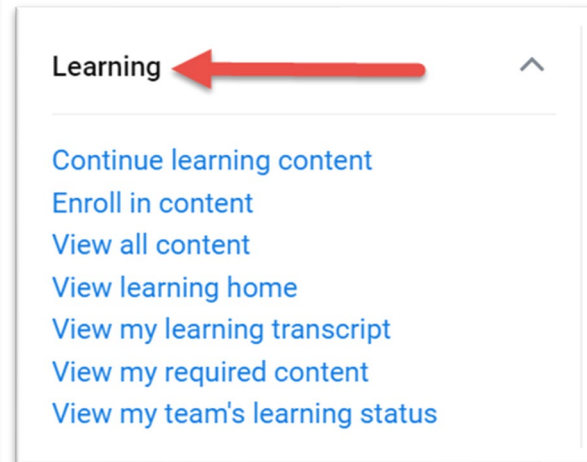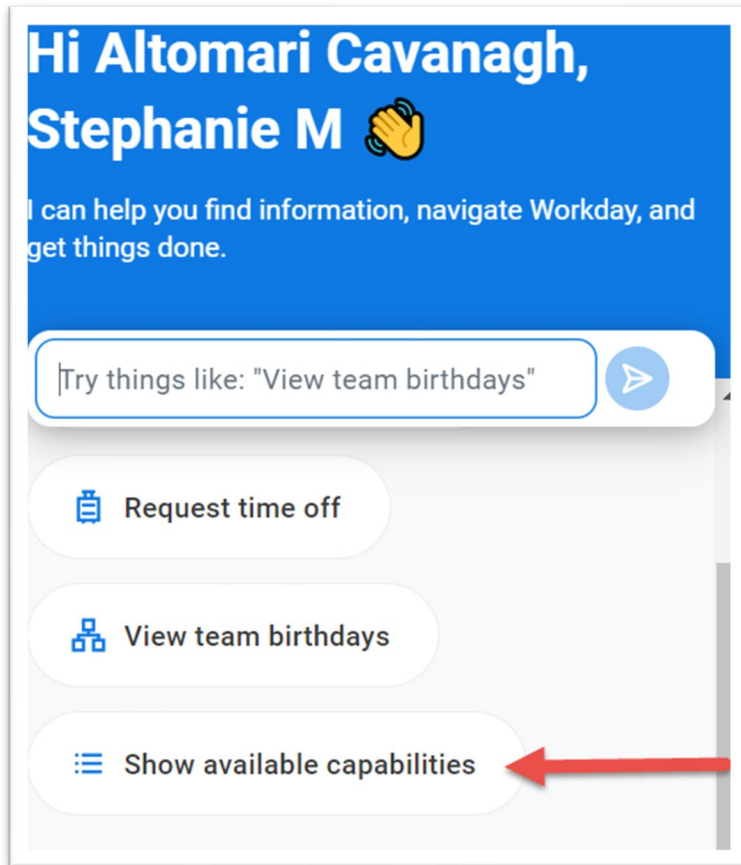
- "Workday Assistant" can now help support users enroll in learning content, view transcript status for your team and view required learning

- Launch by selecting Assistant and typing "Learning"

Learning Assistant
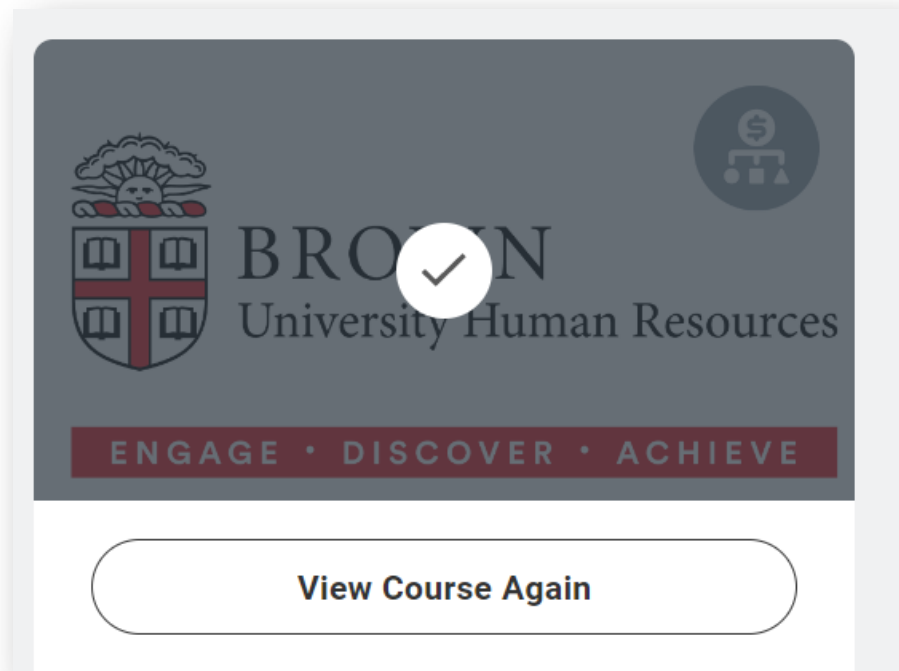
- Once a user has completed learning content, the user experience will vary when reviewing the content. Users that have failed scored content will see "Retake"

- Those receiving a passing score on content will see "View" to take the course again

View versus Retake
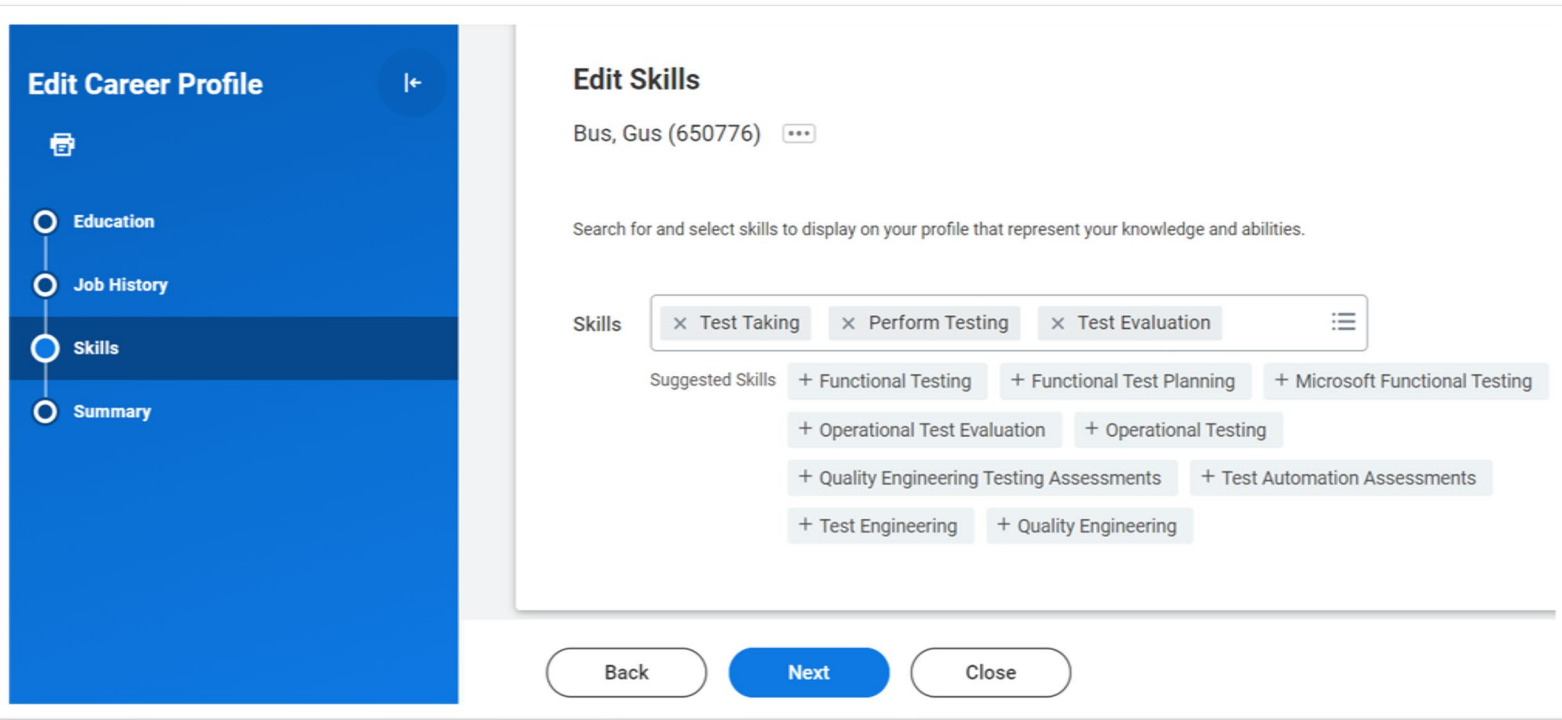
- Skills have been enabled in Workday and can be added to staff professional profiles and internal job applications

- Skills will be expanded through 2023 to be included in job requisitions and learning content

Skills Enabled

Workday 40:
Feature Highlights

Mobile

- User Interface Update

- Name Pronunciation via Mobile

- Learning Actions

- Create Receipt for PO

- Scan Receipts and Create Expense reports via Mobile
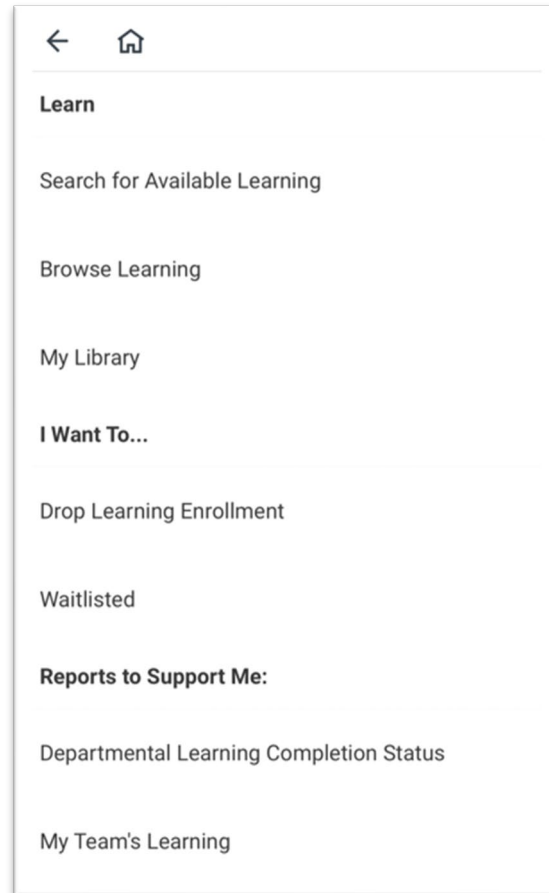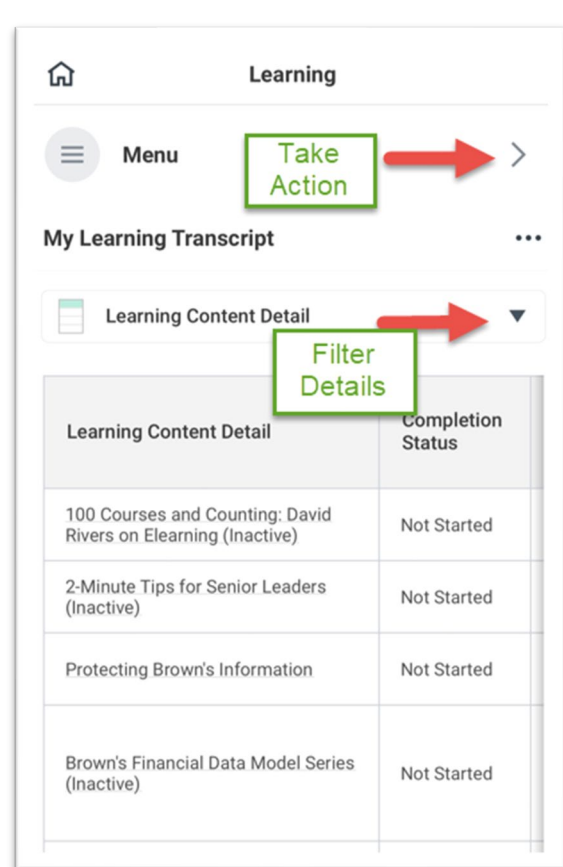
- Access learning activities and transcript details

- Take action to drop learning enrollments and enroll in additional content

- Continue learning directly from transcript for in progress, media based content
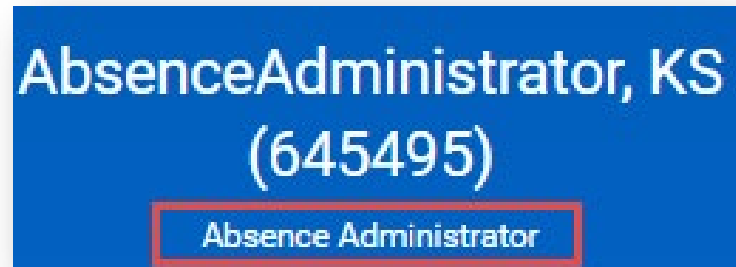
Learning Access
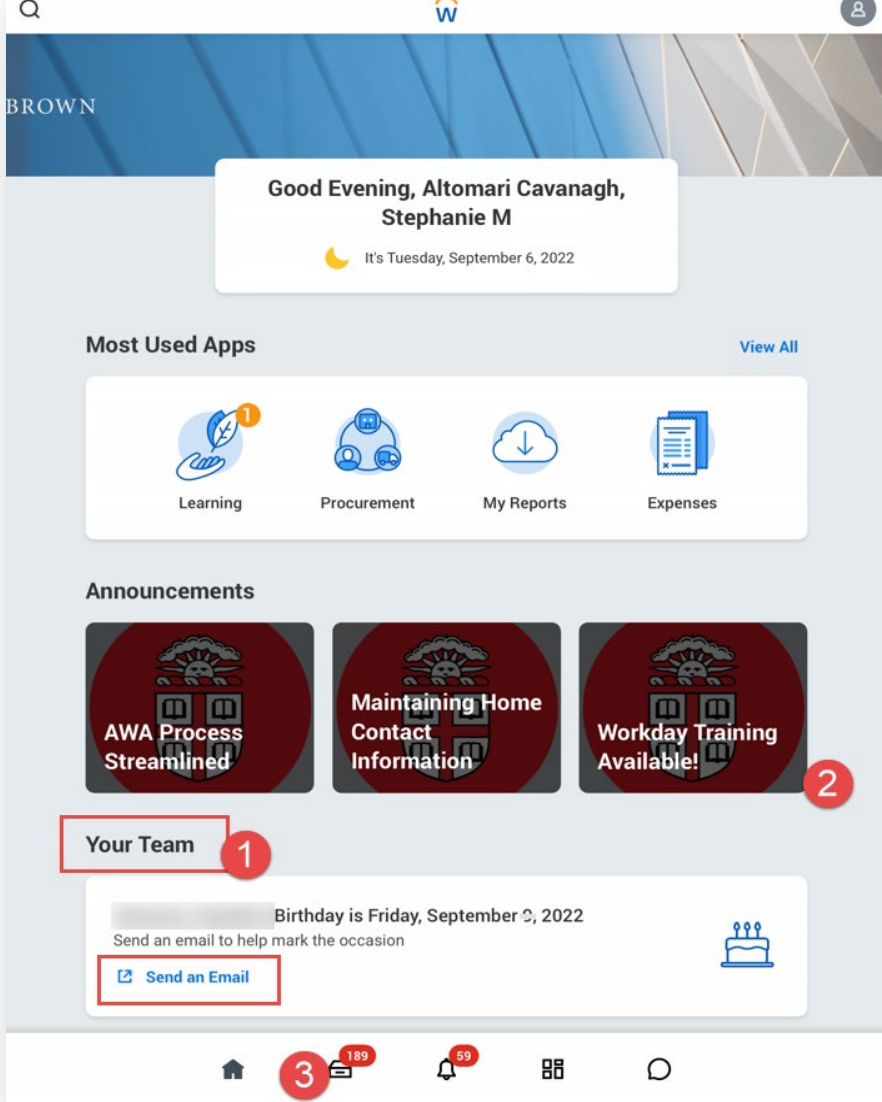
- Email workers directly from notification of birthday or anniversary

- Access Learning to engage in media based content via mobile

- Access inbox and review most tasks for completion
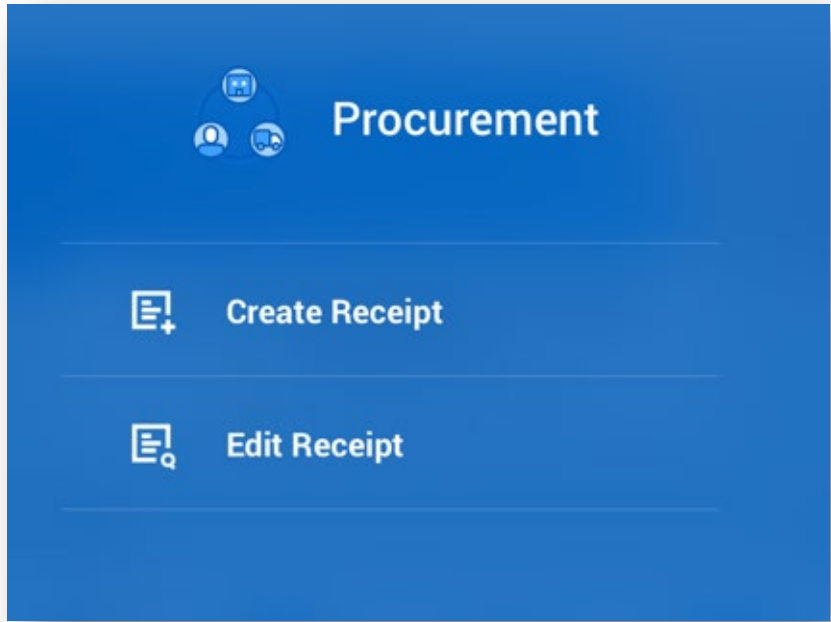
Mobile User Interface Enhancements

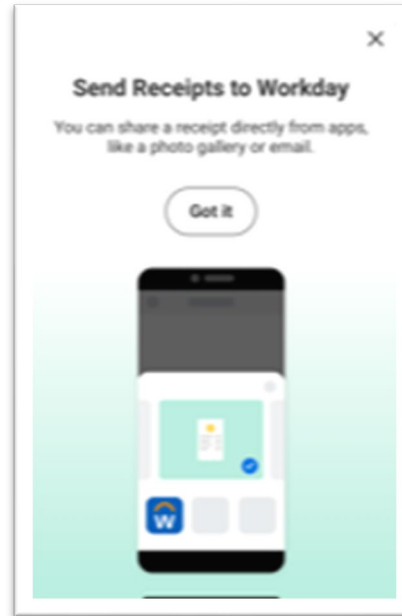- Name pronunciation is available to update in mobile and is viewable on workers profile when using the Workday Mobile app
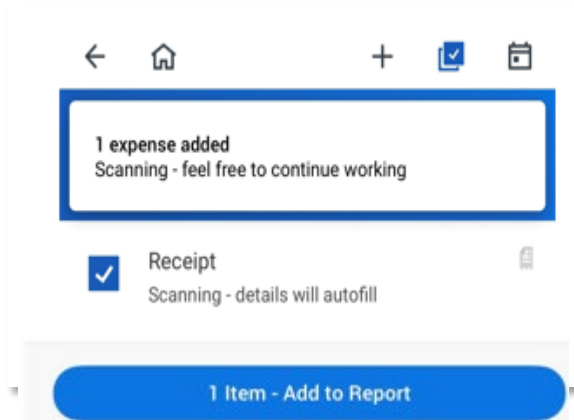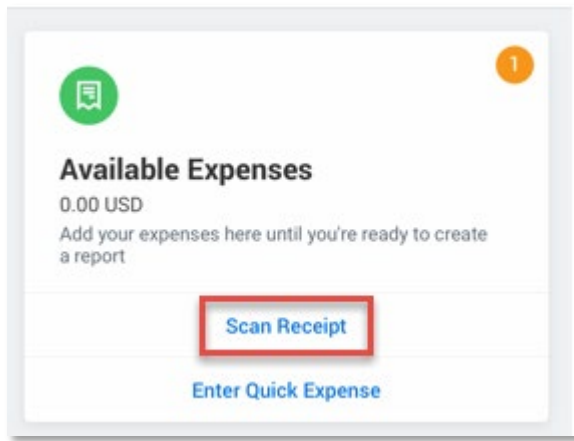
Name Pronunciation via Mobile

- Financial Coordinators can create or edit receipt right from the mobile application

- Receipt will route as designed once completed

Create or Edit Receipt from Mobile

- Receipt scanning directly from "Create Expense Report" process in mobile application

- Once scanned, select applicable receipts and then "Add to Report"

Mobile Expenses
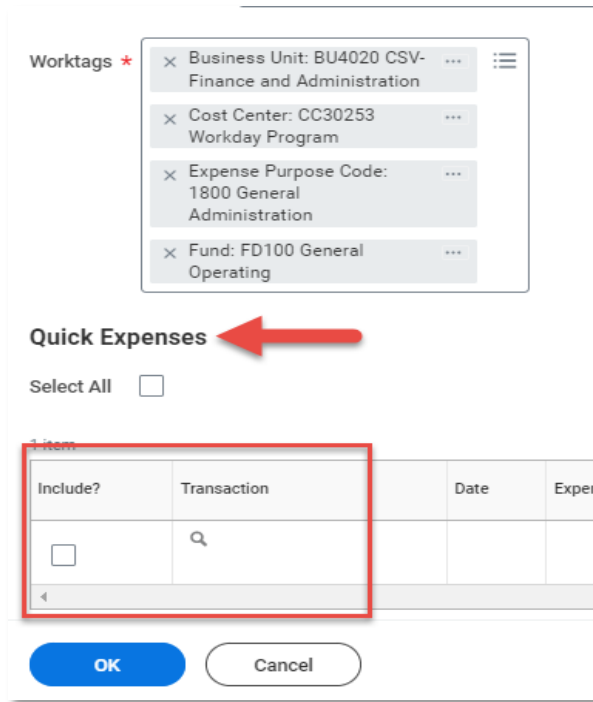
- Complete your expense report on the mobile application or log onto Workday from your computer.

- The scanned receipt will be awaiting your action when creating the next expense report in Workday

Mobile Expenses

- Next release of Workday functionality in September 2023