



Workday 41 System Update

Feature Highlights | September 2023

Agenda

- Workday Update Methodology
- Feature Highlights
- Stay Tuned

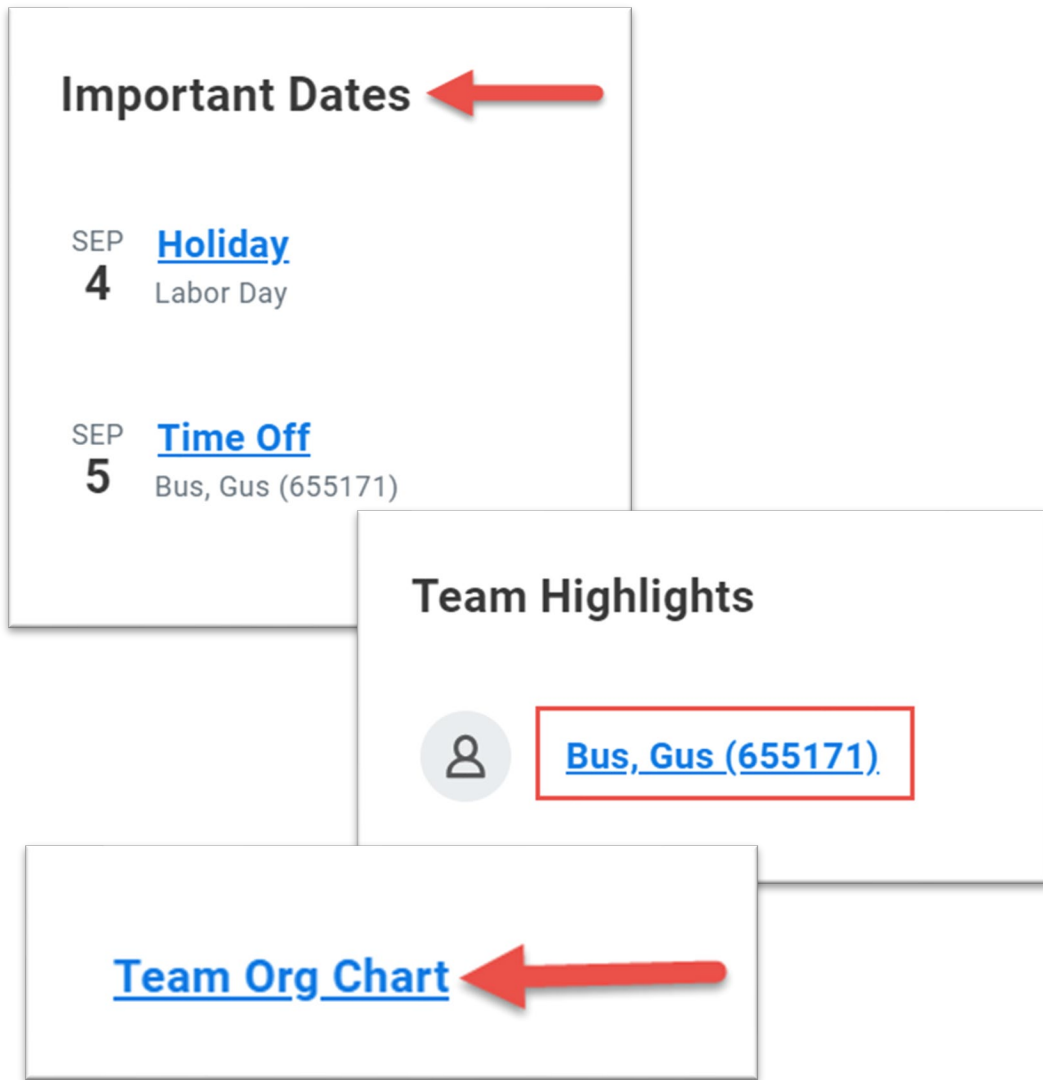
Workday 41: Methodology

- 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 41: Feature Highlights

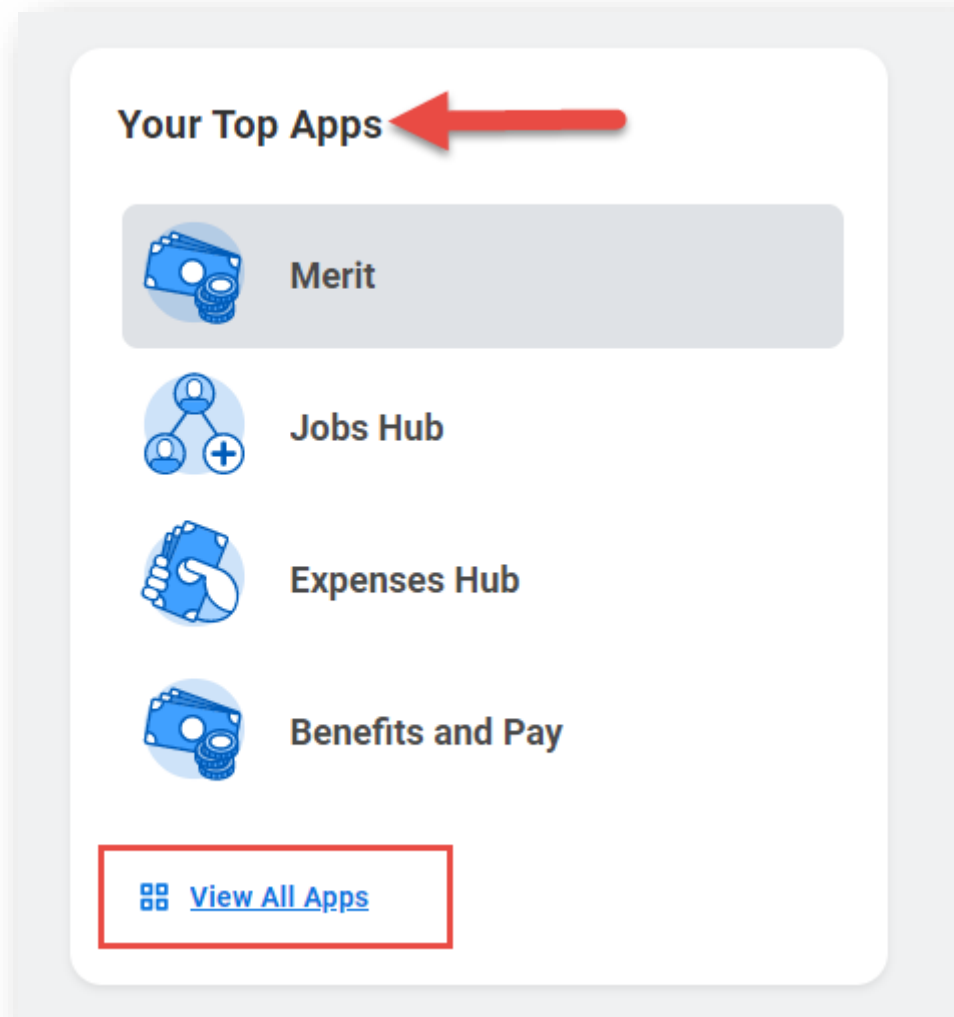
User Experience Changes

- Home Page Enhancements: Important Dates and Team Highlights
- Quick Review Task from Home Page
- My Tasks Advanced Filters
- Workday Assistant updates
- Expanding Hubs
- Recovery Assistant Update



- Important Dates can be found at the top of the Workday Home landing page to include birth month and day, work anniversaries, holidays and time off for your direct reports
- Team Highlights will display all your direct reports and make accessing their employee profiles easy with a single click
- Click “Team Org Chart” to view your organization, superior and subordinate organizations at Brown
- All managers will have access to this data


Home Page Enhancements



- “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


Home Page Enhancements

Awaiting Your Action ...



 [Time Off Correction: Bus, Gus \(655171\)](#)

My Tasks - 38 second(s) ago





DUE 08/30/2023

 **Quick Review**


Review ✕

Time Off Correction: Bus, Gus (655171)  

Details to Review

Time Off Correction 1 item    

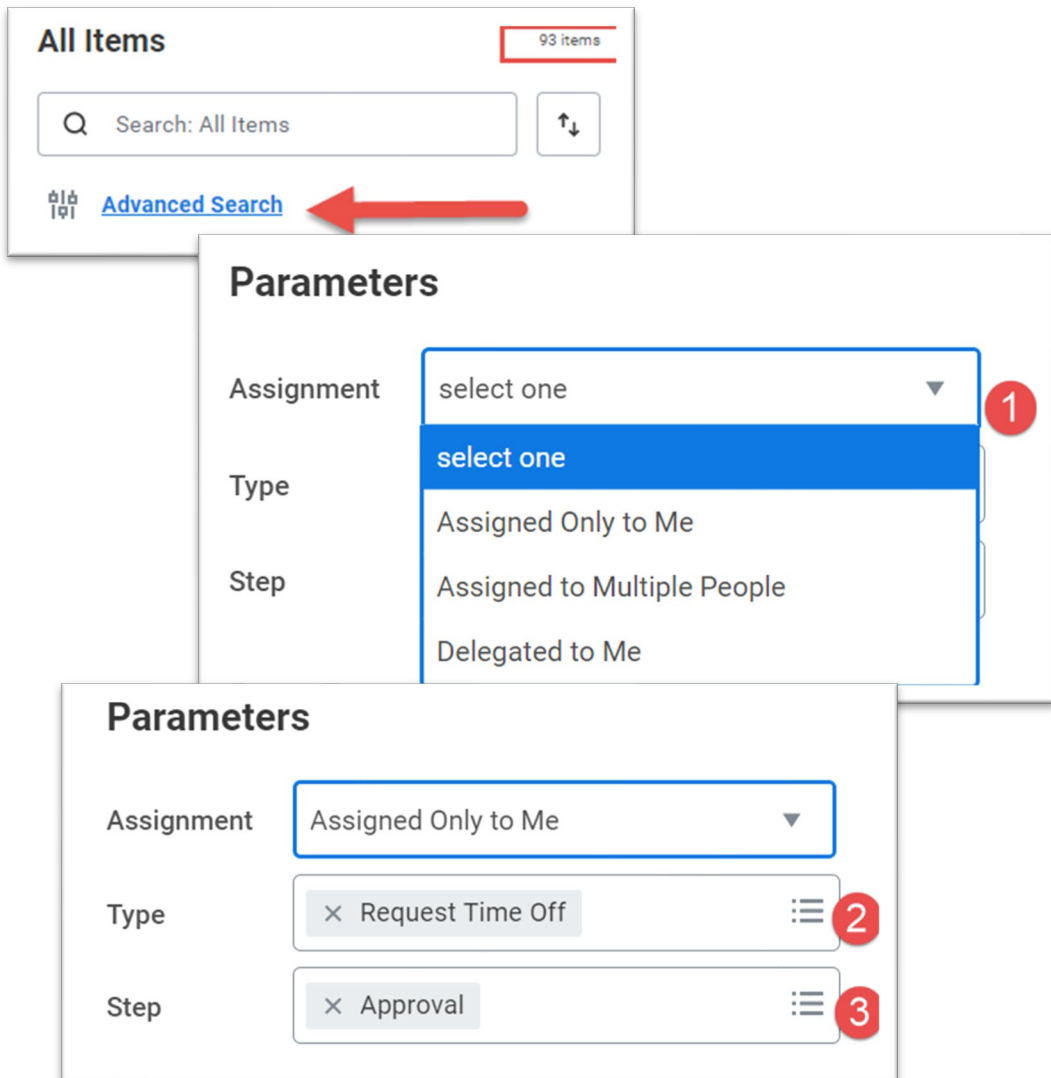
Date	Day of the Week	Type	Previously Requested	Correction to Requested	Unit of Time
09/05/2023	Tuesday	Sick Days (Exempt)	1	0	Days

 **Approve** **Send Back** **Deny** **Cancel**

All available actions accessible through "My Tasks" will be available view "Quick Review"

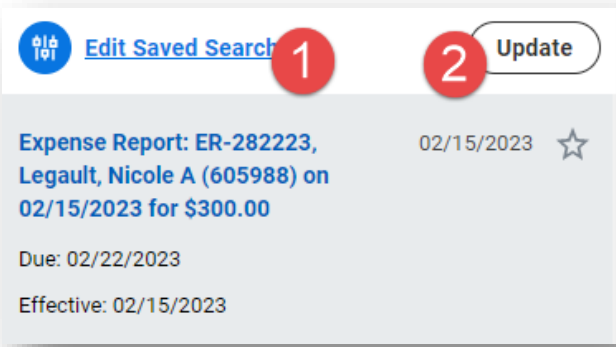
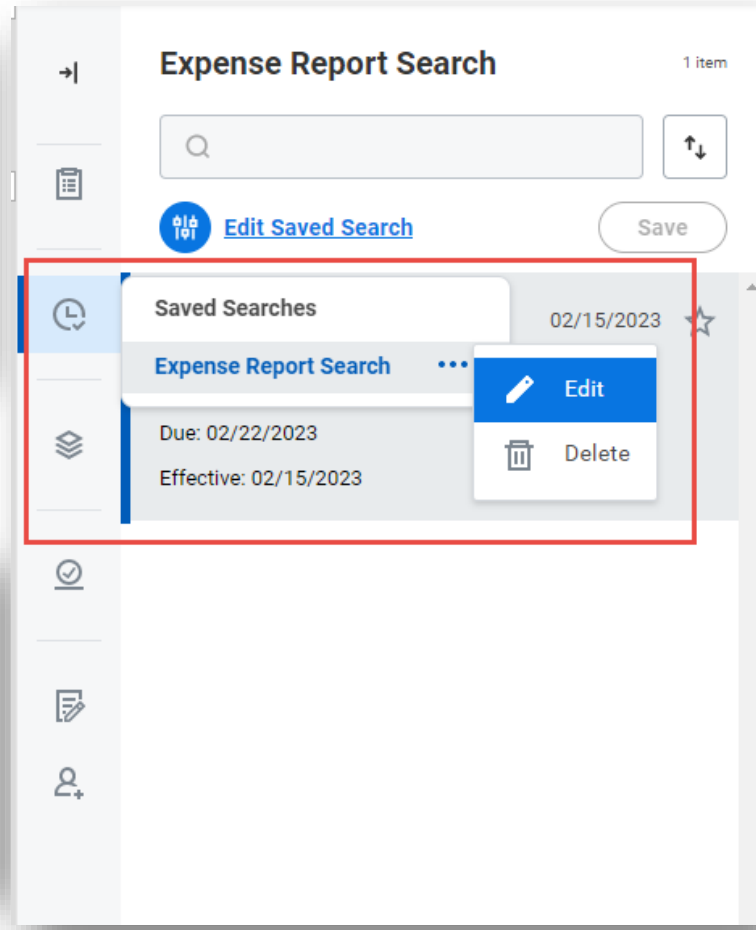
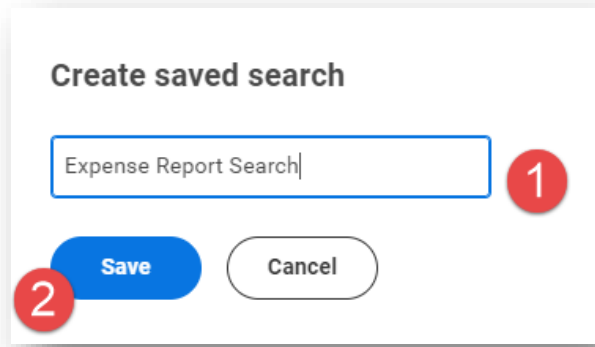
- Quick Review allows you to take action directly from home page
- Click "Quick Review" to access the most recent inbox three tasks
- Task details will be presented without being moved into "My Tasks" page
- Once action is taken, tasks in "Awaiting Your Action" will refresh and additional items will appear if applicable

Quick Review from Home Page



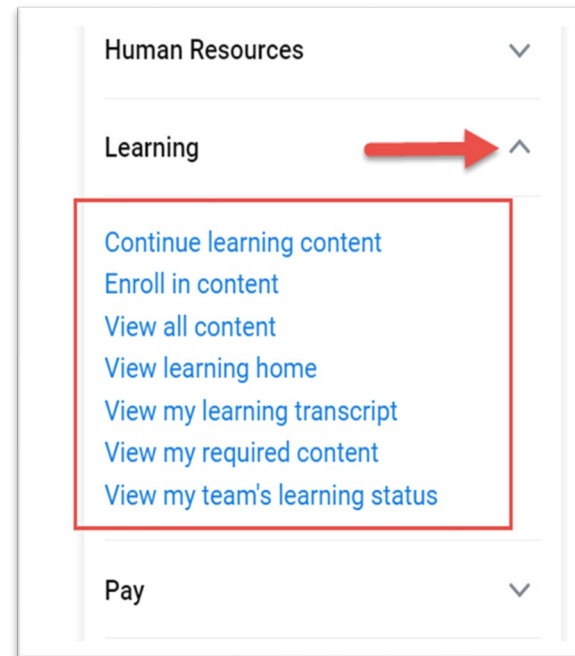
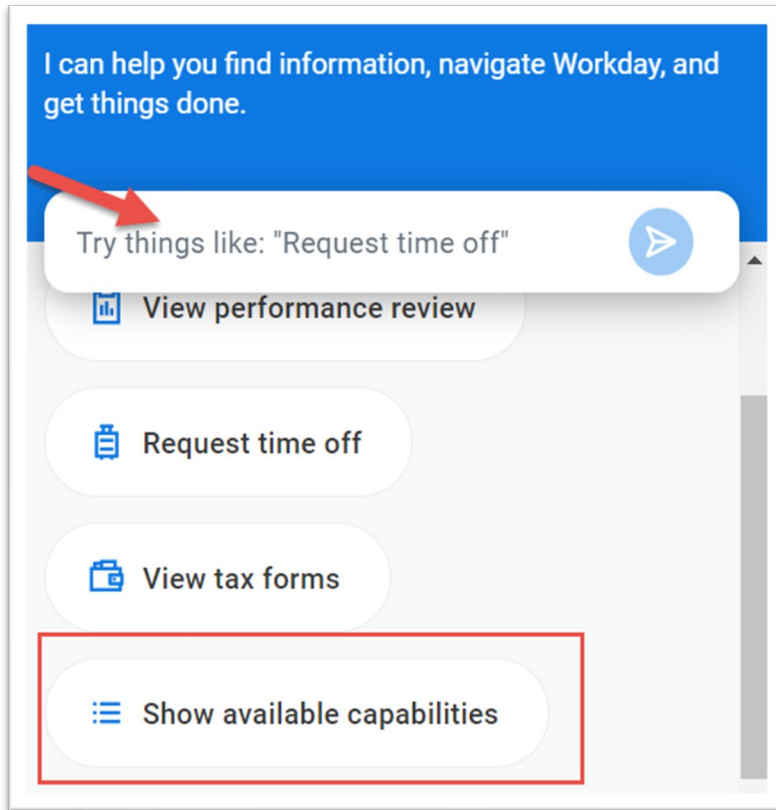
- Advanced Search in “My Tasks” supports searches by task type, step and date range
- Select tasks assigned to you, others or delegated to you
- Identify the type of task you want to search; this will default to the tasks in your inbox at the time the search was created

My Tasks Advance Search



- Once search is set, it can be edited, removed or saved
- To remove saved search, click arrow icon to return to all results
- Once search is set, it can be saved to identify critical tasks on an ongoing basis

My Tasks Advance Search



- 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 click "show available capabilities"
- Once on the topic heading, select from a list of items that Workday Assistant can support

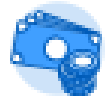
Workday Assistant



Expenses Hub



Jobs Hub



Benefits and Pay

- Hubs consolidate tasks, reports and data in a single place
- Jobs Hub and Benefits and Pay Hub are currently available to all users
- Expenses Hub available with WD₄₁
- Time and Absence and HR Partner Hubs coming fall, 2023

Expanding Hubs

Welcome to the Pay and Benefits Hub

The Pay and Benefits hub consolidate tasks and information from both the Pay and Benefits app. Use this app to access and update information for your pay and benefits in a single place in Workday.

[Read More](#)

Tasks and Reports

[Payment Elections](#) [Change Benefits](#) [My Tax Documents](#)

Needs Attention

NOT STARTED
Benefit Event
Retirement Savings Election

Submit elections by July 6, 2023.

[Enroll](#)

Benefits and Pay |←

- Overview
- Benefits 1
- Pay 2
- Compensation 3

Tasks and Reports

[Payment Elections](#) [Change Benefits](#) [My Tax Documents](#)

- 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



Welcome to Find Jobs at Brown!

Welcome to Find Jobs at Brown, Brown's Internal Career Hub. Browse for openings, review application status and create j...

[Read More](#)

Recent Applications

[View All Applications](#)

UNDER REVIEW

Senior Research Assistant



Careers at Brown



Overview



Browse Jobs

1



My Job Alerts

2



My Applications

3

- 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



Welcome to the Expenses Hub!

Use this hub to access all expense related actions in data in Workday! Click suggested links below to access expense job aids.

[Read More](#)

Tasks

[Create Expense Report](#)



Expenses Hub



Overview



Expense Reports

1



Expense Transactions

2



Payment Elections

3



You're All Caught Up!



When you have expenses to complete, we'll display them here.

- View expense reports awaiting action
- Create and view expense report status and history
- View expense transactions awaiting expense report assignment
- Update Payment Elections for reimbursements

Expenses Hub

HR Business Partner Hub

HR Business Partner Hub lists all staff based reports and transaction information for the organizations you are assigned to support.

[Read More](#)

- HR Business Partner Hub
- HR Partner Overview** 1
- Reports** 2
- Suggested Links** 3
 - HR Reporting Dashboard
 - My Team's AWA Requests

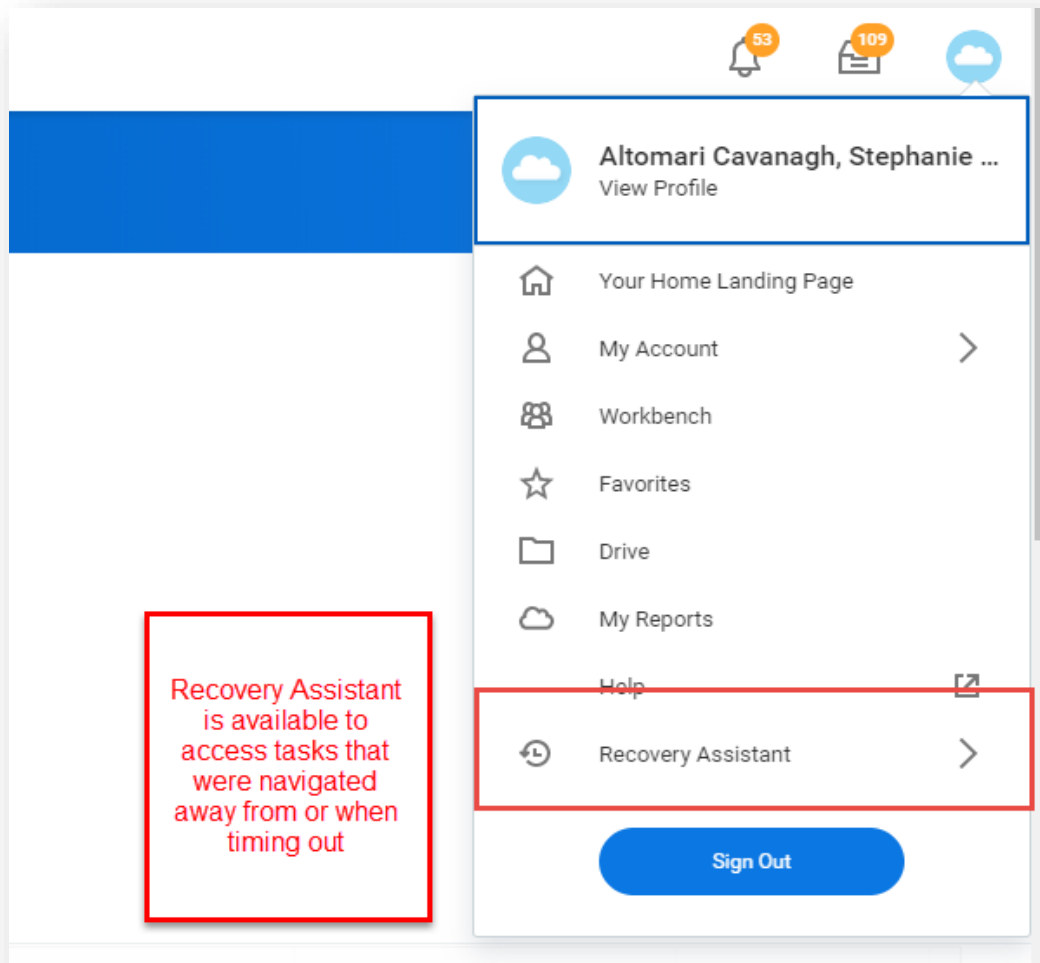
[Filter](#) 2

Worker Movement

- [View Incoming Workers](#)
- [View Outgoing Workers](#)
- [View Change Job Events](#)

- Single point of access for HR related data
- View **Worker Movement** including incoming and outgoing workers and change job events
- Process level data available for viewing and to take action
- Links to currently available reports and dashboards
- Additions, announcements and other seasonal announcements available

HR Business Partner Hub



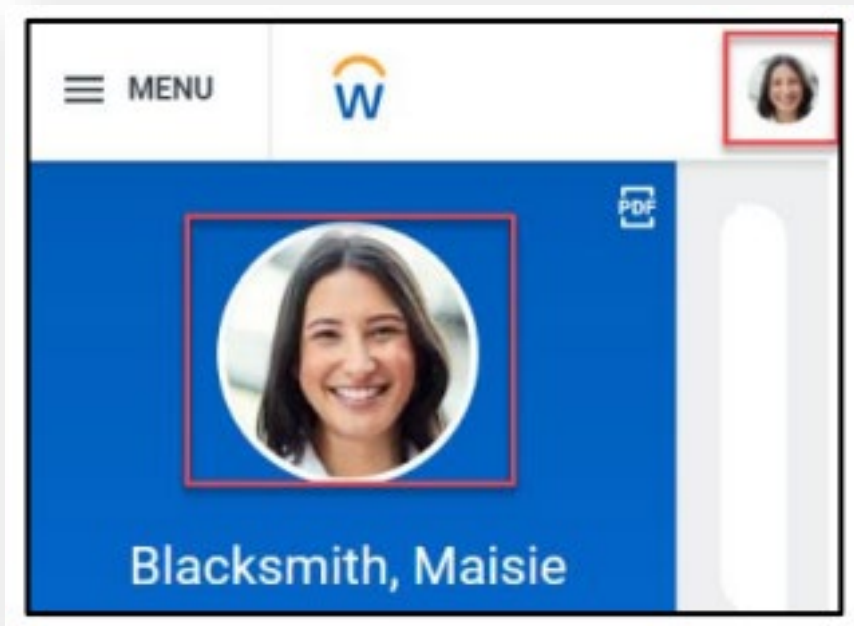
- “Recovery Assistant” available for tasks started and navigated away from within 24 hours of last interaction
- Available via worker profile cloud

Recovery Assistant

Workday 41: Feature Highlights

Recruiting, Staffing and Payroll

- Photos in Workday
- Auto-Disposition Reasons
- Multi-Select Pronoun
- Update Professional Profile from Job Application
- Job Change Updates
- Model My Pay Updates
- Costing Allocation End Date Requirement
- Job Requisition Reasons



- Upload your professional photo to your Workday profile to create a more personalized experience and build a connected campus community. Your photo will display on your Workday profile and be visible to others in the Brown community in Workday.
- Guidance on photos can be found on the UHR website [here](#)

Photos in Workday

REQ189356 Business Analyst (Closed)

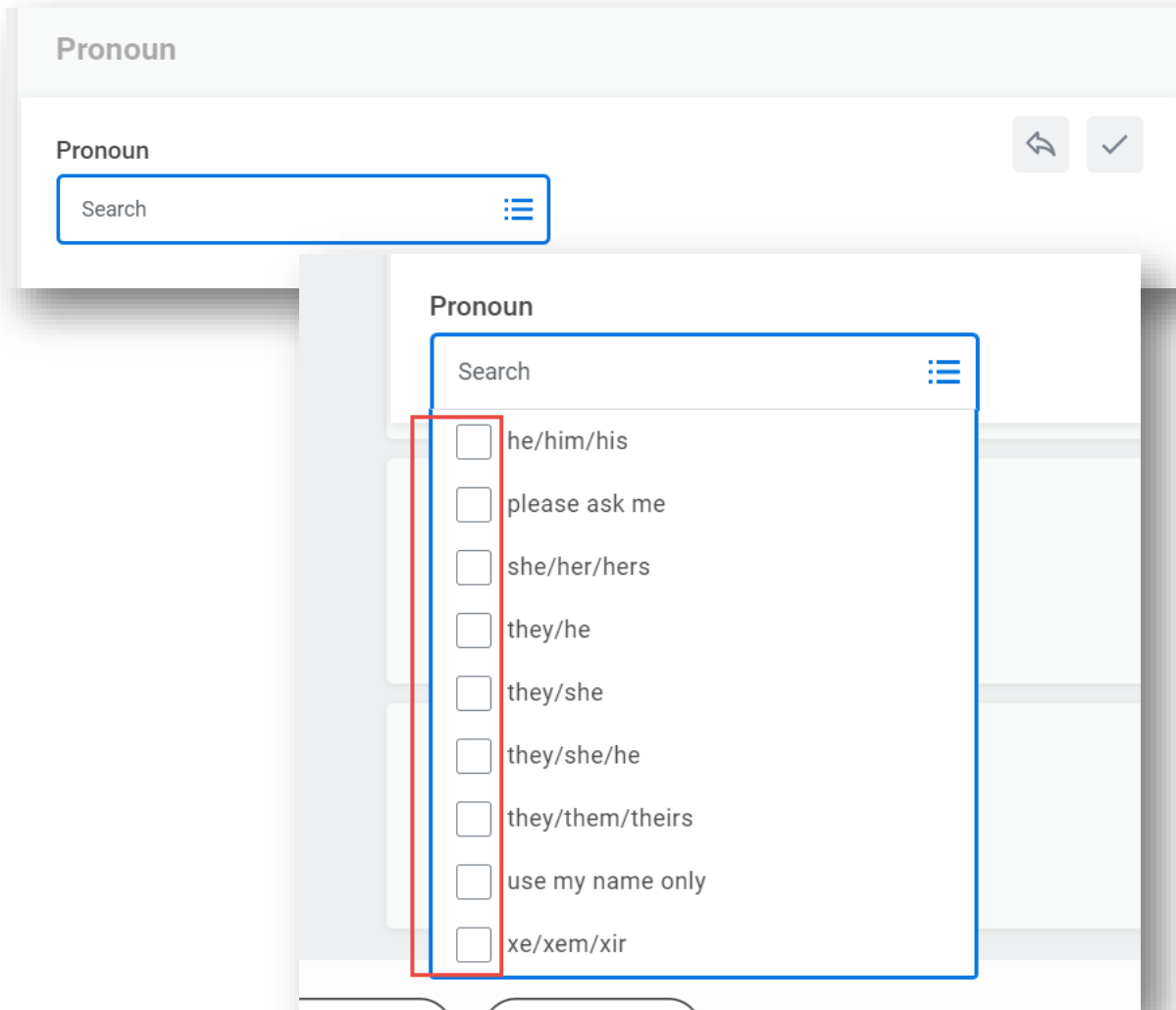
Recruiting Start Date 08/04/2023 - 26 days ago

Target Hire Date 08/04/2023 - 26 days ago

Primary Location  [South Street Landing](#)

- When a job requisition is closed, candidates that are currently in any stage of the recruiting process will be auto-dispositioned
- Streamlines the recruiting process and ensures data integrity

Auto-Disposition for Close Job Requisitions



- Pronouns have been enabled for multi-select options supporting more than one pronoun group
- Pronouns will display in Workday both on the employee profile and on the Workday employee directory

Multi-Select Pronoun

Skills

Skills

Replace the Skills information in my profile with this information

- When applying for internal positions at Brown, you can update your Professional Profile in Workday
- This feature keeps your experience, education and skills in sync with your professional profile ensuring your profile is up to date for additional opportunities

Update Professional Profile from Internal Job Applications

The screenshot displays a worker profile for Gus (650776) in a Planner role. The interface includes a top navigation bar with a PDF icon, a main header with the worker's name and role, and an 'Actions' section with 'Email' and 'Team' buttons. A left sidebar contains navigation links for Summary, Overview, Job, Compensation, and Benefits, with a 'More (5)' option at the bottom. The main content area shows job details: Location (Philip D. Andrews Memorial Building), Manager (Grewer, Lichen E (314213)), Position Title (POS330368 Planner), and Supervisory Organization (Facilities Planning (Grewer, Lichen E (314213))). A 'Start Job Change' section features a 'Location Change' button.

- Job Change business process is enhanced to support location changes for employees
- The process can be initiated from the worker profile

Job Change Updates

Model My Pay Bus, Gus (650776)

Reference Pay

Company	Brown University	Position	POS330368 Planner
Pay Period	Feb 1, 2023 - Feb 28, 2023	Gross Pay	8,750.00
Payment Date	Feb 28, 2023	Net Pay	6,349.91

Modeling Options

Expand sections below as needed and enter new values in the Adjusted Value column. Click the Adjust Federal Taxes and Adjust State Taxes buttons to make changes. When finished, click the Model button to run a calculation that compares your changes to your original pay.

> Pre-Tax Deductions: 0.00

▼ Tax Elections: 2,400.09

Federal Tax Withholding 3 items



State Tax Withholding 6 items

3

Model

1

Adjust Federal Taxes

2

Adjust State Taxes

Cancel

- 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 selecting the respective adjustment and then model

Model My Pay

Modeling Options

Expand sections below as needed and enter new values in the Adjusted Value column. Click the Adjust Federal Taxes and Adjust State Taxes buttons to make changes to your tax elections. When finished, click the Model button to run a calculation that compares your changes to your original pay.

1
Pre-Tax Deductions: 2,789.66


4 items


*Description	Additional Information	Input Details		
		Type	Current Value	Adjusted Value
Dental				
		Amount	72.74	
Fidelity Deferred Vesting				
		Percent	0.19	2
Medical UHC EE				

4 Model Adjust Federal Taxes Adjust State Taxes Cancel

- Model My Pay can be used to review your retirement elections and project potential changes prior to making them in Workday
- Retirement deduction updates are available for review by entering an adjustment percent and then model
- A new retirement deduction can be added by using the plus sign to add a new deduction line to model

Model My Pay: Retirement Deduction(s)



Start Date * 08/30/2023  ?









End Date 12/31/2023  ?

Default Organizational Assignments (As of Start Date)

Business Unit: BU4030 CSV-Facilities Management
 Cost Center: CC72000 FM - Project Management
 Expense Purpose Code: 9999 Not Applicable
 Fund: FD100 General Operating

> **Costing Allocation Attachments**

1 item  

	Order	Default (As of Start Date)	Required with no Default (Must have Costing Override)	*Worktags	*Distribution Percent
 		Business Unit: BU4030 CSV-Facilities Management Cost Center: CC72000 FM - Project Management		<ul style="list-style-type: none">  Expense Purpose Code: 1080 Instruction - Private Sponsor  Fund: FD500 Sponsored Grants & Contracts  Grant: GR5292003 WD41 EXTRA AWD 	<input type="text" value="100"/>

- Costing allocations for grant worktags will require end dates
- Allocations without end dates will generate an error message to add an applicable end date

Costing Allocation End Date Requirement

Recruiting Details

Reason *



Search



Create Job Requisition > Budgeted Replacement



Create Job Requisition > Existing Position Repurposed



Create Job Requisition > Existing Position Requiring Increase to Budget



Create Job Requisition > New Position With No Existing Funding



- Job requisition reasons and recruiting questionnaire updated to include budget details
- When initiating the business process, select the relevant reasons for your job requisition request
- Additional funding source details will be requested when the requisition is submitted

Job Requisition Reason Updates

Workday 41: Feature Highlights

Purchasing and Supplier Accounts

- Requisition App
- Miscellaneous Pay
- Draft Receipt Warning
- Purchase Order Grid Filters
- Expense Distance Calculation
- Supplier Account Analytics
- Supplier Management
- Effort Certification Work Area

Requisition Details

Requesting for

Altomari Cavanagh, Stephanie M (314198)

Company

Brown University

Currency

USD (\$)

Requisition Type

Standard

Deliver-To

South Street Landing

Ship-To

350 Eddy Street...

Worktags

Business Unit: BU4020 CSV-Finance and Administration

Cost Center: CC30253 Workday Program

2 more worktags [view all worktags](#)

[Start Requisition](#)

[Edit Details](#)

Ordering Methods



[Search Catalog](#)



[Request Non-Catalog Items](#)

1



[Connect to Supplier Website](#)

2



[Add from Templates and Requisitions](#)



[Select from My Procurement Favorites](#)

3

- Requisitions App is available to Financial Coordinators to help support requisition requests and reporting
- Default requisition details can be stored to streamline the requisition initiation process

Requisitions App

Requisitions [Reset Filters](#) [Edit Filters](#)

[Open \(36\)](#) [Completed \(50\)](#)

REQ-0137176 *** Total Amount: \$2,500.00 3 items ▾	Approved Created on 08/17/2023	Ordered Receiving Invoicing
REQ-0137152 *** Total Amount: \$16,000.00 2 items ▾	Approved Created on 08/14/2023	Ordered Receiving Invoicing
REQ-0137150 *** Total Amount: \$2,500.00 2 items ▾	Approved Created on 08/14/2023	Ordered Receiving Invoicing
REQ-0137147 *** Total Amount: \$2,500.00 1 item ▾	Approved Created on 08/14/2023	Ordering Receiving Invoicing
REQ-0137130 *** Total Amount: \$2,500.00 1 item ▾	Approved Created on 08/14/2023	Ordered Receiving Invoicing

REQ-0137150 ✕

[View](#)

[Close Requisition](#)

- View all requisitions and take action from Requisitions menu
- “My Requisitions” also renders data in the Requisitions App for Financial Coordinators

Requisitions App


Miscellaneous Payment Request Miscellaneous Payment Request Number MISC PY-0000005 Document Status In Progress Payment Status Unpaid

Requester Altomari Cavanagh, Stephanie M (314198)

Primary Information	Payment Details
Document Date * 08/24/2023	Total Payment Amount 100.00
Company * Brown University	Control Total Amount 100.00
Payee * X Jones, Mac	Memo test
Currency * X USD	External Reference
Payment Type * X Check	
Request Category * X Emergency Payments	

- Streamlined payment process to miscellaneous payees (non-suppliers, individual payees and Brown students) in lieu of supplier invoice for specific types of payments
- Workflow mirrors procurement card and supplier invoice routing
- Payee setup done through request supplier process with supplier requests
- Reportable via journal source in all financial reports

Miscellaneous Payments

 1 Alert [View All](#) ×

Create Receipt

Document Number *

Fully Receive

Edit Existing Draft Receipt

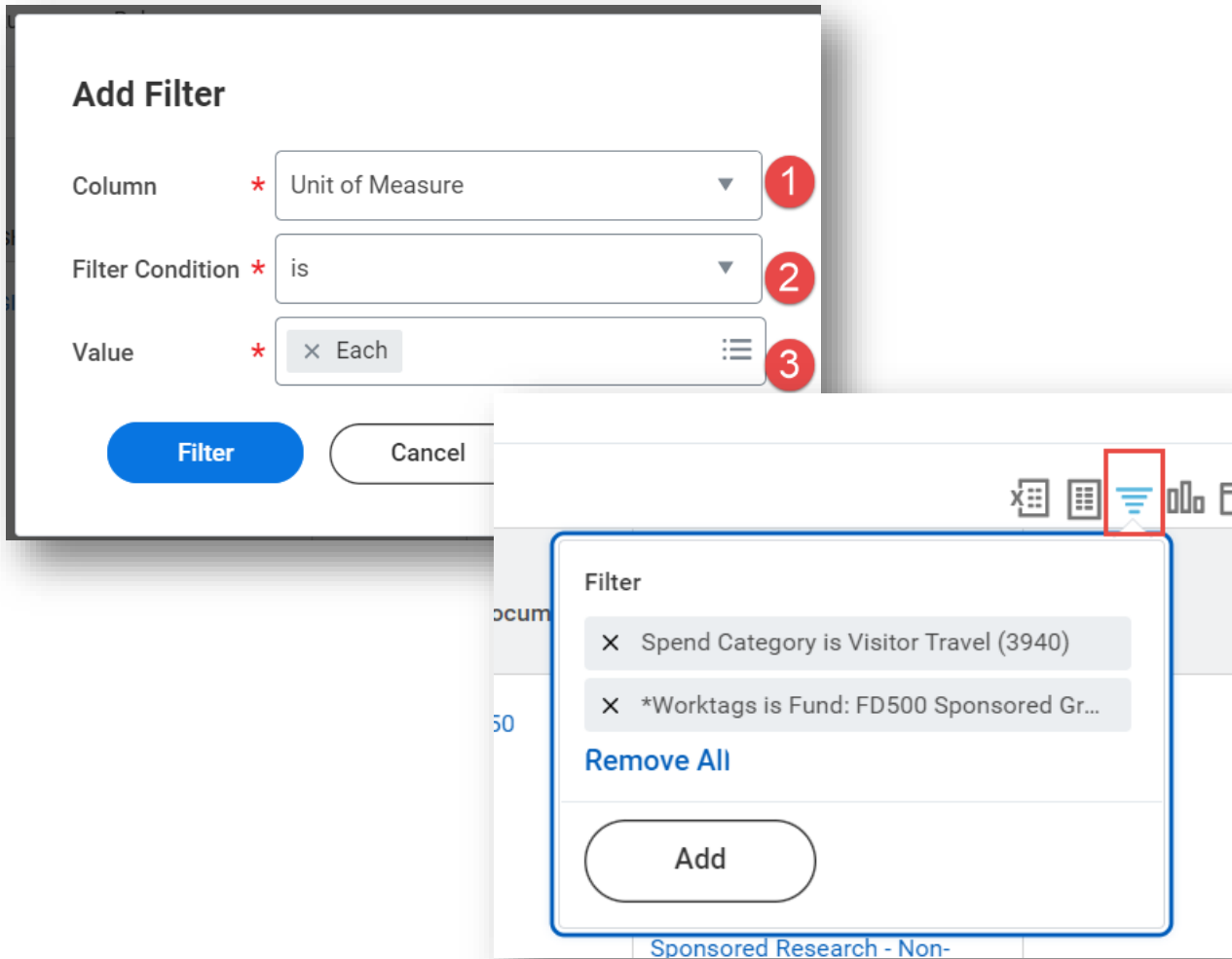
Alert: A Draft Receipt already exists for document: PUR-0121805

Alert

1. [Edit Existing Draft Receipt](#)
A Draft Receipt already exists for document: PUR-0121805

- 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



- Users can apply a filter when reviewing their Purchase Order to view only applicable rows
- Click **Filter** and select applicable filters to customize the Purchase Order view and select specific lines for view


Purchase Order Grid Filters

Item Details

Origin Address 1 *


Destination Address 2 *

Unit of Measure for Distance Miles

Estimated Distance of Driving Route * 54.7 

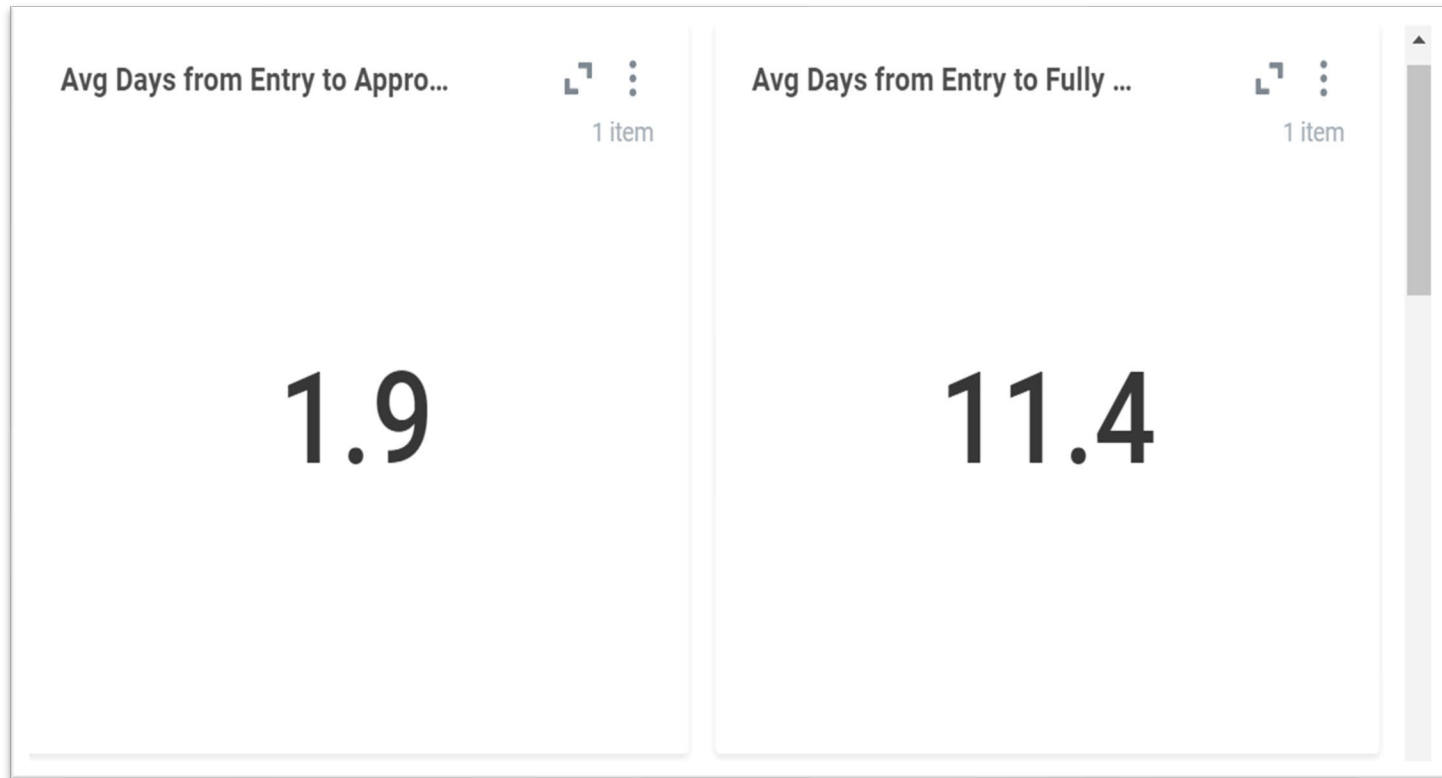
Trip Distance *

Round Trip

Distance to Expense * 109.4 

- Google maps is available to calculate mileage distance in expense process
- Round trip calculation can automatically be assessed by selecting "Round Trip".

Distance Calculation



- Supplier transaction summaries, supplier creation and days to complete available to Accounts Payable
- Other KPIs also available

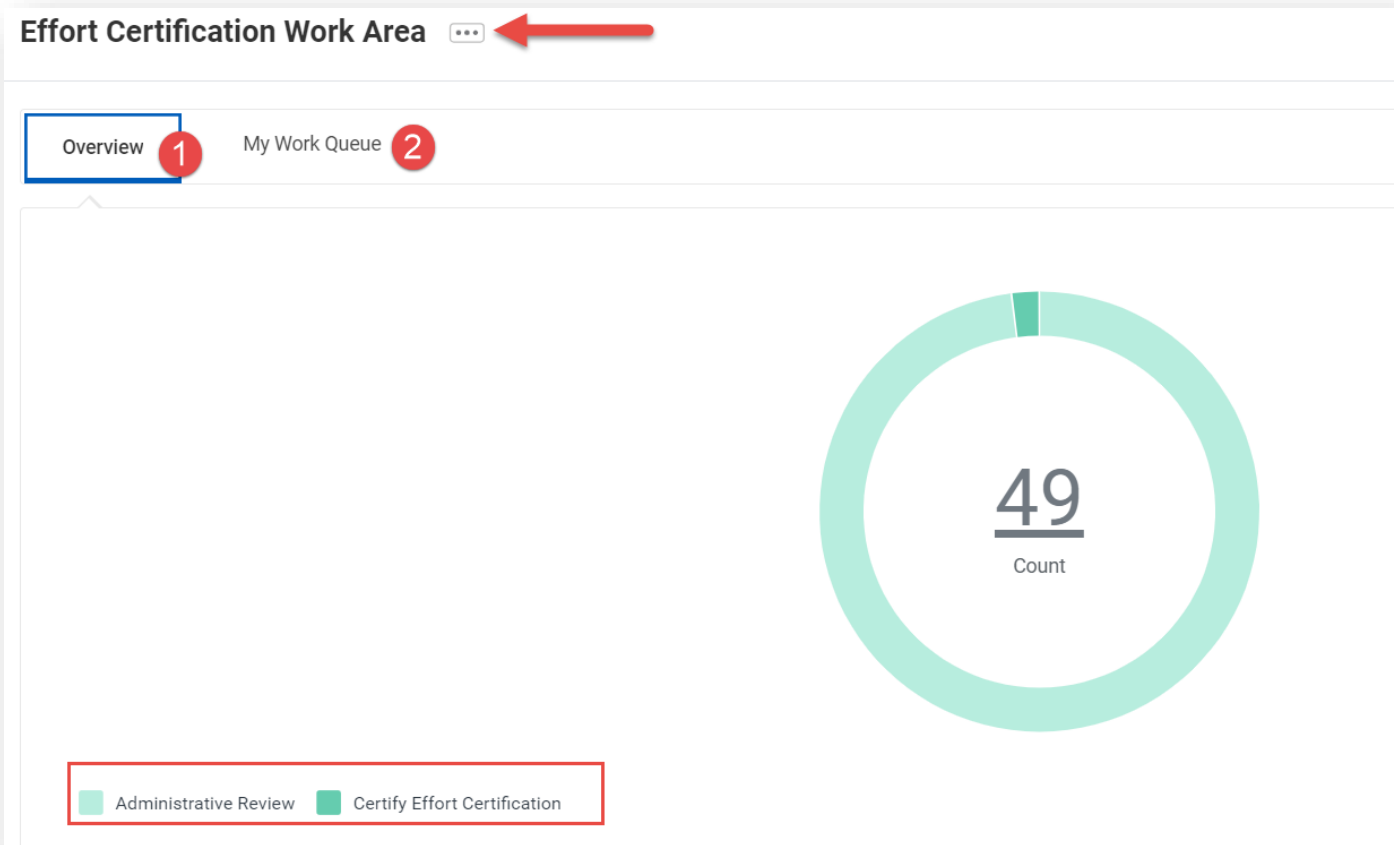
Supplier Account Dashboard



COMING
SOON

- Supplier registration is moving to the Workday platform
- Suppliers will be sent a registration link and integrated to Workday once approved by AP
- This experience will streamline the supplier registration process

Upcoming Supplier Management Changes



- Effort Certification Partners can access the Effort Certification Work Area to view all Effort Certifications assigned to them in a single place
- Toggle the Overview and My Work Queue tabs to view and take action on your assigned effort reports

Effort Certification Work Area

Workday 41: Feature Highlights

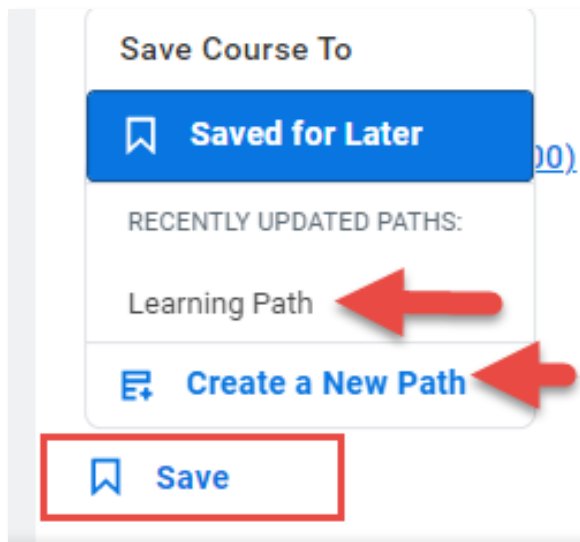
Learning and Skills

- Google Calendar Integration
- Share Learning Paths
- Learning Recommendations on Content
- Learning Dashboard Enhancements
- Learning in Workday Assistant
- Waiver Enhancements
- Skills in Workday
- Skills Available on Courses



- Workday will integrate calendar invites for instructor led content to a learners google calendar
- An email will be sent with a brief description of the content when registering
- Contact the course contact with any questions about the course
- Coming, September 2023

Google Calendar Integration



- 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 clicked, the link has been copied and can be sent to any other learner



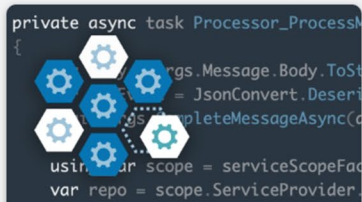
Sharing Learning Paths

.NET 6 SDK Advanced Exploration: Attributes

Attributes add metadata to your programs and allow you to annotate given types, assemblies, modules, and methods. They're especially handy if you're an advanced .NET developer, as they lend your code base more declarative power with the additional services of .NET tools and code libraries. In this course, senior LinkedIn Learning instructor Walt Ritscher shows you how to use predefined, standard .NET attributes as well as how to create custom attributes on your own.

[Show All](#) ▾

You Might Also Be Interested In



Advanced Azure
Microservices with .NET...



Navigating .NET and .NET
Standard for Cross-...



Advanced
Automatic



This is an External Course

You will be brought to LinkedIn Learning to complete this content

Enroll

Duration

89 minutes

Date Added

05/20/2022

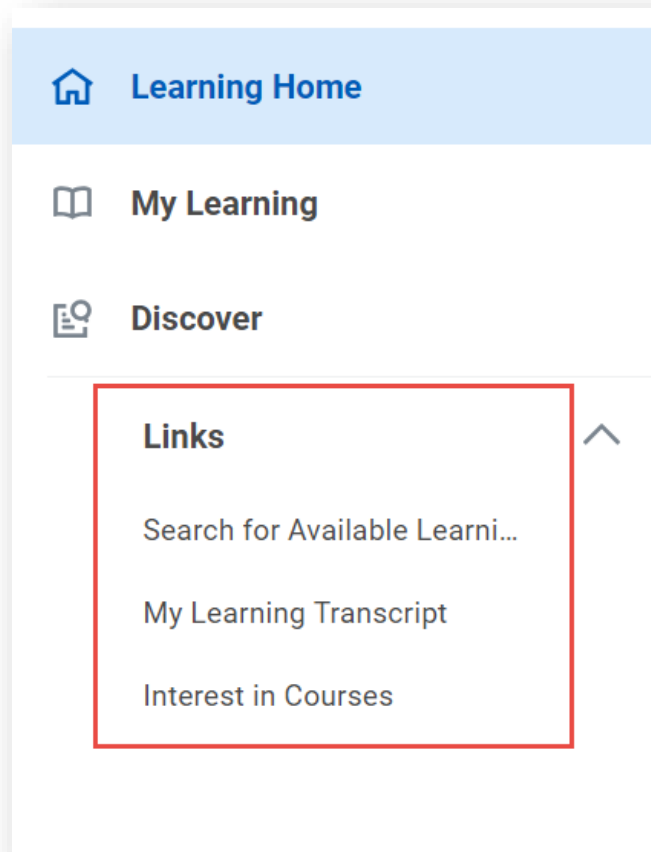
Content Provider

LinkedIn Learning

[Save](#)

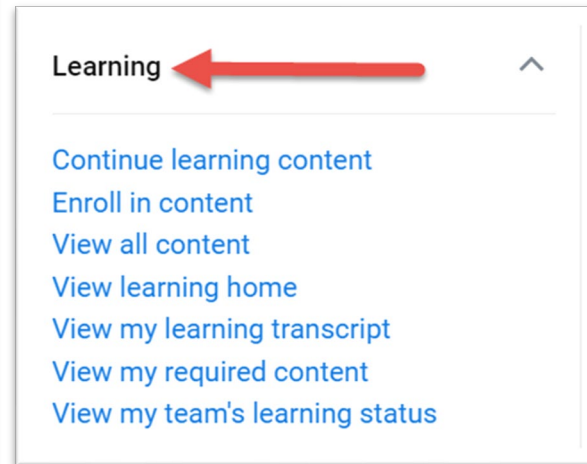
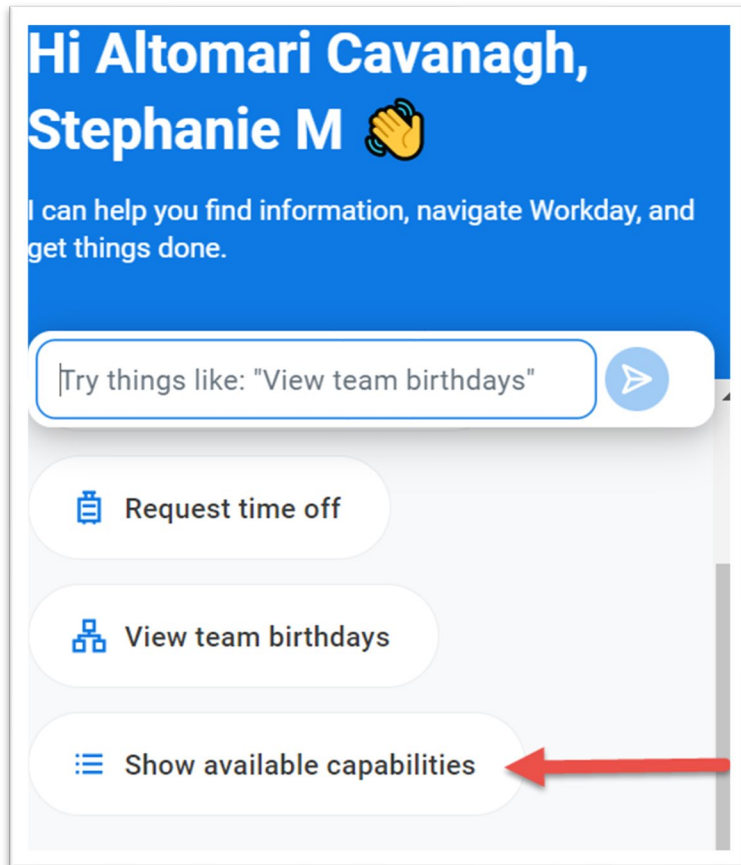
- When reviewing media content, recommendations for similar content may be available
- Review "You Might Also Be Interested In" to tab through related content

Learning Recommendations



- Search for Available Learning and My Transcript has been added to the Learning App as Suggested Links to streamline access
- Also, access courses you have expressed interest in via Suggested Links

Learning Dashboard Enhancements



- “Workday Assistant” can now help support users enroll in learning content, view transcript status for your team and view required learning
- Launch by selecting the Assistant icon>Show Available Capabilities>Learning

Learning Assistant

Waive Reason

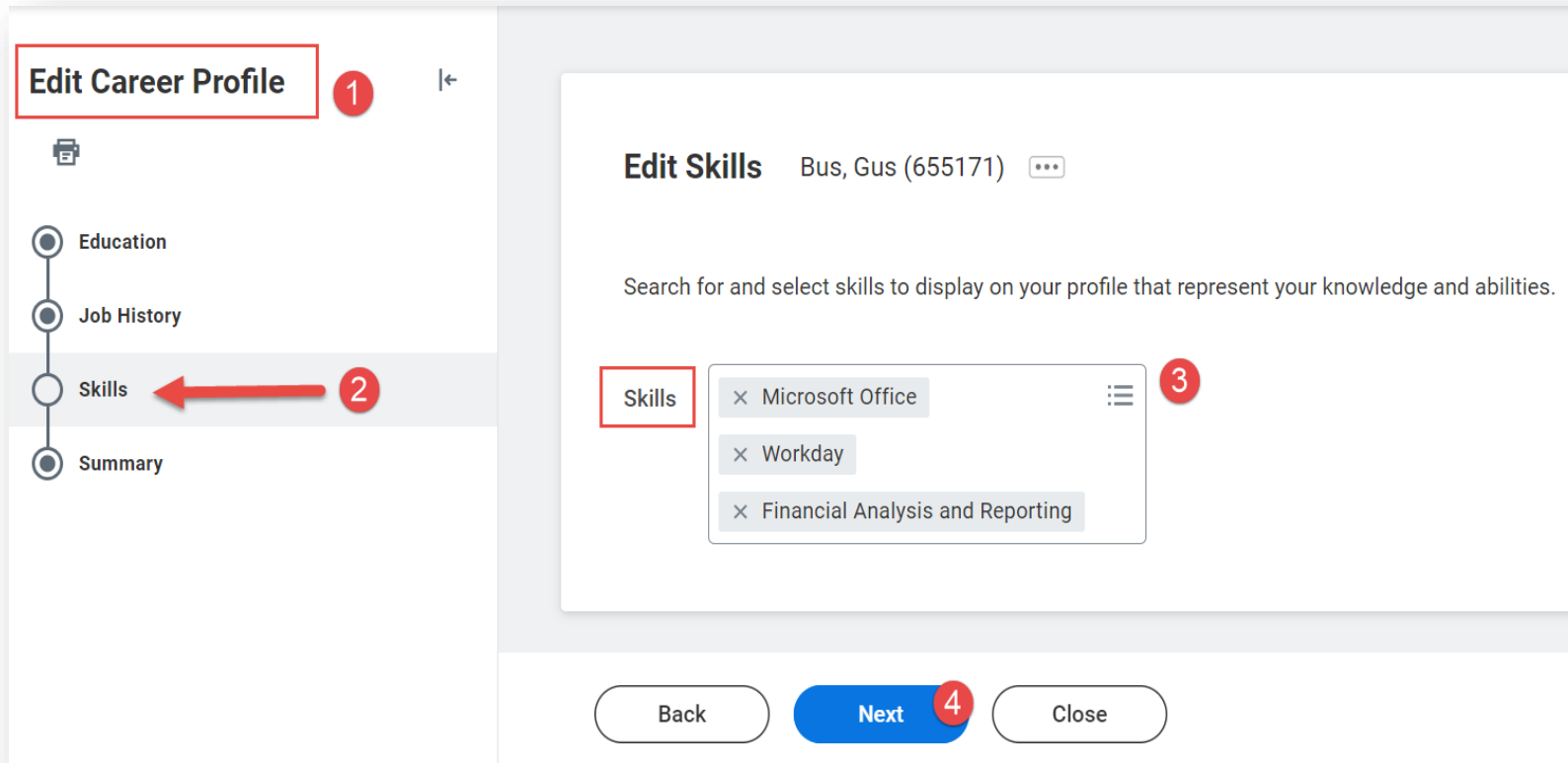
Eligible Assignments Ineligible Assignments

0 items ☰ ☐ ↗

<input type="checkbox"/>	Learner	Learning Content	Assigned Date	Assignment Mechanism	Assigned By	Due Date	Enrolled	Required
No Data								

- Waiver functionality streamlined and moved to grid framework
- Mass waiver supported
- Supports Learning administrators with updating required learning assignments

Waiver Enhancements




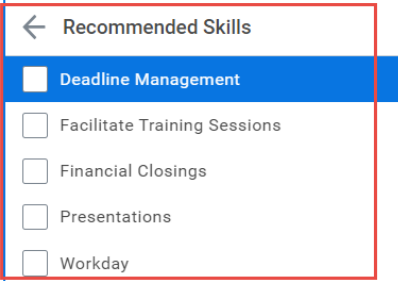
- Crowd sourced skills can be added to your professional profile in Workday
- Skills on your professional profile can be used when applying for internal positions via the Jobs app
- This fall, skills will be available to help identify open requisitions that align to your current skills

Skills in Workday

Course Title * 2023 Year End Training Sessions-Virtual


Skill Level select one

Description *  This information session will cover topics related to the year-end close process in Workday. It will include a timeline of important deadlines to ensure the closing of the fiscal year goes smoothly.

Topics * 

- Recommended Skills
- Deadline Management
- Facilitate Training Sessions
- Financial Closings
- Presentations
- Workday

Security Category

Skills 

2023 Year End Training Sessions-Virtual

This information session will cover topics related to the year-end close process in Workday. It will include a timeline of important deadlines to ensure the closing of the fiscal year goes smoothly.

Skills in This Course

Workday Deadline Management Financial Closings

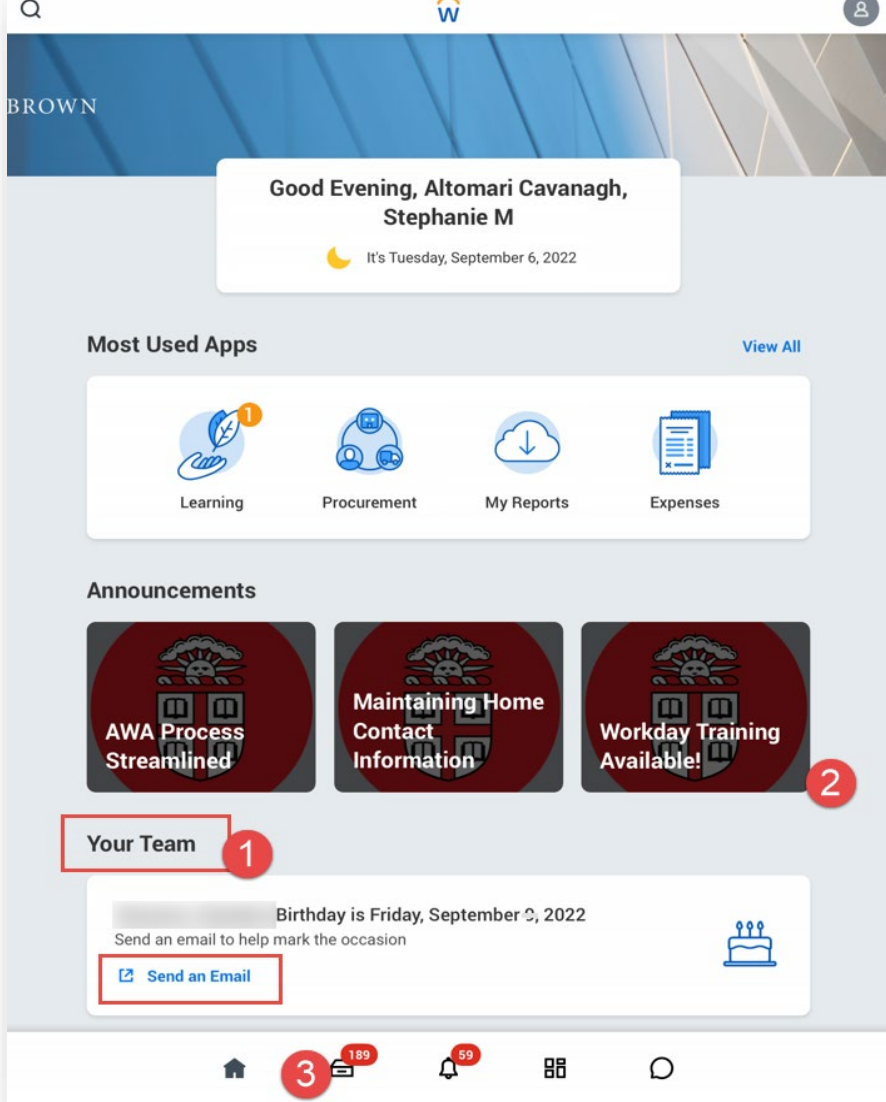
- Skills have been updated to available on course content
- Course creator can view available skills to associate to content
- Adding skills to course content provide an opportunity to learners to select courses in skills they want to improve or develop

Skills on Courses

Workday 41: Feature Highlights

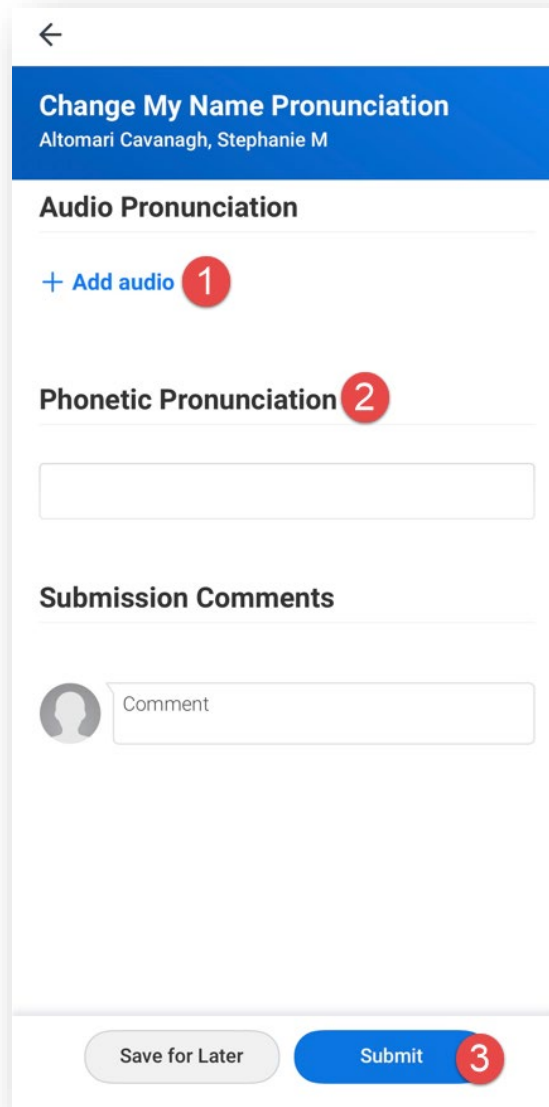
Mobile

- User Interface Update
- Audio Name Pronunciation via Mobile
- Learning Actions
- Change Benefits via Mobile
- Update Payment Elections
- Create Receipt for PO
- Scan Receipts and Create Expense reports via Mobile



- 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
- Access Workday Assistant to help with self service tasks

Mobile User Interface Enhancements



←

Change My Name Pronunciation
Altomari Cavanagh, Stephanie M

Audio Pronunciation

+ Add audio 1

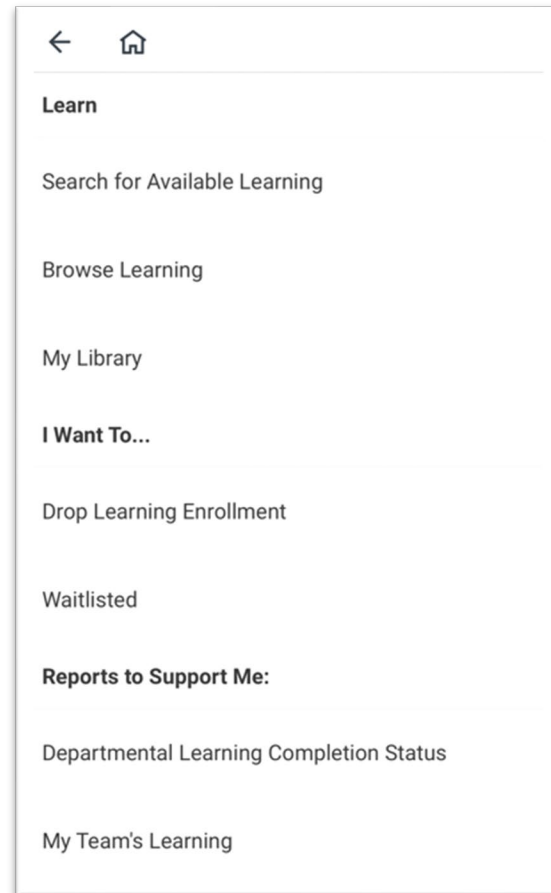
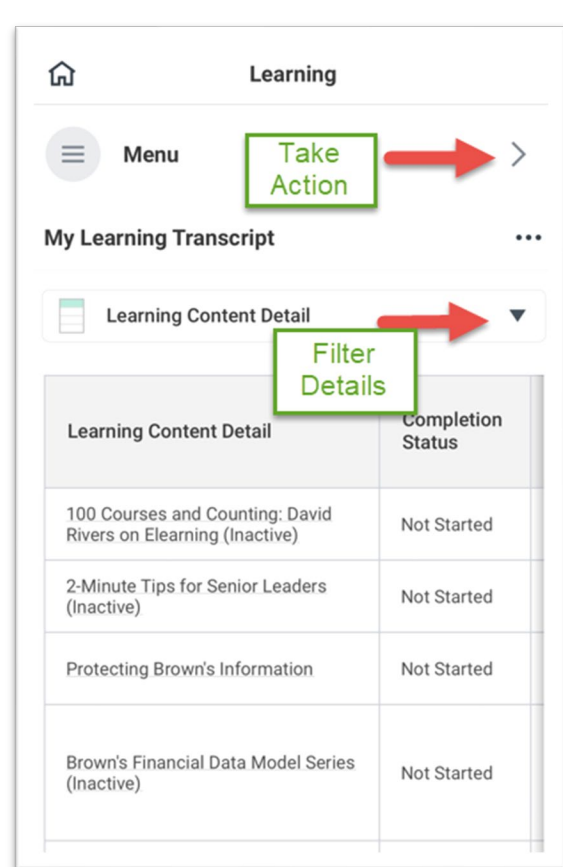
Phonetic Pronunciation 2

Submission Comments

Save for Later Submit 3

- Name pronunciation audio can be added with mobile app to supplement visual pronunciation in Workday
- Record your name, preview and submit
- Once submitted, your audio pronunciation will be accessible in Workday

Audio Name Pronunciation 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

Change Benefits

Change Reason *

Submission Comments

Comment

Close Change Reason

Search





- Birth/Adoption
- Change Beneficiary at any time
- Change HSA at any time
- Change in Spouse's Employment
- Change Life Insurance Coverage
- Change Transit or Parking
- Death of Dependent
- Delete Dependent

Save for Later Submit

Benefits

\$729.43
Cost Per Paycheck

Health Care and Accounts

 Medical UnitedHealthcare PPO... \$656.69	 Dental Delta Dental RI Dental... \$72.74
 Vision Enroll	 Health Savings Account Enroll


Select each available card to update elections. Once complete, click on the "View Summary" button to review final selections and Submit

View Summary

- Open Benefits application from home page
- Choose appropriate benefits change reason
- Access inbox or benefits application to open change benefits task and update elections

Change Benefits on Mobile

Pay 1 ...



Most Recent Pay
Aug 31, 2023

Take Home Pay
\$5,466.82

Gross Pay \$10,439.27
Total Hours 0.00

[View Pay Details](#)

Pay History

Date	Hours	Net Pay	Gross Pay
Aug 31, 2023	0.00	\$5,466.82	\$10,439.27
Jul 31, 2023	0.00	\$5,466.82	\$10,439.27
Jun 30, 2023	0.00	\$5,262.62	\$10,013.69

Manage Payment Elections 2

Accounts 2 Items

★ ✎ Joint Checking

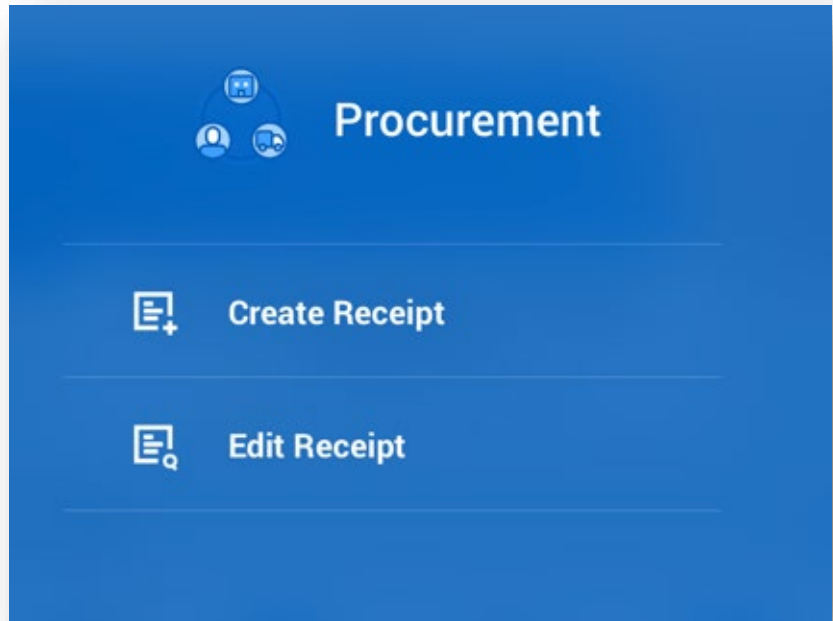
★ Add

Payment Elections 2 Items

★ ✎ Payroll
Joint Checking

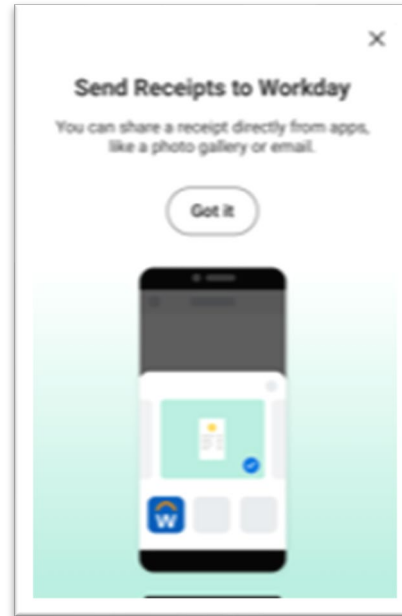
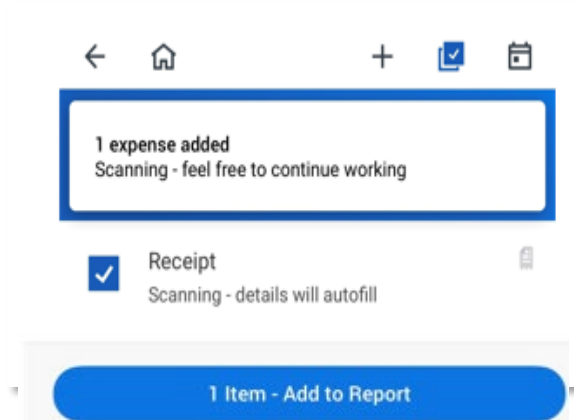
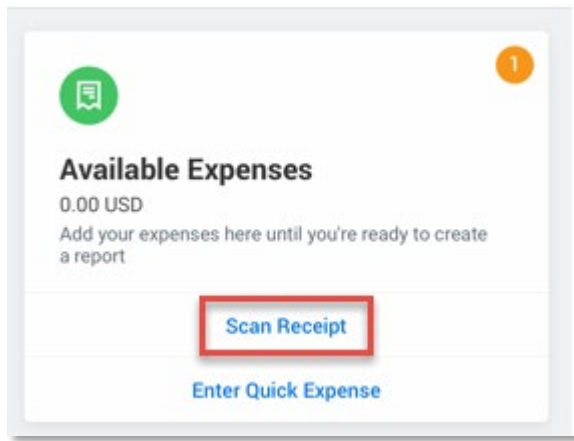
- Open Pay application from home page
- Select actions in upper right corner to open Payment Elections
- Click on pencil icons to edit existing accounts or elections
- Click Add to enter new accounts or elections

Payment Elections from Mobile



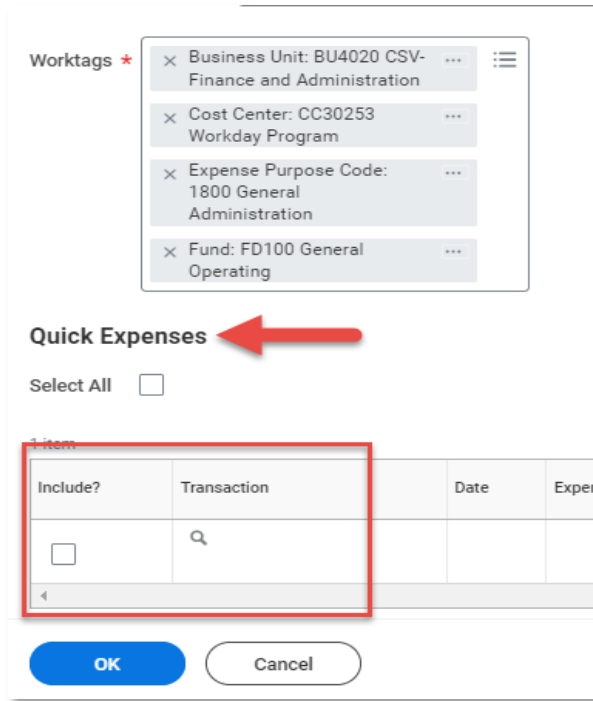
- Financial Coordinators can create or edit receipt right from the mobile application
- Receipt will route as designed once completed

Create or Edit Receipt from Mobile



- Receipt scanning directly from “Create Expense Report” process in mobile application
- Once scanned, select applicable receipts and click “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 March 2024