# Workday 41 System Update

**Feature Highlights| September 2023**

# Agenda

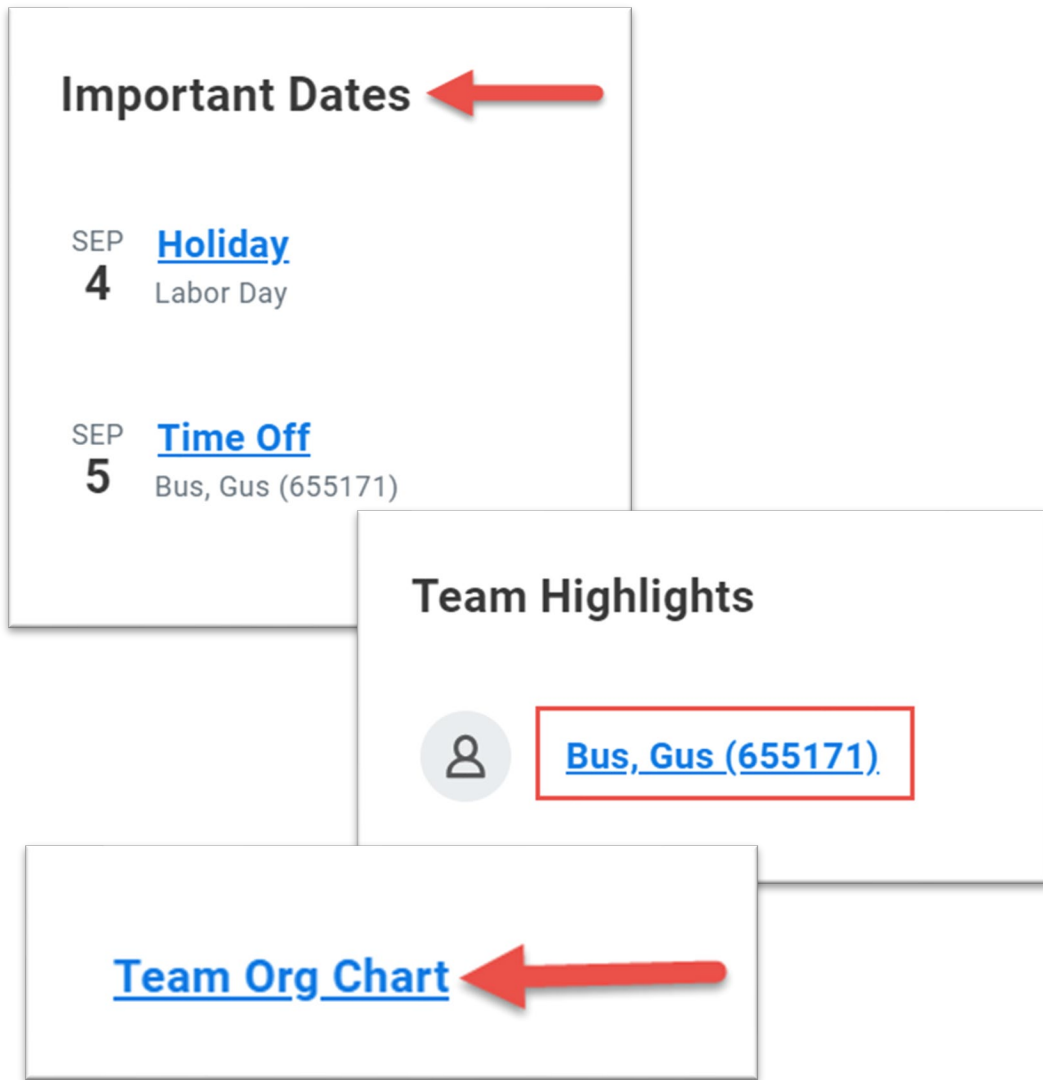- Workday Update Methodology

- 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**

SEP **Holiday**
4 Labor Day

SEP **Time Off**
5 Bus, Gus (655171)

**Team Highlights**

👤 **Bus, Gus (655171)**

**Team Org Chart**

- 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
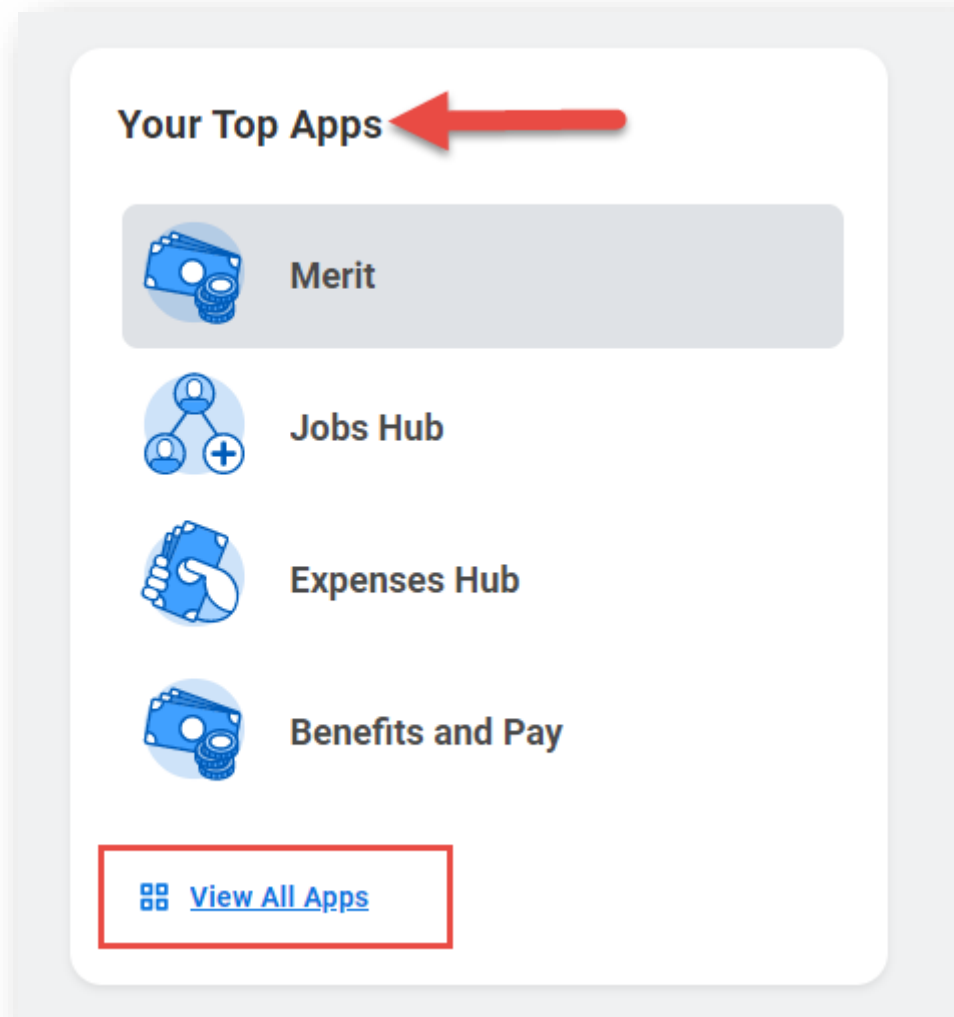
- "Your Top Apps" links to your "Menu" of Apps page

- 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

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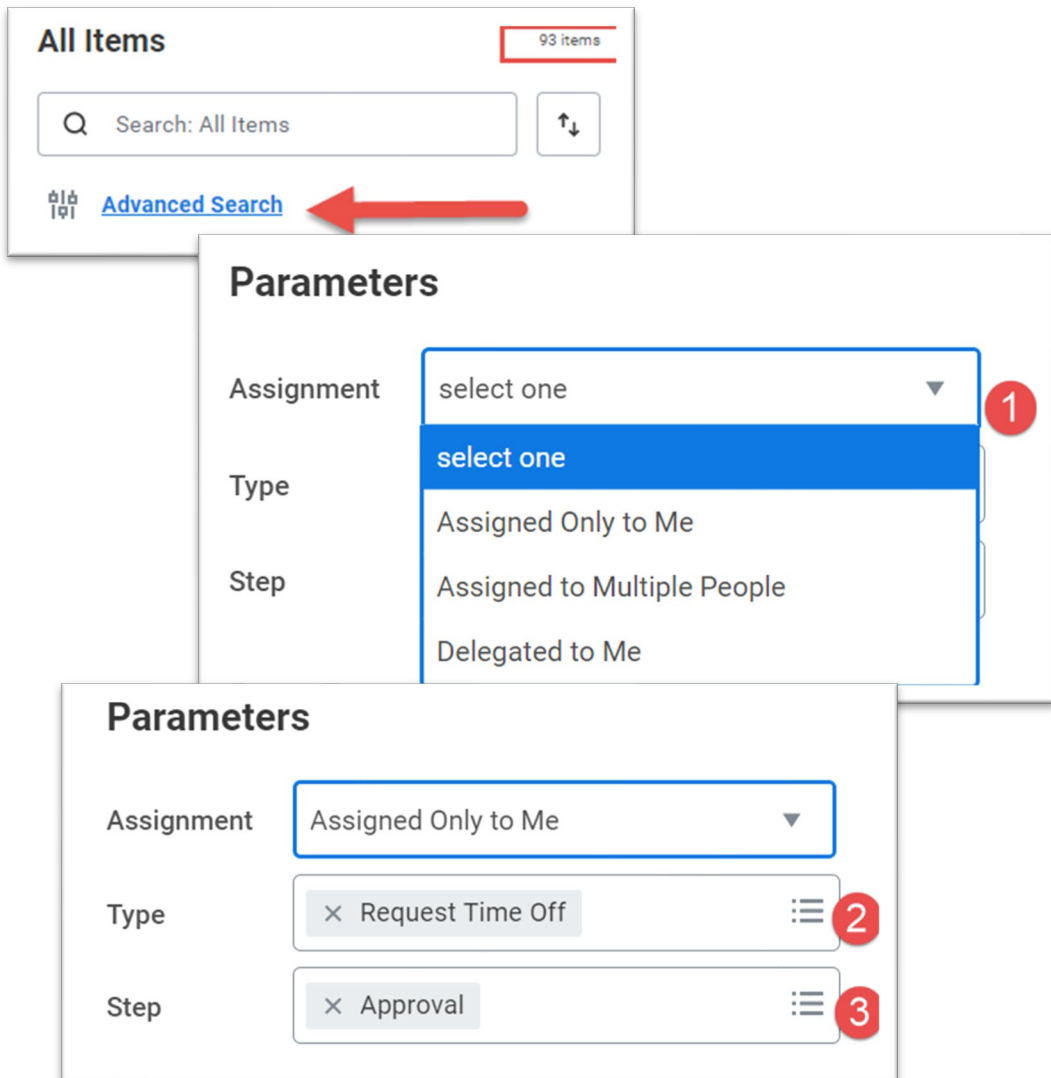
- Advanced Search in "My Tasks" supports searches by task type, step and date range

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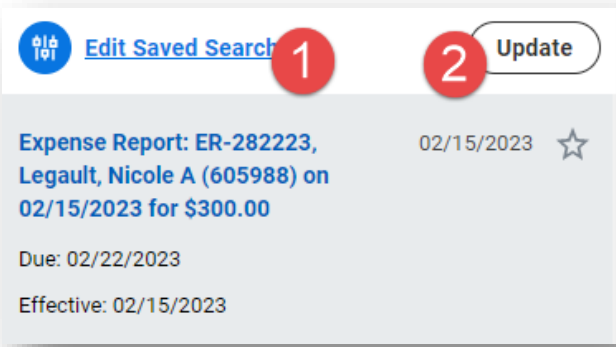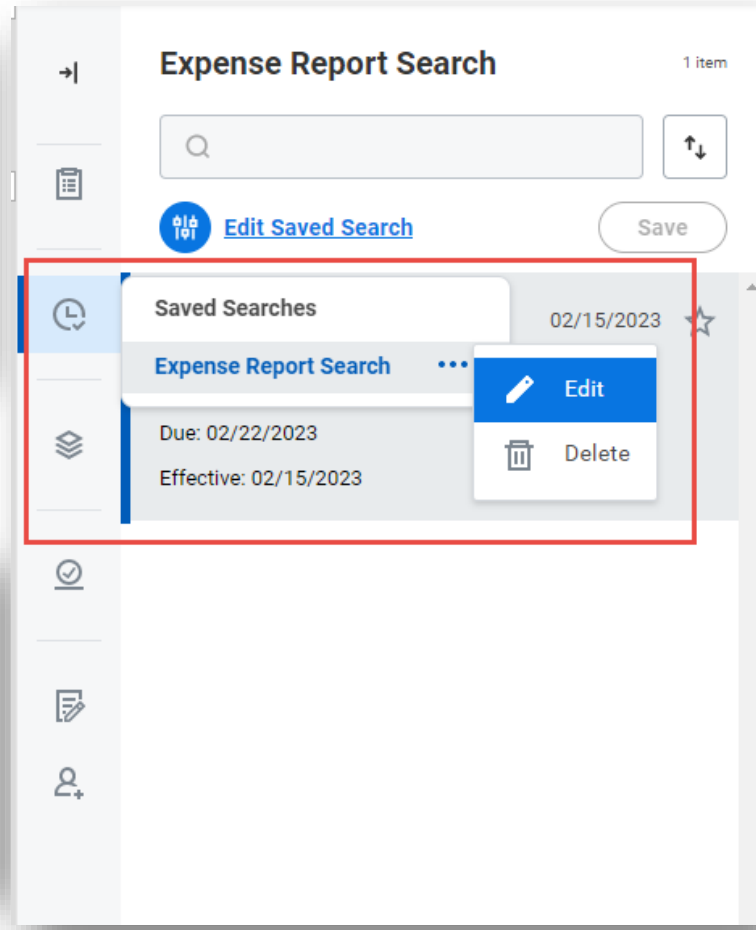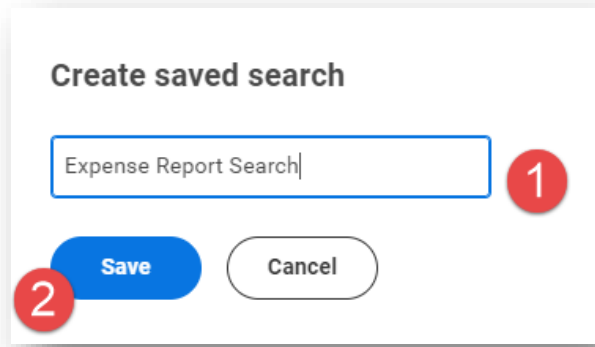
- Once search is set, it can be edited, removed or saved

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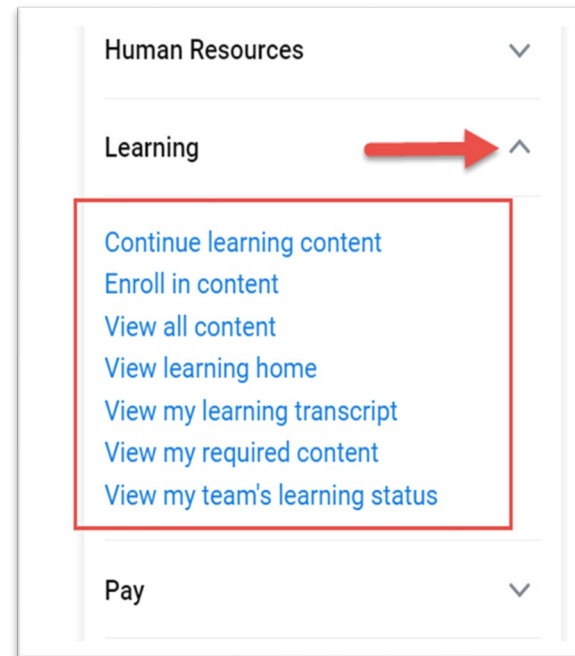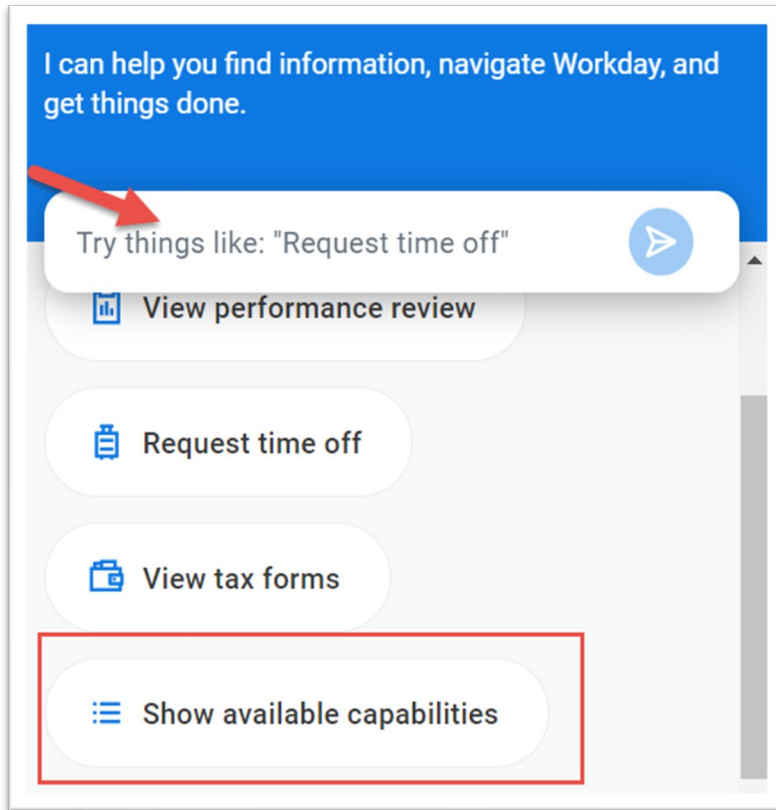
- Workday Assistant supports self service tasks such as requesting time off, viewing performance reviews, enrolling in learning content or updating contact information

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

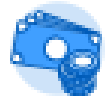- Once on the topic heading, select from a list of items that Workday Assistant can support

# Workday Assistant

- 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

- 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

- Update Payment Elections for reimbursements

# Expenses Hub

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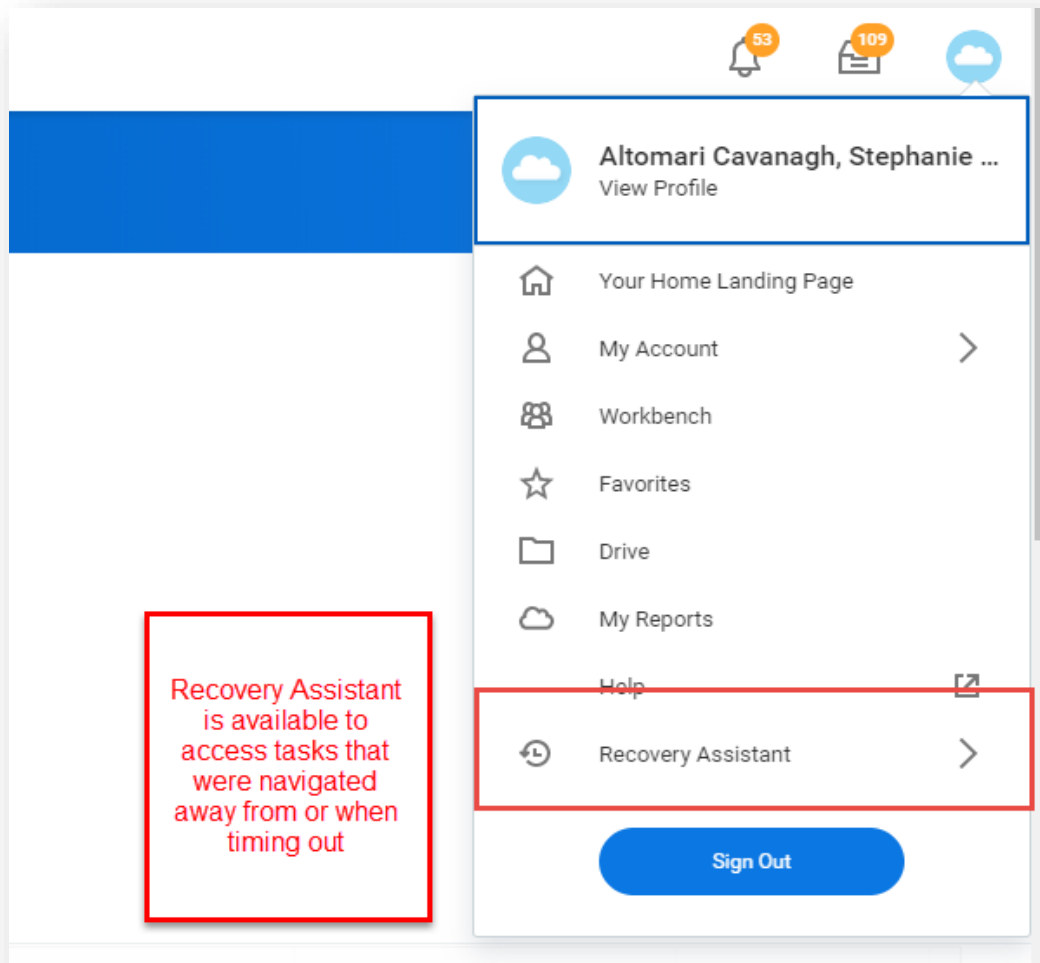
- "Recovery Assistant" available for tasks started and navigated away from within 24 hours of last interaction

- 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
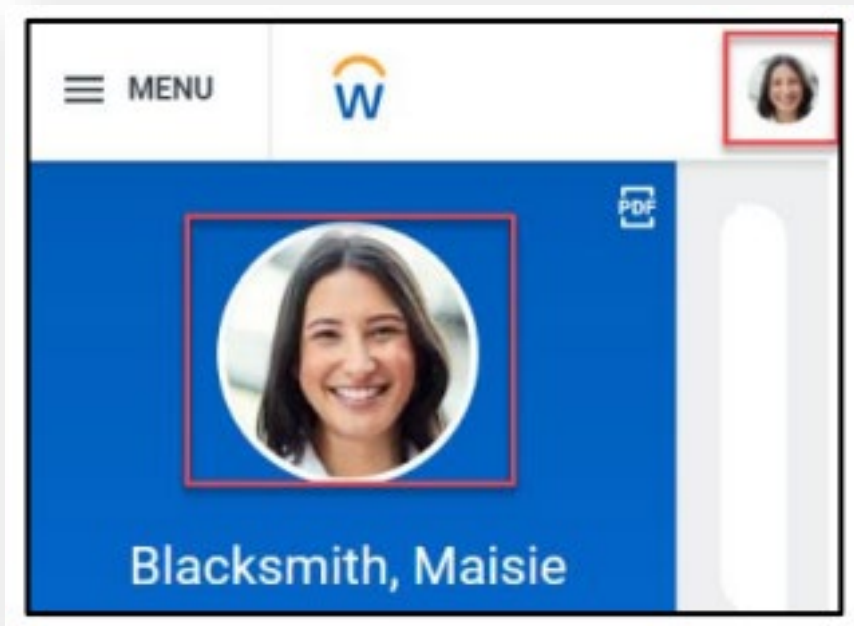
- Upload your professional photo to your Workday profile to create a more personalized experience and build a connected campus community. Your photo will display on your Workday profile and be visible to others in the Brown community in Workday.

- Guidance on photos can be found on the UHR website [here](here)
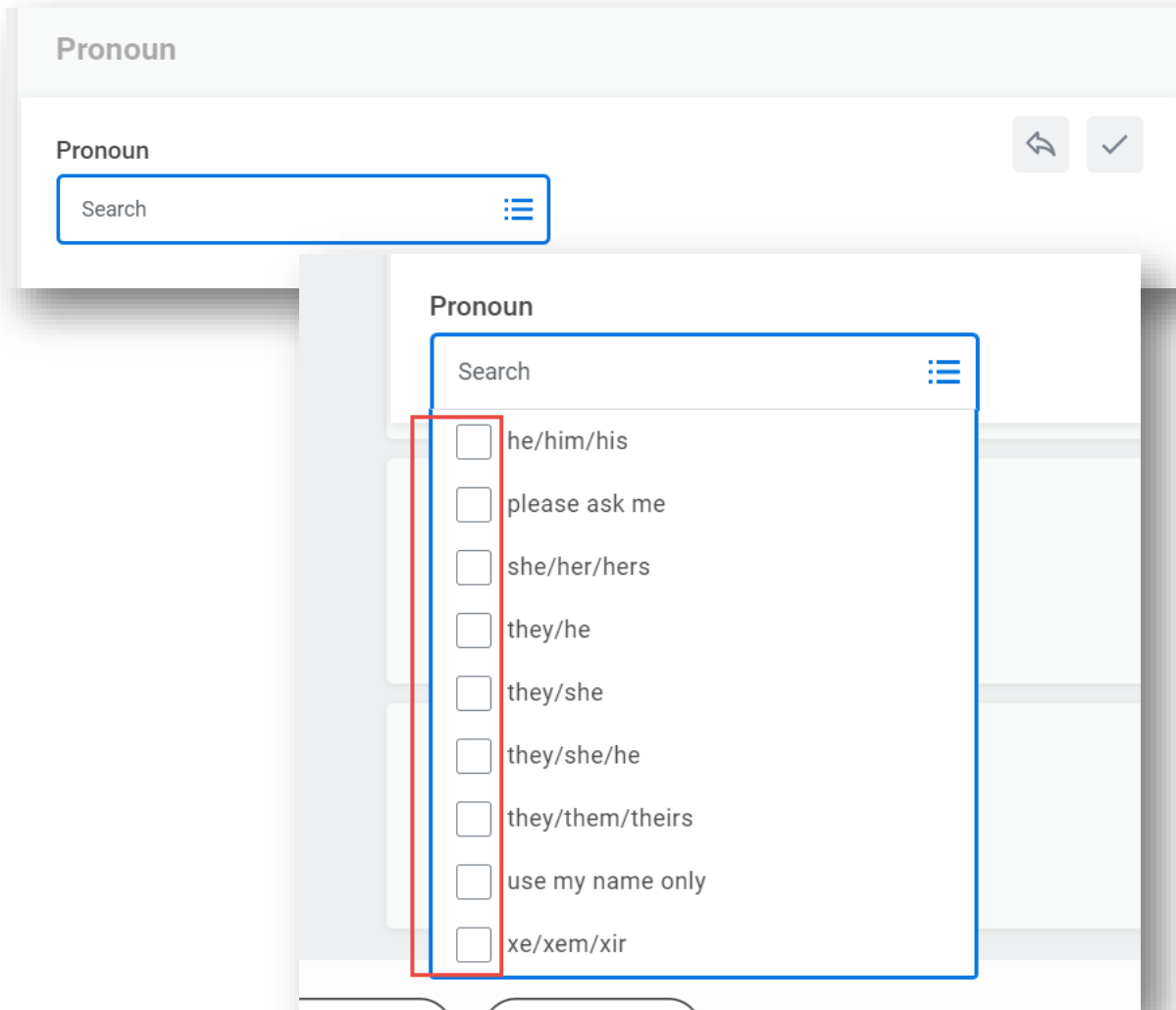
# Photos in Workday

- 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

- 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

- 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 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

- 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)

- 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

- 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

- View all requisitions and take action from Requisitions menu

- "My Requisitions" also renders data in the Requisitions App for Financial Coordinators

# Requisitions App

- 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

- 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
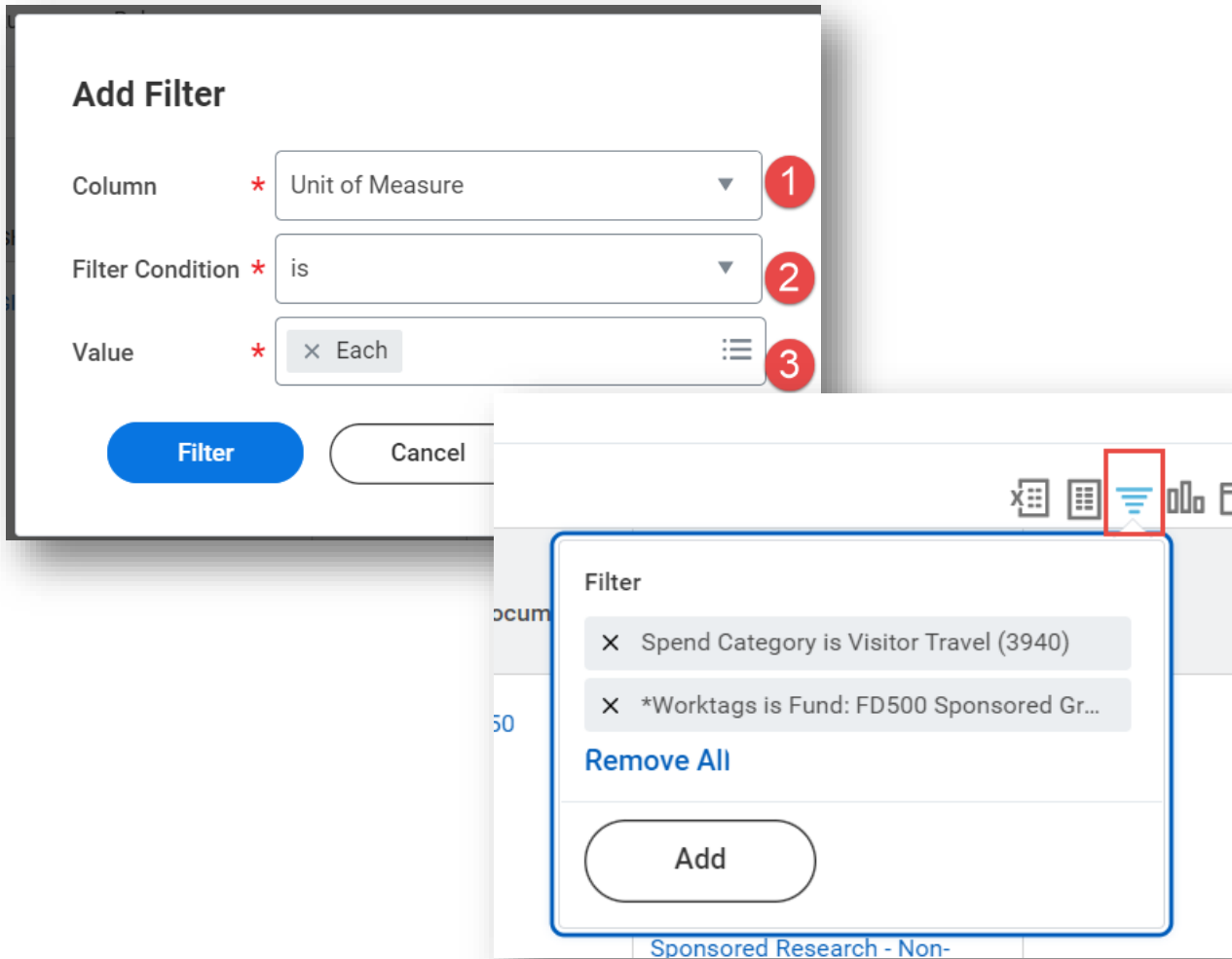
- Users can apply a filter when reviewing their Purchase Order to view only applicable rows

- 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) * × 3 Eddy St, Providence, RI, USA

**Destination Address** (2) * × Harvard University, Cambridge, MA, USA

**Unit of Measure for Distance** Miles

**Estimated Distance of Driving Route** * 54.7 ←

**Trip Distance** * 54.7

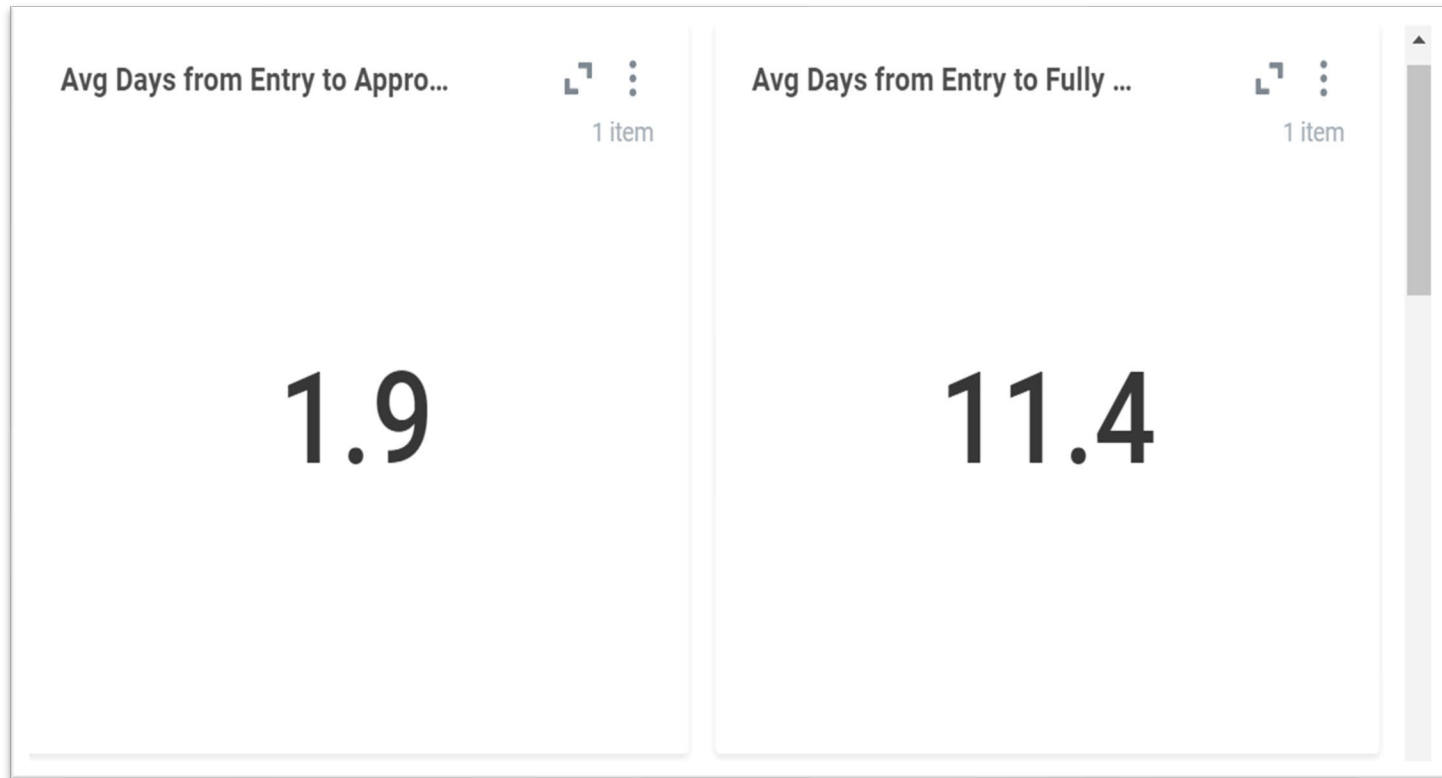**Round Trip** ☑

**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
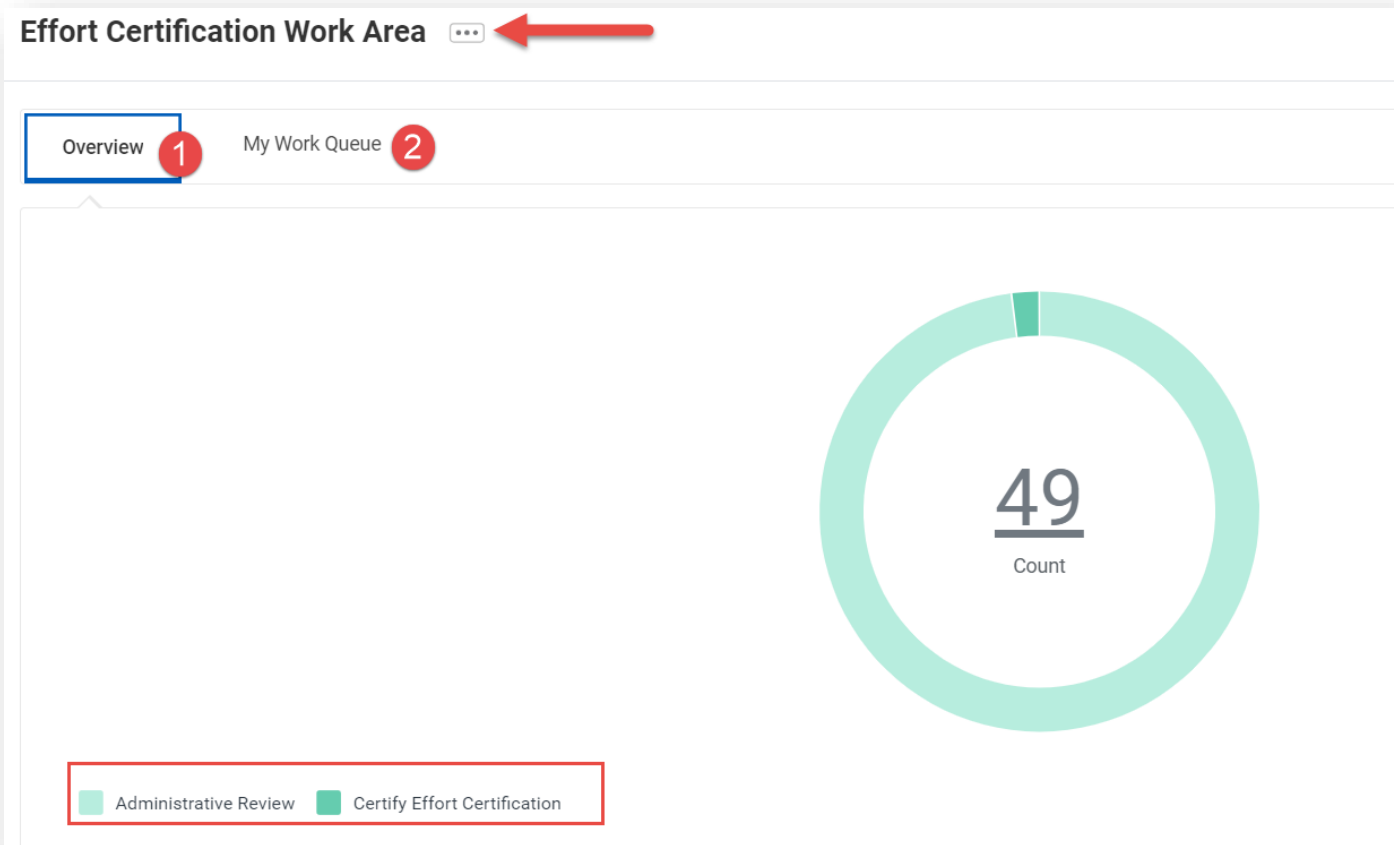
- Other KPIs also available

**Supplier Account Dashboard**

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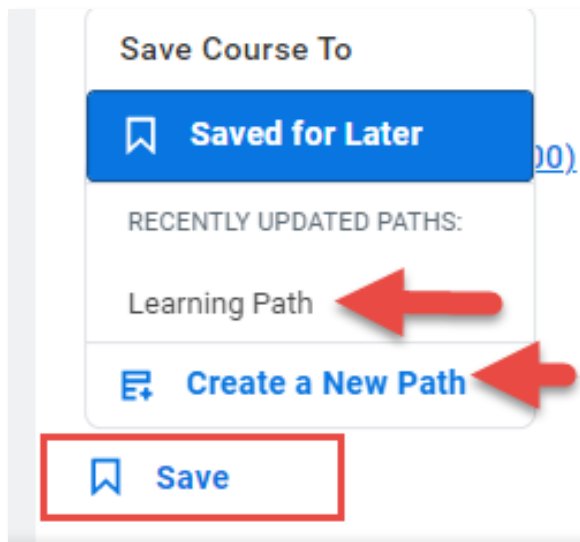
- Learning Paths are groupings of training content that can be created by saving learning pages

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

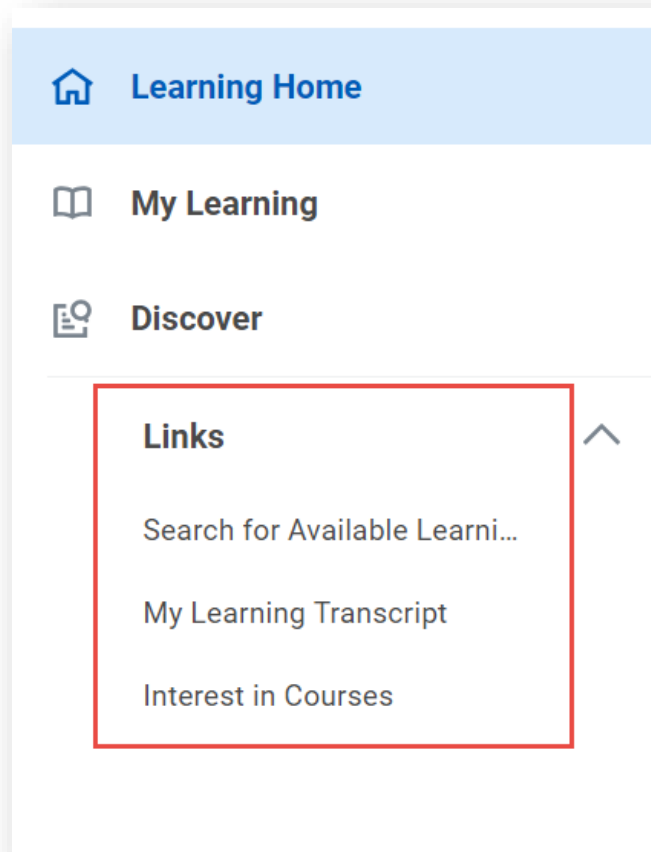- Once **Share Path** is clicked, the link has been copied and can be sent to any other learner

# Sharing Learning Paths

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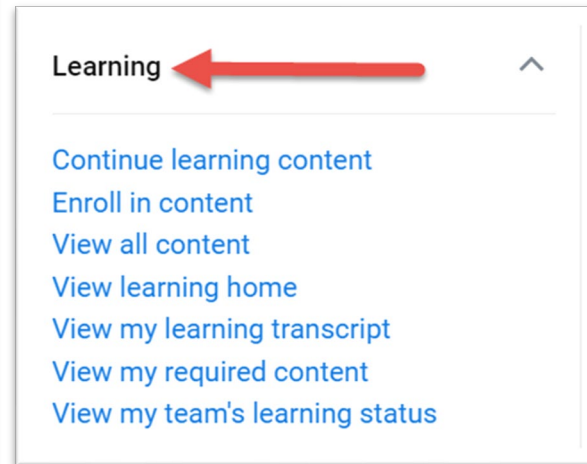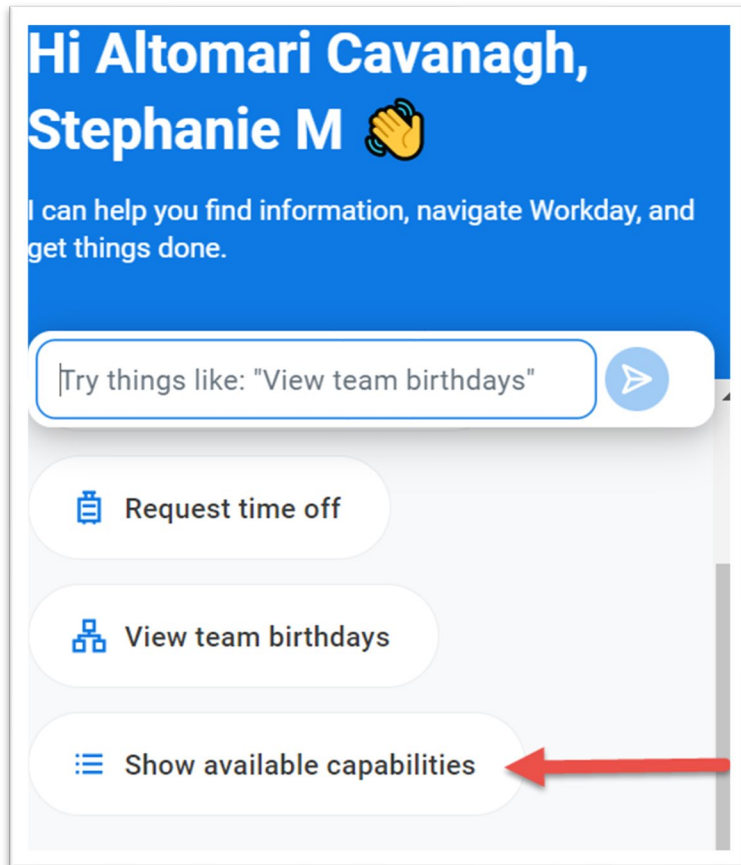
- "Workday Assistant" can now help support users enroll in learning content, view transcript status for your team and view required learning

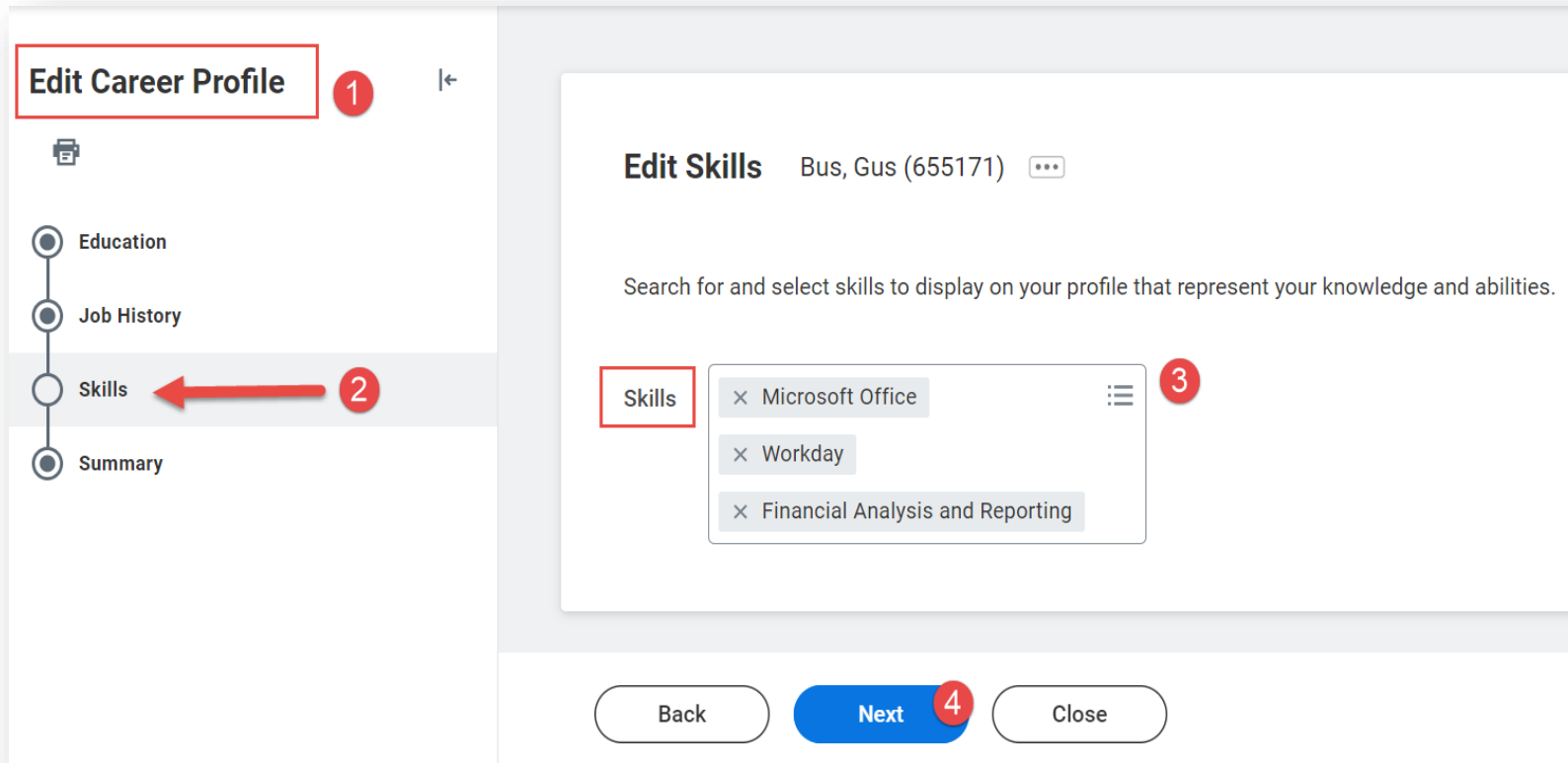- Launch by selecting the Assistant icon>Show Available Capabilities>Learning

# Learning Assistant

- Waiver functionality streamlined and moved to grid framework

- Mass waiver supported

- Supports Learning administrators with updating required learning assignments
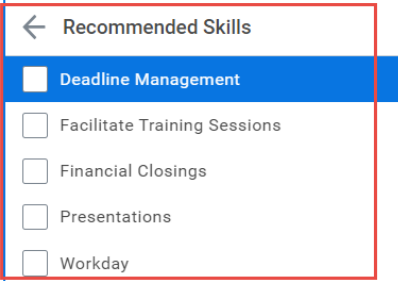
# Waiver Enhancements

- 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

- 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

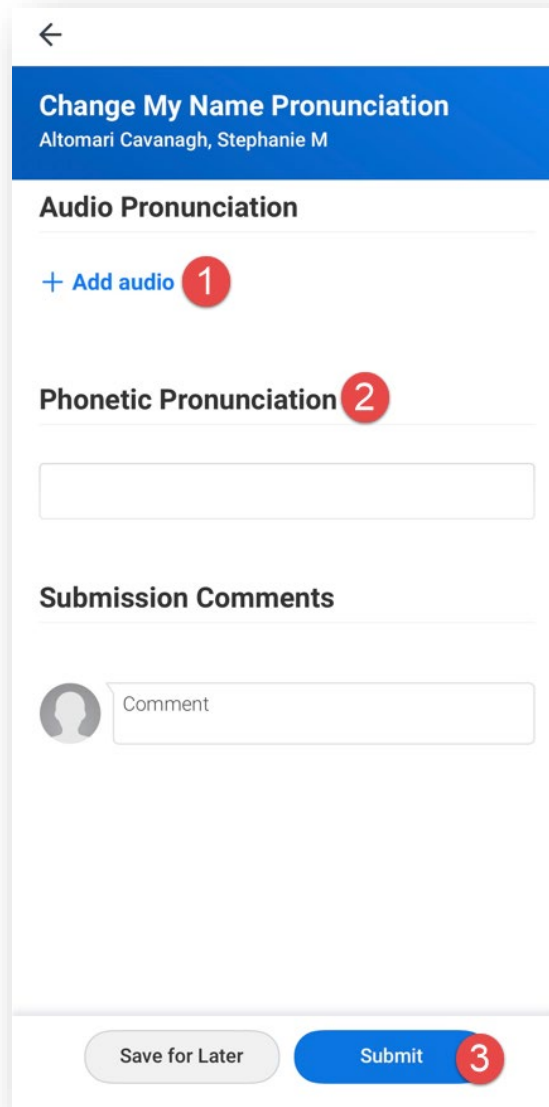# Workday 41: Feature Highlights

## *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
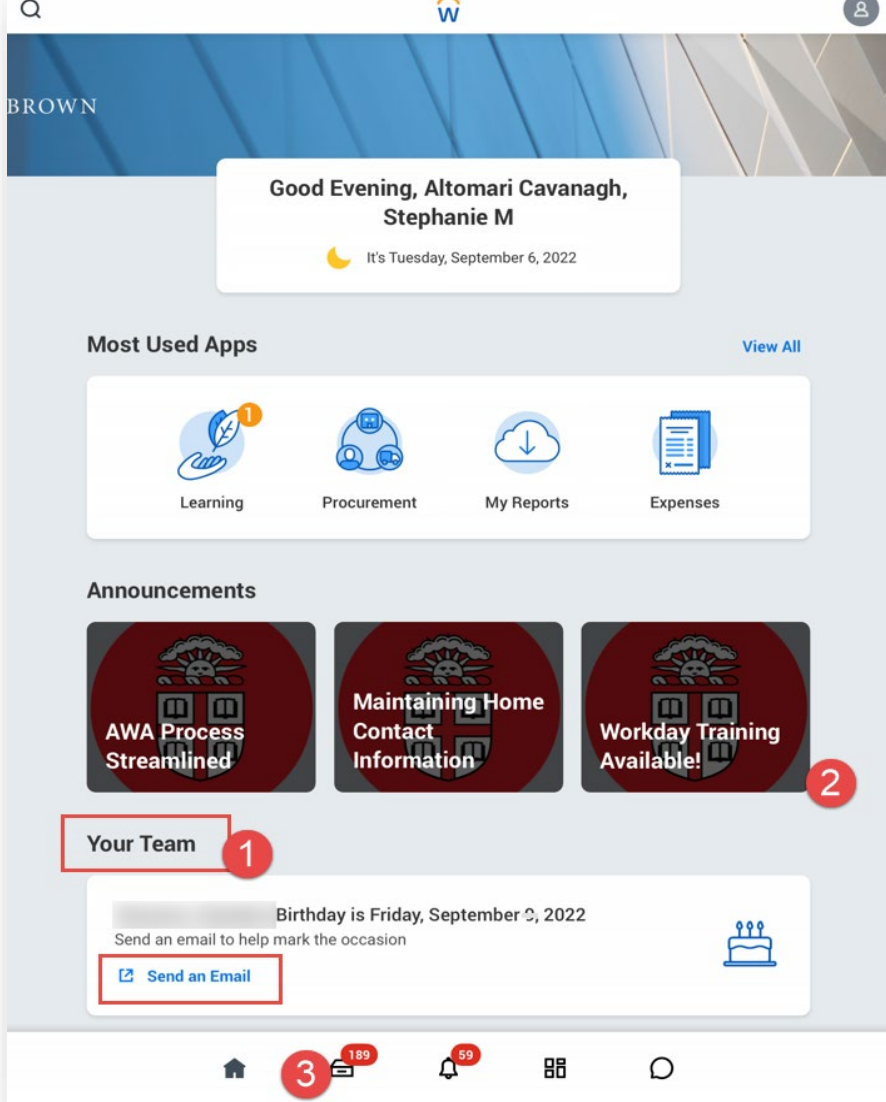
- Email workers directly from notification of birthday or anniversary

- 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

- 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
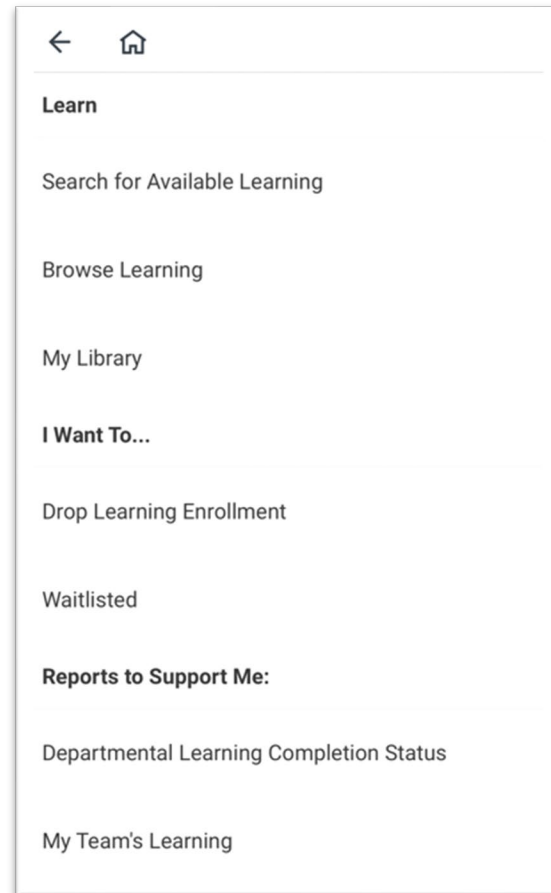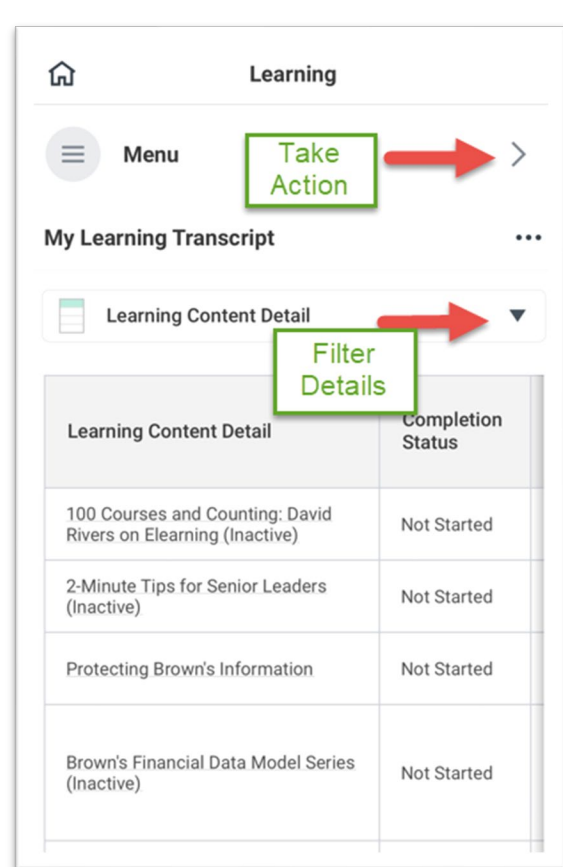
- Access learning activities and transcript details

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

- Continue learning directly from transcript for in progress, media based content

# Learning Access

- 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

- Open Pay application from home page

- Select actions in upper right corner to open Payment Elections
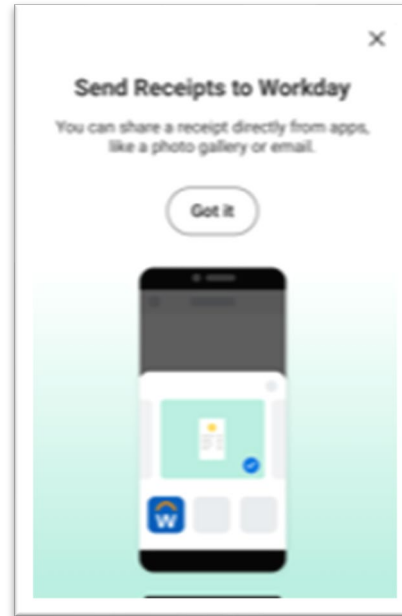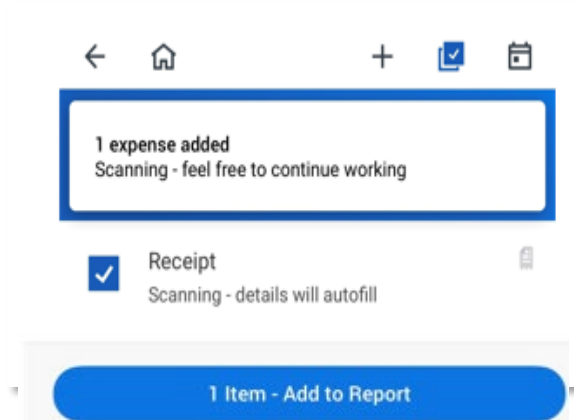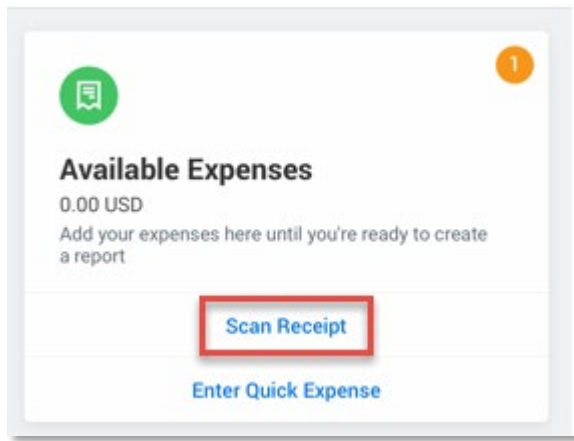
- Click on pencil icons to edit existing accounts or elections

- Click Add to enter new accounts or elections

# Payment Elections from Mobile
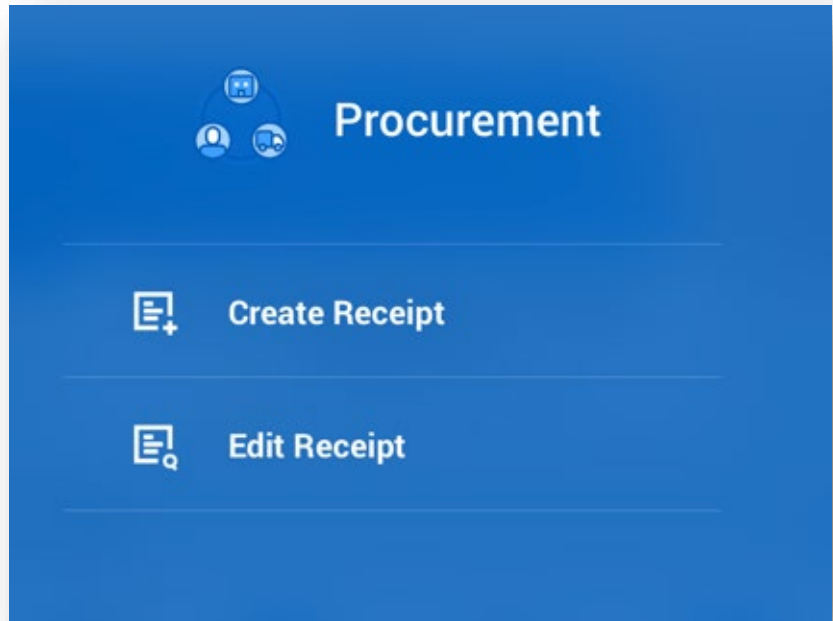
- Financial Coordinators can create or edit receipt right from the mobile application

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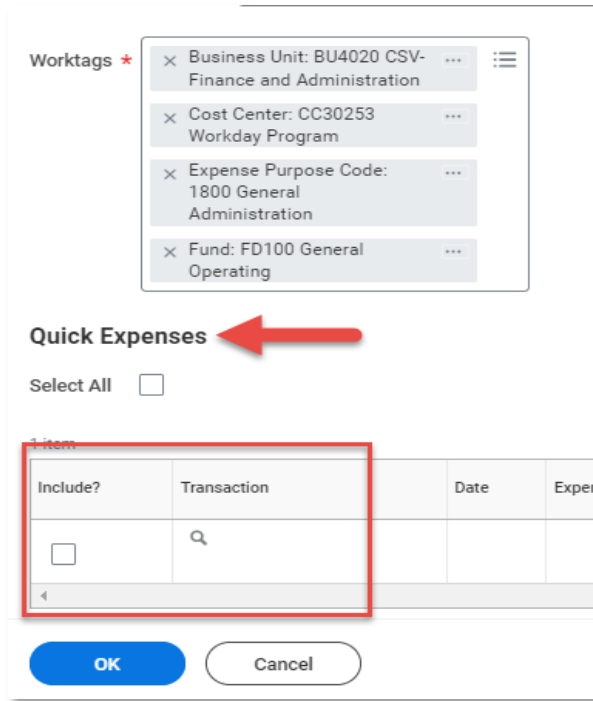
- Complete your expense report on the mobile application or log onto Workday from your computer.

- 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