Workday VNDLY

Product Summary

March 11, 2025

Contents

Workday VNDLY

Welcome to the Workday VNDLY Guide, where you can learn how to configure and use Workday VNDLY, a vendor management system (VMS). This guide covers the following product areas:

- Extended Workforce Management - Supports the ability to source, onboard, manage, invoice, and offboard contingent labor.
- Statement of Work - Supports the ability to track projects against key areas, manage change orders, and build process controls on Statements of Work (SOW).
- Worker Profile Management - Supports the ability to capture data for headcount and individual workers for programs that track time or expenses outside Workday VNDLY.

To learn more about how to use our documentation, click here or watch the video.

Sign In to Workday VNDLY

Profile Preferences: Change Your Password

Context

You can change the password for your Workday VNDLY account. Passwords don't expire.

Steps

1. Access the **My Profile** page from the drop-down menu under your name.
2. Select the **Change Password** button.
3. Create a new password that contains at least 8 characters.

Set Up Multi-Factor Authentication in Workday VNDLY

Context

Workday VNDLY supports enhanced security for accounts with Multi-Factor Authentication (MFA). When enabled, you must present a separate token that validates their identity. This validation provides additional security by preventing unauthorized access in the event that a password is compromised.

Note: The Authentication type must be Workday VNDLY Login and the user must use a Workday VNDLY email.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. Click the **Configuration** tab.
4. Under the **Multi-factor Authentication** section, check the box next to **Enabled**.
5. Under **Applies to User Types**, select the user types you want MFA to apply to.

Set Up Multi-Factor Authentication as a User in Workday VNDLY

Prerequisites

- The Authentication type in the user profile must be set to **VNDLY Login.**
- You must use a Workday VNDLY email.

Context

After Multi-Factor Authentication (MFA) is enabled, applicable users are prompted to set up MFA, and can't proceed to the application before doing so.

Steps

1. Click **Next** under Enable Two-Factor Authentication.
2. Download your authenticator app of choice on your smart device.
3. Open your authenticator app and scan the QR code on the page.
4. Enter the token and click **Next**.
5. Click **Continue to Home Page**.

Next Steps

- Log in to VNDLY with Multi-factor Authentication.

Reset Multi-Factor Authentication in Workday VNDLY

Context

You might need to reset your Multi-Factor Authentication (MFA) for Workday VNDLY if you purchase or receive a new device.

You must be logged in to Workday VNDLY to reset your MFA. If you can't sign in and have misplaced your device, please contact Workday VNDLY Support.

Steps

1. Sign in to Workday VNDLY.
2. Click **My Profile**.
3. Click **Reset MFA Token**.
4. Click **Confirm**.
5. Follow the same process for your initial sign-in.

Sign in to Workday VNDLY with Multi-Factor Authentication

Prerequisites

- Set up your Multi-Factor Authentication (MFA) device.
- Have your password and your token generated by the authenticator app that you selected when signing up.

Context

You use multi-factor authentication to make your sign-in more secure.

Note: For your convenience, you can check the box for **Don't ask again on this device for 30 days**. If you click this box, you won't be prompted to provide your token for 30 days.

Steps

1. Navigate to the Workday VNDLY Sign In page.
2. Enter your username and click **Continue**.
3. Enter your password and click **Continue**.
4. Open your authenticator app and type your token.
5. Click **Next**.

Steps: Set Up SAML Single Sign-On

Prerequisites

VNDLY:

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Have the role of Admin.
- Determine which users will use single sign-on (SSO).
- Determine whether users will initiate SSO using the service provider, identity provider (IdP) or both.
- Accounts must be set up first in VNDLY and marked as active before an SSO user can sign in.

Identity Provider (IdP):

- Determine if a single or multiple IdPs are required in VNDLY. VNDLY supports multiple SAML integrations per tenant.
- Purchase and configure an IdP. Your VNDLY Test and Production tenants can use either:
  - a production IdP
  - a test and a production IdP

  Note: VNDLY only connects with IdPs that allow service provider based authorization.

Context

SSO allows users to access VNDLY using credentials managed by your company's IdP. Each user has an account in VNDLY.

SSO can be implemented for client users, contractors and vendors.

VNDLY is a SAML 2.0 Service Provider. When SSO via SAML is enabled, VNDLY supports:

- Service Provider initiated login.
- Identity Provider initiated login.
- Signed and encrypted assertions.

Steps

1. Collect VNDLY Metadata Files.
2. Complete SAML Single Sign-On Setup.

3. Set Up Default Authentication Method for New Users.
4. Update authentication methods:
    - Update Authentication Method for a Single User.
    - Update Authentication Method for Multiple Client Users.
    - Update Authentication Method for Multiple Contractors.

Collect VNDLY Metadata Files

Prerequisites

Have these permissions:

- *sso.saml.settings.edit*
- *sso.saml.settings.read*

Context

Setting up single sign-on (SSO) requires you to exchange Security Assertion Markup Language (SAML) metadata files between VNDLY and your identity provider (IdP). VNDLY exposes 1 metadata file per VNDLY tenant. Each of your Test and Production tenants has its own URL for the SAML metadata.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **SAML Single Sign On**.
3. Click **Default**.
4. On the **Details** tab, copy the URL in the **Metadata URL** field.
5. Open a browser window and paste the URL and press **Enter**.
   SAML 2.0 XML data displays.

   If you encounter an error opening the metadata file in the browser window, navigate back to the **Details** tab and:

    a. Select the **Allow unsolicited** check box.
    b. Click **Save**.
    c. Repeat step 5.
6. Right-click the browser window and select **Save As**.
7. Save the file as .xml format.
8. Repeat the steps for your other tenant.
9. Send the VNDLY Test and Production tenant metadata files to your IdP administrator.
   The IdP administrator uploads the files to the IdP.
10. Obtain the IdP Test and Production tenant metadata files from your IdP administrator.

    If there's only 1 IdP instance, only 1 metadata file is required.

Complete SAML Single Sign-On Setup

Prerequisites

- Have these permissions:
    - *sso.saml.settings.edit*
    - *sso.saml.settings.read*

- The full metadata files (in .xml format) from your identity provider (IdP). If you use the same IdP for your Test and Production tenants, only 1 metadata file is required.
- Determine whether users will initiate single sign-on (SSO) from VNDLY (service provider) or from the IdP.

Context

Metadata files are usually in a .xml file format and are not a certificate. VNDLY uses the metadata file(s) to finish the SSO setup. Complete the following steps for the Test and Production tenants.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **SAML Single Sign On**.
3. Click **Default**.
4. On the **Details** tab, consider:

Option	Description
Label	Enter a name for the server.
Service provider entity ID override	Enter a different entity ID if you want to override the default service provider entity ID and change how VNDLY identifies itself as the SAML service provider.
Allow unsolicited	Select the check box if your tenant is set up to use IdP initiated login to allow users to initiate a login from the IdP.
Require Signed Response	Select the option whether the IdP requires a signed response and/or a signed assertion. The recommended option is *Require signed response*.
Allowed clock skew	Enter the number of seconds that VNDLY allows for assertion timestamps to skew past their cutoff. Clocks between remote systems can often differ by significant amounts of time and clock skews can help to account for the varied time differences. Example: Server clocks are often not in sync with each other. If an authorization message arrives after its valid date/time, then VNDLY rejects it. Adding time with the clock skew field allows for additional time to account for the slight differences in the server clocks and VNDLY will accept messages that arrive within the allowed clock skew range.
Metadata valid duration	Enter the number of hours to mark the VNDLY metadata as valid. When the VNDLY metadata expires, your IdP can automatically obtain an updated VNDLY metadata file.

Option	Description
Allowed name ID formats	Indicates the name ID formats that are allowed from a dropdown menu. Ensure all values are selected.
PREFERRED SINGLE-SIGN-ON BINDING ORDER	Defines the order VNDLY searches IdP metadata files when looking for SSO bindings.
PREFERRED SINGLE-SIGN-OUT BINDING ORDER	Defines the order VNDLY searches IdP metadata when looking for single logout bindings.

5. Click **Save**.
6. Click the **Identity Providers** tab.
7. Click **Single Sign On - SAML**.
8. As you complete the **Identity Provider** page, consider:

Option	Description
Label	Label for the identity provider. The label appears as a dropdown option when updating a user's authentication method.
External Identifier	Value used when referring to the IdP in external integrations. It indicates which IdP should be used when performing account bulk uploads in VNDLY.
IdP metadata	Copy and paste the SAML metadata from the metadata file provided by your IdP for this tenant.
Bypass metadata validation	Select the check box to enable VNDLY to bypass the metadata validation. Some metadata files may contain SAML extensions that cause validation errors even when valid.
Name ID policy format	Select the name identifier to use for users. You can obtain the policy format from the IdP metadata file. If the name ID policy format is missing within the metadata, select *unspecified*.
Signing algorithm	Select the signing algorithm indicated in the IdP metadata file. You can search for keyword *signing* in the IdP metadata file.
Digest algorithm	Select the digest algorithm indicated in the IdP metadata file. You can search for keyword *digest* in the IdP metadata file.
Chained logout URL	Enter a custom URL if you wish to skip the SAML logout process and redirect the user to the specified URL when the user logs out of VNDLY. The user is also logged out of all other applications from the user's IdP. If the chained logout URL is blank, a user may still be logged out of all applications if single logout (SLO) is set up within your IdP.
Use subject as username	Select the check box to use the subject value as the highest priority username option.

Option	Description
	SAML assertions contain a subject field and additional attributes. Typically, the username comes from the attributes. In some cases, the IdP expects to use the subject field as the username instead.
Username Attributes	Add SAML attributes for VNDLY to search and use as the username during authentication. Attributes may be customized as needed to align with your IdP configuration. It’s recommended to use the username attribute to identify the user, as the username attribute in VNDLY is unique. This means the same username cannot be used twice when creating a user. Example of Username Attribute: test.user Recommended attributes: • NameID • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn • nickname • principalname • urn:mace:dir:attribute-def:eduPersonPrincipalName • urn:oid:1.3.6.1.4.1.5923.1.1.1.6 • Username A sample of user attributes exposed by the IdP may assist with mapping user attributes in VNDLY.
Email Attributes	Add SAML attributes for VNDLY to search and use as the e-mail during authentication. Attributes may be customized as needed. It’s not recommended to use an email field to identify the user as multiple user accounts in VNDLY can have the same email address. Example of Email Attribute: test@email.com Recommended attributes: • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress • urn:mace:dir:attribute-def:mail • urn:oid:0.9.2342.19200300.100.1.3

To save time, be sure to take note of the value you used for the **External Identifier**. You will require this in a later step when setting the authentication method for users.

9. Click **Save**.

10. (Optional) To configure an additional IdP:
    a) Navigate to the **Identity Providers** tab.
    b) Click **Create**.
    c) Complete Steps 8 and 9 for the additional IdP.
11. Repeat the above steps for your other VNDLY tenant.

    It's recommended to save the original metadata file from your IdP in case you need to make updates or revert to a previous version.

Set Up Default Authentication Method for New Users

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you can specify a default authentication method for new client and contractor users (optional). A default authentication method must be set for the Test and Production tenants to allow new users to log into VNDLY using SSO. If a default authentication method isn't set, then users will use a username and password to log into VNDLY by default.

The authentication method for new vendors is set when creating each vendor profile.

Steps

1. Configure the default authentication method for contractors. Complete the steps for your VNDLY Test and Production tenants.
    a) From the header, select **More** > **Company Settings**.
    b) From the **People** section, click **Candidate Profile**.
    c) In the **Default authentication provider** field, enter the identity provider's (IdP's) **External Identifier** for your tenant.

       Use the value you entered in the **External Identifier** field on the **Identity Providers** tab during the Complete SAML Single Sign-On Setup. See: Complete SAML Single Sign-On Setup.
    d) Click **Save**.
2. Configure the default authentication method for clients in your VNDLY Test tenant.
    a) In a new browser window enter the URL for your VNDLY Test tenant.

       Enter *https://<tenant name>.test.vndly.com/settings/integrations/user-import* and replace *<tenant-name>* with the name of your VNDLY Test tenant.
    b) In the **default_auth_provider** field, enter the **External Identifier** of the IdP for your Test tenant.
    c) Click **Save**.
3. Configure the default authentication method for clients in your VNDLY Production tenant.
    a) In a new browser window enter the URL for your VNDLY Production tenant

       Enter *https://<tenant name>.vndly.com/settings/integrations/user-import* and replace *<tenant-name>* with the name of your VNDLY Production tenant.
    b) In the **default_auth_provider** field, enter the **External Identifier** of the IdP for your Production tenant.
    c) Click **Save**.

4. Test to ensure SSO works for VNDLY Test and Production tenants. If you require additional assistance, submit a product support case.

Update Authentication Method for a Single User

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing clients and contractors. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. If you don't set a default authentication method, users will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. From the header, select 1 of these options:
   a) For users, select **More** > **Users**
   b) For contractors, select **Contractors** > **Contractors Summary**
2. Select the user or contractor profile to update.
3. From the **Authentication** prompt, select the SSO authentication method.

   This will be the **Label** you entered on the **Identity Providers** tab during the Complete SAML Single Sign-On Setup. See: Complete SAML Single Sign-On Setup.
4. Click **Save**.

Next Steps

Test to ensure that SSO works for VNDLY Test and Production tenants. Submit a product support case you're unable to resolve an error.

Update Authentication Method for Multiple Client Users

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing clients. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. Use these steps when you update the authentication method for a large number of existing clients. If you don't set a default authentication method, users will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Search for the **User Master Data** report.
3. Click **Export**.
4. Open the report and filter the data for the users you wish to update.
5. From the header, select **More** > **Users**.
6. Click **Bulk Upload**.
7. Click **Download Format** to download the .csv format template.
8. Open the downloaded template and remove all the columns in the template except for **user_principal_name** and **authentication_method**.
9. Populate the **user_principal_name** column using the data in the **Username** column from the **User Master Data** report for the users you wish to update.
10. For the **authentication_method** column, use the **External Identifier** of the IdP to indicate which SSO configuration should be used for each user.

    Use the value you entered in the **External Identifier** field on the **Identity Providers** tab during the Complete SAML Single Sign-On Setup. See Complete SAML Single Sign-On.
11. Save your changes for the bulk upload template.
12. Upload the bulk upload template into VNDLY and view the results.

Next Steps

Test to ensure that SSO works for clients in Test and Production tenants.

1. From the header, select **More** > **Users**.
2. Select a client user that you imported.
3. Confirm the **Authentication** field displays the desired SSO option.

Update Authentication Method for Multiple Contractors

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing contractors. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. Use these steps when you update the authentication method for a large number of contractors. If you don't set a default authentication method, contractors will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Search for the **Contractor Detail List** report.
3. Click **Export**.
4. From the header, select **More** > **Company Settings**.
5. In the **Vendors** section, click **Import Contractor Updates**.
6. Download the bulk_update_contractors template.
7. Open the downloaded template and remove all the columns except for **system_id** and **authentication_method**.
8. Populate the **system_id** column using the data from the **System ID** column in the **Contractor Detail List** report.
9. Populate the **authentication_method** column using the **External identifier** of the IdP to indicate which SSO configuration to use for each user.

   Use the value you entered in the **External Identifier** field on the **Identity Providers** tab during the Complete SAML Single Sign-On Setup. See Complete SAML Single Sign-On.
10. Save your changes for the bulk_update_contractors template.
11. Upload the file into VNDLY and view the results.

Next Steps

Test to ensure that SSO works for contractors in Test and Production tenants.

1. From the header, select **Contractors** > **Contractors Summary**.
2. Select a contractor that you imported.
3. Confirm the **Authentication** field displays the desired SSO option.

Related Information
Examples
Contractor Updates Inbound

Reset Multi-Factor Authentication For Another User

Prerequisites

Have the following:

- The *user.multi_factor_authentication.reset* permission, VNDLY administrators have this permission. If other users need this permission, they need to request this permission from the administrator.
- Be logged in as your role. You can't impersonate another user.
- Multi-factor authentication is enabled in Workday VNDLY.
- Be a client user. Vendors and contractors can't reset someone else's MFA token.
- In the user profile, the user must have **VNDLY Login** set for the **Authentication** option. (**More** > **Users** or **More** > **Vendors** for vendors).

  Note: For contractors, make sure that **VNDLY Login** is set for the **Authentication** option when you edit the contractor.

Context

An administrator can reset the multi-factor authenticator (MFA) token for users who have previously established their MFA and have lost their credentials. Example: A user lost their phone and needs to set up Multi-Factor Authentication on a new device.

Steps

1. Navigate to the user that you want to reset the MFA token and edit the user.

Option	Description
Vendor	From the header, select **More** > **Vendors**. Select the vendor and go to the **Contacts** tab. Edit the vendor by clicking the pencil icon.
Contractor	From the header, select **Contractors** > **Contractors Summary**.
Client	From the header, select **More** > **Users**.

2. Click the **Reset Multi-Factor Authentication** link under **Authentication**.
3. Confirm that you want the token reset.

Next Steps

When the user signs in to VNDLY, they'll be redirected to the same MFA setup process that appeared when they initially signed in. See

Set Up Multi-Factor Authentication as a User in Workday VNDLY.

Change Sign-Up Token Expiration Period

Prerequisites

Have these permissions:

- *settings.admin* at the top level Organization Unit
- *admin.settings.security.configuration.read*
- *admin.settings.security.configuration.write*

Context

Depending on how new users are set up in VNDLY, they may receive an invitation email with a link to sign in to VNDLY for the first time. For security purposes, the link is only valid for a specific length of time. You can adjust how many hours that link is valid for in your tenant.

Steps

1. From the header, click **More** > **Company Settings**.
2. From the **Organization** section, click **Security Settings**.
3. Click the **Configuration** tab.
4. In the **Sign Up Token Expiration (Hours)** field enter the number of hours the invitation link is valid for.
5. Click **Save**.

Result

Example

Next Steps

Concept: VNDLY Authentication Methods

VNDLY supports 2 types of user authentication methods that provide different levels of security:

- VNDLY sign-in with username and password
- SAML Single Sign-On (SSO).

Sign-in With Username and Password

This is the basic authentication method offered by VNDLY. Users input their assigned VNDLY username and their password. VNDLY verifies the password entered matches the user's record and grants them access. There's no additional verification or authentication unless multi-factor authentication (MFA) is also configured for the tenant.

Administrators can configure VNDLY to use MFA for enhanced security for client users, vendors and contractors. MFA is a method of confirming the identity of a user by requiring more than 1 type of identity verification. Workday recommends that you enable MFA in all of your tenants to provide additional security. When enabled, users must present a separate one-time password (OTP) token that validates their identity. This validation provides additional security by preventing unauthorized access in the event that a password is compromised. Most often, VNDLY users will download an authenticator app on their smartphone and use it to obtain the OTP token. Users without a smartphone can use a browser-based option. The OTP token is only available for a particular site and user account, and is only valid for a short period of time (usually 30 seconds).

Key Features

- The username and password authentication method is VNDLY's standard sign-in method and doesn't include any other identity validation.
- VNDLY stores user passwords in an AES-256 encrypted database and uses the PBKDF2 algorithm with a SHA256 hash, a password stretching mechanism recommended by the National Institute of Standards and Technology (NIST).
- When implementing MFA, VNDLY administrators must configure MFA for each user type (client users, vendors and contractors) and users must set up MFA on their smartphone.
- Users signing in with MFA can opt to trust the device they're using to bypass the need for an OTP token at each sign-in for 30 days.
- Multiple authenticator apps integrate with VNDLY.

Example Sign-in Process With MFA

Note: The user must complete a one-time MFA setup prior to signing in with MFA.

1. A user signs into VNDLY from a browser with their username and correct password.
2. VNDLY verifies their password is the expected password and displays the token login window.
3. The user accesses the designated 3rd party authenticator app (or designated website) and obtains the OTP token.
4. The user inputs the token (usually 6 digits) into the token login window.

5. VNDLY verifies the token is valid and grants the user access.

SAML Single Sign-On (SSO)

Security Assertion Markup Language (SAML) is an XML-based framework for transferring identity data between 2 entities: a service provider (SP) and an identity provider (IdP). VNDLY is considered an SP. With SAML, the SP (VNDLY) agrees to trust the IdP to authenticate users. In return, the IdP performs the authentication and generates an authentication assertion, which indicates that a user has been authenticated.

Key Features

- Ease of access for users.
- Increased security with a single point of authentication.
- Reduced costs for user maintenance in VNDLY.
- VNDLY administrators must configure SSO for the user type (client users, vendors and contractors).
- VNDLY supports the SAML 2.0 SSO standard for signing in to VNDLY from other identity providers.

Example of Sign-in Process With SAML SSO

1. A user signs into VNDLY from a browser with their username, which is configured to use SSO.
2. The browser redirects the request to the IdP.
3. The IdP authenticates the user (through username and password or two-factor authentication) and generates a SAML response.
4. The IdP sends the SAML response to the SP for verification.
5. If the verification is successful, the SP grants the user access to VNDLY.

Note: Clients can also set up links within their intranet portal to authenticate and log users into VNDLY using SSO.

Concept: Sign-Up Token Expiration

VNDLY uses an email invitation with a link for new users to sign in to VNDLY for the first time. Depending on how the user's profile is created, VNDLY may automatically send the invitation to the user after you create their profile. For security purposes, the link is only valid for a specified length of time. VNDLY Administrators set how many hours that link is valid for as a tenant-wide setting. When a user clicks the link in the invitation after the expiry period, they can’t log in. You can resend the invitation to the user and it will be valid for the same number of hours.

VNDLY doesn’t automatically send an invitation to all users after you create their profile. There are multiple factors affecting whether VNDLY automatically sends an invitation:

- The method used to create their profile.
- The **Authentication Method** on the user's profile. VNDLY only sends an invitation for users with an **Authentication Method** of *VNDLY Login*.

User Profile Creation Method	Type of User	Invitation Automatically Sent?
From Users page	Client Contractor Vendor	Yes
Through an integration	Client	No
Bulk upload	Client Contractor Vendor	No

Concept: Your First Sign-In

Welcome to Workday VNDLY and congratulations on your new role! Workday VNDLY is where you'll fill out your timesheets and submit expenses. Once you onboard to your new job, you might receive an email with the subject line, **Time entry system access credentials.**

To create a password, click the link in the email. Follow the instructions, and then sign in to Workday VNDLY with the username provided and the password you created.

Concept: SAML Single Sign-On

Overview

Security Assertion Markup Language (SAML) is an XML-based framework for transferring identity data between 2 entities: a service provider (SP) and an identity provider (IdP). VNDLY is considered an SP. With SAML, the SP (VNDLY) agrees to trust the IdP to authenticate users. In return, the IdP performs the authentication and generates an authentication assertion, which indicates that a user has been authenticated. This is also known as Federated Identity. Authentication information is exchanged through digitally signed XML documents.

SAML is mostly used as a web-based authentication mechanism as it relies on using the browser agent to manage the authentication flow.

SAML is flexible enough to support the authorization workflow being initiated by either the SP or the IdP. When setting up SAML single sign-on (SSO), customers determine where users will initiate the SSO.

Benefits of SAML SSO

There are many benefits of implementing SAML SSO:

- Ease of access for users
- Increased security with a single point of authentication
- Reduced costs for user maintenance in VNDLY
- Increased compliance

Example of SAML Flow for Service Provider Initiated Sign In

This is an example SAML flow when a user tries to sign into VNDLY using SSO.

1. A user signs into VNDLY from a browser with their username, which is configured to use SSO.
2. The browser redirects the request to the IdP.

3. The IdP authenticates the user (through username and password or two-factor authentication) and generates a SAML response.
4. The IdP returns the encoded SAML response to the browser.
5. The browser sends the SAML response to the SP for verification.
6. If the verification is successful, the SP grants the user access to VNDLY.

Troubleshooting: Unable to Sign in to Workday VNDLY

If you're having trouble signing in to Workday VNDLY, there could be a few possible causes:

- System-generated email was not used for first-time sign in.
- Email address was used instead of username to sign in.
- Can't remember password.

Cause: System-generated email not used for first-time sign in.

Solution: When your account is first created, a system-generated email is sent to the email in your profile. You must click the link within the email in order to sign in for the first time. During this initial sign-in, you create your password.

Cause: Email address was used instead of username to sign in.

Solution: For some Workday VNDLY accounts, your username may not be the same as your email address. If your username is different from your email address and you wish to make them the same, you can change your username by editing your profile in Workday VNDLY. If you use Single Sign-On and wish to change your username or password, please contact your IT team.

Cause: Can't remember password.

Solution: Sometimes we forget our passwords, but no worries. To reset your password, click the **Reset your password** link under the **Next** button on the sign-in page. This will prompt you to enter your username and then you will receive an email with details on resetting your password.

FAQ: Multi-Factor Authentication

What if I don't have a mobile device?	If you don't have a mobile device, you can use a browser-based option, like 1Password. These services provide browser plugins that can scan a QR code displayed in the browser.
Can Single Sign On (SSO) users enable multi-factor authentication (MFA)?	No. Currently only users with the authentication method VNDLY Login can use multi-factor authentication.
What happens if an Administrator selects to disable MFA for a set of users?	If MFA is disabled for a user, they won't be prompted for a device token upon logging in to Workday VNDLY.
What happens if a user loses their token or they get a new phone?	If a user no longer has access to their token, they must contact Workday VNDLY Support to have their device record removed. After the record has been removed, the user can re-enroll using their new device. See the article for Set Up Multi-Factor Authentication as a User in Workday VNDLY for instructions.
Why is my token being rejected as invalid?	Ensure that the time on your device is synced correctly. The tokens are generated based on the current time, so both the site and authentication

	device must display the same time. Also, if you have multiple tokens for different sites, ensure that the token matches the site you're wanting to log in to.
I provided a token in my authenticator app after it expired, but it was recognized as valid. Shouldn't it only accept the currently displayed token?	Due to network latency, it's policy for our system to validate a token for the previous 30 seconds. There might be an acceptable time delay between when the token is generated and when it's validated in our system.

Reference: Password Standards

Single Sign-On

Single Sign-On (SSO) user account passwords aren't stored in Workday VNDLY and are managed by your identity provider (IdP).

Workday VNDLY Password Standards

This information applies to user accounts configured to use VNDLY Login, where user account passwords are stored and managed directly in Workday VNDLY.

VNDLY Login credentials are stored in an AES-256 encrypted database using the PBKDF2 algorithm with an SHA256 hash, a password stretching mechanism recommended by the National Institute of Standards and Technology (NIST). It is outlined in NIST Special Publication 800-132 Recommendation for Password-Based Key Derivation Part 1: Storage Applications. We follow NIST recommendations for password strength as outlined in NIST Special Publication 800-63B, Digital Identity Guidelines.

Component	Description
Password length	Minimum of 8 characters and configurable up to 64 characters
Allowed characters	All printable characters allowed, including spaces
Special characters	Permitted, but not required
Password comparison	Workday VNDLY compares passwords to dictionaries and a list of 20,000 common, easily guessed passwords.
Expiration period	None
Password hints	None
Knowledge-based authentication	None. Example: Who was your best friend in high school?
Reauthentication	Required using configurable session timeout
Temporary account lockout	30 minutes after 5 invalid attempts
Multi-factor authentication (MFA)	Configurable by user type. Example: Client, vendor, contractor.

Related Information
Tasks

Set Up Multi-Factor Authentication as a User in Workday VNDLY on page 10

Examples

National Institute of Standards and Technology

Reference: Recommended Authenticator Apps

When setting up Multi-Factor Authentication (MFA) in Workday VNDLY, you're prompted to download an authenticator app. An authenticator app provides added security around your Workday VNDLY account.

Below is a list of authenticator apps that we recommend. Each app has varying set up processes.

Popular Authenticator Apps

- Google Authenticator
- Duo Mobile
- LastPass Authenticator
- Authy
- Microsoft Authenticator

Navigation

Save Filter Settings

Context

You can save commonly used filter settings in various pages throughout Workday VNDLY. This allows you to access more relevant information quickly. You can save the filter settings on the following pages:

- Job List
- Job Card
- Work Order List
- Worker Profile Work Orders
- Vendor Distribution Groups
- Vendor Distribution Rules
- Rate Cards
- SOW List
- SOW Change Orders
- SOW Units Tab
- SOW Milestones Tab
- SOW Fixed Price Payments Tab
- SOW Role List
- SOW Worker List
- SOW Checklist List
- RFP List
- RFP Proposals Tab

Note: You can only save filters within the NEW Job List and Job Card pages. If you are using an older version of these pages, you won't have the ability to save filters for these pages.

Steps

1. Navigate to the appropriate screen.

2. From the **Filters** sidebar, select the filters that you'd like to save for the search.
3. Select **Save current filters (*n*)**, where n is the number of filters that you've selected.
4. Name your filter and click **Save Filters**.

   When you return to the page, the new filter is available for selection.

Concept: Workday VNDLY Home Page

The Workday VNDLY Home page serves as your starting point and acts as a landing page with key information and links to make it easy to navigate to action items. The Home page content will vary based on the role of each user and how you configure your tenant. Example: A Resource Manager sees data for jobs that they have visibility to whereas an Administrator, who has access to the whole organization, sees jobs across all Resource Managers.

Header

The header provides access to the various modules of Workday VNDLY and includes menus with additional navigation options. The **More** menu provides access to numerous options including the **Company Settings** page for configuration settings to customize Workday VNDLY for your environment.

The Tasks drawer next to your name provides easy access to a filtered list of tasks:

- **My Tasks**: list of tasks specifically assigned to you.
- **All Tasks**: list of tasks assigned to user roles that you belong to.

Hovering over your name provides access to:

- My Profile
- Notification Preferences
- Switch Account
- Delegate Access
- Sign Out

Note: Workday VNDLY uses a responsive display based on the device, screen size, and display magnification. The header might display across the top of the page or collapse on the left side and it’s accessible by clicking the hamburger icon.

Cards

Below the header, a set of cards related to key areas of Workday VNDLY display relevant metrics to each of those areas (depending on the setup of your environment):

- Jobs
- Work Orders
- Pending Modifications
- Contractors
- SOW
- RFP

Clicking the metric numbers quickly links you to the main page of the relevant area. If you click one of the more specific metrics within the card, the related page opens filtered to that category. Example: When you click the **On Hold** number in the **Jobs** card, the **Jobs** page opens with the filter of **Current Status** set to *On Hold*. You can filter the data as needed and save the filters on the related page. The filters don't affect the filtered data displayed in the scorecards on the Home page.

The cards displayed are dependent on the functionality enabled in your environment. Example: You will only see the SOW card if you have SOW enabled in your environment.

Quick Actions

A group of quick action buttons display below the cards, enabling you to jump to common actions. The buttons vary based on the security permissions assigned to your role.

Tasks

The **Tasks** section on the Home page enables you to view important to-do items by category. A maximum of 14 task categories can display, and you can click a task category to view those tasks in the **Tasks** list. From the **Tasks** list, you can set up filters and view approvals.

Notifications and Messages

Adjacent to the **Tasks** widget, is a section containing 2 tabs: **Notifications** and **New Messages**.

Icon	Description
Notifications	Alerts generated as a result of different workflows and actions taken in Workday VNDLY display here, based on the settings for your company. Use the Notification Preferences option under your name in the global navigation bar to configure how to receive notifications (In app or email). Your Notification Preferences will override the notification settings of your tenant. See Concept: Notification Recipients in Settings for more information.
New Messages	In-app messages from vendors display here. You can see more messages by clicking **Inbox**.

Favorite Reports

This widget displays all of your favorite reports for quick access. Click the report name to access the report to run it or take other actions for the report. You can manage the list of favorite reports from the **Reports** page, under **Reports** tab, by clicking the heart icon on the desired report.

Spend and Headcount Graphs

At the bottom of the Workday VNDLY Home page, 2 reports—**Spend by Month** and **Headcount By Vendor** illustrate the data by graphs for easy visualization. You can download the chart image as a PNG or click **View as Report** to see the table view of the report.

Related Information
Concepts

Concept: Work Orders on page 117

Concept: Tasks in Workday VNDLY on page 38

Concept: Timesheets on page 125

Foundational Configurations

Add an Organization Level to Organization Hierarchy in Settings

Context

Organization Levels enable you to label each level in your organization. These levels help you identify the appropriate areas of your organization on forms and reports.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Organization Hierarchy**.
3. Click **+ Add Organization Level**.
4. Name your new Organization Level and click **Add**.

   If you need to remove a level or expand your hierarchy beyond 14 levels, please contact the Workday VNDLY Support team.

Change Company Profile Preferences

Context

Administrators and MSPs can:

- Edit their company profile.
- Determine what modules they want to turn on and off within the system.

Steps

1. Access the **More** drop-down.
2. Select **Company Profile** and edit the task.
3. Toggle on or off the relevant modules in the **Preferences** section.

Add Currency to Workday VNDLY in Settings

Context

The currencies you select to add to Workday VNDLY impact several areas of the application, like invoices. It's important to add the currencies your organization uses for proper reporting and representation in the application.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Currency**.

3. Click **+ Add** to add a single currency or **+ Bulk Upload** to add several currencies.

   If you're adding a single currency, complete the fields in the pop-up window and click **Save**. If you're bulk uploading currencies, download the document format from the pop-up window and add your data to the fields.
4. Upload your file.

Enable Multiple Currencies in Settings

Context

Workday VNDLY users with access to **Company Settings** can set **Allowed Currencies** and **Default Currencies** on a worksite. Default currencies can only be sourced from allowed currencies.

Multiple currencies can be added to a single worksite.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Currency**.
3. Click **Edit**.
4. Click **Enable Multiple Currencies?**

Add Locations in Settings

Prerequisites

- Set up regions.

Context

Locations specify where a program wants to hire workers or where a job takes place. Workday VNDLY also uses this information to assist in calculating accurate taxes if a program decides to manage taxes in the application.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Locations**.
3. Click **Add**.
4. When adding a location, consider these options:

Option	Description
Accounting Location Code	Used when generating an invoice.
Overtime Profile	Linking an **Overtime Profile** applies all **Overtime Profile** rules to a location, which saves time for users when creating jobs and work orders. This field only displays when your environment doesn't use overtime **Rules** in the **Overtime** section of **Company Settings**.
Allowed Currencies	The default enables all currencies set up in VNDLY. Users can adjust the currencies applied

Option	Description
	to locations and available when creating jobs. In addition, the setting can help users avoid accidentally changing currencies, which could impact rate cards associated with a job.
Default Currency	Sets a default currency for job forms with the location selected.
Tags	Serves as an additional source of tag. If using the tax location tag, the location won't be eligible for selection on jobs and work orders. However, the location will display for tax purposes, like Work Site Tax Overrides.
Features	Benefits associated with a location.

5. Click **Save**.

   You can edit a location by clicking the pencil icon or delete a location by clicking the trash can icon.

Add Locations in Bulk in Settings

Prerequisites

- Set up regions.

Context

Locations specify where a program wants to hire workers or where a job takes place. Workday VNDLY also uses this information to assist in calculating accurate taxes if a program decides to manage taxes in the application. You can add locations in bulk by importing a file with the appropriate data.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Locations**.
3. Click **Bulk Add**.
4. Click the **Here** link to download the bulk upload file.
5. Fill out the file fields.
6. Select the file from the pop-up window.
7. Click **Upload**.

Concept: Sequences

Sequences in Workday VNDLY determine how system IDs are formatted and displayed across your tenant. You can customize sequences by adding custom prefixes and specifying padding values.

VNDLY uses these sequence strings by default:

Name	Format	Example
Work Order	WO{seq}	WO00323
Statement of Work	SOW{seq}	SOW00456

Name	Format	Example
Contractor	C{seq}	C00004320
Vendor	V{seq}	V0000216
Position ID	P-{seq}	P-912

Note: The Position ID only displays in VNDLY tenants that have the Workforce Connector integration enabled.

To manage sequences, from the header select **More** > **Company Settings**. From the **Foundational Data** section, click **Sequences**. You can edit sequences by clicking the pencil icon, or add new sequences by clicking the **Add** button. You can't delete sequences. When you edit or add sequences, consider:

Field	Description
Name	Name of the sequence. You can't enter duplicate names.
Format	Specifies how to format the sequence. The format must always be enclosed in curly braces. Example: {V-{seq}}
Padding Minimum Width	Specifies the minimum character length of the sequence. The default value is 7. Example: A value of 7 generates IDs within the range 0000000 to 9999999.
Increment By	The amount that increases with each instance of a sequence.
Starting Value	Defines the starting value of the sequence. After a sequence has started, this field becomes read-only. You can request changes to this field with VNDLY support if necessary.

Example: You edit the vendor sequence to use the prefix *VD* instead of the default *V*, so a vendor ID displays VD00213 instead of V00213. This change applies across your tenant where the ID displays, including the **Vendors** home page, **Vendor Details** page, and **Active Vendor List** page.

Changes you make to the contractor sequence prefix only impacts future contractors. VNDLY doesn't retroactively apply changes to existing contractors.

For the vendor sequence, VNDLY uses any existing custom prefix for contractors and amends it with the letter V. Example: If you have the contractor sequence configured with the prefix C, a vendor ID would display as CV0000216.

For the position ID sequence, you can customize how position IDs display when VNDLY generates them. After you set up the format within sequences, navigate to **More** > **Company Settings**. From the **Integrations** section, click **Workday**. From the **General Configuration** tab, enable the setting **Use Workday VNDLY to generate position IDs** for the appropriate module. This setting enables VNDLY to use the custom sequence when creating position IDs for Job or Worker Profiles.

Configure Management Levels

Prerequisites

Have these permissions:

- *settings.admin*
- *user.management_level.update*

Context

Management levels enable you to map your organizations hierarchical structure and set approval limits. You should create as many management levels as needed. Once the management levels are created, you'll need to associate each one to a user profile.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Management Levels**.
3. Select **Add Management Level**.
4. As you complete the task, consider:

Option	Description
Name	Name for the specific management level. The name is used to identify the management level when its used for approvals.
Code	Code for the specific management level.
Parent Management Level	Assign an existing management level as the parent level.
Job Approval Limit	Maximum spend authority amount for jobs and work orders associated with managers within this hierarchy.
Expense Approval Limit	Maximum spend authority amount for expense reports and misc. adjustments associated with managers within this hierarchy.
SOW Approval Limit	Maximum spent authority amount for SOWs associated with managers within this hierarchy.
SOW Payments Approval Limit	Maximum spend authority amount for SOW payments associated with managers within this hierarchy.

5. Click **Add**.
6. From the header, select **More** > **Users**.
7. Locate the appropriate user and click **Edit**.
8. Select the **Management Level**.
9. Click **Save**.

Example

This example illustrates how you can utilize approval rules with management level hierarchies to ensure the correct approver reviews the item.

Scenario: A Work Order Modification has been submitted to which it greatly increases the work order budget by $15,000 USD. Due to the fact that it’s a large budget modification, the Work Order Modification needs to be approved by a Manager User who has the right spend authority amount before it becomes effective. Budget Approver works off of a Delegation of Authority (DoA) concept and uses a hierarchical system to determine the correct approver who needs to approve or reject the item.

The management levels:

Management Level	**Job Approval Limit**
Manager A	$1,000 USD
Manager B	$10,000 USD
Manager C	$20,000 USD

Result: Because the modification results in a $15,000 USD budget change, the approval routes to Manager C, who has a spend approval limit of $20,000 USD.

Related Information
Examples
2024R2 Feature Release Note: New Management Level Approver Type for Workflow Approvals

Custom Fields and Custom Data Sources

Create Custom Fields in Settings in Workday VNDLY

Context

Custom fields enable you to add a field to a form that you want to collect information from. You can configure:

- The field type.
- A source for the available options.
- Default values.
- Client and vendor permissions.

Adding a default value to your custom field ensures you can:

- Confirm that a value is accurate, instead of inputting the same response in multiple forms.
- Reduce the likelihood that an incorrect response is added.
- Select a different response, if needed.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Fields**.
3. Click **Create a Custom Field**.
4. Complete the **Type of Field** section:

Option	**Description**
Type of Field	Select the type of field that you want to capture your data: • *Dropdown (Single-Select)*: Select 1 from a list of options. • *Dropdown (Multi-Select)*: Select 1 or more options from a list of options. • *Text Input*: Enter one or more lines of text. • *Boolean (True/False)*: Select true or false. • *Number*: Enter numbers. • *Decimal*: Enter a number with a decimal.

Option	Description
	• *Date*: Select a date using the date picker.
Source Type	Identifies the source type to use for your drop-down field. These sources vary according to what is set up in your tenant. Example: Select the **Charge Code Source Type** if you want to enter a charge code for this field.
Source	The dataset used to populate your drop-down field. If the dataset that you want isn't available from the **Source** drop-down menu, you need to create it. You can create a dataset from **Custom Data Sources** or **Charge Codes**.
Choose a default value for this custom field.	When selected, the **Default Selection** field displays.
Default Selection	Enables you to select or enter a value that will be the default for the field. This value populates on every form this field displays on.
Client Permissions	Select the client permissions that you want to assign to your user roles. By default all client roles will be able to view and edit the field. If you select **Set up custom permissions for specific Client** roles, you can select the role and permission level you want them to have. If you don't see a role, select **I don't see the role I need** and set up the role. Permission levels are either **Can View** or **Can View & Edit**. If you don't specify a role and permission, then no one can see or edit the field.
Vendor Permissions	By default all vendor roles are able to view and edit the field. If you select: • **All vendor roles can view this field**: Vendors can view the field but not edit them. • **Hide this field from all vendors**: Vendors can't view or edit the field.

5. Select the forms and templates in which you would like to make your custom field available.
6. (Optional) Click **Configure Advanced Settings** for each form that you selected to add additional parameters for the form or template.

   You can indicate whether or not the field should be required. If a custom field is configured to use a default value, it is automatically marked as required and cannot be changed unless the default value is removed. You can specify which business unit the field should apply to if you don't want it to apply to all business units.
7. Complete the **Visibility Conditions** tab in the **Advanced Settings** section:

Option	Description
Make this field conditionally visible	Create relationships between custom fields on the same form. These relationships ensure that fields only display on the form when the appropriate conditions are met.

Option	Description
	You can only select a field that is already a field in the form group. Example: if you select the Job Edit form, you'll only be able to select fields in the Job Form, not in groups such as Candidate and Contractor or Work Order.
And/Or	The operator that you want to control the appearance of the custom field. • And: indicates that all conditions must be met to make the field visible. • Or: indicates that only one of the condition statements must be met to make the field visible.
Add Condition	You can only add a condition operator that matches the previous condition operator. Example: if your first operator is an Or statement, any additional conditional statements must be Or statements.
Add Condition Group	You use condition groups to create more complex conditions. With conditional groups, you can link an And statement with an Or statement.

8. Click **Continue**.

Example

This example illustrates how you can create a condition that would control when a custom field displays.

Say you want the custom field **Performance Details** on a **Contractor Profile** to display only if the performance of the contractor is **Needs Improvement** or **Poor**. To generate a condition for the custom field, click **Add Condition** and enter the following on the **Visibility Conditions** tab:

Field	Value
And/Or	Or
Custom Field 1	What was the contractor's overall performance on previous assignments?
Operation	Equals
Value	Needs Improvement
Add Condition	
Custom Field 2	What was the contractor's overall performance on previous assignments?
Operation	Equals
Value	Poor

Create Custom Data Source Tables in Workday VNDLY

Context

Custom data source tables enable you to source data into custom fields. Example: if you're creating a custom field and want to provide 3 options available for selection, you could create a custom data source table.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Data Sources**.
3. Click **Create a Custom Data Source**.
4. Name your data source and click **Create**.
5. Click **Add Column**.
6. Name your column and click **Create**.
7. Continue adding columns until you've reached your desired amount and then click **Upload**.
8. Select your file and click **Upload**. The page populates with your data.

Update Display Rules for Custom Data Source Table

Context

Updating display rules for custom data source tables enables you to configure the data that displays to various users. You can only update the display rules for user generated custom data sources.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Data Sources**.
3. Click the custom data source that you wish to edit.
4. Click **+ Update Display Rules**.
5. Select the columns that you wish to display within Workday VNDLY.

   You can drag and drop column names to reorder them.

Tasks

Change Available Tasks

Prerequisites

- Have a Workday VNDLY superuser implement the correct feature flag. To have this done, contact the Workday VNDLY Support team.
- Have the *settings.admin* permission.
- Have the *user_tasks.settings.manage* permission.

Context

Tasks delivered to recipients in the **My Tasks** and **All Tasks** sections can be activated or deactivated based on your organization's needs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Tasks**.
3. Open the desired task from the **Task List**, and click **Activate** or **Deactivate**.

   When a task is deactivated, new tasks won't be created. Tasks that have already been generated are not removed.

   Check the **Task Recipients** section to see how the task delivers differently between users receiving it in the **My Tasks** section and the **All Tasks** section.

Concept: Tasks in Workday VNDLY

Tasks help you better manage your day-to-day tasks by keeping track of to-do items assigned to a user or a group of users. Tasks are available to all user roles, except contractors.

You can access tasks from 3 main places:

- The **Home** page.
- The **Task** side panel.
- The **Tasks** list.

Tasks List

To view the **Tasks** list, click **View All Tasks** from the **Home** page or from the **Tasks** side panel.

The **Tasks** page is a comprehensive list of all of your tasks. In addition, you can filter, sort, and search. Bulk action functionalities are available.

The **Tasks** page has tab filters for **My Tasks** And **All**, with the default filter being **My Tasks**. You can also narrow the tasks that display using the filters on the left side bar. Example: If you'd like to see *Interview* tasks in *Pending* status, you could check those boxes.

You can filter the **Tasks** page by:

- **Pinned**.
- **Current Status**.
- **Categories**.
- **Locations**.
- **Assignees**.

You can also search for tasks by:

- *Description*
- *Category Name*
- *Component Name*
- *Component ID*

You can sort tasks by:

- **Important** (default).
- **Category A - Z**.
- **Category Z - A**.

When using **Sort By: Category** the **Important** section doesn't display.

The **Tasks** list page also gives users an extended view of their tasks' information, like what user roles a task gets assigned. Near the bottom of each task, you see the **Assigned to roles** information. Example: Assigned to roles: Administrator, Program Team.

For each task, you can perform 4 actions using the **Actions** drop-down:

Option	Description
Pin to top	Moves task to top of task list and marks it as **Important**. This option only displays if the selected task isn’t currently pinned.
Unpin from top	Moves task from top of task list back to its original place based on order of importance. This option only displays if the selected task is currently pinned.
Dismiss for Me	Removes task from your personal task list. The task will no longer be visible to you, but remains visible and accessible to other users with previous joint access to the task.
Dismiss for All	Resolves and removes the task from all **Tasks** lists for all users. The task will no longer be viewable or accessible to users.

Concept: Bulk Actioning Tasks

At the top of the **Tasks** list, the bulk action bar saves you time by allowing you to select multiple tasks and performing a single action on them. Using the check box next to the title of the task, you can select specific tasks from their lists and perform these actions:

Option	Description
Pin Task(s)	Moves a task to the top of the **Tasks** list and marks it as *Important*.
Dismiss for Me	Removes a task from your personal task list, and makes it invisible to you. The tasks might remain visible and accessible to other users with previous joint access to the tasks.
Dismiss for All	Resolves and removes a task from all task lists for all users. The task will no longer be viewable or accessible to all users.

By default, the options on the bar display unusable unless you select one or more tasks from the list. When you select at least 2 tasks, the bar displays the total number of selected tasks. You can click the **Select All** check box to select all tasks on a page. If you have more than 30 tasks and wish to bulk action all of your tasks in Workday VNDLY, you can click **Select all *number***.

Reference: Tasks Available with Tasks V2

Currently, not all tasks are available with Tasks V2. Similar to the Notification Engine, we'll add additional tasks to this feature over the course of future releases. Below is a list of all tasks currently available with Tasks V2.

Tasks are available for these categories:

- Billing Cycle
- Expense
- Interview
- Job
- Job Applicant
- Job Offer
- Timesheet
- Vendor
- Work Order

Billing Cycle

Name of Task	Description	User Roles	Task Trigger	Action
Update billing cycle for "name"	Reminds Admins/ MSPs to update billing cycles by extending date	Admins and Program Team	Work Order Extended	Billing Cycle is updated

Expense

Name of Task	Description	User Roles	Task Trigger	Action
Approve Expense Report "name" for "name"	Requires approval action on submitted expense report	Admins and Program Team	Expense submitted	Expense approved

Interview

Name of Task	Description	User Roles	Task Trigger	Action
Reschedule Job Interview for Candidate "name" for Job "name"	Prompts user to act on job interview reschedule request	Admins and Program Team	Interview reschedule request	Interview is rescheduled

Job

Name of Task	Description	User Roles	Task Trigger	Action
Approve Job edit for "name"	Prompts user to approve an edited Job	Approver	If Job is edited and Job Change workflow approval is enabled	Job is approved after edit
Resubmit Job Change for "name"	Prompts user to act on rejected Job Change approval	Admins and Program Team	If Job is rejected and needs to be resubmitted	Job Change has been resubmitted or canceled
Resubmit Job Post for "name"	Prompts user to act on rejected Job Publish Approval	Admins and Program Team	Job Post was rejected	Job Post was resubmitted or canceled

Name of Task	Description	User Roles	Task Trigger	Action
Approve published Job "name"	Requires internal approval of job published	Admins and Program Team	Job has never been Active and is going through Job Publish workflow approval rule	Job Publish workflow approval is complete (fully approved or rejected)
Reminder: Open Job "name" inactive for 4 weeks	Prompts user to act on jobs open for over 4 weeks	Admins and Program Team	Open date exceeds 4 weeks without action	Any action taken on Job

Job Applicant

Name of Task	Description	User Roles	Task Trigger	Action
Add New Candidate rating for "name"	Requests candidate feedback on contractor rating	Vendor and MSPs	Interview Completed	Feedback added
Missing email for Contractor		Admins and Program Team	Saved contractor/ candidate profile without an email	Email added to contractor/ candidate profile
Offer Declined by Vendor "Name" for Job ID "number"	Prompts user to act on Vendor rejecting candidate's job applicationPrompts user to act on contractor's missing "Email" after onboarding	Admins and Program Team	Vendor declines a Job Offer, Applicant has Job Applicant status Rejected	Job Applicant status is no longer Rejected
Onboard Candidate "name" for "job"	Requires Vendor to process and/or onboard candidate	Admins and Program Team	Offer sent	When onboarding is completed
Reminder: Onboard "Candidate" is past due	Prompts user to act on past due onboarding for candidate	Admins and Program Team	If job applicant is past due for job onboarding	Job onboarding is completed
Approve "Candidate" for onboarded "name" Job	Requires approval on applicant onboarding for job	Admins and Program Team	After Job Applicant is onboarded and approvals are needed	Approvals completed
Onboard Candidate "name" for Job "name"	Prompts user to process candidate ready for onboarding	Admins and Program Team	Onboarding ready for candidate on job	Onboarding completed

Job Offer

Name of Task	Description	User Roles	Task Trigger	Action
Reminder: Offer Rejected for "Job"	Prompts user to act on offer release	Admins and Program Team	Offer rejected	Job is closed, reopened, another

Name of Task	Description	User Roles	Task Trigger	Action
	that was rejected for applicant			offer is sent, job is canceled.
Approve job offer release for Job "name"	Prompts user to act on pending internal approvals on job offer release	Admins and Program Team	Job offer released for approvals	Approvals completed

Timesheet

Name of Task	Description	User Roles	Task Trigger	Action
Submit missing timesheet for "name"	Prompts user to act on missing timesheet from the previous week	Admins and Program Team	Timesheet is missing from prior week	Timesheet submitted

Vendor

Name of Task	Description	User Roles	Task Trigger	Action
Onboard Vendor "name"	Prompts user to onboard Vendor	Admins and Program Team	New Vendor added	Onboarding complete

Work Order

Name of Task	Description	User Roles	Task Trigger	Action
End Work Order "number"?	Requires user to end work order after contractor onboarding	Admins, Program Team, and Resource Managers	Work Order status is Active and Work Order End Date is today's date or prior	Work Order status is Ended
Approve payment for Work Order "number"	Prompts user to act on pending payment approvals on Work Order	Admins and Program Team	Payment is submitted for approval	Approvals completed
Approve Work Order "number" Ending	Requires approval to end a Work Order	Admins and Program Team	Work Order is triggered to end that has approvals	Work Order is approved to end
Approve modification for Work Order "number"	Prompts user to act on pending approval to made modifications to a Work Order	Admins and Program Team	Modification for Work Order was submitted	Approval for modification is completed
Remind Vendor to approve Work Order "name"	Prompts user to act on a Work Order modification	Admins and Program Team	Modification is pending Vendor approval	Vendor approves modification

Name of Task	Description	User Roles	Task Trigger	Action
	awaiting Vendor approval			

Notifications

Change Your Profile Preferences in Workday VNDLY

Context

You can update your preferred name, contact number, and default location information.

Steps

1. Access the **My Profile** page from the drop-down menu under your name.
2. Select **Edit Profile**.

   Note: Changes to your name won't update your **Email Address**.

Create Notification Groups in Settings

Context

Notification groups enable you to customize the recipients of a notification. You can select recipients by role or role tags, as well as individually by name or email. Example: Five finance approvers want to see when an invoice is submitted. You can add all 5 to a notification group to receive a notification each time this occurs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Notifications**.
3. Click the **Groups** tab and click **Create New Group**.
4. As you complete the task, consider:

Option	Description
Group Name	Displays on the **Notification Recipient** page.
Which organization unit will trigger a notification?	Limits notifications to a particular organization unit.
Recipients	Users added to the group, which can include Users, Roles, Role Tags, and Emails.

Set Up Email Notifications

Prerequisites

Have the following permissions:

Context

- *notifications.read*
- *notifications.user_preferences.edit*
- *notifications.recipient.update*

You can control what users receive email notifications.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Notifications**.
3. Click the **Settings** tab.
4. As you edit the settings, consider:

Option	Description
Email Recipient Rules	Enables you to turn on and off email notifications, as well as control where the emails are sent. If you select Email notifications allowed for specified domains and/or email addresses, you can enter a comma-separated list of domains and emails where you want the emails to sent.
Notification Email Limits	Controls the maximum number of recipients allowed for a single sent email notification. This limit ensures that sending mail stays within manageable boundaries. The limit is 1000 recipients per single sent notification.

5. Click **Submit**.

Edit Notifications

Context

Editing a notification ensures that the messaging is accurate and the appropriate people receive the notification. You can also configure how the recipients receive the notification:*In App Notification*,*Email Notification*, or both.

You can create multiple versions of the same notification by user locale as needed. This can be helpful to ensure the intent of the message is clear across languages and locations. Note: The ability to view and edit notifications in non-US English language is available only when using the localization capability. VNDLY-supplied content is already translated in the languages we support. Any language content that you customize must be translated separately. VNDLY won't automatically translate non-US English language content.

Note: We're in the process of adding the ability to customize text and recipients' delivery channels. Not all notifications have been converted to this functionality and might differ compared to what is below.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Communication** section, click **Notifications**.
3. Click **Edit** to the right of the notification you want to modify.

4. From the **Templates** tab, click **Edit**.
5. On the **General** tab, indicate the recipients and the method of delivery.
6. On the **Notification Content** tab, select the language you'd like to modify notification content for.

   Each notification type displays as a preview of what's been entered.
7. Click **Edit**.

   You can edit the text for each content type as needed. You can add system variables as needed to customize the content. Example: You could insert the *name* system variable to personalize the message with each recipient's name automatically.

   You have additional formatting options when modifying the **Email Content**.

Concept: Notification Recipients in Settings

Notifications enable you to set up notices that are triggered automatically when an event occurs in Workday VNDLY. You set up notifications by enabling a template that sends a predetermined message to the recipients specified in the template. Depending upon the template, you can have Workday VNDLY send an email to recipients as well as notifying the recipients directly in the Workday VNDLY Workday. Also, depending upon the template and your permissions, you can edit the message and recipients of the email.

Example: You want to make sure that the resource managers are notified when a candidate accepts a scheduled interview. In Notifications, you can enable a template that sends an email to users automatically when a candidate accepts a scheduled interview and adds the Resource Manager user role as a recipient.

Not all notifications are editable based on criteria that are within the notification.

From the header, go to **More** > **Company Settings** to view and manage notifications. From the **Communication** section, click **Notifications**.

Note: We're in the process of adding to notification templates the ability to customize recipients and specify how the notification is delivered. Not all notifications have been converted to this functionality.

When managing your notifications, consider:

Tab	Definition
Settings	Controls how you edit and distribute email notifications.
Templates	Lists notification templates that you can enable and disable. Depending on the template, you can also edit the recipients and the notification message. See Edit Notifications on page 44.
Groups	Creates and edits groups of users that you can add to a notification template. Example: You want to make sure that Workday VNDLY alerts both users with the MSP role and users with the Administrator role when a bulk upload fails. Instead of adding 2 different role tags as recipients for the notification, you can create a user group called Troubleshooters with both the MSP and Administrator tag. You can use that user group as recipients for the notification. See Create Notification Groups in Settings.

Users and Security Settings

Create Security Roles

Prerequisites
Have these permissions:

- The *settings.admin* permission. This gives you access to the **Company Settings** page.
- The *rbac.roles.create* permission. This lets you create security roles.

.

Context

While Workday VNDLY has a set of preconfigured security roles, you can create additional security roles to meet the needs of your organization.

Steps

1. From the header, select **More** > **Company Settings**. From the **Security** section, click **Security Settings**.
2. Select 1 of the following:
   a) **Create Role** to create a unique security role.
   b) **Clone** to duplicate a security role.
3. As you create the role, consider:

Option	Consideration
Role Tags	Select the role tags from the dropdown menu. Role tags are labels that you add to roles to identify groups of roles.
Is Vendor Role?	Select to let you assign the role to vendor users within VNDLY.
Permissions	Select any additional permissions that you want to add to the role.

   You can find all permissions and their definitions on the **Permissions** tab of the **Security Roles** page. Use these definitions to make sure that you're selecting the correct permissions for the role.
4. (Optional) If you've duplicated an existing role, rename the duplication.
5. Click **Save**.
6. (Optional) If you want to edit a role, select the role, change any information, and click **Save**.

Result

The new role is now available to assign to users.

Example

Example: You need a resource manager role that doesn't have rights to edit work orders.

1. Clone the resource manager role and rename the copy **Resource Manager No Work Order Edits**.
2. Keep the same role tags as the original resource manager role.

3. Remove any permissions associated with editing a work order, such as *workorder.timekeeping_settings.edit*.

Add Permissions to a User Role in Settings

Context

Adding permissions to a user role enables you to configure what various users can view and modify. Example: if you wanted to add the ability to bulk submit saved timesheets to a timekeeper role, you would type *time.bulk.submit* in the **Permissions** box next to the role.

Note that only Administrator users have the ability to adjust permissions.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings.**
3. Click the **Roles** tab.
4. Click the pencil icon next to the role that you wish to add a permission to.
5. Enter the permission name into the **Permissions** box and select the permission from the list.
6. After you've added your permissions, click the checkmark icon to save.

Set Up Security Policies

Prerequisites

Security policies enabled in your test tenant. To enable, create a product support ticket with Workday VNDLY Support.

Context

You can use a security policy to control when a security role applies to an entity or user.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. On the **Policies** tab, click **Create**.
4. As you complete the task, consider the following context restrictions:

Context Restrictions Option	Description
Context Restrictions	Restricts the role around the circumstance of the action you're trying to take.
Interactive	Allows you to restrict the role based on a certain circumstance. Example: You need to restrict the role to only apply when the role attempts to bulk update. Select **Only applies when Bulk Updating.**

Context Restrictions Option	Description
JSON	Allows you to modify the JSON syntax of the context restriction, so you can further refine the restriction.

5. As you complete the task, consider the following work order restrictions:

Work Order Restriction Option	Description
Work Order Restrictions	Restricts the role around attributes of the work order that you want to access. With **Work Order Restrictions**, you want to select the module that you want access to. Example: If you select **Contingent staffing** as the module, the role won't be able to access the **Statement of Work (SOW)** and the **Worker Profile Management (WPM)** modules.
Interactive	Allows you to restrict the role based on the following: • **Module**: You can choose to add the following modules: Contingent Staffing, Worker Profile Management, or Statement of Work. You can select multiple modules. • **Status**: You can choose to add a status of the work order. You can select multiple statuses. You can choose either **Module** or **Status**, but not both. If you want to include both **Module** and **Status**, modify the JSON syntax.

JSON	Allows you to modify the JSON syntax of the context restriction, so you can further refine the restriction.
	
	Example: You would use this if you want a policy that restricts by **Module** and **Status**, such as a policy that restricts access to only active contingent workers.
	
	In the **JSON** field, you would type the following:
	
	`{`
	`"policy":{`
	` "type":"and",`
	` "conditions" :[`
	`  {`
	`   "type":"module",`
	`   "values":[`
	`    2`
	`   ]`
	`  },`
	`  {`
	`   "type":"status",`
	`   "values":[`
	`    7,`
	`    8`
	`   ],`

Work Order Restriction Option	Description

	`"description":"Only  active/ended WO"`
	`}`
	`]`
	`},`
	`"apiVersion":"WorkOrderPolicy/v1"`
	`}`

6. Save the policy and navigate to the **Roles** tab.
7. Select the role(s) that you want to add the policy to. In the **Edit Role** page, select the policy from the **Policy** dropdown menu.

Example

This example illustrates how you can set up a policy that restricts resource managers to bulk update Worker Profile Management (WPM) work orders only.

Note: In an example like this, you'll likely need multiple resource manager roles, as there may be some resource managers who need access across modules.

Table 1: Context Restrictions Values

Field	Value
Bulk Updates	**Only applies when Bulk Updating**

Table 2: Work Order Restrictions Value

Field	Value
Module	**Worker Profile Management**

After creating the policy, add it to applicable **Resource Manager** roles.

Concept: User Type Permissions in Settings

As an administrator, you can grant or remove different permissions to certain user types. You can also grant or remove permissions for profile roles that encompass many different roles. These permissions provide you greater control and ensure that you don't miss a role when granting permissions. You find these roles under the **Roles** tab in **Security Settings** in the **Security** section of **Company Settings**.

There are 3 profile roles:

- All Candidates: Candidates and contractors that only sign in to do their personal timekeeping or expenses.
- All Employers: Any client user that is also granted some other role in the system.
- All Vendors: Any vendor users associated as contacts on a vendor profile.

These profile roles are granted default permissions. You can add or remove the permissions as needed. To locate the permissions to grant, go to the **Permissions** tab under **Security Settings**.

Concept: Workday VNDLY Allowlisting Protocols

Email Address Allowlisting

Workday VNDLY is a multi-instance cloud hosted Vendor Management Solution (VMS). Workday VNDLY sends email notifications to authorized users based on certain business process conditions. Example: job posting submissions, timesheet approvals, candidate submissions. These emails are sent from the following email address, which should be allowlisted in the client's corporate email system: noreply@vndly.com.

Workday VNDLY uses DomainKeys Identified Mail (DKIM) and all emails sent by VNDLY are signed using a cryptographic key. An email message that is sent using DKIM includes a DKIM-Signature header field that contains a cryptographically signed representation of the message. A provider that receives the message can use a public key, published in Workday VNDLY's DNS record, to decode the signature. This DNS entry is referenced in the selector record of the DKIM-Signature header. Email providers then use this information to determine whether messages are authentic.

IP Allowlisting

Allowing designated IPs isn’t the recommended method to prevent internet traffic intended for VNDLY from being hijacked or rerouted to a rogue website. VNDLY doesn’t recommend allowlisting because when IPs are added to changes, customers can experience connection interruptions until they update their allowlist databases.

Ingress - VNDLY connecting to client

These IPs are for customers who need to allowlist inbound (ingress) connections from VNDLY servers. Note:

- If you’re using allowlists for Production 1, please ensure the IP addresses for Production 2 are also included in case a disaster recovery event is needed.
- If you’re using allowlists for Production 3, please ensure the IP addresses for Production 4 are also included in case a disaster recovery event is needed.

Production 1 (AWS Oregon - US West 2)

- 52.43.6.70
- 34.214.224.40
- 54.188.53.91
- 35.164.22.135
- 44.226.63.81
- 34.217.1.184

Production 2 (AWS Ohio - US East 2)

- 3.13.20.176
- 13.59.151.166
- 18.191.14.169
- 3.14.208.12
- 18.190.60.168
- 3.132.229.237

Production 3 (AWS UK - EU West 2)

- 18.130.90.0
- 35.177.199.103
- 13.41.234.8
- 18.132.87.198

- 18.135.213.44
- 18.168.102.162

Production 4 (AWS Ireland - EU West 1)

- 52.50.126.26
- 54.72.135.73
- 52.214.255.110

Production 5 (AWS Frankfurt - EU Central 1)

- 3.121.250.19
- 3.122.70.56
- 52.59.46.163

Production 6 (AWS Ireland - EU West 1)

- 34.248.108.93
- 54.229.189.172
- 63.32.187.152

Egress - Client Connecting to Workday VNDLY

IPs for customers to need to allowlist outbound (egress) connectors to Workday VNDLY servers:

Endpoint	Public IP	Cryptographic Algorithms
sftp.vndly.com (US)	52.12.202.235 44.235.231.104 44.233.130.213 3.131.132.136 52.15.179.5 3.13.183.7	Key Types: • rsa • ecdsa Host Keys: • ssh-rsa • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • chacha20-poly1305@openssh.com • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521

Endpoint	Public IP	Cryptographic Algorithms
		• diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com • umac-64@openssh.com • umac-128@openssh.com • hmac-shad2-256 • hmac-sha2-512 • hmac-sha1
sftp-dc1a.vndly.com (US)	44.230.63.7 54.69.232.73 52.34.210.82	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • shh-ed25519 SshCiphers: • aes128-gcm@openssh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 SshMacs: • hmac-sha2-256

Endpoint	Public IP	Cryptographic Algorithms
		• hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
sftp-uk.vndly.com (UK)	18.134.78.80 18.132.253.240 18.135.142.203 54.194.254.236 52.48.198.217 54.217.252.123	Key Types: • rsa • ecdsa Host Keys: • ssh-rsa • rsa-sha2-256 • rsa-sha2-384 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • chacha20-poly1305@openssh.com • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521 • diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com

Endpoint	Public IP	Cryptographic Algorithms
		• umac-64@openssh.com • hmac-sha2-256 • hmac-sha2-512 • hamc-sha1
sftp-dc2a.vndly.com (UK)	3.10.240.72 18.170.175.172 35.176.210.71	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • aes128-gcm@opensh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie--hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 SshMacs: • hmac-sha2-256 • hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
sftp-eu-dc3.vndly.com (Germany)	3.77.99.81 3.76.232.251 18.193.188.83 52.19.97.205 34.249.104.180 52.208.210.45	Key Types: • rsa • ecdsa Host Keys: • ssh-rsa • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2nistp384

Endpoint	Public IP	Cryptographic Algorithms
		• ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • chacha20-poly1305@openssh.com • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521 • diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com • umac-64@openssh.com • umac-128@opensh.com • hmac-sha2-256 • hmac-sha2-512 • hmac-sha1
sftp-dc3a.vndly.com (Germany)	18.197.166.31 18.194.57.30 3.78.65.231	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384

Endpoint	Public IP	Cryptographic Algorithms
		• ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • aes128-gcm@openssh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 • SshMacs: • hmac-sha2-256 • hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
[tenant].vndly.com	VNDLY uses AWS Cloudfront, which means all Cloudfront IPs need to be allowlisted. This process is documented on Amazon's website.	

Please contact the Workday VNDLY Product Support team Monday through Friday 7:00 AM ET to 7:00 PM ET, with additional questions or concerns.

Delegation

Request Access to Manage Other Users' Workday VNDLY Accounts

Context

You might want to request access to manage other users' Workday VNDLY accounts on their behalf. This access can be helpful in the event that they're unable to log in and complete tasks. The Program Team might also be managing multiple accounts.

Note: This feature isn't restricted by role. Example: A hiring manager can request access from an administrator.

Steps

1. From the header, select **Profile** > **Delegate Access**.
2. Select the **Request Access** tab and click **+ New Request**.
3. Locate the user that you'd like to request access from using the **Search** bar or the filters.
4. Click **Add** next to the user you wish to request access from.
5. Select the **End Date** for access removal. If you select a specific date, you won't be able to access the user's account after the date you entered. If you select **Forever**, you can access their account as long as they remain a user in the system.

Result

The request enters Requested status and the user is notified of your request. The user must accept your request in order for you to delegate into their account.

After the request is either accepted or rejected, the status updates next to the request.

Accept a Delegation Request for Access

Context

You can receive a delegation request from another user. Delegation requests give other users access to your account.

Steps

1. From the **Profile** drop-down, click **Delegate Access**.
2. From the **Grant Access** tab, click **Accept** next to the Delegation Request.

Grant Access Without a Request In Workday VNDLY

Context

You can grant access to other users to manage your Workday VNDLY account on your behalf. This access is useful in the event that you’re unable to log in and complete tasks.

Steps

1. From the header, select **Profile** > **Delegate Access**.
2. Under the **Grant Access** tab, click **+Add New Delegate**.
3. Locate the user that you'd like to request access from using the **Search** bar or the filters.
4. Click **Add** next to the user you wish to grant access to.
5. Select the **End Date** for access removal.

   If you select a specific date, they won't be able to access your account after the date you entered. If you select **Forever**, they can access your account as long as you remain a user in the system.

Result

The user now has access to your account.

Data Privacy

Bulk Export Users Before Purging

Prerequisites

Have these permissions:

- *settings.admin* at the ALL Business Unit level or above
- *data_privacy.erasure.read*.

Context

With the Data Privacy feature in VNDLY, you can export a list of filtered VNDLY user IDs in preparation of purging the data of the user records. Exporting a list of users is restricted to records with the status of *Inactive*. After exporting the list of inactive users you can:

- Review the user records.
- Use the data to populate the required fields in the data privacy bulk upload template when you're preparing to delete the user records.
- Archive the list of user records before you purge them from VNDLY.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Data Privacy**.
3. Click **Export**.
4. Enter the **Export Name**.
5. Select the **Export Format**.
6. Confirm the **File Extension** displayed is correct.
7. (Optional) Select the **Include email, phone number and address** check box if you want to include this information for the users in the export file.
8. Click **Export**.

   VNDLY only exports user records with status of *Inactive*.

Result

The file downloads and is available for your review.

Example

Next Steps

Bulk erase users.

Erase User Data

Prerequisites

- **Data Privacy** set up in your tenant.

- Have the *settings.admin* permission at the All business unit level or above.
- Have the *data_privacy.erasure.read* permission.

Context

You can erase a user's personal data from Workday VNDLY in order to comply with certain privacy regulations and laws. Example: The General Data Protection Regulation (GDPR) and the Personal Information Protection Act (PIPA). Some items to consider before deleting personal data:

- Workday VNDLY provides the tools to erase personal data. However, it is your responsibility to ensure the data is erased.
- Once data is erased, it can't be retrieved. It is your responsibility to ensure that erasing that person's data doesn't negatively impact your systems.
- Because **Data Privacy** takes some time to search records, you should limit the number of users that you erase at a time.
- A user must be inactive and not have any work orders in order to erase their data.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Data Privacy**.
3. Locate the appropriate user and click **Erase Personal Data**.

   The user must be inactive and not be associated with any active work orders.
4. Review the explanation of what will be deleted and enter a **Reason for erasure** if necessary.
5. Click **Confirm & Erase**.

Result

You can monitor the process of the **Data Privacy** action from the **History** tab.

Verify that the user's personal data has been erased. Workday VNDLY keeps the user record so that any pre-existing relations between the erased record and any other record in the database are maintained.

Concept: Data Privacy

Data Privacy in VNDLY is a feature that enables you to delete certain personally identifiable information (PII) permanently from your tenant. If you have the proper permissions, you can search records linked to selected user records and erase any personal identifiable information pertaining to those records. Example: Erase personal information for a former employee when they leave a company.

The Data Privacy feature helps you comply with privacy regulations and data protection laws, such as, General Data Protection Regulation (GDPR) requirements.

Erased data displays differently depending on the type of data:

- Text, such as names, get replaced with the word *Erased*.
- Numeric values, like phone numbers, get replaced with zeroes.

Some items that you need to be aware of before deleting a user's personal data:

- Workday VNDLY provides the tools to erase a user's data. It's your responsibility to use these tools as needed based on your company policies.
- When you erase data, you permanently remove it from your tenant. VNDLY can't reverse erased data. It's your responsibility to ensure that erasing data doesn't negatively impact your systems outside of VNDLY.
- Data Privacy doesn't erase content in custom fields. If you have custom fields that display personal data, you need to manually remove the data from the custom fields.

- Because Data Privacy takes some time to search records, you'll want to limit the number of users that you erase at a time.
- User types must be in a specific status:

User Type	Status
Candidate	Inactive
Client	Inactive
Contractor	Inactive with all related work orders ended
Vendor	Inactive
Worker Profile	Inactive

Reference: Types of Erasable Data

VNDLY erases data for multiple fields when you erase personal data with the Data Privacy feature.

User Type	Erasable Fields
Candidate	• First name • Last name • Middle Name • Preferred first name • Preferred last name • Client contractor email • Alternate email • Contact number • E-mail addresses • Experience - title, company name, description, location, start, end date • City • Postal Code • Address Line 1 • Address Line 2 • Address Line 3 • County • Neighbourhood • Residence status • Country • Subdivision • Profile pic • Certifications- Course, institute, certificate location, start date, end date • Education • Feedback • Avatars • Checklists • Resumes • Location

User Type	Erasable Fields
Client	• Name • Contact Number • Email • Profile pic • Username • First name • Last name • Client email • Preferred last name • Preferred first name
Contractor	• Resume • Username • First name • Last name • Client email • Preferred last name • Preferred first name • Email • Job application document • Job application note
Vendor	• Name • Contact Number • Email • Profile Pic • Username • First name • Last name • Client email • Preferred last name • Preferred first name
Worker Profile	• First Name • Last Name • Middle Name • Preferred First Name • Preferred Last Name • Email • Residence country • Residence status • Phone number • Client email • Job application document • Job application note

Vendors

Add a Vendor

Context

When you add a vendor to Workday VNDLY, we automatically send a sign-up email to the vendor. This email notification template, titled *Invitation*, can be found under **Company Settings** > **Miscellaneous Settings** > **Notifications**.

Steps

1. In the header, select **More** > **Vendors**.
2. Click **Add Vendor**.
3. Complete the **Add Vendor** pop-up, and click **Send Invite**.

Result

The vendor is sent an email. You won't be able to complete onboarding the vendor until they've signed into Workday VNDLY.

Next Steps

- Onboard the vendor.

Set Up Authorized Services For Vendors

Context

You can specify if certain vendors are the Vendor Lite type. See Concept: Vendor Types. To do this, you need to set up authorized services for vendors.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, click **Vendor Settings**.
3. From the **Authorized Service Configuration** tab, set up the authorized services. As you enter the information, consider:

Option	Consideration
Authorized Services that do not Require an Invite	Vendors added with an authorized service that doesn't require an invite are automatically classified as Vendor Lite. The vendor won't be invited into the system and no vendor users will be associated with the vendor profile. If a vendor is assigned to both an authorized service type that doesn't allow an invite and one that does, the service that allows invites overrides and sends the invite.

Option	Consideration
	Example: Worker Profile Management (WPM) is added in **Vendor Settings** as an authorized service type that won't send invites. A vendor is added with both WPM and contingent worker. That vendor will be sent an invite, because contingent worker overrides the WPM restriction.
Allow Voluntary Invite to VNDLY system	This enables vendors to be manually invited into VNDLY once the vendor is already in active status. **Note:** This triggers the full vendor onboarding process to turn a Vendor Lite type into a Vendor Full type.

Bulk Upload Vendors

Context

You can add vendors en masse to Workday VNDLY by importing a file with the appropriate information. You can also add vendors individually by adding their email and clicking **Invite**. The vendor will receive an email to set up their profile.

Steps

1. In the header, select **More** > **Vendors**.
2. Click **Bulk Upload**.
3. Click **Upload** to submit.
4. Review the status of the upload by clicking **View Results**.

   You can also review file transfers by navigating to **Reports** > **File Transfer Reports**

   You can find a list of all specification files with details on field definitions, file formats, and required permissions on Workday VNDLY File Import Specifications.

Onboard Vendors

Prerequisites

- Notification that the vendor has completed their profile.

Context

Once notified that the vendor has completed their profile, you're then prompted to onboard them.

Steps

1. In the header, select **More** > **Vendors**.
2. Open the vendor profile that you want to onboard.
3. Click **Onboard Vendor** and complete the form.

4. As you complete the form, consider:

Option	Description
Authorized Services	Any **Authorized Services** selected determine what actions the vendor can participate in. These options limit the visibility of the vendor within Workday VNDLY.

Result

The vendor is now active.

Communicate with Vendors

Context

You can communicate with any of your vendors by sending an email or scheduling a meeting.

Steps

1. From the **More** menu, go to **Vendors**.
2. Locate the vendor that you want to contact and select the vendor.
3. From the Actions menu, select an option. Consider these options:

Option	Description
Send Message	Sends an email to all contacts for the selected vendors. You can find these contacts listed under the **Contacts** tab.
Schedule Meeting	You can schedule any of these options: • Phone - You must add a phone number. • Video - You must add a video conference link. • In Person - You must add an address to meet.

Edit the User Role for a Vendor

Prerequisites

- Have the *vendor_user.update* permission

Context

If you have administrator rights, you can edit a vendor's user role. Editing the user role enables you to replace a vendor administrator in Workday VNDLY or create a new vendor administrator if necessary.

Steps

1. From the header, select **More** > **Vendors**.
2. Open the vendor profile that you want to edit.
3. Select the **Contacts** tab and click the pencil icon.

4. As you select the **Role**, consider these options:

Option	Description
Admin	Select this role if you want the vendor to be a vendor administrator.
Manager	Select this role if you want to remove the vendor as a vendor administrator.

Add Vendor Distribution Rules for Jobs

Prerequisites

- Pre-identify job candidates, if necessary, as part of the job publishing process.
- A Vendor Distribution Rule must exist that matches the criteria of the job you're publishing.

Context

Jobs can be automatically distributed to vendors by the designated tiers as they have been set up by your organization. Adding job distribution rules is optional and may not be relevant to your organization.

Steps

1. Select the appropriate Distribution Rules.
2. Enter any additional vendors for distribution.

   If you do not choose any specific vendor or a tier, it will be sent out to all vendors added to Workday VNDLY.

Next Steps

Request Job Approvals, if necessary.

Create Distribution Scenario

Context

Distribution scenarios enable you to designate a delay in the distribution of a job. You can configure a scenario indicating the number of hours or days to delay the distribution. You'll create a scenario and attach the scenario to a distribution rule. The distribution rule indicates the vendors and vendor groups to whom the job is distributed.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Vendors** section, select **Vendor Distribution**.
3. Select the **Scenarios** tab and click **Create New Scenario**.
4. Enter the **Scenario Name** and **Conditions**.
5. Click **Save**.
6. Select the **Distribution Rules** tab and locate the appropriate distribution rule.
7. Click **Edit**.
8. Under the **Additional Distributions** heading, click **Add Additional Distribution**.

9. Select the new rule that you created and indicate the vendors or vendor group to whom you want the posting to go.

Concept: Vendor Types

There are two vendor types in Workday VNDLY, Vendor Full and Vendor Lite, that you can assign to vendors.

Vendor Full

We recommend using Vendor Full if you need vendors to actively participate in the VNDLY system. This vendor type is best for Extended Workforce Management (EWM) and Statement of Work (SOW).

With the Vendor Full vendor type, you need to be aware:

- Can be client-managed or vendor-managed, depending on if there are vendor users or not.
- Customer or MSP has sufficient data to create a vendor profile in VNDLY.
- Customer requires vendors to have access to information in VNDLY.
- Customer needs to delegate some actions to be completed by a vendor.
- Vendor has to complete checklist items to be onboarded.

Vendor Lite

We recommend using Vendor Lite if you need profiles created for vendors, but don't need vendor users in VNDLY. This vendor type is best for Worker Profile Management that's client-managed.

With the Vendor Lite vendor type, you need to be aware:

- Is client-managed.
- Customer or MSP has minimal data about a vendor and isn't required to enter additional data into VNDLY.
- Customer doesn't need to have vendor users that log into VNDLY.
- Customer doesn't need to delegate actions to be managed by a vendor. Actions are managed by the hiring manager or program team or both.
- Checklist items won't be required for the vendor.
- When added, the vendor profile moves automatically into active status.

Vendor types information displays in the vendor dataset and you can report on vendor types.

Changing Vendor Type

You can move Vendor Lite vendors to Vendor Full in one of the following ways:

- Manually invite vendors into VNDLY. This triggers the vendor full onboard process.
- Add additional authorized services that are considered vendor full. This action triggers the vendor full onboard process. See Set Up Authorized Services for Vendors.
- Adding vendor users within a vendor profile changes the vendor's profile from client-managed to vendor-managed.

Note: You can't move Vendor Full vendors to the Vendor Lite type. You can remove access and users as needed.

Job Workflow and Settings

Job Workflow

Create Job Templates

Prerequisites

Have these permissions:

- *settings.admin* to create job templates.
- *job_templates.bulk.create* to bulk load job templates.
- *job_templates.read* to view job templates.

Context

Job templates are customizable templates that users can choose when publishing a job or Statement of Work (SOW) Role in VNDLY. Creating a job template saves time and increases consistency when publishing jobs. Each job template can be configured with different criteria. More than 1 job template can have the same job title as long as they are in different job categories. Example: If you're creating a job for the Business Analyst job title, there may be multiple job templates with that job title. You'll select the Business Analyst job template for the appropriate job category which will pull key information specific to that position in that job category.

If you don't see a field listed in the table when completing the job template, submit a product support case for assistance to review your tenant's job form configuration.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Job Templates**.
3. Click **Add**.
4. Complete the task:

Option	Description
Job Category	Enables job templates to be grouped by broad categories. It can also be used as a criteria for other settings that utilize rules. **Note:** If you don't see a job category that's expected, ensure it's been added on the **Job Categories** page.
Is Active	Ensure the option is enabled, otherwise the template is not visible on the **Publish Job** form.
Module Restrictions	Add 1 or more modules to limit when the job template can be used. If you don't add any modules, the template is available for all modules.
Popular Job	Enable to list the job as a commonly used template for all users when they are publishing jobs.

Option	Description
Country Restrictions	Add 1 or more countries to limit when the job template can be used. If you don't add any countries, the template can be used for jobs in any country.
Job Types	If your tenant has custom job types set up, you can include variations such as Junior or Senior. Job Types enable you to create multiple rate cards using a single job template.
Max Duration of Job	When a template includes a maximum number of (calendar) days, and a user attempts to publish a job with a longer duration, VNDLY displays an alert indicating the duration of the job is greater than the max duration of the job. If the user has the *job.max_duration.override* permission, they can accept the alert and continue with publishing the job.
Select Premium Rate on Job Form	Enable this option to select a premium rate when publishing a job. Premium rates allow you to set rates on the job form for different shifts such as the 2nd or 3rd shift.
Hide Expense Type	You can hide this option from displaying when publishing a job.
Hide Weekly Paid Travel	You can hide this option from displaying when publishing a job.
Hide Projects Site	You can hide this option when publishing a job. **Note:** This field may use a custom data source.
Use Fast Path	If your tenant has **Fast Path** enabled, enable this field for the job to always use fast path. **Note:** This field is only visible when the option of **Specified in job template** is selected on the **Job Applications Settings** page.
Override Default Fast Path Setting	If your tenant has **Fast Path** enabled, enable this option to override the default candidate status.
Fast Path Candidate Status	If your tenant has **Fast Path** enabled, and you've chosen to override the default **Fast Path** setting of your tenant, select the status you wish VNDLY to place the candidate into when they’re submitted for this job.
Apply Shifts	If your tenant has shifts set up, enable this option to display shifts when publishing a job.
Are Shifts Required	Enable this option to make shifts a mandatory field when publishing a job. This option only displays when you've enabled **Shifts**.

Option	Description
Override Default Pre-Id Settings	If your tenant has **Pre-Id Settings** enabled, enable this option to override the default candidate status.
Pre-Id Candidate Status	If your tenant has **Pre-Id Settings** enabled, and you've chosen to override the default pre-ID settings of your tenant, select the status you wish VNDLY to place the candidate into when they're submitted for a preidentified job.
Must Have	Select from the pre-defined skills from Workday Skills Cloud or type your own unique skills.
Nice to Have	Select from the pre-defined skills from Workday Skills Cloud or type your own unique skills.
Description	Enter the details of the job. The content entered can be edited when publishing the job.

5. (Optional) Click **Add Attachment** in the **Add New Documents** section to include other pertinent information.
6. Click **Save**.

Result

VNDLY displays the job template in the list of templates on the **Publish Job** form.

Related Information
Examples
2024R1 Feature Release Note: Resume Parsing and Skills Extract Service
Workday Community: Workday VNDLY File Import Specifications

Publish a Job

Context

Publishing a job enables you to post job information, compensation, and requirements for an open position.

On the **Publish Job** page, you can select from **Templates** and **Recent Jobs**. When using an existing job template, these fields automatically populate: **Job Title**, **Job Category**, **Job Summary**, and **Job Description**.

Steps

1. From the header, select **Jobs** > **Job Dashboard**.
2. Click **Publish Job**.
3. Select a job template to start from. Consider the following options:

Option	Description
Templates	• Search templates by job title or select from a list of all available jobs. • Use **Filter by Location** to only show jobs that are eligible in the specified job location. • Select **Show Only Popular Jobs** to filter the list of jobs. Your organization determines

Option	Description
	popular jobs based on the number of requisitions.
Recent Jobs	• Search templates by job title or select from a list of recently used jobs. • Your organization determines recent jobs based on recently used requisitions.

4. Complete the appropriate fields and add any attachments if necessary.

   If you select **Save For Later**, the job form is saved as a draft on the **Job Dashboard** page.

Next Steps

Administrator users can modify or assign checklists to the job posting if needed.

Add Job Approvals

Prerequisites

- Configure approval setup.
- As part of the job publishing process, add distribution rules if necessary.

Context

You can request approvals before the job is published. A job remains in pending status and is auto-published only after the approvers approve the job. Once the job is published, the status of the job changes from Pending to Active.

You may also be able to click **Skip Approvals** to skip approval requirements and publish the job immediately if you have the correct permissions.

Steps

1. Select the relevant **Level** of approval.
2. Enter the name or email of the approver.
3. Select if the approval is **optional** or **mandatory**.

Concept: Approvals Widget

The **Approvals Widget** displays throughout the app and provides an easier way to track items that require approvals. Example: when publishing a job on the **Job Dashboard**, the **Approvals Widget** enables you to see what part of the approvals process the job posting is in.

Under the **Approvals** heading, you see the required approvals and optional approvals. The blue dot displays where the item is in the approvals chain. Once approved, the blue dot changes to a green checkmark and the next user in the approval chain receives a notification.

If you're directly assigned as an approver, you see **Approve** and **Reject** buttons next to your name.

When all approvers in a level are required, you see “and” between the approvers. Optional approvers display below required approvers in the list.

You can add comments to your approvals by clicking **+Add Comment**. Comments are optional, but you must provide a Rejection Reason when rejecting an approval.

Lastly, you can remind other approvers an approval is waiting by clicking **Remind** next to their name. If you’re an Admin user, you can also approve on behalf of other approvers. To approve on behalf of another approver, click the **three vertical dots** next to their name. You can then select **Remind**, **Approve**, or **Reject**.

Concept: Published Jobs

You can view the applicants that have been applied to a job or edit a published job from the **Job Dashboard**.

You can use these options to organize the results and configure the display:

Field	Definition
Filters	You can narrow your search for open jobs with these filters: • Status • Location • Candidate Source • Hire Type • Organization Unit • Created By • Start Date • End Date • Resource Manager • Job Title • Job Category • Pay Type • Favorites
Sort	You can sort the jobs that display using these parameters: • Created Date - Newest • Created Date - Oldest • Job ID (Low - High) • Job Title (A - Z) • Last Modified Date
View	You can toggle between **List View** and **Grid View** depending on how you'd like the jobs to display.
Defaults	You can customize the list data with up to six of these items: • Start/End Date • Bill Rate • Pay Rate • Pay Type • Hiring Type • Location/Work Site • Resource Manager (Reports To) • Program Team • Org Unit • Job Type • Job Category • Number of Positions

Field	Definition
	• Number of Open Positions • Created By • Job Summary

You can open a job to view more details. From the **Details** tab, you have these action options:

Option	Description
End	In case you don't need the requisition any longer, you can close or end the published job.
Hold	Temporarily ask vendors not to apply candidates to the job.
Duplicate	Create a cloned job to save time when creating a similar or identical role.
Edit	Make necessary edits to the published job.
Print	Print a copy of the published job details.
Share	Share the published job details with others by email. Recipients must be Workday VNDLY users.
Settings	Adjust settings for candidate submission rules, which enable you to limit the type and number of candidates.

In addition, you can review these options:

Area	Description
Job Status	What stage of the process the job is in, from sourcing to onboarding.
Approvals	Whether the optional people have given or denied approval.
Distributions	Displays tiers and vendors of the job.
Activity Log	Displays what different people have done to the job.

Concept: Job Candidate Applications and Actions

As your vendors submit candidates for jobs, you can view these applied candidates by selecting **Jobs** > **Job Dashboard**. Then locate and open an active, published job. From the **Applicants** tab, you can open a candidate's profile to review their resume and additional details.

Both the **Job Dashboard** and the **Applicants** tab display in either list or grid view. Configure the details displayed on the entries by clicking the settings icon and then selecting or clearing data points.

When you open a candidate's application, from the **Profile** tab, you can complete these actions:

- Shortlist the candidate.
- Send the candidate's vendor a message. The message only sends to the vendor user who applied to the job on behalf of the candidate.

- Share the candidate's profile with another Workday VNDLY user. The recipient is able to see the:
  - Candidate profile details
  - Resume
  - Candidate's experience summary
- Schedule an interview.
- Reject a candidate.
- Release an offer to a candidate.

Schedule Interviews with Candidates

Prerequisites

- You must have the **Resource Manager** role tag.
- The job you want to schedule an interview for must be active and published.

Context

You can schedule an interview with a candidate when you think they might be a good fit for the role.

This request to interview goes to the candidate's vendor and not the candidate directly. The vendor will schedule the meeting with the candidate.

Steps

1. From the header, select **Jobs** > **Jobs Dashboard**.
2. Open the appropriate job.
3. Select the **Interviews** tab and click **Create New**.
4. As you complete the **Interview Request** details, consider:

Option	Description
Candidate Name	Select the candidate that you wish to interview from the list of applicants.
Interviewer Name	Select the user who will be leading the interview.
Timezone	Indicate the time zone that the time slots for the interview selected in.
Interviewer Availability	Configure the duration, date, and time you want the interview to be held. You can add up to 10 time slots by clicking **+Add**. Example: You could add multiple options for interview times on December 12, such as 1:00PM, 2:00PM, and 3:00PM.
Preferred Interview Mode	Indicate whether the interview will take place by *Phone*, *Video*, or *In Person*. The page updates based on your selection. Example: If you select *Phone*, you can indicate **The candidate will call the interviewer**. Then, enter the phone number for the candidate to call at the appropriate time.
Additional Attendees	Enter email addresses for anyone else that should attend the interview.
Interview Notes	Enables you to enter an optional message to the vendor.

5. Click **Send Request**.

Result

The interview request is sent to the vendor, and the interview request displays under the **Interviews** tab with the *Awaiting Vendor Action* status.

Reschedule Interviews

Context

You might need to modify details or reschedule an interview due to unforeseen conflicts.

Steps

1. From the header, select **Jobs** > **Interview Management**.
2. Click **Edit** on the appropriate interview.
3. Modify the interview details as needed.

   Depending on the fields you modify, the vendor might need to review the updated interview request. Example: If you change the **Interviewer Name**, the vendor doesn't need to review the changes. But if you change the **Date** or **Interview Mode**, the vendor must review and accept the changes.
4. Click **Send Request** when you've made all necessary changes.

Result

If the vendor needs to approve the changes, the interview is adjusted to a status of *Awaiting Vendor Action*.

Concept: Interview Management

Once you've scheduled an interview with a candidate, you might need to view, modify, reschedule, or even cancel an interview.

To view scheduled interviews, from the header, select **Jobs** > **Interview Management**. This page enables you to view all interviews for which you have access, regardless of job or status. Confirmed interviews display first in chronological order, with interviews awaiting responses displaying further down.

You can expand an interview to view additional details. If an interview request is pending, suggested time slots display for interviewer availability. If the vendor has accepted the interview, the scheduled date and time display. Depending on the interview **Mode** selected when you created the interview, you see the appropriate hyperlink:

- *Video*: Interview URL
- *Phone*: Phone number
- *In Person*: Navigation with Google Maps

You might need to modify an interview request once it's been sent to a vendor. You can click **Edit** on the **Interview Management** page. From here, you're able to modify any necessary details. Example: If the planned interviewer no longer has availability, but your assistant manager is able to fill in and keep the scheduled time, you could modify the interview to reflect the change. In this case, the vendor doesn't need to review the change and it's applied automatically.

Alternatively, if the scheduled interview date no longer works for you and you need to reschedule, you can modify the interview the same way. This time, you see a message indicating the change requires vendor action. When you save your changes, the vendor must review and accept the updated interview request.

Sometimes, you might fill a role before all interviews have taken place. You can click **Cancel Interview** to unschedule the interview and notify all participants.

Release an Offer to a Candidate

Context

Once you've completed your selection process, you can release an offer to a candidate.

Once all the open positions for the job fill and candidates finish onboarding, the job gets closed.

Steps

1. Select **Jobs** > **Job Dashboard**.
2. Open the appropriate job, and select the **Applicants** tab.
3. Click **Offer** to the right of the candidate you wish to release an offer to.
4. As you complete the **Offer Release** section, consider:

Option	Description
Start Date	Enter the effective date when the new hire is expected to begin their employment. This date is usually communicated in the official offer letter sent by the employer and is determined after mutual agreement between the company and the candidate.
End Date	Enter the final date when the job offer becomes inactive or expires. It typically marks the last valid date the offer remains open for acceptance.
Fee Profile	Enter the financial details associated with a candidate's offer. This field ensures transparency and accuracy in the billing and compensation structure.
Offered Pay Rate	Enter the amount that will be paid directly to the worker or contractor for their services.
Offered Bill Rate	Enter the amount the employer will be billed for the worker's services.

5. If you have been assigned permission, you can check the **Waive Verification** check box to skip verification for the candidate. This ability to skip must be configured in **Company Settings**.
6. Click **Release Offer** to release the offer to the candidate.

Job Workflow Configuration

Create a Rate Card in Settings

Context

You can create separate rate cards: cards for Workday VNDLY Extended Workforce Management (Extended WFM) and cards for Workday VNDLY Statement of Work (SOW). You can also create a rate card to cover both Extended WFM and SOWs. To specify what the rate card is for, select an option under **Module**:

Note: The **Module** drop-down menu only displays if you have both the Extended WFM and SOW modules.

- To create a rate card for Extended WFM, select *Contingent Staffing*.

- To create a rate card for SOW, select *Statement of Work*. Rate cards for SOW can only have an *Hourly* for **Bill Rate** and *Sourced Markup* for **Markup**.
- To create a rate card for both, leave *All* as the default. You must select hourly bill rate and sourced markup.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Rate Cards**.
3. Click **New Rate Card**.
4. Select the options that you want in the rate card. Please note that you must enter any rate data as digits; you'll receive an error if additional items are entered.

   Note: When adding rates, you might see a market rate displayed. This number or range provides information that you can use to determine the best rate to set.

Set Up Job Application Settings

Context

Job Application Settings enable you to configure numerous options related to publishing jobs and how vendors submit candidates to jobs. The options span areas such as:

- Workflow
- Job Card
- Fast Path
- Job Applicant
- Interview and Meeting
- Pre Identified Job

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Job Applications**.
3. As you complete the **Workflow Settings** section, consider:

Option	Description
Offer Release	Select options to control the offer release. You can also add additional fields to display in the offer release, such as: • Job Type • Work Type Profile • Calendar Pay Profile • Overtime Profile
Onboarding	Select any of the options to display as a field for onboarding.

4. Click **Save**.
5. Complete the **Job Card Settings** section:

Option	Description
Allow BMI Service	Select to enable Best Match Indicator (BMI). VNDLY assesses skills listed in the job against

Option	Description
	an applicant's resume and provides a BMI calculation.
Allow Skills Extract Service	Select to enable the Skills Extract Service to generate a list of potential skills associated with the **Job Description** of a job or job template that users can search and select from when publishing a new job.

6. Click **Save**.
7. Complete the **Fast Path Settings** section:

Option	Description
Enable Fast Path	Enables you to move applicants to a status other than *Applied* when they're submitted to a Fast Path job.
For any job	You can indicate whether Fast Path is usable for any job or is specified on the job template. If you select *Specified in job template* option, a toggle for the Fast Path setting displays on the job template. This option only displays if the check box for **Enable Fast Path** is checked.
Applied Candidate Status	You can specify whether a vendor applicant moves from *Ready* to *Onboard*, *Onboarded*, or *In Verification* status. This option only displays if the check box for **Enable Fast Path** is checked.

8. Click **Save**.
9. Complete the **Job Applicant Settings** section:

Option	Description
Default Filter to Shortlisted Candidates	Enables you to review candidates and shortlist them so resource managers only review prescreened applicants.
Highlight Rate Exceptions in List/Card	Enables VNDLY to display the applicant's bill rate in red font and displays a warning when the applicant's bill rate exceeds the job's maximum bill rate.

10. Click **Save**.
11. Complete the **Interview and Meeting Settings** section:

Option	Description
Phone Number Required for Interviews	Enables you to determine whether the **Phone Number** field is required or optional when scheduling interviews where the candidate calls the interviewer.

Option	Description
Video Link Required for Video Interviews and Vendor Meetings	Enables you to determine whether the **Interview URL** field is required or optional when scheduling interviews.

12. Click **Save**.
13. Complete the **Pre Id Settings** section:

Option	Description
Enable Pre Identified Job	Enables you to add a pre identified candidate when publishing a job.
Applied Candidate Status	Specify what status a vendor applicant is placed into when applied to a preidentified job. This only displays if the check box for **Enable Pre Identified Job** is checked.

14. Click **Save**.

Create Candidate Submission Rules in Settings

Prerequisites

You must have the *settings.admin* permission.

Context

Workday VNDLY administrators can create criteria rules to apply to a candidate submitted by a vendor. These rules enable you to have different candidate submission rules without needing to create a new tenant. When creating a job, there's a job-level configuration option not to apply the candidate submission rules. This option enables you to keep the rules in place, but skip using the applicable rule for a specific job posting.

There's no limit on the number of rules that you can create. However, it's best to create only the rules that you need, so that you don't end up with conflicts between rules.

Note: The **Default** tab on the **Candidate Submission Rules** page displays the default rules applied to all candidate submissions. Any new rule created will override these default rules except for the Candidate Limit settings when you select a vendor as a criteria in the rule.

You can set the criteria strategy to trigger the rule if any or all of the criteria selected match the rule.

Note: Workday VNDLY limits the settings available for the rule when you use vendor criteria. You can't edit the Candidate Limit section for your rule and it will follow the active settings of the **Default** rule. You can edit all the other options for the rule. If you don't select a vendor criteria, then all sections of the rule are available for editing.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **People**, click **Candidate Submissions Rules**.
3. Click **New Criteria**.
4. Select the criteria that you want in the rule.
5. Click **Save Criteria**.
6. Click the newly created rule from the list and set the candidate configuration details in the middle pane.

7. As you complete the **Candidate Limit** section, consider:

   None of the fields in the **Candidate Limit** section are editable if you set a vendor as criteria, it follows the current **Default** rule settings.

Option	Description
Candidate Submission Rules - Company Defaults	When checked, you can fine-tune settings related to candidate limits and override your tenant's default settings.
Candidate Limit	Enter the maximum number of candidates a vendor can submit for a given job.
Candidate Submission Limit Type	Select whether the candidate limit number is applicable per job or per position.
Allow rejected candidate substitution	Select if you wish to permit vendors to substitute a new candidate for a rejected candidate.
Allow withdrawn candidate substitution	Select if you wish to permit vendors to substitute a new candidate for a withdrawn candidate.

8. Select the **Require Candidate Resume** check box if you require vendors to upload a resume when applying candidates.
9. Select the **Candidate Withdrawal Reason** to set the format available for vendors indicating a reason for withdrawing a candidate.
10. As you complete the **Candidate Rejection Configuration** section, consider:

Option	Description
Allow rejected candidates to be resubmitted	Select if you wish to permit vendors to resubmit client-rejected applicants to a job. It won't be editable if you set a vendor as a criteria, it will follow the current **Default** rule settings.
Hide Candidate Rejection Comments from Vendors	Select if you wish to hide candidate rejection comments from vendors in notifications and on the candidate's profile page.
Candidate Rejection Reason	Set the format available for indicating the reason for rejecting a candidate. Options include List, Freeform or Both.

11. Click **Save**.

Example

You require vendors to submit resumes for all candidates so that Hiring Managers can review the resumes as part of the hiring process. However, there's 1 department at the organization that doesn't require resumes to be attached to applicants as they do high-volume hiring with tight deadlines. They deem the candidate screening that the vendors complete to be sufficient. You can create a rule to require resumes for all jobs apart from those associated with this department.

Or you might want to hide the candidate rejection comments from a vendor that hasn't submitted quality candidates to you in the past. You can create a rule that hides the comments for that particular vendor.

Related Information

Concepts

Concept: Published Jobs on page 71

Select Fields on the Jobs Dashboard in Workday VNDLY Settings

Context

You can customize the default job view for both client tenants and associated vendor tenants. This customization enables you to select the fields that are most pertinent to you.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **List/Card View Defaults**.
3. Click **Customize Data Defaults**.
4. Select up to 6 data points. To remove data points, clear the checkbox.
5. Click **Apply**.

Reference: Candidate Profile in Settings

If you have the role of Workday VNDLY Superuser, you can configure what information Workday VNDLY adds to the **Candidate Profile** within the **Candidate Profile Configuration** page. You can find this page under **More** > **Company Settings** > **People**.

These options are available to you:

Option	Description
Link Worker Profile to Master Candidate Record	When you create new worker tracking, Workday VNDLY notifies you when there might be a match for either a duplicate worker profile or a worker profile marked ineligible for rehire.
Capture and Append 4 Character Security ID in Worker Unique ID	Stores 4 digits of a security ID that a vendor would use to identify a contractor. Workday VNDLY adds this security ID to the end of the **Contractor Unique ID** (without being hashed). The security ID can be only numbers, such as the last four digits of a Social Security number, or an alphanumeric value. Any lowercase letters added to this field will be converted to uppercase letters when the **Contractor Unique ID** is created.
Fields used to calculate Contractor Unique ID	If not using the **Capture and Append 4 Character Security ID in Worker Unique ID** setting, this information will be used to determine the worker's unique ID. This is done when a vendor adds or edits the **Candidate Profile**, or when adding a worker tracker (if the **Link Worker Tracker Profile to Master Candidate Record** setting is enabled). Don't change the fields after loading workers; you could end up getting false duplicates or missing true duplicates. Also known as **Worker Unique ID** .
Default authentication provider	If set, all contractors populate with this authentication provider. Otherwise, contractors are set to the authentication provider that best matches their domain name.

Option	Description
Candidate Profile Required Fields	Fields required when submitting a candidate. You can select multiple fields from the drop-down menu. Example: You might need to make a field required by the vendor to support integrations setup.
Candidate Profile Field Visibility	Lets you hide certain fields in the **Candidate Profile** that aren't applicable to your program. You can only hide fields from the client or both vendor and client, not vendor only.
Additional Fields Visibility	Lets you display certain fields on the **Candidate Profile**, such as **MSP Contractor IDs**. With these fields displayed, you can search by the values in these fields to narrow your search for a particular candidate.
Display Candidate Pictures	Lets you determine whether candidate pictures should display on applicant lists and profiles, as well as contractor lists and profiles.
Pre-Identified Intake Fields	Makes the **Email**, **Notes**, and **Contact Number** fields become required when filling out the Pre-Identified Candidate form.

Reference: Job Compensation Settings

Job compensation settings enable you to configure how you pay and manage a contractor for a particular job. From the header, select **More** > **Company Settings**. Under **Jobs & Work Orders**, click **Job Compensation**.

As you modify job compensation settings, consider:

Option	Description
Contractor Pay Type	You can turn different contractor pay types on or off. When enabled, you can click the gear icon to configure the **Max Bill Rate** for each **Currency Code**.
Milestone Payment Terms	Configure the various milestone payment types. This setting is only applicable to the Extended Workforce Management module.
Bill Rate	There are 3 available **Bill Rate Types**: • *Min/Max*: Enables bill rate ranges. Example: $25.00-$30.00 • *Single*: Enables a set rate. Example: $15.00 • *None*: Won't force vendors to enter a bill rate. Enables vendors to submit candidates at the rate they want. Note: If you're using rate cards, the set bill rate only loads for job profiles that don't have a rate card.
Alternate Compensation	To support healthcare clients, you can turn on **Orientation Tracking** that enables additional features to work on a contractor's timesheet.

Option	Description
Hire Type	Direct hire displays on the job form and work order if enabled.
Contract to Hire	If **Show Contract to Hire** is enabled, you can configure how to display the **Expected Conversion Salary**. This ensures candidates know what the hire rate is upon taking a contract role.
Direct Hire Pay Type	When enabled, the direct hire pay type displays on the job form and work order.
Direct Hire Vendor Payment Terms	Configure how vendors are paid for direct hire roles. This ties directly to invoicing.

Workflow Approvals

Steps: Set Up Workflow Approvals

Prerequisites

You must have the *approval_rules.write* permission.

Context

Workflow approvals enable administrators and MSP users to create and configure approval criteria and approver types. By managing the various elements of approval rules, you cancontrol business user flows and ensure the workflows are compliant with both internal and external regulations.

Steps

1. Create Workflow Approvals.

   See: Reference: Workflow Approval Criteria for more information on the available criteria.
2. Create Approver Types.
3. Configure Workflow Approvals.

Create Workflow Approvals

Prerequisites

You must have the *approval_rules.write* permission.

Context

Approval rules enable you to configure what drives approvals and who's involved in the approval process. Example: You can create a job posting approval rule where if the budget exceeds $100,000, an approval is needed from both the budget approver and the resource manager's manager.

Steps

1. From the header, select **More** > **Company Settings**.

2. Under **Organization**, select **Workflow Approvals**.
3. On the **Rules** tab, click **Add Approval Rule**.
4. As you create a new approval rule, consider:

Option	Description
Approval Types	Indicate the type of approval the approval rule should apply to. You can select one or more as needed. The options you select here limit the option available to select for the**Criteria Type**and**Approver Name**fields.
(Optional) Add Criteria Group	Enables you to add specific criteria that must be met for the approval workflow to be utilized. The options are limited based on the approval type or types selected.
Organization Unit	Indicate the organization unit the approval rule should apply to.
(Optional) Add Approver	Enables you to add an approver based on the selected approval type or types. You can use an existing approver or create a new one as needed.
(Optional) Skip Approval Role Tags	Indicate a specific role tag for which users can skip approvals.
Approval Strategy	Indicate whether the approval rule should require approval from all approvers in each level or if only one approval is required per level.
Approval Restart Policy	Indicate whether approvals should only restart on approvals that impact the edits or if approvals restart on any edit.

Related Information
Examples
The Next Level: Workday VNDLY Workflow Approval

Create Approver Types

Context

Approver types enable you to configure the user who should be the approving authority on the item.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Workflow Approvals**.
3. On the **Approver Types** tab, select **Create**.

4. Select an **Approver Type**.

Approver Type	Eligible Approval Types	Additional Details
Specific Email	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify the email that belongs to the approving authority of the item. This approver type is often used to specify users who are not necessarily part of the system but still need to approve the item. **Note:** If the configuration for **Allow anonymous approvals through email notification** is turned off, then you can only specify emails for users that are part of the VNDLY tenant.
Specific User	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	This approver type is often used to specify a user within the system who is higher up in the management level chain. Example: A VP level approver.

Approver Type	Eligible Approval Types	Additional Details
Resource Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Work Order End	You can use this approver type to specify if the resource manager listed on the item needs to be the approving authority of the item. Example: The resource manager listed on the work order needs to approve or reject work order modifications.
Resource Manager Plus	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Work Order End	You can use this approver type to specify if the manager of the resource manager listed on the item needs to be the approving authority of the item.
SOW Manager	• SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the SOW manager of the SOW needs to be the approving authority of the SOW-related item.

Approver Type	**Eligible Approval Types**	**Additional Details**
SOW Manager Plus	• SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the manager of the SOW manager listed on the item needs to be the approving authority of the item.
SOW Manager From Top	• SOW Acceptance • SOW Change Orders • SOW Closure • SOW Reopen • SOW Payments • SOW Adjust Approved Payment	You can use this approver type to specify the approving authority for several SOW approvals using the SOW manager's reporting chain.
First Level Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Reopen	You can use this approver type to specify if the manager of the user who's submitting the item for approval needs to be the approving authority of the item.
Timesheet Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Scheduled Payments Approval (Milestone)	The timesheet approver listed on the work order needs to approve or reject the timesheets submitted for the particular work order.

Approver Type	Eligible Approval Types	Additional Details
Vendor Approver	• Timesheet • Expenses & Adjustments	You can use this approver type to specify if the vendor company listed on the timesheet, expenses, and adjustments need to be the approving authority of the item. Example: The vendor company listed on the work order needs to approve or reject timesheets submitted for the particular work order.
Expense Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Scheduled Payments Approval (Milestone)	You can use this approver type to specify if the expense approver listed on the item needs to be the approving authority of the item. Example: The expense approver listed on the work order needs to approve or reject the expense reports submitted for the particular work order.
Program Team	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the program team listed on the item needs to be the approving authority of the item. Example: The program team listed on the work order needs to approve or reject the work order modifications.

Approver Type	Eligible Approval Types	Additional Details
Role Tag Group Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	Every MSP user within the system should be able to approve work order modifications submitted across all business units regardless of whether or not they're assigned to the item or not.
Management Level Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Onboarding • Work Order Modification • Work Order Reopen • Work Order Termination • SOW Acceptance • SOW Closure • SOW Reopen • SOW Work Order End • SOW Payments • SOW Adjust Approved Payment • Timesheets • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments (Milestone)	You can use this approver type to incorporate manager users into an approval chain based on the **Management Level** set on their user profile. See:

Approver Type	Eligible Approval Types	Additional Details
Second Level Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Reopen	You can use this approver type to specify if the manager up two levels from the user who's submitting the item for approval needs to be the approving authority of the item.

Related Information
Tasks

Configure Management Levels on page 32

Configure Workflow Approvals

Context

You can customize your approval workflow configuration.

The **Configuration** tab enables you to:

- Set additional approvers to be optional to avoid delays.
- Enable non-VNDLY users to approve through email.
- Specify duplicate approver instructions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Workflow Approvals** and select the **Configuration** tab.
3. As you modify workflow approval configurations, consider:

Option	Description	Example
Allow Additional Approvers to be Optional	Enables you to add optional approvers into your approval rule.	You have a Work Order Modification Approval Rule with the Resource Manager as Level 1, but the manager of the Resource Manager is the Level 2 approver and is optional. The Level 2 approver isn't required for the approval to go through successfully, but they can approve if they choose to and for visibility sake.

Option	Description	Example
Allow anonymous Approval through email notifications	If disabled, individuals who aren't registered VNDLY users will be able to approve or reject an item through an email notification.	A VP who's not a VNDLY registered user needs to approve a work order extension that causes the budget to increase more than a certain threshold as a one-time only approval. With this setting disabled, the resource manager of the work order can forward the email approval notification to the VP and have them approve the modification without having to be registered as a VNDLY user.
Duplicate Approver Handling	• *Remove duplicate approvers in the same level*: This is the default setting for duplicate approvers. When an approver displays more than once for an approval within a single level, VNDLY will only send 1 approval request to the approver. • *Remove duplicate approvers across all levels (lowest level takes precedence)*: The duplicate approver is shown once within the approval chain at the lowest approver level they're assigned to. • *Remove duplicate approvers across all levels (highest level takes precedence)*: The duplicate approver is shown once within the approval chain at the highest approval level they're assigned to.	You select a **Duplicate Approver Handling** of *Remove duplicate approvers across all levels (lowest level takes precedence)*. A Work Order Modification Approval Rule has Resource Manager in Level 2 and Timesheet Approver in Level 4, and both resolve to the same manager who's assigned as the Resource Manager and Timesheet Approver of the work order, that user only displays once as a resource manager approver in Level 2.

Reference: Workflow Approval Criteria

Option	Description	Eligible Approval Types	Examples
Bill Rate Offered is Different from the Job Bill Rate	Rule is only applied if the bill rate amount set in the offer release differs from the amount on the job post. You can use this criteria to specify if the bill rate offered to the candidate,	Offer Release	The approval rule should run if the **Offer Release Bill Rate** is modified. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Any*

Option	Description	Eligible Approval Types	Examples
	within the **Offer Release** page, is modified from the initial bill rate on the job published.		The approval rule should run if the work order bill rate is increased by at least 5% compared to the bill rate on the job. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Increase* • **Change Amount** drop-down: *Percentage* • **Change Amount**: *5*
Budget is Modified	Rule is only applied if the total budget amount is modified. You can use this criteria to specify if the approval rule should run if: • The item's budget is modified, whether an increase or decrease. • The item's budget is specifically increased or decreased. • The item's budget is specifically increased or decreased by a set amount.	Job Change Job Publish Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Reopen SOW Acceptance SOW Change Order Statement of Work Payment	The approval rule should run if the item's budget is modified. You would select: • **Applies if Condition is**: *True* • **Budget Change Type**: *Any* The approval rule should run if the item's budget is increased by at least 5%. You would select: • **Applies if Condition is**: *True* • **Budget Change Type**: *Increase* • **Change Amount** drop-down: *Percentage* • **Change Amount**: *5*
Budget Exceeds Amount	Rule is only applied if the item's budget exceeds the threshold amount you specify. You can use this criteria to specify if the approval rule should run if the budget exceeds the amount specified or not.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen SOW Acceptance SOW Change Order	The approval rule should run if the item's budget exceeds $500. You would select: • **Applies if Condition is**: *True* • **Budget Exceeds By**: *500* The approval rule should run if the item's budget does not exceed $500. You would select:

Option	Description	Eligible Approval Types	Examples
		Statement of Work Offer Acceptance	• **Applies if Condition is**: *False* • **Budget Exceeds By**: *500*
Expense Report Type	Rule is only applied if the expense report type submitted for approval has the report type specified. You can use this criteria to specify if the approval rule should run if the item submitted for approval has the **Expense Report Type** specified or not. The Expense Report Type drop-down displays information from the Report Types list on individual tenants. You can review the list by navigating to **More** > **Company Settings** > **Accounting** > **Expenses & Adjustments** > **Report Types tab**.	Expenses & Adjustments	The approval rule should run if the item submitted is a miscellaneous adjustment without a work order. You would select: • **Applies if Condition is**: *True* • **Report Type**: *Misc. Adjustment without Work Order*
Expense Report Type is Expense	Rule is only applied if the expense report type purpose is expense. You can use this criteria to specify if the approval rule should run if the item submitted for approval is an expense report or not.	Expenses & Adjustments	The approval rule should run if the item submitted is an expense report. You would select: • **Applies if Condition is**: *True*
Expense Report Type is Miscellaneous Adjustment	Rule is only applied if the expense report type purpose is miscellaneous adjustment . You can use this criteria to specify if the approval rule should run if the item submitted for approval	Expenses & Adjustments	The approval rule should run if the item submitted is a miscellaneous adjustment You would select: • **Applies if Condition is**: *True*

Option	Description	Eligible Approval Types	Examples
	is a miscellaneous adjustment or not.		
Geographic Location	Rule is only applied if the item is in a specific geographic area you specify: • Country • Subdivision • Region • Location You can use this criteria to specify it the approval rule should run if the item has the specified location, region, subdivision or country or whether it doesn't. Parameter order from the most specific to the least is: **1.** Location **2.** Region **3.** Subdivision **4.** Country	Expenses & Adjustments Job Publish Job Change Offer Release Onboarding Work Order Modification Work Order Reopen Work Order Termination Timesheet Worker Profile Creation Worker Profile Termination Worker Profile Date Change Offer Acceptance Scheduled Payments (Milestone) SOW Acceptance SOW Change Order SOW Closure SOW Work Order End SOW Payments SOW Reopen SOW Adjust Approved Payment	The approval rule should run if the item has a location within the United States. You would select: • **Applies if Condition is**: *True* • **Country**: *USA*
Item has Custom Field	Rule is only applied if the item has the custom field value you specify. You can only single-select, multi-select, and boolean for this criteria. You can use this criteria to specify if the approval rule should run if: • The custom field is present on the form with the value	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Reopen Work Order Termination Timesheet Worker Profile Creation	The approval rule should run if a **Work Order Custom Field** with the specified value is present on the form. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Work Order Custom Field* • **Value**: *Specify the Value(s) that needs*

Option	Description	Eligible Approval Types	Examples
	specified on the criteria. • The custom field on the form is going to be changed to the value specified on the criteria. • The custom field is present specifically on the contractor's profile with the value specified on the criteria. This is a very special scenario that can be used to trigger multiple approval rules. Refer to the second example for more information. Note: You can specify multiple custom field values for the criteria. However, we will evaluate it 'individually', meaning – the rule should run if any of the value you specified on the criteria is present.	Worker Profile Date Change Worker Profile Termination SOW Acceptance SOW Change Order SOW Payment SOW Adjust Approved Payment Scheduled Payments (Milestone)	*to be 'met' in order for the Rule to run* The approval rule should run if a contractor has the custom field specified on their Contractor Profile. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Contractor Profile Custom Field* • **Value**: *Specify the Value(s) that needs to be 'met' in order for the Rule to run* • **Is Custom Field on Worker's Record?**: *Yes* For programs that have enabled the **Workday Integration**, the approval rule should run if a Workday Custom Field with the specified value is present on the form. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Workday Custom Field* • **Value**: *Specify the Value(s) that needs to be 'met' in order for the Rule to run*
Item has Job Category	Rule is only applied if the item has the job category you specify. You can use this criteria to specify if the approval rule should run when the item has the job category specified.	Job Publish Job Change Offer Release Work Order Modification Work Order Termination Work Order Reopen Timesheet Scheduled Payments (Milestone)	The approval rule should run if the item has the job category specified. You would select: • **Applies if Condition is**: *True* • **Job category**: *Specify a Job Category in the tenant*

Option	**Description**	**Eligible Approval Types**	**Examples**
Module	Rule is only applied if the item belongs to the module you specify. You can use this criteria to specify if the approval rule should run if the item submitted for approval belongs to a certain module.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Timesheet Worker Profile Creation Worker Profile Date Change Worker Profile Termination SOW Work Order End	The approval rule should run if the item submitted for approval belongs to the SOW Module. You would select: • **Applies if Condition is**: *True* • **Module**: *Statement of Work*
Submitted has a Specific Role or Role Tag	Rule is only applied if the user submitting the change has the role or role tag you specify assigned to their user profile. You can use this criteria to specify if the approval rule should run when the submitter has a specific role or role tag specified. Note that both role and role tag are optional parameters.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Expenses & Adjustments Worker Profile Creation Worker Profile Date Change Worker Profile Termination SOW Acceptance SOW Change Order SOW Closure SOW Work Order End SOW Reopen	The approval rule should run if the submitter has an MSP Role on their user profile. You would select: • **Applies if Condition is**: *True* • **Role**: *MSP* • *Other parameters can be left blank* OR • **Applies if Condition is**: *True* • **Role Tag**: *Program Team* • *Other parameters can be left blank* The approval rule should run if the submitter has a *Time & Expense* approver role on their user profile, but for a different organization unit than the item. You would select: • **Applies if Condition is**: *True*

Option	Description	Eligible Approval Types	Examples
			• **Role**: *Time & Expense Approver* • Ignore Business Unit on Item?: *Yes*
Submitter is also Resource Manager	Rule is only applied if the user submitting the change is the resource manager of the item. You can use this criteria to specify if the approval rule should run when an item is submitted by the item's Resource Manager for approval or not.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Timesheet Expenses & Adjustments Worker Profile Creation Worker Profile Date Change Worker Profile Termination	The approval rule should run if the submitter is the Resource Manager of the item. You would select: • **Applies if Condition is**: *True*
Work Order Bill Rate is Modified	Rule is only applied if the work order bill rate is modified. You can use this criteria to specify if the approval rule should run if: • The work order bill rate is modified (doesn't matter if it's an increase or decrease). • The work order bill rate is specifically increased or decreased. • The work order bill rate is specifically increased or decreased by X amount.	Offer Release Onboarding Work Order Modification Work Order Reopen	The approval rule should run if the work order bill rate is modified. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Any* The approval rule should run if the work order bill rate is increased by at least $10. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Increase* • **Change Amount**: *10*
Work Order Date is Extended	Rule is only applied if the work order end date is extended. You can use this criteria to specify if the approval	Offer Release Work Order Modification Work Order Termination Work Order Reopen	The approval rule should run if the work order end date is extended. You would select:

Option	Description	Eligible Approval Types	Examples
	rule should run when a work order end date is extended or not.	Worker Profile Date Change	• **Applies if Condition is**: *True*

Checklists

Add a New Checklist

Prerequisites
Security: *checklists.settings* permission.

Context

Checklists are an optional feature in Workday VNDLY. They enable you to configure checklists for Workday VNDLY to apply based on numerous criteria including:

- Country
- Subdivision
- Region
- Location
- Job Category
- Job Template
- Organization Unit
- Module
- Hire Type

Checklists automatically apply to jobs created after the checklist creation date based on the rules that you select. If you edit an existing checklist, it doesn't impact existing checklist actions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Checklists**.
3. Click **Create New Checklist**. As you fill out the New Checklist form, consider:

Option	Description
(Optional) Add Criteria	This option is only available for Per Worker and Per Contractor selections for **Must Complete** type. It instructs Workday VNDLY to predict which checklist items to apply to the job or SOW role based on the selected criteria. Adding criteria rules enables you to create different checklists for various geographic areas, job categories, job templates, organization unit, module, and hire types. If you don't select any criteria, Workday VNDLY applies this checklist to every job you create. Criteria are grouped into criteria families and you can only select 1 criteria from each criteria family. After selecting a criteria, select one or more of the appropriate options. When selecting a job category,

Option	Description
	organization unit or region criteria, Workday VNDLY applies the checklist to both the parent as well as the children categories. Example: You can create a checklist using criteria of Region for Alabama and Arkansas and Hire Type of Contractor and Job Category of Engineering. The checklist will only display for candidates applying to Engineering contractor jobs in those 2 states. Be aware that the checklist will also display for matching jobs that are in sub-org units within the Engineering parent job category.
Timing	Determines when this checklist action is due. • Pre-Onboarding - blocks the onboarding workflow if you don't complete or waive the checklist. • Post-Onboarding - requires you to specify the number of days for when the checklist is due after onboarding the contractor.
Action Required From	Determines the roles responsible for satisfying the action in Workday VNDLY. These roles will have open, related checklist actions. You can select more than 1 role.
Hide From	Workday VNDLY will hide the checklist actions from the selected side of the application. You can select both check boxes, if required. Program team members, Administrators, and MSP users are able to see all checklist actions and aren't blocked by the **Client** selection.
Expiration	Determines how long a checklist action is valid before you must update it. Select the appropriate option for the checklist action: • Never: Item will never expire. • Specific date of the year: Item will expire on a specific date every year. The renewal date for the related actions is based on the next occurrence of this date after the last completed date of action. • User-entered Expiration Date on Action: Item will force the Action owner to enter an expiration date. The expiration date isn’t calculated and relies on the user-entered value.
(Optional) Notify When Nearing Expiration	Select this setting to configure single or multiple notifications that remind users when a checklist item is nearing expiration. You can configure reminder notifications by the number of days before expiration and the roles to notify. See Set Up Multiple Checklist Expiration Notifications.
(Optional) Additional Details	Add helpful information to display to users. This text can help users select the correct checklist. It displays on each checklist action in the checklist actions list pages and each job checklist requirements tab.

Example
When dealing with different regional requirements, you can create different checklists for specific work locations and job categories.

This example demonstrates how to create a compliance checklist required for each contractor for engineering jobs in California and Oregon. Selecting the **Per Contractor** option requires contractors in these work areas to only complete this checklist once.

Field	Value
Checklist Type	Compliance
Must Complete	Per Contractor
Criteria	Subdivisions: California and Oregon
Criteria	Job Categories: Engineering

If your Statement of Work stipulates that contractors must supply a specific valid credential for a specified job title in specific work regions, you can set the credentials as:

Field	Value
Checklist Type	Credentials
Must Complete	Per Contractor
Criteria	Subdivisions: Florida, Louisiana, Texas
Criteria	Job Template: [selected desired job title]
Criteria	Module: Statement of Work
Criteria	Hire Type: Contractor

Add New Checklist Items to Work Orders

Prerequisites

- Enable the **Allow Checklist Modifications on Job/Role Creation and Work Orders** setting.
- You must have the *checklistactions.add* permission.

Context

Checklist actions feed through from the job to the resulting work order. However, a client might need to add a checklist to a work order that supports their business processes. Example: Extended workforce management workers on active assignments might need to provide additional evidence to prove their continued eligibility to fill their current role. Adding checklist actions to an active work order ensures that these additional tasks get completed.

You can add checklists to work orders in the following statuses:

- Active
- Applied
- Interviewing
- Offer Approval Pending
- Offer Released
- Pending Offer Acceptance
- Pending Offer
- Verification in Progress

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order.
3. Select the **Checklists** tab.

4. Click **Add Checklist**.
5. Select the appropriate checklist items using the search box.

Assign Checklist Items to Jobs

Prerequisites
Start the process of publishing a job.

Context

The **Add Checklists** window displays during the **Publish a Job** workflow. Adding a checklist item to a job during the job creation process ensures that any work orders created from the job are associated with the checklist action.

Steps

1. On the **Add Checklists** page, review the checklist items.

   You can select or clear checklist actions as needed. Some checklist actions are checked and can't be cleared.
2. Use the search box to locate and add the appropriate checklist item.

   Recently selected items display in the search box or you can enter other items as needed.

Next Steps

Add any preidentified candidates.

Edit Assigned Checklists on a Published Job

Prerequisites
Enable the **Allow Checklist Modifications on Job/Role Creation and Work Orders** setting.

Context

You can update checklist items on a published job if there are new requirements for a particular role. Example: You can add your updated IT Policy for the current year.

Note: Note: Criteria-based checklist suggestions only work at the time of job creation.

Steps

1. From the header, select **Jobs** > **Job Dashboard**.
2. Open the job that you wish to edit.
3. Click **Edit** and make your desired changes.
4. Click **Submit** to continue.
5. Indicate whether to notify vendors of your changes, then click **Proceed**.
6. Add or remove checklist items.

   These changes will update all open Applicants to the Job.

   Any checklist items marked with **Force Select when Criteria Matches** can't be removed manually from the job.
7. Click **Next** to publish your changes.

Manage Checklist Actions

Prerequisites

Have the *checklists.waive* to waive a checklist action.

Context

Checklists are an optional feature in VNDLY. You can configure checklists to set up tasks that selected roles must complete before or after onboarding a candidate. Checklist actions in VNDLY are commonly used for compliance tasks such as background checks and onboarding forms. Checklist actions automatically apply to jobs created after the checklist creation date if the criteria matches. You can also manually add them to an active work order.

You can search and filter checklist actions that are relevant to you. Example: You only want to complete missing checklist actions associated with a work order that already has an accepted offer.

Access to checklist actions isn’t only based on security permissions. Users can access checklist actions based on who is the checklist owner and their relationship to the worker.

Steps

1. From the header, select **More** > **Manage Checklist Actions**.

   The **Contractor Checklists** tab displays checklist actions by due date.
2. (Optional) From the **Filters** sidebar, select the filters you'd like to use. As you select a filter, consider:

Option	Description
Completed	The checklist action is complete and requires no further action.
Expired	The expiry date of the checklist action has passed.
Expire Soon	The checklist action expires soon and the expiration notification setting was enabled on the checklist.
Failed	The checklist action requiring a pass or fail evaluation displays as a **Fail**.
Missing	The checklist action is incomplete and requires action.
Pending	The checklist action was submitted and requires approval.
Rejected	The approver rejected the checklist action.
Waived	The checklist action was waived.
3. Click the checklist that you wish to view or take action on.

   The pane on the right displays details of the checklist action. If the checklist action applies to multiple work orders, VNDLY lists each work order along with the status of the work order.
4. Click **View** or **Review** (for *Pending* status actions) to view the action details or take further action on the checklist action.

5. As you view the **Take Action** pane, consider:

If you want to ...	Then ...
Complete the checklist action.	**a.** Complete the fields. **b.** Click **Save** (or **Submit for Approval**).
Approve the pending checklist action.	Click **Approve**.
Reject the pending checklist action.	**a.** Click **Select Reason & Reject**. **b.** Select the appropriate reason. **c.** Click **Reject**.
Waive the checklist action.	**a.** Click **Waive**. **b.** Enter a reason for waiving the checklist action. **c.** Click **Save**. **Note:** When you waive a pre-onboarding checklist action, it blocks the onboarding workflow unless the following checklist settings are enabled in your tenant: • **Allow Waive Checklist Actions at Offer Release**. • **Allow Manager to Waive Checklist Action**. .

Example

Set Up Multiple Checklist Expiration Notifications

Prerequisites
You must have the *checklist.settings.manage* and *checklist.settings* permissions.

Context

You can set up multiple notifications to remind users when a checklist action is nearing expiration. This enables you to prompt users more than once to complete a required checklist item before it expires. You can configure notifications based on the number of days before the expiration and the roles you'd like to notify.

Example: You require one of your vendors to provide proof of citizenship as a checklist action. There's an existing configuration to notify the vendors at 10 days before the item expires, but they ignore the notification. For additional reinforcement, you can set up multiple notifications to send to the vendor at 7 days, and at 5 days to the vendor and the MSP (to escalate the issue).

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Checklists**.
3. Select an existing checklist or add a new checklist.

   See Add a New Checklist.
4. Under the Expiration section, select **Notify When Nearing Expiration**.

5. As you configure the notification, consider:

Field	Description
Days Before Expiration	Specify the number of days before expiration to send the notification. You can't send a notification on the same day as the expiration.
Roles to Notify	Select roles to notify from the drop down menu. You can enter multiple roles.

6. Click **Add Notification** to create another notification. If you delete a notification, this won't impact those that have already been sent.
7. Click **Save**.

Result

The notification setup applies immediately to both new and existing checklist actions.

Set Up Checklist Settings

Prerequisites

Have the *checklists.settings* permission.

Context

You can customize your checklist configuration.

The **Configuration** tab enables you to:

- Allow specific users to waive checklist actions.
- Allow contractors to manage checklist actions.
- Display checklists and allow checklist modifications on job creation.
- Allow managers to view checklist requirements before onboarding.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Miscellaneous Settings**, click **Checklists**.
3. Click the **Configuration** tab.
4. As you modify checklist configurations, consider:

Option	Description
Display Checklist to Manager During Job Creation	Allows Program Management to decide whether the **Add Checklists** pop-up displays with a list of required and suggested checklist items during job creation and when editing a job . **Note:** If this option isn't selected, VNDLY automatically adds required and suggested checklist items that match the job criteria to the job during job creation.
Allow Checklist Modifications on Job/Role Creation	When checked, users can remove checklists when publishing or editing a job, except for checklists set as **Force Select when Criteria Matches** (set when creating a checklist).

Option	Description
	Removed checklists remain applicable to existing candidates. **Note:** This option is only available for selection when **Display Checklist to Manager During Job Creation** is enabled.
Allow Managers to View Checklist Requirements Before Onboarding	When checked, client-users with the permission *checklist.read* can view checklist evidence from vendors before the candidate is in *Ready for Onboard* status.
Allow Waive Checklist Actions at Offer Release	When checked, users with the permission *checklist.waive* can waive pre-onboarding checklist actions at the time of offer release and on individual checklist actions. Waiving pre-onboarding actions allows users to onboard the candidate without having the items complete.
Allow Manager to Waive Checklist Actions	When checked, allows managers with the permission *checklist.waive* to waive pre-onboarding individual checklist actions. Waiving pre-onboarding actions allows the candidate to be onboarded without having those items complete.
Allow Contractors to Manage Checklist Actions	When checked, contractors can access and complete checklist actions.
Require Waived Checklist Actions to be Completed After Onboarding	When checked, checklist actions that were waived before onboarding must be completed post-onboarding. The due date will be the onboarding date plus the specified number of days after onboarding.
Waived Checklist Actions must be completed within X days After Onboarding	This field is required when **Require Waived Checklist Actions to be Completed After Onboarding** is checked. It requires input of the number of days checklist actions must be completed after onboarding to remain compliant.
Enable Checklist Actions Rejection Reason	When checked, VNDLY displays a list of custom rejection reasons when rejecting a checklist approval request.

Result

Example

Next Steps

Work Orders

Edit Work Orders

Context

You use **Edit a Work Order** to make changes to a work order, such as Job Type or Resource Manager. Editing enables you to modify the work order without having to delete it and create a new one. Editing a work order doesn't require internal or vendor approvals.

Note: You can't edit pay rates or the end date with **Edit a Work Order**. To change a pay rate or end date, you can select:

- **Change End Date**
- **Change Rates**
- **Change End Date and Rates (Modify Work Order)**

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the work order that you wish to edit.

   A yellow icon next to a green Active status indicates that the Work Order modification needs vendor approval.

   Certain permissions control the visibility of some filters:

Permission	Ability
vendor_company.read	User with this permission can see the **Vendor** filter.
organization_unit.read	User with this permission can see the **Organization Unit** filter.

3. Click **Update Work Order**.
4. As you edit the work order, consider:

Field	Consideration
Worker Classification Field	To view and edit the **Worker Classification** field, you must have the *contractor.classification.read* and the *contractor.classification.write* permissions. These permissions are granted to vendors by default. Note: If worker classification is updated on a work order, the default candidate worker classification will not be updated. In addition, when viewing candidate/contractor information, the worker classification that is displayed will show the default value, not the per work order value.

Change Work Order Dates and Rates

Context

If you want to adjust a wider range of work order details, including the dates, the rates, the budget, and the fee profile, you can do so with the **Change End Date and Rates (Modify Work Order)** action.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Change Dates and Rates (Modify Work Order)**.
4. As you make changes to the **Modify Work Order** page, consider

Option	Description
Duration	Adjusting the date fields updates the **Budget** values accordingly.
Rates	Click **Edit** to adjust the **Effective Date**, **Pay Rate**, and **Bill Rate**. Note that you can backdate—if you have the proper permissions—the **Effective Date** only as far back as the work order setting **Backdating Effective Date Tolerance in Weeks** allows.
Additional Rate Information	Click **Edit** to adjust the **Effective Date** and **Fee Profile**. Note that you can backdate—if you have the proper permissions—the **Effective Date** only as far back as the work order setting **Backdating Effective Date Tolerance in Weeks** allows.

5. Click **Review Changes**.
6. Select the **Reason for Change** and click **Submit for Approval**.

Result

Once submitted, the requested change takes effect after any configured internal or vendor approvals have taken place.

Change Work Order End Dates

Context

You can update a work order to adjust the end date from the date entered during work order creation.

Note: If associated to a statement of work (SOW), you can't extend a work order date after the SOW end date.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.

   To change the work order status to *Ended* along with the end date change, use the **End** action instead of **Update Work Order**. See **End Work Orders Early**.
3. Select **Change Dates**.

4. In the **End Date** field, enter or find the new date.

   The **Budget** section adjusts accordingly.
5. Click **Review Changes**.
6. Select the **Reason for Change** and click **Submit for Approval**.

Result

Once submitted, the requested change takes effect after any configured internal or vendor approvals have taken place.

Change Organizations on Work Orders for Workday-Integrated Tenants

Prerequisites

Have the following permissions:

- *field.organization_unit*. This is a field-level permission. Some tenant configurations may make the Organization Unit field non-editable, despite having this permission.
- *organization_unit.read*.
- *bulk_operations.workorder.update_organization*. Lets you bulk update work order organization unit.
- *workorder.modifications.create*.
- In addition, make sure that the work order is:
  - Provisioned in Workday.
  - Eligible for provisioning.
  - The primary work order.

Context

If you want to adjust the organization on a work order provisioned in Workday, you can do so with the **Make Organization Changes** action. Both vendor and client users can change the organization unit, although there are special considerations when changing the organization unit in a work order provisioned in Workday.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Make Organization Changes**.
3. Change the **Organization Unit**.

   If you're changing an organization unit with the following staffing models, you'll be prompted to select a position type:

   - Job Management to Position Management.
   - Position Management to another organization unit with Position Management.

   You'll be able to select organization units at or above your current organization level. Users may be prompted to select only resource managers that are associated with that organization unit if this has been already set up in the **Job Form Configuration** page. (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations** > **Resource Manager** > **Restrict Resource Manager to Organization Hierarchy mapping**).
4. Click **Review Changes** and review the change.
5. Click **Submit for Approval**.

Result

The change will sync with the work order provisioned in Workday. Be aware:

- This change may require approvals which will delay the sync with Workday.
- Even if there are no approvals for the change, there will be a slight delay with the sync with Workday.

Change Organizations on Work Orders for Non-Workday Integrated Tenants

Prerequisites

Have the following permissions:

- *field.organization_unit.* This is a field-level permission. Some tenant configurations may make the *Organization Unit* field non-editable, despite having this permission.
- *organization_unit.read*.
- *bulk_operations.workorder.update_organization*. Lets you bulk update work order organization unit.
- *workorder.modifications.create*.

Context

If you want to adjust the organization on a work order, you can do so with either the **Make Organization Changes**, **Change Dates and Rates (Modify Work Order)**, or **Edit Work Order** action.

Both vendor and client users can change the organization unit.

Steps

1. From the header, select **More** > **Work Orders.**
2. Open the appropriate work order and click one of the following: **Make Organization Changes**, **Change Dates and Rates (Modify Work Order) Order**. or **Edit Work Order**. Which option you choose depends upon how you need to edit the organization unit:

Option	Description
Make Organization Changes	Select this option if you're changing organization units at any level of the organization unit hierarchy. This option targets the organization unit specifically and you won't be able to edit other aspects of the work order. Example: A resource manager can request a change to the organization unit and resource manager outside of their current organization.
Change Dates and Rates (Modify Work Order) Order	Select this option if you're changing organization units at any level of the organization unit hierarchy and changing other aspects of the work order. Example: You need to change the organization unit on a work order, as well as backdating the work order.
Edit Work Order	Select this option if you're changing organization units that are at or below your current level in the organization unit hierarchy.

Option	Description
	Example: You want resource managers to only change work orders that are at or below their current level in the organization unit hierarchy. Direct them to use this option.

3. Change the **Organization Unit**. If it's been set up, you can also change the resource manager. To allow users to change the resource manager, select **Restrict Resource Manager to Organization Hierarchy mapping** when configuring the job form (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations**).
4. Click **Review Changes** and review your change.
5. Click **Submit for Approval**.

Adjust Work Order Pay and Bill Rates

Context

You can adjust the pay rate and bill rate of a work order.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Change Rates**.
4. Enter the new **Effective Date**, **Pay Rate**, and **Bill Rate**.

   You can backdate the **Bill Rate** if you have the proper permissions, and the **Effective Date** can be set as far back as the work order setting **Backdating Effective Date Tolerance in Weeks** allows.
5. Click **Review Changes**.
6. Select the **Reason for Change** and click **Submit for Approval**.

Result

Once submitted, the requested change takes effect after any configured internal or vendor approvals have taken place.

End Work Orders Early

Context

You can schedule work orders to end on an earlier date than the original end date. This applies to work orders for **Extended Workforce Management (Extended WFM)** and **Worker Profile Management**.

Example: A current work order has an **End Date** of 10/15/2023. You can change the date to have the work order end early on 10/01/2023.

Consider these items when ending a work order early:

- You can't end work orders that have any pending approvals.
- If you have work approval rules configured, they will still trigger after you change the work order end date.
- To extend the work order to a future end date instead, use the **Change Dates and Rates (Modify Work Order)** action.

Steps

1. From the header, select **More** > **Work Orders**.
2. Select the work order and click **View Work Order**.
3. Click **End**.
4. As you complete the task, consider the following:

Option	Description
End Details	**End date:** • You can end work orders on the same day as the start date. • The end date can't be moved prior to dates with time submitted for the work order. Example: A work order is scheduled to end on 10/20/23. If there is time submitted through 10/18/23, the earliest date you could move the End Date to would be 10/18/23.
Additional Details	**Do Not Rehire**: • If selected, the contractor's **Rehire Eligibility** updates on their contractor profile. • Administrators can enable or disable this option from the **Work Order Settings** page.

5. Add any approvals, if necessary.
6. Complete the Offboarding Questionnaire, if necessary.

Result

- After you change the date, a banner displays in Workday VNDLY alerting you the number of days that remain until the work order ends. An administrator can configure when this banner displays in the **Work Order Settings** page.
- When you end a work order, it will remain ended even if there is a future modification pending.
- Canceled end requests are tracked in the **Revision History** section of the work order.

Backdate Work Orders with Previously Approved Timesheets

Prerequisites

- Add the backdating bill rate permission to your role to update work orders with previously approved timesheets.

Context

Administrators with the proper permissions can make updates to an already approved work order. Example: The rate on a work order might have a change in the bill rate after timesheets are submitted and approved.

Backdating a bill rate adjusts invoicing for previously submitted timesheets and creates additional invoice line items.

Any backdated change follows restrictions set in the **Backdating Effective Date Tolerance in Weeks** setting. You can find this setting by navigating to **More** > **Company Settings** and selecting **Work Orders** under **Jobs & Work Orders**. The backdating restrictions can be found in the**Modification** section.

Example: If the value set is 6 weeks, the maximum time that you can backdate the bill rate is back 6 weeks from the current date, then to the beginning of that timekeeping week.

Steps

1. In the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Change Dates and Rates (Modify Work Order)**.
4. Under **Rates**, click **Edit**.
5. Enter the **Effective Date**, **Pay Rate**, and **Bill Rate**.
6. Click **Review Changes**.
7. Select the **Reason for Change** and click **Submit for Approval**.

Result

When a backdated change is made, Workday VNDLY displays a yellow alert banner. After any configured internal or vendor approvals have taken place, any impacted timesheets are updated, and invoice line item are created for rate adjustments. These updated timesheets reflect in the work order's **Activity Log**.

Effective Date Work Type Profiles

Prerequisites

- The **Allow Work Type Profiles and Work Types to be effective dated/overridden** must be checked on the **Work Order Settings** page in **Company Settings**.
- **Work Type Profile** must be checked on the **Job Application Settings** page of **Company Settings**.

Context

You can make changes to a work type profile or to specific work types on a work order as needed. Example: You might modify a work type profile if there's a new contractual update that needs to be made to ensure a worker is paid the proper rate.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order.
3. Click **Update Work Order** and select **Change Dates and Rates (Modify Work Order)**.
4. Under **Work Type Information**, click **Edit**.
5. Enter the new **Effective Date**, **Work Type Profile**, and individual **Work Type Overrides** as necessary.

Transfer an Employee

Context

Resource managers can perform employee transfers directly in Workday VNDLY. This feature is only available for primary work orders provisioned in Workday.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.

3. Click **Make Organization Changes**.
4. Make your adjustments to the **Organization Unit** and **Position Type** as you see fit.

Result

The **Connector Status** log updates and your changes flow through to Workday.

Adjust Work Week Start Time

Prerequisites

- Must have these permissions:
  - *workorder.update*
  - *workorder.timekeeping_settings.edit*

Context

A work week contains 168 consecutive hours within a timesheet. These hours might need to start at a different time of day, such as if there's a shift change. **Work Week Start Time** adjustments enable you to make these changes quickly and easily. Please note that these adjustments must start at the beginning of a work week. Example: given two timesheets, week 1 and week 2, the worker changes shifts permanently midweek of the week 1 timesheet. The **Effective Start Date** should be the first day of week 2.

Workday VNDLY doesn't current support work week start day adjustments.

Steps

1. In the header, select **More** > **Work Orders**.
2. Locate and open the appropriate work order.
3. Under **Timekeeping Settings**, click **+Add Override**.
4. Enter the new **Work Week Start Time**.
5. Enter the start date when the time change should be effective. This date must be the start of a new week.
6. Enter the end date if the work week start time is a temporary change.

Terminate a Contractor

Prerequisites
Security: Users require the necessary permissions to access the **End** button in a work order.

Permission	Consideration
workorder.owned.end	End work orders for a contingent worker where you're a manager.
workorder.end	End any contingent worker work order.
worker_tracking.owned.end	End work orders for a Worker Profile where you're a manager.
worker_tracking.end	End any Worker Profile work order.

Context

VNDLY offers 2 methods to end work orders, manual or automated. You can configure the settings for ending a work order from **More** > **Company Settings** > **Jobs & Work Orders** > **Work Orders**.

If you've set your environment to automatically end work orders, VNDLY ends the work order based on the timing settings.

Option	Description
Require Work Order End Time	VNDLY ends the work order on the work order end date at the specified time of day (usually 23:59).
Auto-End Grace Period	VNDLY ends the work order on the date calculated as [Work Order End Date + number of grace period days] at the specified time of day.

If an approval is configured for Approval Type: Work Order Termination, all required approvals must be completed for VNDLY to end the work order.

If your environment is set to manually end a work order, it will remain in active status until you complete the steps to end the work order. To terminate a contractor and complete the steps to end the work order, you'll need to provide details such as:

- End Reason
- Eligible for Rehire
- Approvals
- (If configured) Offboarding Questionnaire

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order.
3. Click **End** and then **End Work Order**.

   If the worker has never entered a timesheet, then you have the option to **Cancel** or **End** the work order.
4. Complete the **End Details**, including the appropriate **End Reason**.
5. Click **Next**.
6. As you complete the **Do Not Rehire** check box consider:
   - This option might not display, based on the settings of your environment. Administrators can enable or disable this option from the **Work Order Settings** page.
   - If selected, the contractor's **Rehire Eligibility** updates on their contractor profile.
7. Click **Next**.
8. Review and click **Save**.
9. Request approvals if necessary.
10. (If configured) Complete the **Offboarding Questionnaire**.

Result

- When you end a work order and terminate the contractor, the work order:
  - Remains in active status until all approvals are completed.
  - Remains in ended status even if there’s a future modification pending.
- If the contractor is associated with 2 work orders and you end the primary work order, VNDLY automatically switches to the secondary work order.

- If the Workforce Connector is set up in your environment/tenant, then VNDLY sends the work order updates to Workday as well.

Reopen a Work Order

Prerequisites

- Configure reopen settings on the Work Order option in the **Work Order Settings** page of **Company Settings**.
- Security: *workorder.reopen* permission.

Context

You can reopen work orders closed within the number of days set in **Reopen within X days of Work Order End** on the **Work Order Settings** page in **Company Settings**. Example: You want to reopen a closed work order to fulfill a labor need.

Note: If the Extended Workforce Management Work Order Modification workflow approval is enabled, it will still be triggered after completing the **Reopen Work Order** pop-up window.

Steps

1. From the header, select **More** > **Work Orders**.
2. Select the work order that you want to reopen.

   You can use the **Filters** to limit the results to work orders in *Ended* status.
3. Click **Reopen**.
4. As you complete the task, consider:

Option	Description
End Date	Enter the new date that the work order should finish.
Reason for Reopen	Indicates why the work order was reopened.
Leave a Note (Optional)	Enter details on why you're reopening the work order.
Current Budget Amount **Budget Change Amount** **Modified Budget Amount** **Total Invoiced Amount** **Remaining Budget Amount**	Displays the available budget, including increases due to reopening the work order. You can't directly update these fields, but you can utilize the **Revise Budget** area to make changes in real time.
Revise Budget	When checked, enables you to enter a new: • **Expense Amount** • **Tax Amount** • **Program Fee** • **Other Amount**

Print Work Orders

Context

You can quickly generate a simple format for printing a work order.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the work order that you wish to print.
3. Click the **Print** icon to open a new tab in your browser along with the print menu.
4. Follow the browser wizard to print the work order.

Configure Work Order Settings

Context

You can customize your work order default settings. Work orders are critical in tracking key details of a contractor's assignment. These settings enable you to make changes to the configuration of work orders to customize the way you manage work orders to meet your business requirements.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Work Orders**.
3. As you configure the settings in the **Modification** section of the **Work Order Defaults** tab, consider:

Option	Description
Vendor Approval Fields	VNDLY automatically sends an approval request to the vendor anytime that you make a change to the specified field when you edit or modify a work order.
Vendor Work Order Mod Rejection Reason	Set how the Rejection Reason displays: • List menu • Free-form field • Both
Allow Negative Budget Amounts	Select to enable budget amounts to be negative for work order modifications.
Show the Resource manager field next to Organization Unit field	Select checkbox to display the resource manager field if the Organization Unit field also displays when you modify a work order. This allows a user to change both the resource manager and organization unit in a single workflow when they make organization changes to a work order.
Work Order End Type	Select whether work orders should end manually or automatically. If you select automatically, you must indicate if the work order requires an end time or a grace period of days before the work order closes.

Option	Description
Default End Reason	You can keep the default selection or select another reason if your tenant has additional custom reasons. The selected reason displays on the work order for why the work order automatically ended.
Auto-End Grace Period (Days)	The number of days following the end date that the work order automatically ends.
Contractors can login after Work Order End	Select to enable contractors to sign in after the work order ends.
Skip Vendor Approval for Reopen	Select to enable users to reopen a work order without a vendor approval.
Allow Negative Budget Amounts	Select to enable budget amounts to be negative when reopening a work order.

4. Click the **Vendor Actions** tab to manage vendor access to comments.

   As you configure the settings on the **Vendor Actions** tab, consider:

Option	Description
Vendor can read Work Order comments	Select to enable vendors to have the capability to read work order comments for all work order types (Extended Workforce Management, Worker Profile, and Statement of Work).
Vendor can create Work Order comments	Select to enable vendors to have the capability to create work order comments for all work order types (Extended Workforce Management, Worker Profile, and Statement of Work).
Vendor can make comments visible to Client	Select to enable and display a check box called*Allow Client Visibility* on the work order in the Comments section. Vendors can decide whether to make their comments visible to their clients.

5. Click the **Approval Fields** tab to create custom-named lists of work order fields (field sets) to use with workflow approvals using approval criteria.

   These named lists are field sets that act as a way to limit when VNDLY generates work order modification approvals.

   As you configure the settings on the **Approval Fields** tab, consider:

Option	Description
Fields	Select the fields that you want to add to the field set to use with workflow approvals using approval criteria.
Create an approval rules Criteria to match fields in this list?	Select to enable VNLY to create a criteria for the fields selected. The criteria is available to use for a Contingent Work Order Modification workflow approval rule.
Create an inverse approval rules Criteria to match fields NOT in this list?	Select to enable VNDLY to create a criteria for all fields NOT selected. The criteria is available

Option	Description
	to use for a Contingent Work Order Modification workflow approval rule.

Note: When considering creating field sets, be aware:

- You can only use them as criteria for Contingent Work Order Modification workflow approval rules.
- That if you don't use field sets, any change made on the **Modify Work Order** form acts in current state and generates approvals for any matching Contingent Work Order Modification workflow approval rule.

Note: The field sets criteria can only be edited from the **Approval Fields** tab. You can't edit it from the **Criteria** tab on the **Workflow Approval** page.

Example
You want to add a criteria to an approval rule that when a user modifies specific fields in a work order, VNDLY generates a workflow approval. Using the **Approval Fields** tab, you create a field set using **Pay Rate**, **Bill Rate**, **Fee Profile**, **End Date**, and **Budget** work order fields. You then add this field set as a criteria to an approval rule. When a user modifies these fields in a work order, VNDLY generates a workflow approval.

Concept: Work Orders

A work order is a record that is unique to each applicant for each assignment. Workday VNDLY automatically creates the work order when a candidate is applied to a job. A work order follows the contractor throughout the entire job workflow, from application to onboarding to completion of the job.

Data from the job and details from the contractor populate the work order. Thereafter, job data is no longer synced to the work order data.

With work orders, you can:

- Have multiple work orders for a candidate.
- Edit the details of the contractor work order. Depending upon how you've configured your tenant, those edits might require approvals.
- View work order details on the profile of the applicant.
- Associate checklists to a work order.
- Bulk update information. Bulk update changes might also require approvals.
- Filter base reports using the work order dataset by status by status, for example to view only work orders for onboarded contractors.

You need to be aware of:

- If you edit a job after an associated work order is created, the job edits don't display on the work order. You'll need to go to the associated work order and edit it.
- You can edit the source type on a work order only if it's one of these types: Directed, Payrolled, and Supplier sourced.
- Previously Workday VNDLY made work orders active at time of onboarding a candidate. They are now created when the candidate is applied. If you have previously been referencing the **Created On** field, you might need to consider using **Pending Offer Release Date** field to reflect more accurately active work orders.

Concept: Gaps and Overlaps When Adjusting Work Week Start Times

When adjusting work week start times, you may encounter situations where a change moves time forward and leaves a gap or where a change moves time backwards and there is an overlap.

Handling a Change That Moves Time Forward (The Gap)

This scenario describes how we handle a work week start time change that moves the time forward. An example might be moving a work week start time from 12am to 12pm. We call this handling the “gap”, where lining up two consecutive weeks with the change creates a gap in the work week for each timesheet. In this scenario, the Week 1 timesheet will allow the worker to clock in and out during this “gap”.

For example, given two timesheets (Mon-Sun) Week 1 and Week 2, the worker makes a permanent shift change in the middle of the Week 1 timesheet, resulting in a work week start time change from 12am to 12pm effective on the start date of the Week 2 timesheet. Week 1 timesheet will allow the worker to clock in and out during this gap.

A banner displays on the timesheet to indicate a schedule change.

Handling a Change That Moves Time Backwards (The Overlap)

This scenario describes how we handle a work week start time change that moves the time backward. An example might be moving a work week start time from 12pm to 12am. We call this handling the “overlap”, where lining up two consecutive weeks with the change creates an overlap in the work week for both timesheets. In this scenario, the Week 1 timesheet will NOT allow the worker to clock in or out during this “overlap”.

For example, given two timesheets Week 1 and Week 2, the worker makes a permanent shift change in the middle of the Week 1 timesheet, resulting in a work week start time change from 12pm to 12am effective on the start date of the Week 2 timesheet.

You will receive an error on the timesheet if the worker tries to clock in or out during this overlap - "Entry crosses work week which is not supported."

Pre-Identified Workflows

Pre-Identify Job Candidates

Prerequisites

- The box for **Enable Pre-Identified Job** must be checked in **Company Settings**.
- As part of the job publishing process, the job form must be started and admins can assign checklists.

Context

Pre-identifying job candidates enables you to invite candidates that match the requirements to apply to the new position. Pre-identifying candidates is optional and might not be relevant to your organization.

Steps

1. Click **Yes** for **Have you preidentified a candidate?**

2. When determining **Is the Candidate Profile in VNDLY?**, consider:

Option	Description
Yes	Select this option if you know the candidate that you wish to pre-identify for the role has a profile in Workday VNDLY. Then you'll need to select the Vendor and one or more candidates to pre-identify for the job.
No	Select this option if you know the candidate that you wish to pre-identify for the role doesn't have a profile in Workday VNDLY.
I don't know	Select this option if you aren't sure whether the candidate you wish to pre-identify for the role has a profile in Workday VNDLY.

3. If you clicked **No** or **I don't know**, consider:

Option	Description
Candidate	Enter the candidate's first and last name, email, and phone number.
Vendor	Enter the vendor's company name, contact name, email, and phone number.
Rates	Enter the candidate's pay rate and bill rate.
Worker Classification	Indicate the payroll type of the contractor, if known.

Next Steps

Add job distribution rules if necessary.

Bulk Updates and Imports

Concept: Bulk Imports

Workday VNDLY offers a variety of options for bulk imports that allow program administrators to upload or update data in bulk. This functionality helps reduce manual effort and time spent on data entry, particularly for operational tasks that require processing high volumes of data.

Workday VNDLY provides templates that you can download within the application. You can use the appropriate template to bulk create or update records, and upload the files into Workday VNDLY. Note that some bulk imports are limited to record creation and replacement and don't update records. To verify if the bulk import was successful and to identify any potential errors, navigate to the File Transfer Report from **Reports File Transfer Reports** from the VNDLY header.

You can find a list of all specification files with details on field definitions, file formats, and required permissions on Workday VNDLY File Import Specifications.

Concept: Bulk Updates

Access to Bulk Updates is restricted by permissions, so check with your program team if the menu item is not available. See Reference: Bulk Updates Permissions for more information.

You can find bulk updates under the **More** tab in the top menu.

The **Bulk Updates** summary page displays the list of bulk updates created in Workday VNDLY.

Line Level Details

When viewing the **Bulk Updates** summary page, users can easily see if bulk updates were successful, failed, or a partial success. If a bulk update triggered approvals, it will display on the page. The following fields are available on the **Bulk Updates** summary page:

Option	Description
ID	The ID number is associated with a bulk update.
Model	The type of bulk update. Currently, all are listed as **Work Order**.
Status	Options available: • *Success* • *Failure* • *Partial Success* This displays whether a bulk update worked, didn't work, or partially worked.
Description	Entered when bulk update is created.
Run Date	The time and date when a bulk update ran.
Completion Date	The time and date when a bulk update finished running.
Total Rows	The total amount of rows impacted by the bulk update.

Create Bulk Updates

Prerequisites

Access to **Bulk Updates** is restricted by permissions, so check with your Program Team if this menu item isn’t available.

Context

You can use the **Bulk Update Wizard** to select modules and records to update, or you can also manually select records to bulk update from the **Work Order** list page.

Users have 2 options when creating a bulk update: the **Bulk Update Wizard** or the **Work Order** list page. Please note that if a tenant has Workday enabled, some bulk actions could be negatively impacted. Due to this possibility, approval requests are disabled when Workday is enabled.

Note: Canceled items can’t be bulk actioned.

Using the Bulk Update Wizard enables you to select a filter and preview records if needed.

Steps

1. From the header, select **More** > **Bulk Updates**.
2. Click **+Add New Bulk Update**.

3. Select the module that you wish to update. You can select either **Work Orders** or **Worker Tracking**.
4. Use these filters to select records for your bulk update:

Option	Description
Dataset	When using the **Any Of** condition and entering multiple values, you must press the enter key after each value entered. The enter key is used as the delimiter between multiple values.
Value	Refers to the condition of the Work Order. This field can be automatically populated or left as a freeform field. **Active** is automatically selected here and if you delete **Active**, you receive a warning message. Changing work orders that aren't active isn't recommended.

5. Click **Next** to proceed after adding your filters.
6. Select an action from the drop-down list and click **Next**.
7. Add additional details to your bulk update and click **Next**.

   Note: You can trigger workflow approvals for actions that have approvals configured. If approvals are triggered, each item associated with the bulk update will trigger approvals. Bulk updates don't trigger group approvals.
8. Preview your changes and click **Next**.

View Bulk Updates

Bulk Updates are restricted by permissions. If you can't access this menu option, please contact your Program Team.

From the header, select **More** > **Bulk Updates**.

Click the Bulk Update you wish to view in the list.

The first section displays these options:

- Bulk Update ID
- Reason for Update
- Update Action

The second section displays these options:

- Total Rows
- Processed Rows
- Successful Rows
- Failed Rows
- Started and Finished Timestamps and Duration

The third section displays this option:

- Update Filter Criteria

The fourth section displays this option:

- Update Field Values

The fifth section displays this option:

- Updated Records

These are the records that were changed during the Bulk Update. To view errors only, click **Show errors only?**

Name	Definition
Row ID	ID of rows changed.
Work Order ID	Displays work orders changed. Clicking on the arrowed box brings you to that work order.
Status	The status of the row.
Message	Automatically generated by the system. They reiterate the changes made using the bulk update.

For more information, see About Bulk Updates Summary Page.

Reference: Bulk Updates Permissions

The **Bulk Updates** task found by navigating to **More** > **Bulk Updates** and selecting **New Bulk Update** is restricted by the following permissions:

Non-Administrator Work Order Permissions

Other Bulk Update Permissions

Bulk Action Permission	Description
candidate.compensation.read	Required for bulk updates action **Update Pay Rate**.
workorder.read *worker_tracking.read*	These permissions are needed to pull data for the data preview of records to be updated.

You can make bulk update work order functionality available to non-administrator users by granting those users the *workorder.bulk.update* permission. Permissions can be granted to roles in **Security Settings** within **Company Settings**.

Users with the *workorder.bulk.update* permission must also be assigned at least one field-level permission in order to bulk update work orders. This permission allows you to restrict further non-administrator users to specific action-level permissions.

Example: Users with the *workorder.bulk.update* permission and *workorder.bulk.end* permission only see the option to bulk end work orders, instead of the full suite of bulk actions.

Note: If a user has the *workorder.bulk.update*, the actions available are governed by field-level permissions.

Users with the *workorder.bulk.update* permission must also be assigned one or more of the following field-level permissions in order to bulk update work orders.

Action	Bulk Action Permissions
Add Per Worker Profile and Worker Profile Work Order Checklist Actions	*worker_tracking.bulk.add_checklistactions*
Change Pay Rate/Markup/Bill Rate	*bulk_operations.workorder.update_rates*
End Work Order	*workorder.bulk.end*

Action	**Bulk Action Permissions**
Update Additional Managers	*bulk_operations.workorder.update_additional_manager*
Update Charge Codes	*bulk_operations.workorder.update_charge_codes*
Update Custom Fields	*bulk_operations.workorder.update_custom_fields*
Update Default Location	*bulk_operations.workorder.update_end_date*
Update End Date	*bulk_operations.workorder.update_end_date*
Update End Reason	*bulk_operations.workorder.update_end_reason*
Update Fee Profile	*bulk_operations.workorder.update_fee_profile*
Update Organization	*bulk.operations. workorder.update_organization*
Update Overtime Profile	*bulk_operations.workorder.update_overtime_profile*
Update Premium Rate	*bulk_operations.workorder.update_premium_rate*
Update Program Team	*bulk_operations.workorder.update_program_team*
Update Resource Manager	*bulk_operations.workorder.update_resource_manager*
Update Select Fields	*bulk_operations.workorder.update_misc_fields* **Note:** When bulk updating the Worker Classification field on work orders, Workday VNDLY updates the specific work orders, not the default field on the candidate profile.
Update Shifts	*bulk_operations.workorder.update_shifts permission*
Update Start Date	*bulk_operations.workorder.update_start_date*
Update Timesheet Approvers	*bulk_operations.workorder.update_timesheet_approvers*

Action	**Bulk Action Permissions**
Bulk Add Per Contractor and Per Work Order Checklist Requirements for Jobs/SOW Roles.	*bulk_operations.jobs_roles.add_checklists*

For instructions on adding permissions to a user role, see Add Permissions to a User Role in Settings.

Tenure

Create Tenure Policies

Context

Tenure policies are used for managing and complying with various federal and state rules. You can create 1 or more tenure policies as needed for different countries, job categories, and so on. Example: You can have 1 tenure policy for contractors working in the United States and another tenure policy for contractors working in the United Kingdom.

The first tenure policy that you create is the default policy that applies to all contractors unless they match on a created tenure rule.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Tenure Policy**.
3. Verify that the box for **Tenure Policy is applicable** is checked.
4. Click **Create Tenure Policy**.
5. Check the box for 1 or more **Monitored Tenure Types**, and enter the threshold for each selected.
6. Finish configuring details on break in service, violations, and hour calculations.
7. Click **Save**.

Result
A verification window displays with this message: *Tenure setting changes require up to 24 hours to take effect. This includes contractor tenure calculations*.

Create Tenure Rules

Prerequisites

At least 2 tenure policies must exist.

Context

Tenure rules enable you to set pre-identified specifications for when a tenure policy should be applied to a contractor. You can create tenure rules for one or more of these criteria:

- Country
- Region
- Location
- Organizational Unit
- Job Category
- Job Title
- Vendor
- Module

Example: if you have different tenure requirements for contractors in the UK and the United States, you could create a tenure rule to assign contractors to a tenure policy based on their location.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Tenure Policy**.
3. Select the **Rules** tab and click **Create Tenure Rule**.
4. Enter the **Tenure rule name**.
5. Enter one or more **Criteria**.
6. Select the tenure policy that the rule should apply to.

Update Contractor Tenure Policies

Prerequisites

At least 2 tenure policies must exist.

Context

You might need to assign a different tenure policy to a contractor. Example: If you created a new tenure policy for a particular job category, such as Technology, you can assign this tenure policy to contractors as needed. You can use Tenure Rules to assign a tenure policy automatically during onboarding.

Tenure tracing is tied to an individual's **Master Worker Record**. If a worker has worked for multiple vendors and their **System Unique IDs** match and tie them to the same **Master Worker Record**, then tenure calculations are done across vendors.

Steps

1. From the header, select **Contractors** > **Contractors Summary**.
2. Open the appropriate contractor.
3. Under **Quick Links**, click **View Tenure Status**.
4. Click **Edit**.
5. Select the appropriate **Tenure Policy** from the drop-down.
6. Enter a new **Tenure Start Date** if necessary.
7. Update the **Pre-VNDLY** and **Policy Allows** values as necessary.
8. Enter one or more **Revision Comments**.

   These display in the **Activity Log**.

Timesheets

Concept: Timesheets

From the header, select **Timesheets** > **Summary**. The **Timesheets Summary** page houses active timesheets. Resource managers can view all timesheets submitted by contractors that report to them.

There are 3 main timesheet types: Summary, Time In/Out, and Clock & Assign.

Summary timesheets enable contractors to enter the numbers of hours they worked, which are allocated against the appropriate charge code. Exact clock in and clock out times are not required. With this timesheet type, hours and allocations remain as two distinct datasets.

Time In/Out timesheets enable contractors to enter the times they clocked in and out. Later they can assign the captured time against the charge codes. With this timesheet type, hours and allocations remain as two distinct datasets.

Clock & Assign timesheets enables users to capture exact time punches and pair the time punches and allocations at the point of time entry. Time can be split across workweeks without moving between timesheets. With this timesheet type, hours and allocations are tied together and can be associated in one dataset.

At the top of the **Timesheets** page, quick links display. You can review these options for more information:

Option	Description
Upload	Enables you to upload a timesheet
Upload Notes	You can review imported and exported files within the File Transfer Reports section, including details like: • the outcome • file types • transfer details This action will take you to a new page.
Pending Approvals	Enables you to jump to weeks with timesheets pending approval. Displays all timesheets needing approval for the week selected.
Download	Downloads all filtered timesheets in any status except Not Started.

You can filter the timesheets that display in the list using these options:

Option	Description
Work Week Period	Indicates the 7-day time period for which you wish to view timesheets. Example: Monday - Sunday. The options available for selection depend on your configuration.
Date Range	Enables you to select the timesheet week you wish to view. You can also click the calendar icon to select dates manually.
Search	Narrow the timesheets that display by Contractor name, IDs, or Vendor name.
By Status	Narrow your search by status: • Saved • Submitted • Approved • Rejected • Unsubmitted • I Can Approve

Based on the filters you select, the timesheets matching the criteria display. You see **Total Regular**, **Total Hours**, **Billable Hours**, and **Status** for each timesheet. From here, you can click **Approve** or **Reject** to the right of each timesheet. You can also check the box to the left of one or more timesheets to approve or reject in bulk.

If you wish to view more information about the timesheet, you can click the Up Arrow icon to expand the timesheet details or click **Go To Timesheet**.

From the **Timesheet Summary** page, you can:

Option	Description
Print	Enables you to print the timesheet if you need a hard copy.

Option	Description
Download	Saves a copy of the timesheet to your computer as an .xls file.
Add Attachment	Enables you to attach any time-based evidence needed. Example: A paper timesheet loaded into the system.
Add/View Notes	Adds a note to the timesheet as a freeform field.
Adjust	Modify a timesheet.
Reject	Rejects the timesheet and you must provide a reason for the rejection.
Approve	Approvers the timesheet to go to invoicing.
Remind Approvers	This only displays if the status is Submitted. Enables you to remind the approvers to review the timesheet.
Copy	Copies timesheet information from a previous week into the selected week.
Cancel	Cancels any changes made to the timesheet.
Save	Saves any edits to the timesheet.
Submit	Submits the timesheet for approval.

Related Information
Examples
The Next Level: Feature Adoption Presentation on Timekeeping Settings

Set Up Timekeeping Setting Defaults

Prerequisites

You must have these permissions to view and edit timekeeping settings:

- *timekeeping.settings.read*
- *timekeeping.settings.write*

Context

Workday VNDLY administrators can set up default values for timekeeping settings that apply universally to all work orders within the tenant. These defaults ensure consistent settings when contractors submit their time. When a contractor is onboarded to a new work order, their timesheet inherits these defaults if there are no specific timekeeping setting rules for that work order.

Contractor Timekeeping Settings are stored on the contractor profile, and any changes you make are applied to future contractors. Settings in other sections apply automatically to existing and future work orders and timesheets.

Settings marked with a gray icon are eligible for use in new rules. Settings with a blue icon indicate that at least 1 active rule uses that setting.

Steps

1. From the header, select **More** > **Company Settings**.

2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. As you complete the **Contractor Timekeeping Settings** section, consider:

Option	Description
Timesheet Type	Indicate whether you wish to have contractors enter time for each day using: • *Summary* • *Time In/Out* • *Clock & Assign* Selecting *Time In/Out* or *Clock & Assign* displays additional options.
Timesheet Classification	If you select *Manual*, you can modify these additional timesheet fields: • **Show Premium Rates on Timesheet** • **Block Timesheet if Overtime Insufficient**
Week Starts at Time	The time that the contractor's work week should start.
Show Premium Rates on Timesheet	Indicate whether you wish to display the shift premium rates selection box on the timesheet. This field only displays if you selected a **Timesheet Classification** of *Manual*.
Block Timesheet if Overtime is insufficient	This field only displays if you selected a **Timesheet Classification** of *Manual*. Indicate whether you wish to prevent contractors from submitting timesheets with insufficient overtime logged. Example: A contractor has a profile that enables them to enter overtime after they work 40 hours in 1 week. If they try to enter 48 hours of regular or non-overtime hours, VNDLY requires the contractor to reallocate the additional 8 hours.
Disable Time import Validations	Indicate whether you wish to disable time validations.
Week Starts on Day	The day of the week that the contractor's work week should start.

4. As you complete the **Timesheets** section, consider:

Option	Description
Approval Strategy	Enables you to configure approvals for both work order and workflow approvals.
Manager is not a Time Approver	When checked, the resource manager from the work order isn't a time approver by default and must be added to a workflow approval rule as one if necessary.
Zero Hour Requires Approval	When checked, timesheets submitted with zero hours must be approved.

Option	Description
Allow Bulk Approvals	When checked, approvals can be completed for more than 1 timesheet at a time.
Message of the Day	Enter a freeform message to display on timesheets.
Allow Vendors to View Timesheets	When checked, vendors can view timesheets.
Allow Vendors to Upload Timesheets	When checked, vendors can upload timesheets.

5. As you complete the **Time Adjustment & Submission** section, consider:

Option	Description
Allow the Program Team to Adjust Timesheets	When checked, the program team is able to adjust timesheets.
Program Team Adjustment Tolerance in Weeks	This field only displays if the box for **Allow the Program Team to Adjust Timesheets** is checked. Indicates the number of weeks after the timesheet week that a submitted timesheet can be modified..
Program Team Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted.
Allow Contractors to Adjust Timesheets	When checked, contractors are able to adjust timesheets.
Contractor Adjustment Tolerance in Weeks	This field only displays if the box for **Allow Contractors to Adjust Timesheets** is checked. Indicates the number of weeks after the timesheet week that a submitted timesheet can be modified.
Contractor Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted. Example: If you enter 2, a contractor who works on the first week of the month will have until the end of the third week to submit their timesheet.
Allow Vendors to Adjust Timesheets	When checked, vendors are able to adjust timesheets.
Vendor Adjustment Tolerance in Weeks	This field only displays if the box for **Allow Vendors to Adjust Timesheets** is checked. indicates the number of weeks after the timesheet week that a submitted timesheet can be modified.
Vendor Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted.

6. Configure the remaining sections: **Timesheet Reminder**, **Timesheet Notifications**, and **Timesheet Custom Fields.**
7. Configure **Lock Out Settings**.

   The **Global Lock Date** must be the date before the first date that workers can enter time, which ensures that no time is entered before the Go Live date. Example: Monday, January 3 is the go live date and no time should be allowed before. You would enter January 2.

Related Information
Examples
The Next Level: Feature Adoption Presentation on Timekeeping Settings

Create Timekeeping Settings Rules

Prerequisites

You must have these permissions to view and edit timekeeping settings:

- *timekeeping.settings.read*
- *timekeeping.settings.write*

Context

Workday VNDLY administrators can customize timekeeping settings by creating rules based on various work order criteria. Custom rules enable you to diversify timekeeping settings to match unique or complex business needs.

Example: You create a rule using the Location criteria, so any contractor on a work order in California must use the Timesheet Classification type of Time In/Time Out.

When multiple timekeeping setting rules apply to a work order, Workday VNDLY merges and applies all defined settings. If conflicting configurations exist, Workday VNDLY prioritizes the settings from the most specific setting value.

Custom timekeeping setting rules override default values. While there's no limit on the number of rules you can create, Workday VNDLY recommends creating only what's necessary to avoid conflicts between rules.

Any changes you make to rules won't retroactively impact existing or past work orders. Changes will only affect future work orders.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. On the **Rules** tab, click **Create**.
4. Click **Add Criteria** and select the eligible criteria that should trigger the rule.
    - You can only add 1 criteria from each criteria group.
    - Example: From the **Job** criteria group, you can select either **Job Category** or **Job Template** criteria.
5. For each criteria you add, select which values to use.
    - You can add multiple values for each criteria.
    - Example: You add the **Country** criteria and specify **Canada** and **United States** as criteria values.
6. Click **Add Configuration**. You can add multiple configurations.
7. For each configuration you add, specify which values to use.

    Example: You add a configuration for **Timesheet Type** and specify **Summary** in the **Timesheet Type** field.

Related Information
Examples
The Next Level: Feature Adoption Presentation on Timekeeping Settings

Change Contractor Timekeeping Settings

Prerequisites

You must have these permissions to view and edit timekeeping settings on contractor profiles:

- *contractor.timekeeping_settings.read*
- *contractor.timekeeping_settings.write*

Context

When a contractor is onboarded to a new work order, timekeeping setting values that apply to that work order are saved on the contractor profile. If there are no timekeeping setting rules for the work order, Workday VNDLY applies default settings.

The timekeeping setting values for the new work order must align with any existing settings on the contractor profile for that time period. If there are conflicts between the contractor profile values and the work order settings, Workday VNDLY displays an error message, preventing the contractor from being onboarded to the work order. To proceed, you must update the timekeeping settings on the contractor's profile to match the settings on the work order.

Changes to the contractor timekeeping settings will affect all work orders they're assigned to during that period.

Steps

1. From the header, select **Contractors** > **Contractors Summary.**
2. To access the contractor profile, click the name of the contractor.
3. In the **Contractor Timekeeping Settings** section, click **Schedule Change**.

   To edit a scheduled change, click the square line icon in the appropriate row.
4. Select the **Effective Start Date** and **Effective End Date**.
   - The start date is restricted to the same start date of the week as the **Week Starts on Day**.
   - You can schedule changes for periods of time when the contractor has a work order in **Active** or **Ready to Onboard** status.
   - You can't schedule changes for periods of time when the contractor already has a timesheet in **Submitted** or **Saved** status. You must move these timesheets to a **Draft** state before you can save changes.
5. Make changes to the settings.

   The only setting that you can't change is the **Week Starts on Day**, which is set for a contractor during their initial work order.
6. Click **Schedule Change**.

Track Time on a Clock and Assign Timesheet

Context

The Clock and Assign timesheet type enables users to capture exact time punches and pair the time punches and allocations at the point of time entry. Contractors can also enter time across work-week boundaries with or without being aware of the exact work-week start and end times. Example: A contractor clocks in at 10pm on a Sunday evening and works until 4am on Monday morning; the hours are allotted to the appropriate work weeks automatically.

The clock and assign timesheet gives the ability to view all time punches at-a-glance over the entire workweek. Each time punch displays on the timesheet as a block on the appropriate work day and time.

Steps

1. From the header, select **Timesheets** > **Summary**.
2. Click **Go to Timesheet**.
3. Click **Clock In**.
4. As you assign time, consider:

Option	Description
Use Previous Assignment	We auto-populate fields from your last time assignment.
Work Order	Select the work order to associate the time punch with.
Work Type	We display options based on the configurations on the **Manage Work Type Profiles** page.
Shifts	Administrators configure the shift options for applicable roles.
Charge Codes	We display options based on the selected work order.

5. Click **Assign** to save the allocation.

   You can click **Assign Later** to complete the required fields at a later time. When you're ready to update, click **Assign** on the time punch.
6. As you track time, consider:

Option	Description
Switch Assignment	Ends the current **Working Timer** and starts a new **Working Timer**. Example: If a contractor was assigned to work on Work Order 1 for the first half of their shift and Work Order 2 for the second half of their shift, they would click **Switch Assignment** to begin tracking time on work order 2 and enter the appropriate details.
Break	Pauses the **Working Timer** and starts the **Break Timer**. You're prompted to enter the **Work Type**. When you click **End Break**, the **Working Timer** starts again.

7. Click **Clock Out**.
8. Click **Submit**.

   Submit your timesheet once you have tracked all time for the week.

Set Up Calendar-based Premium Pay

Context

Calendar-based premium pay enables you to display holidays on a timesheet. You can also configure these dates to include a rate differential as needed. Example: If your contractors receive time and a half for holidays, you could add New Years Day to the US Holiday calendar and configure the **Calendar Pay Profile** to calculate the pay rate with a Type of*Bill Rate * Rate* and a Rate Differential of *1.5*.

If you only want to display the holiday and not include a rate differential, you would select a Type of *Bill Rate + Rate* and a Rate Differential of *0*.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the**Timekeeping** section, select **Calendar-based Premium Pay**.
3. On the **Create Calendars** tab, click **Add New**.
4. Enter the **Calendar Name** and check the box for **Show on Timesheet** if appropriate.
5. Click **New Row** and enter the details.
6. Click **Save**.
7. Select the **Calendar Pay Profiles** tab.
8. Click **Add New** and enter the **Profile Name**.
9. As you configure the calendar pay profile, consider:

Option	Description
Holiday Profile	Select the calendar to assign a rate differential.
Type	You can choose *Bill Rate * Rate* or *Bill Rate + Rate*. Example: To assign time and a half for holiday pay, you could select *Bill Rate * Rate* to indicate the worker's bill rate times the entered rate differential should equal the new pay. Bill Rate times 1.5 equals the new holiday rate.
Rate Differential	Enter the value to be used in the calculation. Example: To assign time and half for holiday pay, you would enter 1.5. If you only want to display the holiday and not include a rate differential, you would select a Type of *Bill Rate + Rate* and a Rate Differential of *0*.
Include in Paid Breaks	Indicates whether the rate differential should be applied to paid breaks.

10. Click **Save**.
11. Select the **Assign Organization** tab and assign the calendar pay profile to each organization as necessary.

    This option sets the calendar pay profile as the default and all workers in the organization will have the configured calendar pay profile. The calendar pay profile can be overriden on the work order if necessary.

Enable Overtime Allocation Enforcement on Timesheets in Settings

Prerequisites

- You must select `Manual` for **Timesheet Classification**.
- An **Overtime Profile** must exist on the work order.

Context

You can enable overtime allocation enforcement on timesheets to prevent timesheet submission until overtime hours are allocated appropriately. If a contractor is using a manually classified timesheet and tries to allocate against their regular hours beyond what is allowed in their overtime profile, they receive an error until the changes are made. This feature assists program offices with accurate accounting and alleviates the burden of running additional reports and adjusting timesheets.

Example: A contractor has a profile that allows them to enter overtime after they work 40 hours in 1 week. If they try to enter 48 hours of regular or non-overtime hours type, Workday VNDLY displays an error message asking the contractor to reallocate the additional 8 hours.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. Check the box next to **Block Timesheet if Overtime Insufficient**.

Upload Timesheets

Context

You can use the **Upload** feature on the **Timesheet** summary page to upload your time information.

Steps

1. From the header, select **Timesheets** > **Summary**.
2. Click **Upload** and locate the appropriate file.
3. From the **Reports** drop-down menu, click **File Transfer Reports** to review the upload and its outcome.
4. If the file was a Partial Success or Failure, click **Transfer Details** to see what went wrong and correct any errors.
5. Repeat the previous steps until you see a successful outcome.

Modify Timesheets

Context

Modifying timesheets enables you to correct any information entered in error. Once changes are made, the timesheet must be re-submitted and approved.

There's a configuration that limits the number of weeks program team, vendors, or contractors can go back into the timesheets to make modifications. Visibility of the **Submit** and **Adjust** buttons depend on these settings.

Steps

1. From the header, select **Timesheets** > **Summary**.
2. Open the submitted timesheet that you wish to modify.
3. Click **Adjust** and make the necessary changes.
4. Click **Submit**.

Print Multiple Timesheets

Context

You can print an employee's timesheet by going to that employee's worksheet and printing the timesheet. However, you may want to print the timesheets of all of the employees for a particular time period.

Steps

1. From the header, select **Timesheets > Summary** and navigate to the time period that you want to print.
2. Click **Download** and print the downloaded file from your spreadsheet program.

Create Overtime Rates and Profiles

Context

You can create overtime rates that align with your program's overtime pay, and then assign a rate to an overtime profile.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Overtime**.
3. From the **Overtime Rates** tab, click **Create**.
4. As you create the overtime rate, consider:

Option	Description
Set as Default	Check the box if you want the overtime rate you’re creating to be the default rate selected on newly created Overtime Profiles. If another overtime rate was set as the default previously, you'll need to confirm the change on the pop-up.
Rate Name	Label the rate to easily identify it.
Overtime Frequency	You can toggle between Hourly, Daily, or Weekly to set the **Display Name** and **Rate** for each.
Display Name	For each Classification, verify or enter the correct display name.
Rate	For each Classification, verify or enter the correct rate multiplier.

5. Click **Save**.
6. Select the **Overtime Profiles** tab and click **Create**.
7. As you create the overtime profile, consider:

Option	Description
Set as Default	Check the box if you want the overtime rate you're creating to be the default Overtime Profile for your tenant. If another overtime profile had been set as the default previously, you'll need to confirm the change on the pop-up.

Option	Description
Overtime Rate	Select the overtime rate that should apply to this overtime profile.
Overtime Profile Name	Label the overtime profile to easily identify it.
Weekly Overtime Threshold (hours)	Indicates the number of hours in a week at which an overtime rate should begin to apply.
Daily Overtime Rules	When you check this box, the **Overtime Hour Thresholds** display.
Overtime Hour Thresholds	Set the range for each overtime type. Example: You could set these thresholds: • **Regular** time to *0 - 8* • **Overtime** to *8 - 16* • **Double Time** to *16 - 24*
Custom Daily Overrides	When checked, you can customize overtime hour thresholds for one or more days of the week. Example: You could select *Sunday* and set **Overtime** to *0 - 8*, and **Double Time** to *8 - 24*.
Consecutive Day Rules	When checked, you can customize overtime thresholds for consecutive start days. Example: You could enter *2* for the **Consecutive Day Start** and set these thresholds: • **Regular** time to *0 - 8* • **Overtime** to *8 - 16* • **Double Time** to *16 - 24*

Next Steps

Create overtime rules, if appropriate.

Create Overtime Rules

Prerequisites

At least 1 overtime profile and 1 overtime rate must exist.

Context

Overtime rules enable you to select criteria by which an overtime profile is automatically selected on a work order or job. Example: You could create a rule where new jobs located in California automatically select an overtime profile with unique, California overtime rates. When a new job or work order is created, Workday VNDLY selects the overtime profile based on which overtime rule is met. If it doesn't meet the criteria for any rules, the default overtime profile is applied.

Overtime rules aren't retroactively applied. Only work orders and jobs created after the criteria group exists will be automatically assigned the appropriate overtime profile. The overtime profile can still be overwritten on the job or work order if needed by users with appropriate permissions.

Sometimes a job or work order might meet the criteria for more than 1 overtime rule. In cases like this, the rule with the most specificity is applied. Example: If you create a rule for jobs located in Ohio, but create a second rule for jobs located in Ohio that are a part of the Human Resources Business Unit, the overtime profile from the second rule would be selected since that rule has more specific criteria.

Workday VNDLY's order of criteria specificity in order from least to most specific is as follows:

- Country
- Subdivision (State/Province)
- Business Unit
  - Sub-Business Unit
- Region (Parent)
  - Sub-Region
- Work Site
- Job Category
  - Sub-Job Category
- Job Template

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, select **Overtime**.
3. Select the **Rules** tab.
4. Click **Create**.
5. As you complete the criteria rules fields, consider:

Option	Description
Criteria Group Name	Enables you to label the rule you're creating.
Criteria	Enables you to configure when the overtime rule profile should apply. You can select one or more criteria, but only 1 option from each criteria family: Location, Job, Organization. Example: You could select *Work Site* and *Job Templates*, but not *Work Site* and *Country*.
Criteria Type	This field displays once you select a criteria. The name of the field is determined by the criteria that you selected. Example: If you selected a **Criteria** of *Work Site*, the criteria type field of **Work Sites** displays. You'll need to select one or more work sites that you want the rule to apply to. You can select multiple values for each criteria type.
Overtime Profile	The overtime profile that should be applied when the criteria are met.

6. Click **Create**.

Expenses

Concept: Expenses

As a Resource Manager, you can view all the expenses submitted by contractors reporting to you. From the header, select **More** > **Company Settings**. From the **Accounting** section, click **Expenses & Adjustments**.

You see all expenses and adjustments. To simplify your search, you can use the filters at the left of the page.

When you've located the appropriate expense report, you can click **View Expense** to open the expense report. From here, you can approve or reject the entire expense report if needed. You can also approve or reject by individual line items if configured in **Company Settings**.

In addition, you can print, email, or edit the expense report if needed.

Under **Expenses**, you can click the icon under **More** to view comments or rejection reasons.

You can view the approval chain, if needed. You can configure reminders to keep the approval process moving. If you want to add an approval comment, you can click **+Add Comment**.

Concept: Event-Based Expenses

Event-based expenses are expense reports that the system creates when triggered by an event. You can configure them to be time-based, where they're triggered by a timesheet submission, or scheduled, where they're triggered based on a set schedule. Automating these types of reoccurring expenses alleviates user overhead and ensures the funds are appropriately allocated to the correct areas for later identification by invoicing.

When creating a Timesheet event-based expense, you'll configure **Criteria** to capture the scenario in which the system should automatically create the expense. Example: Workers earn meal reimbursement after working a minimum of 10 hours per day. With criteria, you would indicate that when a timesheet is submitted with at least 10 hours per day, then the Daily Meal Stipend of $10 should apply.

When creating a Scheduled event-based expense, you'll configure both **Criteria** and **Frequency**. Example: There's a new regulation that requires workers in the UK office to receive a 500 GBP monthly parking reimbursement to compensate for commuting to the office. Since your company has decided to generate the expense report on the last day of every month, you can select a **Frequency** of *Monthly* and choose a **Repeat Criteria** of *Last day of the Month*.

Event-based expenses utilize approval workflows. You can choose between several options:

Option	Description
Automatically approve	The expense is approved as soon as it's created.
Use existing workflow approval	The expense is approved based on the **Approval Strategy** set on the expense report type.
Approve with timesheet	This option is only available if you select an **Event Type** of *Timesheet*. The expense is approved at the same time the timesheet is approved.

After creating the event-based expense, you must attach the event to the appropriate work order. If the work order has not yet been created, you'll need to create a job and select the event as well as the charge code for the event-based expense. After onboarding is complete, you can view the event selected on the worker's work order. Alternatively, if the work order already exists, you can modify the work order and select the event you created along with the charge code.

Create Event-Based Expenses

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** settings page to display.

Context

Event-based expenses are expense reports that are created by the system when triggered by a event. You can configure them to be time-based, where they're triggered by a timesheet submission, or scheduled, where they're triggered based on a set schedule. Automating these reoccurring expenses alleviates user overhead and ensures the funds are appropriately allocated to the correct areas for later identification by invoicing. Example: You could create an event-based expense for a reoccurring event, such as earning meal reimbursement after working a minimum of 10 hours per day. With criteria, you would indicate that when a timesheet is submitted with at least 10 hours per day, then the Daily Meal Stipend of $10 should apply.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. As you create the event, consider:

Option	Description
Event Type	Indicate whether the event is triggered by Timesheet or Scheduled. Selecting *Timesheet* ensures that the event-based expense is created when the timesheet is submitted. Selecting *Scheduled* ensures that the event-based expenses is created at the defined frequency.
Frequency	Indicate the frequency of the scheduled event.
Approval Strategy	Indicate how the expense should be approved: • Automatically approve • Use existing workflow approval • Approve with timesheet
Criteria	Select criteria to narrow the scenarios in which an expense should be automatically created. Example: You might want only expenses created for the United States to be automatically approved, so you could create a criteria for **Country** and include the *United States*.

Option	Description
Expense Report Type	Indicate the type of expense report to be created. You can click **I don't see the report type I need** to create the appropriate report type, if needed.
Expense Report Category	Indicates the expense category to be used for the expense. You can click **I don't see the report type I need** to create the appropriate category if needed.
Expense Type	The expense type within the selected category. You can click **I don't see the report type I need** to create the appropriate type if needed.
Expense Value	Indicates the amount of the expense.

Next Steps
Attach the event you created to the worker's work order. You can either:

- Create a new work order.
- Modify an existing work order and select the event you created.

Attach an Event-Based Expense to a Work Order

Prerequisites

- You must have these permissions:
  - *workorder.modifications.create* or *workorder.owned.modifications.create*
  - *field.event_based_expenses.write*
- An event-based expense must exist.

Context

Once you've created an event-based expense, you must attach both the event-based expense and the appropriate charge code value to the appropriate work order.

Steps

1. From the header, select **More** > **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Change Dates and Rates (Modify Work Order)**.
4. In the **Event-Based Expenses** section, select the appropriate **Event-Based Expense**.
5. Select the appropriate **Charge Code**.
6. Click **Review Changes**.
7. Enter the **Reason for Change** and **Leave a Note (Optional)** if necessary.
8. Click **Submit for Approval**.

Example: Create a Scheduled Event-Based Expense

Example: This example illustrates how to create a scheduled event-based expense in Workday VNDLY.

Context

There's a new regulation that requires workers in the UK office to receive a 500 GBP monthly parking reimbursement to compensate for commuting to the office. Since your company has decided to generate the expense report on the last day of every month, you can schedule the event-based expense to run on the last day of each month. By scheduling the event-based expense, you are streamlining the process and ensuring the approval workflow is triggered as needed.

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** settings page to display.
- Create an expense type for *Parking (GBP)*.
- Create an expense report type and category for *Default Expense*.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. Enter these values:

Option	**Description**
Field	Enter
Event Name	*UK Parking - Reimbursement*
Event Type	*Scheduled*
Frequency	*Monthly*
Repeat Criteria	*Last day of the Month*
Scheduled Time	*12:00 PM*
Timezone	*GMT+0100 Europe/London*
Approval Strategy	*Use existing workflow approval*

5. In the **When** section, click **Add Criteria**.
6. Select *Country* and enter *United Kingdom*
7. In the **Then** section, select these values:

Field	**Enter**
Expense Report Type	Default Expense
Expense Report Category	Default Expense
Expense Type	Parking (GBP)
Expense Value	500.00

8. Click **Save**.

Example: Create a Timesheet Event-Based Expense

Example: This example illustrates how to create an event-based expense with an **Event Type** of *Timesheet*.

Context

You want to ensure workers with more than a 10 hour day receive a meal stipend. You configure a timesheet event-based expense that automatically triggers the meal stipend when a timesheet is submitted with more than 10 hours in one day.

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** to display.
- Create an expense type for Daily Meal Stipend.
- Create a work site for Columbus, OH, USA.
- Create a job template for Box Packer.
- Create an expense report type and category for Default Expense.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. Enter these values:

Option	Description
Field	Enter
Event Name	*Daily Meal Stipend*
Event Type	*Timesheet*
Approval Strategy	*Automatically approve*

5. In the **When** section, click **Add Criteria**.
6. Select *Timesheet Hours Per Day* and enter *10*.
7. Select *Work Site* and select *Columbus, OH, USA*.
8. Select *Job Template* and select *Box Packer*.
9. In the **Then** section, select these values:

Field	Enter
Expense Report Type	Default Expense
Expense Report Category	Default Expense
Expense Type	Daily Meal Stipend (USD)
Expense Value	10.00

10. Click **Save**.

Invoicing

Create Invoice Templates

Context

Invoice templates enable you to prefill some of the recurring fields and determine the viewable fields on invoices, giving you the ability to control and customize your own invoice PDFs. You can toggle various sections on or off using the option near the top of the header for optional sections. Example: You could toggle off the **Remit To** section if you didn't want this section to display on your invoices. All changes made are reflected on the preview invoice on the right side of the page.

Steps

1. From the header, select **Invoices** > **Invoices Summary**.
2. Select the **Templates** tab, and click **Add Template**.
3. While completing the **Formatting** section, consider:

Option	Description
Vertical Layout/Horizontal Layout	Configure whether you'd like the invoice to display vertically or horizontally.
Invoice Number	Configure whether you wish the invoice number to display in the Header.
Workday VNDLY Logo	Configure whether you wish the Workday VNDLY Logo to display in the header.
Page Numbers	Configure whether the page numbers display in the footer. You can also configure the alignment: left, center, right.
Date Created	Configure whether the date created displays in the footer. You can also configure the alignment: left, center, right.

4. Consider these items while completing the **Template Titles** section:

Option	Description
Template Name	Identifies the template.
Report Title	Static text that displays on the invoice.

5. Consider these items while completing the **Payment Terms** section:

Option	Description
Entry Type	Select whether you prefer to enter the payment terms manually or to have the payment terms read from the vendor profile.
Display Options	Indicate whether you want payment terms and the due date to display on the invoice.
Payment Terms (in days)	Number of days after the invoice gets finalized when the bill-to entity can provide payment based to the remit-to entity without penalty. The number

Option	Description
	is generally contractual, and is only available if you selected an Entry Type of Manual.

6. Consider these items while completing the **Bill To** section:

Option	Description
Bill To	The entity responsible for paying the invoice amount.
Bill To Logo	Enables you to upload a file of the logo for the entity responsible for paying the invoice amount.

7. Consider these items while completing the **Remit To** section:

Option	Description
Entry Type	Select whether you prefer to enter the remit to details manually or to read the remit to details from the vendor profile. If you select **Read From Vendor Profile**, you can select the fields you want to include. Selecting to use the **Remit To Address** from the Vendor Profile will only apply to invoices containing a single vendor. Mixed-vendor invoices don't take advantage of this option.
Remit To	The entity to which the payment should be sent.
Remit To Logo	Enables you to upload a file of the logo for the entity where the payment should be sent.

8. Consider these items while completing the **Taxes - Header** section:

Option	Description
Show Tax Amount in Header	Select to display the tax amount on the invoice header.
Show Tax Registration Number	Select to display the tax registration number on the invoice header. When selected, you must select the entry type. If you select **Manual**, you must enter the tax registration number. If you select **Read from Vendor Profile**, the tax registration number is automatically pulled from the vendor profile.

9. Consider this item while completing the **Custom Fields** section:

Option	Description
Custom Fields	Only custom fields configured to display on invoices are available for selection. Each template can display different custom field configurations as needed for that invoice. To display on the Template, configure the Custom Field at the **Business Unit: All** level in Custom Field settings.

10. Consider this while completing the **Messages** section:

Option	Description
Message on Invoice	Enables you to enter a message that displays on the invoice.

11. Click **Edit** to the right of the **Invoice Details** section of the Template Preview.
12. Consider these items while completing the **Invoice Details** section:

Option	Description
Report	Select the appropriate report, which determines the fields that are available for selection. Then check the box for each field that you want on the report. You can modify the field name and order of the fields if necessary.
Create Column	You'll need to enter the Group Name and then select the fields you want included in the group. Click **Add to list**.

13. Consider this while completing the **Subtotals** section:

Option	Description
Subtotal	Fields selected in the **Invoice Details** section that can be subtotaled display here. Check the box for each field that you wish to include subtotals for on the invoice.

14. Consider this while completing the **Invoice Details Grouping** section:

Option	Description
Invoice Details Grouping	Enables you to group fields containing the selected values together. Check the box for one or more fields that you wish to organize by.

15. Consider these while completing the **Table Formatting** section:

Option	Description
Table Row Stripes	Adds alternating gray rows to your invoice tables for easier viewing.
Table Cell Borders	Adds borders to each cell in the invoice tables for easier viewing.

16. Click **Edit** to the right of the **Totals** section of the Template Preview.
17. Consider these while completing the **Taxes - Footer** section:

Option	Description
Show Rate	Includes the tax rate percentage on the invoice footer.
Show Tax Amount in Footer	When selected, displays the total amount of taxes on the invoice footer. Select **Combined Taxes** to display the combined total of taxes, or **Split Taxes** to display a row for each tax type on the invoice.

18. Consider these while completing the **Totals** section:

Option	Description
Show Client Totals	Select to display client totals on the invoice.
Show Vendor Totals	Select to display vendor totals on the invoice. When this option is selected, you can also choose to **Show Client Subtotal** or **Show Discounts**.

Option	Description
Display Currency Code on Totals	Select to display the totals with the local currency code. If you also select **Display Totals in Base Currency**, the totals display with the base currency code.
Display Totals in Base Currency	Select to convert the totals to the base currency amount.

19. Check the box for **Use as default** if you wish to make this template the default invoice template.
20. Click **Save** near the top right of the page.

Create Invoice Template Rules

Prerequisites

- At least 1 Invoice Template must exist.

Context

Invoice template rules enable you to set conditions to determine which invoice templates to use. Example: you could create a rule where if your invoice contains line items for work sites in the UK, then the template for UK work sites is used.

Steps

1. Select **More** > **Company Settings**.
2. From the **Accounting** section, click **Invoice Template Rules**.
3. Select a default template. When no other rules match, this template is used.
4. Click **Add Rule**.
5. While completing this task, consider:

Option	Description
Source	The dataset you want the invoice template rules to reference.
Field	The field within the source you want the invoice template rule to reference.
Condition	The constraints you want the rule to operate within.
Value	The value you want the condition to match against.

6. To add additional conditions to your rule, click **+Add Condition**.
7. Select the Template that you want to assign to the conditions you selected.
8. To add additional rules, click **Add Rule** and repeat the steps above.
9. When you’re ready to save your rules, click **Save** in the upper right corner of the page.

Create an Invoice

Context

You build invoices manually with the Workday VNDLY invoice builder. Along with selecting the desired transactions, the Workday VNDLY invoice builder enables you to tailor the different invoice fields to meet your specific needs.

Steps

1. Select **Invoices** > **Invoices Summary**.
2. Click **Create New invoice**.
3. Select an Invoice Template if necessary.

   If you select **Select for me**, VNDLY selects the template that best matches the line items and invoice template rules.
4. Complete the appropriate fields.
5. Click **Add transaction(s)**.
6. Check the box for one or more transactions and click **Add**.
7. Enter a message on invoice or short description if necessary.
8. Click **Save**.
9. If more than 1 billing cycle is available, select the appropriate billing cycle.
10. Add any attachments.

Create New Invoice Payments

Context

Creating new invoice payments enables you to track and house payment details. You can also add additional invoices or invoice line items to the payment.

Steps

1. In the header, select **Invoices** > **Invoice Payments**.
2. Click **Add Payment**.
3. Select the **Vendor Name** from the drop-down.
4. As you complete the payment details, consider these options:

Option	Description
Payment Name	Optional field to capture the vendor's name as it displays on the check.
Voucher Number	Optional field to capture the voucher number that displays with the payment.
Payment Method	Type of transaction for this payment and populated using the **Custom Data Source** *€œPayment Method*€#. Default values are €œACH€#, €œCash€#, and €œCheck€#.
Payment Number	Transaction number associated with this payment. Format varies depending upon **Payment Method**.

5. Select an invoice from the **Add Another Invoice** drop-down.

6. Click **All Transactions** to include all transactions or—if available—**Select transactions** to select line items individually.
7. Consider these fields as you review the payment form totals:

Option	Description
Amount Received	Should reflect the actual payment amount sent to the Vendor. Calculated as the sum of all payment amounts and all late charge amounts on the payment.
Original Balance	The original vendor amount with vendor-remitted taxes as seen on the invoice. Doesn't include fees.
Remaining Balance	Remaining original balance for this invoice/invoice line item across all finalized payments.
Discount Taken Amount	Optional field to capture any discount during payment. • Can't be used with negative remaining balances. • Must be a positive number. • Remaining balance must be greater than or equal to the sum of the discount taken amount and the payment amount.
Late Charge Amount	Optional field to capture any late charges incurred on this payment. • Can't be used with negative remaining balances. • Must be a positive number.
Payment	The amount to be paid against the invoice/invoice line item. • Positive balances: Remaining balance must be greater than or equal to **Discount Taken Amount** plus **Payment** amount. • Negative balances: Remaining balance must be less than or equal to the **Payment** amount.
Amount to Apply	The amount that will be applied to the listed invoices/invoice line items. This amount is a sum of all listed payment amounts.

8. Click **Submit to Vendor**.

Result

The payment changes to a status of *Paid*, and locks the associated line items from further payment unless a balance remains. If this payment fully completes payment on the associated invoice, the invoice also changes to a status of *Paid*.

Decisioning a Miscellaneous Adjustment for Invoicing

Context

The Invoicing Admin needs to Approve or Reject the miscellaneous adjustment. Current State - notifications are sent to the MSP when there are miscellaneous adjustment submissions.

Steps

1. Select **More** > **Expenses & Adjustments**.
2. Locate the appropriate Misc. Adjustment and click **View Misc. Adjustment**.
3. Review and Approve or Reject each adjustment line item.

Submit Miscellaneous Adjustments for Invoicing

Context

Miscellaneous Adjustments within VNDLY enable you to submit an adjustment. Typically, you would use this type of adjustment for one-off purposes to make financial adjustments that don't fit into typical expenses.

Steps

1. From the header, select **More** > **Expenses & Adjustments**.
2. Click **+Add New**.
3. Enter the appropriate information and click **Save**.

   This action auto-opens the adjustment created.
4. Complete the appropriate fields.
5. Click **Save** and then click **Submit**.

Void Invoices

Prerequisites

You must have the permission *invoice.void*.

Context

You can void invoices in Workday VNDLY that you created in error. Voiding an invoice cancels the invoice without deleting it, preserving its historical records for future audits.

Workday VNDLY offers a setting to generate new invoice files when an invoice gets voided, showing the voided transaction items. The setting is available by from the header, select**More** > **Company Settings** > . From the **Accounting** section, click **Invoice & Payments**. Under the **General** section, enable **Voiding Invoice Generates Invoice File**. If enabled, voiding an invoice generates an invoice file detailing the voided transactions. If disabled, Workday VNDLY won't generate a voided invoice file and if you have certain configurations such as SFTP, the file won't get delivered to any configured, downstream systems and integrations.

Example: You might void an invoice when:

- Taxes were calculated incorrectly.

- Line items were incorrectly created and must be deleted.
- Invoice grouping rules aren't grouping line items as expected.

When you void an invoice, Workday VNDLY will:

- Lock the invoice and change the status to **Voided**.
- Record who voided the invoice and when it was voided in the activity log.
- Update related budgets to reflect actual invoiced amounts.
- Make the associated line items available to be invoiced again.
- Generate a new invoice file showing the voided transaction items (if you enabled the setting).

For every voided invoice, Workday VNDLY automatically creates a credit invoice to offset the invoice amount in reporting. The credit invoice also ensures that accurate credit information flows through to any Workday integrations. Credit invoices have the same invoice number as the original invoice, with -VOID added to the end and a **Void Credit** status. Example: INV0000001-VOID.

Steps

1. From the header, select **Invoices** > **Invoice Summary**.
2. Select the invoice that you want to void.

   You can only void invoices in **Complete** status. If you need to void an invoice that has any active payments associated with it, you must void those payments first.
3. Click **Void**.
4. Click **Confirm**.

Concept: Payments

You can add payments both individually and in bulk from the Invoice Payments page, as well as from a single or multi-vendor completed invoice.

To add a payment individually from the Invoice Payments page, see the article for Create New Invoice Payments.

You can use the Bulk Add option to upload multiple Invoice Payments at once. The file format containing all required columns can be found on the Invoice Payments Bulk Upload window. You can download this file and fill out the appropriate information. Then, select the file to bulk upload.

You can also add payments from a completed invoice. Next to the Invoice Total Amount, you can click Add Payment. If the invoice contains a single vendor, you can select one or more invoice line items to cover with the payment. Then you'll click Include on Payment Form.

If the invoice where you clicked Add Payment contains line items for multiple vendors, you can select which vendor you're providing payment information for. You can change the vendor using the drop-down list to update the line items available in the table. From here, you can select one or more line items to include in the payment.

If necessary, you can send files with payment details over SFTP. You'll need to contact your VNDLY contact to configure this.

Concept: Payment Forms

Payment forms enable you to group invoices for vendor payments. You can create a new invoice payment and complete various actions on the payment form as needed.

Delete Table Rows

You can remove invoices or invoice line items from the payment table by clicking the garbage icon that displays when hovering over the line. These changes aren't retained unless the payment form is saved or submitted.

Partial Payments

VNDLY supports the partial payment of invoices in 2 ways:

- Entire invoice
- Individual line items

Whichever method you use first on an invoice must be used to complete payment on that invoice.

Save Payment

You can save a payment in a Draft status for completion at a later date. Vendors are unable to see draft payments.

Delete Draft

If while managing payments you determine an existing draft is no longer needed, clicking the **Delete** button on the payment form presents the option to delete the draft. This action can't be undone.

Void Payment

If for any reason, you need to cancel a completed payment, you can void the payment from the Payment Form. Enter a Reason for Void, if needed. Once voided, all invoices and invoice line items associated with the payment are released and can be added to a new payment. This action can't be undone.

Voided payments are retained for historical purposes and display a banner when opened to indicate that the payment is no longer valid.

View Payments on the Invoice

Users with the ability to view payments are also able to access that information from the associated invoice. Clicking the amount next to the payment status takes the user directly to the payment page for review.

Concept: Historical Miscellaneous Adjustments Improvements for Invoicing

To foster a better experience, we've updated the Historical Miscellaneous Adjustments page to enable easier navigation and searchability.

If you had adjustments in VNDLY before this update, you can view them by navigating to **Invoices** > **Historical Misc. Adjustments**.

To create a new misc. adjustment, click the link in the banner on the **Historical Misc. Adjustments** page or navigate to **More** > **Expenses and Adjustments**.

Concept: All Transactions vs. Select Transactions with Payments

When creating a new invoice payment, you can select the appropriate option based on how you're grouping invoices. Example: if a program is grouping invoices in a way that would only ever represent a single vendor per invoice, you're more likely to select All Transactions. If the invoice has more than 1 vendor on the invoice, you must always select Select Transactions. Each payment can only be made to a single vendor.

All Transactions

After selecting an invoice, if you click All Transactions, one of 2 things can happen:

- A single line displays in the table with the invoice listed and no invoice number.
- One or more lines display in the table with the invoice line items on separate lines.

If either of these statements are true, a single line displays in the table with the invoice listed and no invoice line number. This indicates that the user is applying the payment to the entire invoice.

- The selected vendor owns all line items on the selected invoice and those line items are all unpaid.
- The selected vendor owns all line items on the selected invoice and this invoice and there's already a partial payment recorded on this entire invoice.

If either of these statements are true, one or more lines display in the table with the invoice line items on separate lines. This indicates that the user is applying the payment to each line item.

- The selected invoice contains line items for more than 1 vendor.
- The selected invoice contains line items that were included in another completed payment, either partially or in full.

Select Transactions

After selecting an invoice, if you click Select Transactions, a new window opens to enable you to select the line items to include on the payment. After selecting one or more of the line items, clicking Include on Payment Form loads the selected line items into the payment form table. Each payment can be a mix of full invoices and invoice line items to fit the needs of your payment strategy.

Concept: Invoicing Strategy for Fees

We generally invoice vendor amounts and program fees together in a single-line item; however, you also have strategy options to split them into separate line items, and then invoice those fees and amounts individually.

This setting can be found by selecting **More** > **Company Settings**. From the **Accounting** section, click **Invoice & Payments**. Click **Edit**.

Under the **General** section, you can determine how VNDLY splits the supplier amount from the fees by selecting 1 of 5 available **Invoicing Strategy for Fees**:

Option	Description
Keep It All Together	The default option for all programs. Maintains how VNDLY works today where items contain both the supplier amount and fees and are invoiced together as a single-line line item.
Always Split and Standalone Fees	Always splits each invoice transaction into separate lines at the time of line item creation: fees and supplier amount. The fees each have their own line items that invoice as standalone line items. The amount line items and fee line items can be invoiced together on the same invoice.
Keep It Together Until Invoicing with Aggregated Fees (Auto-fee Invoicing)	Keeps the amounts and fees together on the line item until invoicing. Invoicing creates negative

Option	Description
	line items for the aggregated fees in the supplier amount invoice, and automatically creates separate invoices for the positive fees.
Keep It Together Until Invoicing with Split Fees (Auto-fee Invoicing)	Keeps the amounts and fees together on the line item until invoicing. Invoicing creates negative line items for each fee in the supplier amount invoice, and automatically creates separate invoices for the positive fees.
Keep It Together Until Unless Tax Country Differs	Line items contain both the supplier amount and fees and are invoiced together as a single-line item *except* where the tax country for the supplier amount is different from the tax country for the MSP fee. When there’s a difference, the line item splits when approved.

Note: Changes to the **Invoicing Strategy for Fees** setting affect all invoice line items and invoices created after the change. Modifications to this strategy might impact external invoice integrations, and programs are advised to validate integrations after the change.

Charging Fees to Other Accounting Codes

If you’ve selected an **Invoicing Strategy For Fees** option that splits the fees, you can also charge all fees to a different accounting code than the accounting code used for the supplier amount. On the **Invoice & Payments** page, click **View Fees Accounting Code** under the **Program Fees** section to adjust these codes.

Shifts

Setup Considerations: Shifts

You can use this topic to help make decisions when planning your configuration and use of shifts. It explains:

- Why to set it up.
- How it fits into the rest of Workday VNDLY.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Shifts are defined blocks of time in Workday VNDLY that allow companies to ensure consistent staffing coverage. Companies can also use shifts to compensate hard-to-fill times differently to incentivize workers. You can configure and maintain shifts during job creation to offer release, and from work orders to invoicing.

Business Benefits

With shifts, you can:

- Track time against a data element, such as a work order.
- Allocate time against a data element that will also pay a premium.
- Collect the time data allocated against shifts and export it to a different system for calculation.
- Enable warnings that appear if shifts are entered outside of defined shift times.
- Use the **Shifts** dataset or the **Shift Differential** dataset to report on shift definitions in custom reports.

Use Cases

Create multiple shifts, or a shift with exceptions, by deploying the flexible shift strategy to accommodate a contractor's changing schedule.

Create shifts that have extra pay (shift differentials) attached to encourage contractors to take that particular shift.

Set the ability to have the shift differentials to calculate automatically in the client rate.

Modify work orders with the bulk update process to add shifts and differentials to the work orders your clients to update.

Questions to Consider

Questions	Considerations
What are shift strategies?	Shift strategies are different ways a client might manage their shift needs for each work order. VNDLY Workday supports 2 types of shift strategies: **Dedicated shift strategy**. This strategy maintains a 1 to 1 relationship between a single shift and a work order. By selecting this strategy you are limited to only 1 shift for the assignment. We don't restrict contractors from being assigned to multiple work orders with a dedicated strategy, but we do restrict contractors from being assigned to 2 different strategies on work orders. You might use a dedicated strategy when you only need a contractor to cover a single shift or if you have an integration with an external system that restricts contractors to a single work order. Dedicated strategies default to the shift assignment on the timesheet so that the contractor doesn't have to select which shift their time should be allocated to. **Flexible shift strategy**. This strategy allows a contractor to be assigned to more than 1 shift on the same work order. You might use this shift strategy if you have a contractor who might be assigned to work multiple shifts and needs the flexibility to be able to punch in and out of their assigned shifts as needed. Flexible shift strategies require the time to be manually allocated on the timesheet so that the system knows which shift the hours were worked against.
How do you display shifts on jobs?	A toggle on the job templates allows you to apply shifts to the job and/or make it required on the

Questions	Considerations
	job. This toggle helps ensure that shifts don't automatically apply to every job.
What timesheets and classification types can I use with shifts?	Shifts are supported on **Time In / Time Out** and **Summary** timesheet types. However, flexible shift strategies don't work with auto-classified timesheets.
What if a job fits the criteria for multiple criteria groups of different shift rules?	Workday VNDLY prevents users from creating duplicate rules, but doesn't prevent users from creating rules that could overrule another. You should compare any shift rules created to ensure that there isn't a conflict. For more information, see Concept: Shift Rules.
Can I include shifts on a time import?	You can include shift assignments if you have the add_shift_to_time_import feature flag enabled in your tenant. To enable, create a Product Support ticket with Workday VNDLY Support.
Can I remove a shift that I no longer need?	You can remove shifts by deleting or deactivating the shifts. You can only delete a shift if it hasn't been assigned to a job or work order. If the shift is already assigned to a job or work order, you can only make it unavailable by deactivating it. Shifts can be deactivated if there's no time allocated against it. It will no longer be selectable on jobs, work orders, or timesheets, and you won't be able to save or submit time against it.
What timezone will my contractors' punches be collected in?	Existing timesheets honor the timezone that the contractor's computer is set to.
How does the shifts functionality affect my current jobs?	When you set up shifts, the shifts and any rules that you create only apply to new jobs going forward. This includes the **Are Shifts Required** setting. Existing jobs aren't impacted. However, you can modify a work order to add a newly created shift to it. Shifts aren't required on timesheets; a contractor can either allocate their time against a shift or not select a shift.

Recommendations

We recommend that light industrial clients implement shifts in their tenants.

If you have a contractor that is assigned to a shift, but also needs to allocate time outside of a shift, we recommend that you assign them a flexible shift strategy. This lets the contractor either select a shift or not select a shift to allocate their time.

Requirements

Clients using only:

- Extended Workforce Management.

- Manually allocated timesheets. (Shift allocation requires manual classification. Only dedicated strategy works with auto-classified timesheets at this time).
- Charge codes.
- Premium applied to the bill rate. (Pay rate premiums aren't included in shifts functionality).

Limitations

Shifts functionality:

- Is used as a tracking tool, not a scheduling tool.
- Applies the premium only to the bill rate.
- Doesn't support Worker Profile Management or Statement of Work.
- Only supports charge codes, not project codes.
- Doesn't support flexible shift strategies with auto-classified time.

Tenant Setup

Create a Product Support ticket with Workday VNDLY Support to enable shifts in your tenant.

Security

Administrators with the *settings.admin permission* can add the following permissions to roles to view and maintain shifts:

Module	Permission	Description
Job	*shift.differential.read*	Permission to view shift differential on a job page.
Settings	*shift.settings.read*	Permission to view shift settings.
Settings	*shift.settings.edit*	Permission to edit shift settings.
Job, Work Order	*field.shifts.update*	Permission to override shifts, shift strategy, and shift differentials on a job or work order.
Work Order	*workorder.modifications.shifts_backdate.create*	Permission to backdate shift, shift strategy, and shift differential changes for a work order.

Business Processes

You must have the correct permissions for each business process:

Business Process	Consideration
Publish a Job	Change the shift selection and the shift strategy when publishing a job.
Modify Work Order	Edit shifts on a work order, including backdating the shifts.
Release an Offer	Update the shifts, **Type of Rate Differential**, and **Rate Differential** (if already created for the shift) before releasing the offer.
Timesheet Summary	Submit a timesheet with shift information.
Work Orders	Filter for work orders with shifts.

Reporting

Datasets	Considerations
Shifts	Can report on shift definitions in custom reports.
Shift Differential	
Shifts joined with:	Can create full data reports.
Jobs	
Timesheets via Jobs	
Work Orders via Effective Dated Values	

Steps: Set Up Shifts

Prerequisites

Shifts enabled in your environment. To enable, create a Product Support Case with Workday VNDLY Support.

Context

You can define and maintain shift needs within Workday VNDLY. This ability allows companies to use defined blocks of time (shifts) to identify gaps in their schedule that need to be filled to avoid downtime. Companies can also compensate hard-to-fill times differently to incentivize workers.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. Add the *shift.settings.edit* and *shift.settings.read* permissions to security roles that require access to view and maintain shifts settings.

   These settings must be added by an administrator role that has the *settings.admin* permission.
4. Within **Security Settings**, add the following permissions to roles that require access to view, edit, and backdate shifts and shift differentials:

   - *shift.differential.read* to view shift differential on a job page.
   - *field.shifts.update* to override shifts, shift strategy, and shift differential on a job or work order.
   - Backdating shifts also require the *workorder.modification.shifts_backdate.create* permission.
5. Enable Shift Selection for Job Templates.
6. Create Shifts.

Result

Changes to **Shifts Settings** are captured in the **Activity Log**.

Next Steps

Assign shifts to relevant jobs and work orders.

Enable Shift Selection for Job Templates

Prerequisites

- Shifts enabled in your environment. To enable, create a product support case with Workday VNDLY Support.
- Ability to view and edit **Company Settings** (**More** > **Company Settings**).

Context

You can enable the ability to add shifts to a job template, so that newly created jobs let contractors allocate time against a shift.

Note: Shifts aren't required on timesheets; a contractor can either select to allocate their time against a shift or not select a shift.

Steps

1. From the header, go to **More** > **Company Settings**.
2. From the **Job & Work Orders** section, click **Job Templates**.
3. Select and edit the job template that you want to add the ability to use shifts. In the job template, select the **Apply Shifts** toggle and (optional) the **Are Shifts Required** toggle.

   Enabling or disabling the **Apply Shifts** and the **Are Shifts Required** setting on a job template will only apply to new jobs created after the setting is enabled. This setting won't impact existing jobs.
4. (Optional) If you're using the Workday VNDLY time import templates and you want to include shift assignments, download and use the updated **Time Import** templates to include shift assignments in the file.

Next Steps

Create Shifts.

Create Shifts

Prerequisites

Apply Shift Selection to Job Templates

Context

You can create shifts to apply automatically or manually to a job or work order. With a shift, you can specify the days and times of the shift, as well as assign any shift differentials that you want to incentivize with a pay increase.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Definitions** tab, click **Create**.

   (Optional) You can also create a new shift by copying an existing shift.

4. As you create the shift, consider:

Option	Consideration
Internal Shift Name	Clear the **Use this name for all users** check box if you want to enter a different shift name that displays to all users. You might want to do this action if you have a shift name that is highly technical or long. This name wouldn't make sense to a resource manager or hiring manager who just needs the shift covered. Example: A shift is named Shift jh000023432. But the **Alternate Shift Name** is Weekend Swing Shift.
Start Time/End Time	Enter the times that shift begins and ends. If you enter a shift that is 12 hours or longer, Workday VNDLY warns you that the shift is over 12 hours long. Also, if you create a shift that crosses midnight (Example: 11:00pm to 6:00am), VNDLY warns you that the shift will end the following day. You won't be restricted in entering time. These warnings just give you the opportunity to check to make sure that you've entered the times that you want.

5. (Optional) On the **Shift Rules** tab, create rules that target the shifts to specific criteria.

   You can configure shift differentials here if you need them.
6. (Optional) On the **Shifts Settings** tab, enable the warnings that display if a contractor tries to save or submit their timesheet if their time falls outside the defined shift days or times.

   Enabling this setting doesn't prevent the contractor from saving a timesheet with time outside the defined shift days or times. The setting only lets contractors know about the discrepancy.

Create Shift Rules

Prerequisites

Create Shifts.

Context

You can create criteria and rules to ensure your shifts and shift settings apply in specific scenarios. Rules can limit the shifts that display to managers while creating and editing a job or work order. The configured rules can also determine how shift settings are applied and enforced.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Rules** tab, click **Create**.
4. As you create the shift rule, consider:

Option	Description
Criteria	Add criteria to define scenarios when your configuration should be applied. The criteria display from the least specific to most specific.

Option	Description
	Workday VNDLY evaluates and uses the most specific criteria for the rule. Example: You create 2 shift rules for an IT worker located in California: • Rule 1 Criteria: Subdivision: California, Shift = Shift A. • Rule 2 Criteria Job Template: IT Subdivision: California, Shift = Shift B. Workday VNDLY applies Rule #2 because it's the more specific rule.
Shift Strategy	• Select **Dedicated** to enable managers to assign a single shift to a contractor on a work order. • Select **Flexible** to enable managers to assign more than 1 shift on a work order.
Shift Differentials	Select the **Enable Shift Differentials** toggle to add shift differentials to the shift. Before you can **Enable Shift Differentials**, you need to select: • A currency for the **Currencies** criteria. • At least 1 shift. If you don't know what differential to apply yet, select **None** as the **Shift Differential Type**. This selection creates a placeholder for the **Shift Differential Type**, so you can enter the differential later.

Result

Shift rules automatically trigger and apply if there are criteria that match when you create a job from a template that has shift selection.

Note: All criteria must match before VNDLY applies the rule.

Example

Example: You want to have night shifts available for Bindery Operator jobs located in Charlotte, North Carolina and want to encourage contractors to take those shifts. You create a rule where the:

- **Location** is **Charlotte** for the **Criteria**.
- **Currencies** is **US Dollar (USD)**.
- **Shift Strategy** is **Dedicated**.
- **Shift** is **Night Shift**.
- **Shift Differentials** is enabled and **Shift Differential Type** is **Bill Rate + Rate Differential** with **Rate Differential** is 5.00 for a 5 dollar increase in the hourly rate.

You then select the Bindery Operator job template with shifts selection enabled and select Charlotte as the location. The **Shifts** fields now populate with the information that you specified in the rule.

Bulk Update Shifts

Prerequisites

You must have these permissions:

- *shift.settings.edit*
- *shift.settings.read*

Context

You can bulk update shifts. This action enables you to update several shifts at once, saving you time and allowing you to avoid mistakes.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Definitions** tab, select the shifts that you want to update.
4. As you update the shifts, consider:

Option	Consideration
Bulk Deactivate	You can't select deactivated shifts on a job or work order. If the deactivated shifts are assigned to a job or work order, the shift selection clears. You'll need to select a new shift on the job or work order.
Bulk Delete	You can only bulk delete shifts that aren't assigned to a job or work order.

Concept: Shift Rules

Shift rules give you the ability to target your shifts to specific criteria that you select. These configured rules enable your requesting managers to see and select only shifts that apply to them when creating and editing a job and or work order (if they have the proper permissions). The rules also determine how some of the shift settings are applied and enforced.

When you create a shift rule, you:

- Define the criteria that trigger the rule for the shift.
- Select the shift strategy to use.
- (Optional) Apply shift differentials to the shift.

  The currency criterion is required if you enable shift differentials.

Shift strategies are ways that a client might manage their shift needs per work order. You can select between 2 shift strategies:

Dedicated shift strategy. This strategy limits the contractor to only 1 shift for the assignment. Dedicated shift strategy is a great way to maintain a 1 to 1 relationship between a single shift and a work order. Workday VNDLY doesn't restrict contractors from being assigned to multiple work orders with a dedicated strategy, but does restrict contractors from being assigned to 2 different strategies on work orders.

- Dedicated shift strategy gives a simpler contractor timesheet experience. It allows for consistent scheduling with no variance for outside shift working.

- You might use a dedicated strategy when you only need a contractor to cover a single shift. Or if you have an integration with an external system that restricts contractors to a single work order. By default, the shift assignment displays on the timesheet so that the contractor doesn't have to select which shift to allocate their time.

Flexible shift strategy. This strategy enables you to assign a contractor to more than 1 shift on the same work order.

- Flexible shift strategies require you to allocate the time manually on the timesheet, so that Workday VNDLY knows which shifts the hours were worked against.
- You might use this shift strategy if you have a contractor that the client assigns to work multiple shifts. This contractor might need the flexibility to be able to punch in and out of their assigned shifts as needed.

When creating shift rules, consider:

- Rules only apply to job templates that have **Apply Shifts** enabled.
- Updates to existing shift rules will only apply to all future jobs and work orders with shifts.
- Workday VNDLY prevents the creation of duplicate rules, but won't prevent users from creating rules that overlap.
- Workday VNDLY evaluates and uses the most specific criteria for the rule.

  You create 2 shift rules for an IT worker located in California:

  - Rule 1 Criteria: Subdivision: California, Shift = Shift A.
  - Rule 2 Criteria Job Template: IT Subdivision: California, Shift = Shift B.

  Workday VNDLY applies Rule #2 because it's the more specific rule.

Concept: Shift Differentials

Shift differentials assign an additive or multiplier to the bill rate. They're used by companies to compensate hard-to-fill times differently to encourage workers to take those shifts.

You configure shift differentials in shift rules, where the differential automatically populates on a job template when that rule triggers. You can also assign or update a shift differential during offer release and during the modification of a work order.

Consider that shift differentials:

- Aren't required.
- Don't impact budget, or approvals based on budget, for jobs or work orders. This characteristic is because Workday VNDLY doesn't know how many hours a worker allocates against their assigned shifts. Also you can edit differentials at any time, making the differentials inconsistent to calculate. Because of these variables, shift differentials don't have an impact on approvals based on budgets.
- Won't take effect if premium rates are in use. Premium rates take precedent.

- Calculate in these special circumstances:
  - **Holidays**. Shift differentials that apply to a day with a holiday premium will calculate shift differential followed by the holiday premium.
    - First, the (Bill rate + shift differential) or (Bill rate × shift differential).
    - Then + (holiday premium) or × (holiday premium) is added to the bill rate modified by the shift differential.

      Example: You have a bill rate of $25/hr with a shift differential of an addition of $10/hr. Your holiday premium is time and a half. The formula to calculate this rate would be: (25 + 10) × 1.5 = $52.50/hr.
  - **Overtime**. Calculations made with shift differentials and overtime follow the same formula used by premium rates and OT formulas:
    - (Bill Rate + Shift Differential) × Overtime × Hours.
    - (Bill Rate × Shift Differential) × Overtime × Hours.

Concept: Backdate Shifts on Work Orders

You can backdate changes to assigned shift strategies, shifts, and shift differentials. This action enables you to adjust timesheets so they accurately reflect the contractor's time.

You backdate shifts through the Modify Work Order action. To backdate shifts, you must have the *workorder.modifications.shifts_backdate.create* permission. Contact your Workday VNDLY administrator to get this permission.

With this ability, consider:

- You can backdate shift strategy on work order modifications if the wrong shift strategy was applied. You can change the shift strategy from flexible to dedicated or dedicated to flexible. However, you can't assign workers to conflicting strategies on work orders.
- If you backdate the shift or shift strategy, the user is required to resubmit approved timesheets to reprocess.
- If you backdate only the shift differential:
  - Workday VNDLY doesn't require the user to resubmit approved timesheets for invoiced time. VNDLY automatically regenerates the invoice line items with the updated rate.
  - Line items on the timesheet update automatically for approved timesheets that aren't invoiced.
- If you select an effective date that predates where there are timesheet records, Workday VNDLY automatically updates, resubmits, and reapproves that change on the timesheet. This action automatically creates updated invoice line item records.
- When a shift on a work order is backdated, you'll receive a warning. This warning states that the change creates additional invoice line items for previously submitted timesheets once approved.

Calculation Engine

Concept: Calculation Engine Formulas

Calculation engine formulas enable you to determine how key billable amounts are calculated. With calculation engine formulas, you can:

- Choose the order by which billable amounts are calculated to support needs such as rounding in different locations, placing premium rates on the pay rate, and PAYE (pay as you earn) calculations.

- Choose to calculate billable amounts differently for different types of work, such as calculate regular time differently from overtime.
- Target and manage different sets of calculations for different jobs and work orders, giving flexibility to support multiple needs in a single tenant.
- Define if a formula is meant to be used as a formula group or as a nested formula.

Creating Formulas

When creating calculation engine formulas:

- All calculations follow order of operations (PEMDAS/BEDMAS).
- The formula builder supports numbers, operators (+, -, *, /), and parentheses.
- You must start a decimal value that's less than 1 with a 0 in the 1's place. Example: 0.25.
- You can't use parentheses-based multiplication. You must include an operator next to the parenthesis. Example: Use 2 * (4 + 3), not 2(4 + 3).
- Formula components with **Operator** in the name use the operator from the source. The operator components must be surrounded by numbers or formula components representing numbers. Example: If you've already configured differentials or premiums in Shifts, you could enter *(Shift Differential Operator)(Shift Differential)*.
- If you require rounding at different points in the calculation, you need to create a formula for each rounded part, then place that formula into another formula. Example: You may want to round your bill rate without overtime to the nearest whole number, but not round your bill rate with overtime. You would set a rounding rule for your base bill rate as *Round Half Up* and your overtime formula to *Do Not Round*.
- You can choose between a Simple or Conditional formula. A Conditional formula enables you to define the equation that the system should use based on meeting certain values or conditions. This enables you to override the value when certain conditions are met.
- Clicking the **Validate** button confirms that the entered formula can be calculated. However, it doesn't confirm the accuracy of the formula.
- Once a formula is saved and validated, you can utilize the **Simulate** button in the **Actions** menu to simulate the formula and see how it would calculate totals.
- Pay rate and markup are not used in bill rate-based calculations.
- For pay rate-based calculations, markup is a decimal value, and can be used to calculate the markup amount. Pay rate based programs must have at least 1 pay rate rate card configured.

We recommend the following when building formulas:

- For complex equations, consider creating your equations on paper or in a spreadsheet before recreating it in VNDLY.
- If your program is using flat rate work types and multiplier work types, you may want to create conditional formulas to calculate these differently.

New or Duplicate Formulas

You might choose to start building your system calculations from a new, blank formula, or you might choose to start building your system calculations by modifying an existing formula.

There are several things to consider when choosing to start from a new formula or duplicating an existing formula:

	Create New	Duplicate Formula
Pros	• Only the elements you add will be in your calculations, reducing the risk of accidentally including a value you don't use in your program's calculations. • All conditions will be written by your program and the logic will be tailored specifically to your needs. • New formulas can be nested in other formulas.	• Helps ensure main system configurations are covered by formulas. • You don't have to know how to configure the conditions to meet the common use cases. • Can replace just the pieces your program needs different. • All custom formulas and select bill rate system formulas can be duplicated from the **Actions** menu on the formula to be duplicated.
Cons	• It's possible to miss the formulas or logic needed for the less frequent calculations, like flat rates.	• May include values in formulas that aren't used by the program. • May require additional clean up to ensure the formulas represent the desired calculations.

Steps: Calculation Engine

Prerequisites

You must have the *calculation_engine.settings.update* permission.

Context

Calculation Engine enables you to manage and customize the formulas used for system calculations. VNDLY provides system formulas components and system formulas, but you can customize formulas as needed.

Calculation engine functionality enables:

- meeting organization and region-specific requirements by determining the formulas used for key financial calculations.
- full visibility of the breakdown of calculations.
- automation of the assignment of formulas to jobs.

Steps

1. Create Custom Calculation Engine Formula Components.
2. Create Calculation Engine Formulas.
3. Create Calculation Engine Formula Groups.
4. Create Calculation Engine Rules.

Create Custom Calculation Engine Formula Components

Context

Formula components define common system values and allow creation of custom values that may be used to calculate billable amounts in formulas.

Formula components can either be:

- System Components: Sourced from throughout the system.
- Custom Components: User-created in the **Formula Components** tab.

Updates to system components must be performed where that system component originates.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. On the **Formula Components** tab, click **Create New**.
4. Complete the required fields.

Option	Description
Component Value	The numeric value that is used in formula calculations. This value can be negative.
Display Component Value in Calculation Breakdown As	How this value will be formatted in the **Calculation Breakdown**. The options are: • Number • Currency • Percent

5. Click **Save**.

Create Calculation Engine Formulas

Prerequisites
You need the following permissions:

- *calculation_engine.settings.read*
- *calculation_engine.settings.write*

Context

Formulas combine formula components and other formulas to indicate how billable amounts should be calculated.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Accounting** section, click **Calculation Engine**. Select the **Formulas** tab.
3. Click **Create New**.

   To duplicate an existing formula, click the formula that you want to duplicate, and select **Duplicate** from the **Actions** drop-down menu.

4. Complete the required fields:

Option	Description
Purpose of Formula	Determines how this formula should be used when calculating billable amounts. • *To be used in a formula group as a bill rate*: This formula displays when building a formula group. It can also be used in another formula. • *To be used as a nested formula*: This formula can be added into other formulas, but can't be directed in the formula group.
Display Formula Result in Calculation Breakdown As	How this value displays in the calculation breakdown. The value is stored as the numerical value in reporting regardless of your selection.
Rounding Preference	Determines the strategy to be used when rounding the result of the formula. • *Banker's Rounding with Currency Precision*: The system default rounding. Uses Round Half Even as the method up to the precision of the related currency. • *Round Half Up*: If the number after the desired rounding precision is 5 or more, round down. • *Round Half Down*: If the number after the desired rounding precision is 5 or less, round down. • *Round Half Even*: If the number after the desired rounding precision is 5, the precision number is rounded to the nearest even number. • *Do Not Round*: All decimal places are maintained.
Rounding Precision	Determines how many decimal places the result of this formula should be rounded. This option is available only if you selected one of the following **Rounding Preference** options: • *Round Half Up*. • *Round Half Down*. • *Round Half Even*.
Build a Simple Formula	The entered equation is always used during calculations when applied in another formula or formula group.
Build a Conditional Formula	The logic in a conditional formula enables you to define the equation that the system should used based on matching certain values or conditions. Multiple layers of conditions may be supported.

Create Calculation Engine Formula Groups

Prerequisites

The formula you want to associate to the formula group must exist.

Context

Formula Groups contain sets of bill rate formulas that calculate billable amounts based on the work type. Formula Groups are assigned to jobs and work orders.

When your program needs billable values in VNDLY calculated differently from the default system configurations, you can create and manage formula groups to assign to jobs and work orders for timekeeping to use when running calculations.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Formula Groups** tab and click **Create New**.
4. Complete the following fields:

Option	Description
Pay Type	The pay type that can use this formula group. Because the calculations and checks performed can vary by pay type, each type must have its own set of formulas. When selecting formula groups on jobs and work orders, only the formula groups matching the selected pay type will appear. This value cannot be changed after save.
Program Rate Type	Designates if this set of formulas is Bill Rate based or Pay Rate based. Pay Rate based formulas must align to a pay rate rate card. If using Bill Rate based, calculations start from the Work Order Bill Rate. If using Pay Rate based, calculations can start from the Work Order Pay Rate and Markup. This value cannot be changed after save. • *Bill Rate Based*: Calculations for billable amounts start from the bill rate. Pay Rate and Markup are collected and stored for reference purposes, but are not used in calculations for billing on entered time. • *Pay Rate Based*: Calculations for billable amounts start from the pay rate. These calculations must align to a Pay Rate Rate Card, and users are allowed to enter the pay rate and markup, and the bill rate is calculated. Values can be entered between the pay rate and the bill rate in any order.
Default Formula	Select an existing formula to calculate the billable amounts for time billed against work orders using this formula group. Only formulas that are

Option	Description
	selected as **To Be Used** in the formula group as a bill rate setting from when the formula was built display here.
Add Override Formula	You can utilize override formulas to create exceptions where a type of work should be calculated differently from the default.

5. Click **Save**.

Create Calculation Engine Rules

Context

Rules define a set of conditions that apply the specified formula configuration when the criteria has been met. Example: You can create a rule to automatically apply the formula group to the workers in Texas using the **Subdivisions** criteria.

Rules can be overridden on the job or work order by users with the correct permissions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Rules** tab and click **Create.**
4. Complete the required fields:

Option	Description
Add Criteria	Criteria define scenarios when your configuration should be applied on Jobs. All Criteria must be met for the rule to apply. You may only add one Criteria from each Criteria family in a given rule.
Pay Type	The pay type that can use this rule. Because the calculations and checks performed can vary by pay type, each type must have its own set of formulas.
Program Rate Type	Designates if this rule is Bill Rate based or Pay Rate based. Pay Rate based formulas must align to a pay rate rate card. If using Bill Rate based, calculations start from the Work Order Bill Rate. If using Pay Rate based, calculations can start from the Work Order Pay Rate and Markup. This value cannot be changed after save. • *Bill Rate Based*: Calculations for billable amounts start from the bill rate. Pay Rate and Markup are collected and stored for reference purposes, but are not used in calculations for billing on entered time. • *Pay Rate Based*: Calculations for billable amounts start from the pay rate. These calculations must align to a Pay Rate Rate Card, and users are allowed to enter the pay

Option	Description
	rate and markup and the bill rate is calculated. Values can be entered between the pay rate and the bill rate in any order.
Formula Group	The formula group that should default when the criteria match the fields completed on the job form.

Example: Create Pay Rate Based Formulas

This example illustrates how to create a pay rate based formula.

Context

You're operating a pay rate based program model and want to save time and manual effort. We'll build pay rate formulas to source the pay rate and markup values to calculate the bill rate and use criteria to determine when these formulas should be applied.

Prerequisites

You must have at least one pay rate rate card.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Formulas** tab, and locate the system formula for **Final Bill Rate (Hourly Pay)**.
4. Click **Actions** and select *Duplicate* from the drop-down menu.
5. Enter a **Formula Name** of *Pay Rate Calculation*.
6. Under **Formula Builder**, locate the **Define a New Equation for this Condition** field for **Condition Group 3**.

   The equation should display as: *([Bill Rate] [Work Order Premium Rate Operator][Work Order Premium Rate Modifier]) * [Work Type Rate Modifier]*
7. Replace *Bill Rate* with *Pay Rate* using **Add Formula Component**.
8. Enter *1 + [Markup]*.

   The equation should now display as: *(([Pay Rate]*(1+ [Markup])) [Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) * [Work Type Rate Modifier]*
9. Under **Condition Group 5**, locate the **Define a New Equation for this Condition** field.

   The equation should display as: *(((([Bill Rate] [Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) [Shift Differential Operator] [Shift Differential]) [Timesheet Premium Rate Operator] [Timesheet Premium Rate Modifier]) * [Work Type Rate Modifier]) [Calendar Pay Rate Operator] [Calendar Pay Rate Modifier]*
10. Replace *Bill Rate* with *Pay Rate* using **Add Formula Component**.
11. Enter *1 + [Markup]*.

    The equation should now display as *(((([Pay Rate] * (1+ [Markup])[Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) [Shift Differential Operator] [Shift Differential]) [Timesheet Premium Rate Operator] [Timesheet Premium Rate Modifier]) * [Work Type Rate Modifier]) [Calendar Pay Rate Operator] [Calendar Pay Rate Modifier]*
12. Click **Save**.
13. Select the **Formula Groups** tab and click **Create New**.

14. Enter the following information:

Option	Description
Formula Group Name	*Pay Rate Worker*
Pay Type	*Hourly*
Program Rate Type	*Pay Rate Based*
Default Formula	*Pay Rate Calculation*

15. Click **Save**.
16. Select the **Rules** tab and click **Create**.
17. Enter the following information:

Option	Description
Rule Name	*Pay Rate Rule*
Pay Type	*Hourly*
Program Rate Type	*Pay Rate Based*
Formula Group	*Pay Rate Worker*

18. Click **Save**.

Result

As you open new jobs, the new formula group is reflected in the **Formula Groups** field for jobs that meet your criteria that align with the rate card and settings configured above.

When sourcing a pay rate, the system uses the updated formula to calculate the bill rate by pulling the pay rate and markup values.

Taxes

Add Tax Overrides to Work Orders

Prerequisites

- Permission to add tax overrides to work orders.
- Global tax settings must be configured.

Context

Work Orders use the current work site to determine which tax rate to use for timesheets and expenses. Programs have the option to enable tax overrides on Work Orders. Depending on which users manage tax rates for your program such as the MSP and Program Team or Vendors, you might not be able to perform this action.

See the article for Managing Global Taxes in VNDLY for instructions on enabling Work Order tax overrides.

Steps

1. From the header, select **More** > **Work Orders**.
2. Click the Work Order that you wish to add a tax override to.

3. Under the **Tax Overrides** section, click **+ Add More**.
4. Select the **Start Date**.

   This field indicates when your tax override takes effect. You can also add an **End Date**, which is optional.
5. When selecting a **Tax Behavior** consider:

Option	Description
Don't Tax This Work Order	Taxes aren’t calculated for this work order.
The Rate is Fixed to a Single Tax Location	Taxes are calculated based on a specific Work Site, including those tagged as tax_location_only. Select a Work Site from the drop-down list.
Set the Rate Manually	Taxes are calculated based on your specifications. Select the country for your tax rate and provide the information and tax percentages associated with that country.

6. Click **Create Tax Override**.

Create Invoice Templates

Context

Invoice templates enable you to prefill some of the recurring fields and determine the viewable fields on invoices, giving you the ability to control and customize your own invoice PDFs. You can toggle various sections on or off using the option near the top of the header for optional sections. Example: You could toggle off the **Remit To** section if you didn’t want this section to display on your invoices. All changes made are reflected on the preview invoice on the right side of the page.

Steps

1. From the header, select **Invoices** > **Invoices Summary**.
2. Select the **Templates** tab, and click **Add Template**.
3. While completing the **Formatting** section, consider:

Option	Description
Vertical Layout/Horizontal Layout	Configure whether you'd like the invoice to display vertically or horizontally.
Invoice Number	Configure whether you wish the invoice number to display in the Header.
Workday VNDLY Logo	Configure whether you wish the Workday VNDLY Logo to display in the header.
Page Numbers	Configure whether the page numbers display in the footer. You can also configure the alignment: left, center, right.
Date Created	Configure whether the date created displays in the footer. You can also configure the alignment: left, center, right.

4. Consider these items while completing the **Template Titles** section:

Option	Description
Template Name	Identifies the template.
Report Title	Static text that displays on the invoice.

5. Consider these items while completing the **Payment Terms** section:

Option	Description
Entry Type	Select whether you prefer to enter the payment terms manually or to have the payment terms read from the vendor profile.
Display Options	Indicate whether you want payment terms and the due date to display on the invoice.
Payment Terms (in days)	Number of days after the invoice gets finalized when the bill-to entity can provide payment based to the remit-to entity without penalty. The number is generally contractual, and is only available if you selected an Entry Type of Manual.

6. Consider these items while completing the **Bill To** section:

Option	Description
Bill To	The entity responsible for paying the invoice amount.
Bill To Logo	Enables you to upload a file of the logo for the entity responsible for paying the invoice amount.

7. Consider these items while completing the **Remit To** section:

Option	Description
Entry Type	Select whether you prefer to enter the remit to details manually or to read the remit to details from the vendor profile. If you select **Read From Vendor Profile**, you can select the fields you want to include. Selecting to use the **Remit To Address** from the Vendor Profile will only apply to invoices containing a single vendor. Mixed-vendor invoices don't take advantage of this option.
Remit To	The entity to which the payment should be sent.
Remit To Logo	Enables you to upload a file of the logo for the entity where the payment should be sent.

8. Consider these items while completing the **Taxes - Header** section:

Option	Description
Show Tax Amount in Header	Select to display the tax amount on the invoice header.
Show Tax Registration Number	Select to display the tax registration number on the invoice header. When selected, you must select the entry type. If you select **Manual**, you must enter the tax registration number. If you select **Read from Vendor Profile**, the tax

Option	Description
	registration number is automatically pulled from the vendor profile.

9. Consider this item while completing the **Custom Fields** section:

Option	Description
Custom Fields	Only custom fields configured to display on invoices are available for selection. Each template can display different custom field configurations as needed for that invoice. To display on the Template, configure the Custom Field at the **Business Unit: All** level in Custom Field settings.

10. Consider this while completing the **Messages** section:

Option	Description
Message on Invoice	Enables you to enter a message that displays on the invoice.

11. Click **Edit** to the right of the **Invoice Details** section of the Template Preview.
12. Consider these items while completing the **Invoice Details** section:

Option	Description
Report	Select the appropriate report, which determines the fields that are available for selection. Then check the box for each field that you want on the report. You can modify the field name and order of the fields if necessary.
Create Column	You'll need to enter the Group Name and then select the fields you want included in the group. Click **Add to list**.

13. Consider this while completing the **Subtotals** section:

Option	Description
Subtotal	Fields selected in the **Invoice Details** section that can be subtotaled display here. Check the box for each field that you wish to include subtotals for on the invoice.

14. Consider this while completing the **Invoice Details Grouping** section:

Option	Description
Invoice Details Grouping	Enables you to group fields containing the selected values together. Check the box for one or more fields that you wish to organize by.

15. Consider these while completing the **Table Formatting** section:

Option	Description
Table Row Stripes	Adds alternating gray rows to your invoice tables for easier viewing.
Table Cell Borders	Adds borders to each cell in the invoice tables for easier viewing.

16. Click **Edit** to the right of the **Totals** section of the Template Preview.

17. Consider these while completing the **Taxes - Footer** section:

Option	Description
Show Rate	Includes the tax rate percentage on the invoice footer.
Show Tax Amount in Footer	When selected, displays the total amount of taxes on the invoice footer. Select **Combined Taxes** to display the combined total of taxes, or **Split Taxes** to display a row for each tax type on the invoice.

18. Consider these while completing the **Totals** section:

Option	Description
Show Client Totals	Select to display client totals on the invoice.
Show Vendor Totals	Select to display vendor totals on the invoice. When this option is selected, you can also choose to **Show Client Subtotal** or **Show Discounts**.
Display Currency Code on Totals	Select to display the totals with the local currency code. If you also select **Display Totals in Base Currency**, the totals display with the base currency code.
Display Totals in Base Currency	Select to convert the totals to the base currency amount.

19. Check the box for **Use as default** if you wish to make this template the default invoice template.
20. Click **Save** near the top right of the page.

Manage Global Tax Settings

Prerequisites

- Have tax management permissions.

Context

Your program team might want to enable and configure global taxes for a few reasons:

- To avoid the need for a separate tax solution to manage taxes after invoicing.
- To complete invoices.
- To see your total spend in reports.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Manage Taxes**.

   If you haven’t configured taxes, you see a message indicating that *Taxes are not being managed in VNDLY.* Click **Go To Tax Configuration** to continue with this process.
3. Click the **Cog** icon near the top right of the page.

4. As you complete the **Tax Configuration** page, consider:

Option	Description
Tax rates will be managed by	Enables the program to decide who is responsible for managing tax rates on the supplier amount in VNDLY: • MSP Team/Program Team • Vendor The team selected is responsible for verifying that tax rates match their needs. If *Vendor* is selected to manage taxes, the MSP/Program team only sees **Tax Configuration**, except for programs that manage MSP fee taxes on individual work sites.
I want taxes on the MSP program fee	Determines how taxes are calculated on MSP program fees. You can select from these options: • *to not be taxed* - Taxes aren't calculated on the MSP program fee for any transactions in VNDLY. • *to be managed at each work site individually* - Enables the program team to enter tax rates directly on the work site in **Manage Taxes** settings. This option enables programs to configure MSP fee taxes on the work site even when the supplier amount taxes are managed by vendors. • *to be set by a default tax rate* - Enables the program to set a single, default tax rate for MSP fee taxes. You're prompted to select a **Country of default tax rate** to gain access and fill out the appropriate tax fields. • *to match the tax rate of the supplier amount* - The MSP fee taxes use the same rate used for the supplier amount on all taxable transactions.
Enable Canada Regulation 105 Tax	Reserves 15% automatically for work orders where the vendor is headquartered in the United States and the client work site is located in Canada.
Allow tax overrides on individual work orders	For the entity responsible for tax management, either program team or vendor, the ability to override taxes displays for that specific work order.

Change Work Site Tax Rates

Prerequisites

- Program taxes must be managed in Workday VNDLY.
- One or more work sites must be set up.

Context

You may want to edit a work site's tax rates for a variety of reasons, such as:

- Work site is eligible for a tax holiday.
- Default tax rates are not granular enough.
- Work site is tax exempt.

These steps can be completed by whichever group is managing taxes: MSP/Program team or vendors.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Manage Taxes**.
3. From the **Manage Taxes** page, select the country of the desired work site.
4. Select the work site you wish to edit tax rates for.

   You can adjust tax rates for a country's entire subdivision by clicking three dots inline with that subdivision. Example: You could adjust the tax rates for the entire state, province, or country.
5. When completing the **Tax Rate**, consider:

Option	Description
Tax Rate Example: VAT	Fields where you can adjust the default percentage of tax rates from the country's or region's default. Depending on the country, this may be one field or split into several.
Exclude all [subdivision] work sites from taxes	Found only on the country's subdivision tax rate settings. Checking this box excludes all work sites associated to that region.
Don't tax vendor amount at this work site	Vendors are not taxed at the work site.
Apply tax rate to markup portion of bill rate only	To meet certain local laws, the application only calculates taxes on the markup portion of the bill rate.
MSP program fee - [Tax Rate]	Fields where you can adjust the default percentage of tax on the MSP program fee. Depending on the country, this may be one field or split into several. This field only displays for MSP/Program team and only if taxes on MSP program fees are managed on the individual work site level.
Schedule Change	**Start Date** and **End Date** for this tax rate change.
Reason for Change	The reason the tax rate is being modified. This list can be customized in **Custom Data Sources**.
Leave a Note	Optional field to provide any additional information at the time of making the change.

Concept: Tax Management

Tax management is consolidated into a single page, with everything you need readily available. Taxes can be managed by the MSP/Program Team, by the vendors, or you can choose not to manage them in Workday VNDLY at all. From the **Manage Taxes** page, you have the ability to:

- enable and set tax settings

- add and edit tax percentages
- exempt entire countries from supplier tax calculations
- set how the MSP program fee taxes are managed - regardless of who manages the supplier tax rate

Access to tax management is restricted by permissions, so check with your program team if the menu item is unavailable.

Work Sites, Changes, and Logging

All work sites in Workday VNDLY automatically appear on this page with default tax rates displayed. Each work site and sub-division (state, province, county, etc.) have tax configuration options using the parent country or province's specific sales tax structure. Default tax tables for supported countries are retrieved from a third-party software, Avalara, and updated on a quarterly basis.

Note: You can pin a country you regularly interact with to the top of the list. Hover over the country name and click the pin icon in-line with the country name.

Workday VNDLY uses the most granular tax rate level defined for work orders. For example, if the tax rate is defined differently in the actual work order, that supersedes tax rates defined at the work site and sub-division level; tax rates defined for a work site supersede the sub-division tax rate, and so on. It's also important to point out that Workday VNDLY automatically groups invoices along two inherent rules: tax countries and currency (these rules don't need to be set up, and cannot be changed).

Changes can be scheduled for a future, known tax rate change or occur immediately for any invoices completed after the change. All changes made to tax rates on the work sites or sub-division are tracked in the related **Activity Log** for troubleshooting purposes. Additionally, scheduled and active overrides can be modified or removed when needed to ensure correct tax rates are represented. You can filter the work site list by work sites that have a scheduled change, work sites that have changed from the default rate, or work sites that haven't changed from the default rate.

Imports and Exports

Users responsible for managing taxes can download a copy of the work sites with any current overrides in the same format needed to upload back in again. Options are provided to download all work sites or just the filtered work sites the user is currently viewing.

Statement of Work (SOW)

SOW Configuration

Set Up Statement of Work Settings

Context

You can specify the options that are available when you create a new statement of work (SOW).

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Statement of Work** section, click **SOW Configuration**.

3. As you complete the **SOW Configuration** section, consider:

Option	Description
Enable Fast Path SOWs	Vendors are required to review and approve SOWs but aren't able to make edits to the SOW content.
Default Fast Path for every SOW?	Enables Fast Path for all SOWs by default on the **SOW Settings** tab.
Allow vendors to onboard candidates	Vendors can apply and onboard contractors to any SOW Role without Client or MSP involvement.
Can SOWs be reopened?	Enables SOW managers to move a closed SOW back to *Active* status.
Program Team	Choose to have the program team display on the SOW and whether or not the program team is required or not. You can also change the title of the program team dropdown menu in the SOW by editing the **Label** field.
Enable SOW Budget Allocation	Once enabled, newly created SOWs display a separate **Charge Code** tab. 100% of their SOW total budget must be allocated across the added charge codes. Existing SOWs won't see this budget allocation functionality. This is enabled for new SOWs going forward. If charge codes need to be added, removed, or allocation updated, clients must do so via a change order which is not sent to vendors.

4. As you complete the **Role Form Configuration** section, consider:

Option	Description
Bill Rate	Specifies the type of field displayed on the SOW role form when there are no matching rate cards in the application. You can select: • Single • Min/Max • None
Rate Cards	Controls if rates for a role are enforced if a matching rate card is found. If selected, **Use Rate Card** option is hidden from users. If unselected, this option enables a user to override the rate card values on the role.

5. As you complete the **Change Order Configuration** section, consider:

Option	Description
Vendors can create change orders	Vendors can start a new change order and propose SOW changes, which are sent to the client for review and approval.

Option	Description
Client/MSPs can create change orders	Clients and MSPs can create a new change order and propose SOW changes, which are sent to the vendor for acceptance.
Skip Vendor Review for Change Orders	Lets you choose items that don't need vendor review if included in a change order. Example: You want to skip vendor review for vendors if the location is changed on a change order. Select **Location** from the **Skip Vendor Review for Change Orders** dropdown menu. Note: This option is only available if the **Client/MSPs can create change orders** checkbox is selected.

6. As you complete the **Payment Configuration** section, consider:

Option	Description
Vendors can create approved payments adjustments	Vendors can create an adjustment for an already approved payment to correct an inaccurate amount. This adjustment is then sent to the client to review and approve.
Client/MSPs can create approved payments adjustments	Clients and MSPs can create an adjustment for an already approved payment to correct an inaccurate amount. This adjustment is then sent to the vendor to review and approve.

7. Under the **Approval Configuration** section, select **Enable approval workflow for scheduled payments** checkbox to make sure that scheduled payments go through the approval process.

Create Statement of Work Templates

Context

When creating a statement of work (SOW), you might want to include certain clauses, such as a schedule of delivery. You can create an SOW clause template that contains those clauses. This template enables you to add that text to the SOW, without needing to rewrite the clause.

Any edits to the SOW Clause Templates will only apply to future created SOWs, not already created SOWs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Statement of Work** section, click **SOW Templates**.
3. Click **Add New SOW Clause Template**.
4. Add the appropriate text in the field and select the options to apply to the clause.

Option	Description
Default	Automatically selects the SOW clause template. You can utilize this option for SOW clauses that you use often.
Active	SOW clause templates currently used. Inactive templates remain, but not available to be used.
Lock Clause	Prevents users from editing SOW clauses. You might want to use this option to protect legal

Option	Description
	language of the clause. Locked clauses can still be edited in **SOW Clause Templates** in **Company Settings**.

5. (Optional) To add sections and subsections, click **Add Section** .

Configure Rate Cards for Statement of Work in Settings

Context

To use rate cards for statements of work (SOWs), your program must have both the Workday VNDLY Extended Workforce Management (Extended WFM) and Workday VNDLY Statement of Work modules turned on.

You can create a rate card for specific vendors, which you can reuse on SOWs without referencing the Master Services Agreements. This assists with accountability within Workday VNDLY by ensuring that the correct rates apply when creating SOW roles.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Rate Card**.
3. Click the **Configuration** tab.
4. Under the **SOW** section, make your selections.

Edit Rate Cards to Include Statement of Work in Settings

Context

To apply existing rate cards to statements of work (SOWs), your program must have both the Workday VNDLY Extended Workforce Management (Extended WFM) and Workday VNDLY Statement of Work modules enabled.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Rate Card**.
3. Click **Edit** in-line with the rate card that you wish to add SOW to.
4. For the **Module** field, clear the current selection.
5. Leave the field with **All** selected to apply the rate card to both Extended WFM and SOW modules, or select **Statement of Work** to apply the rate card to only the SOW module.

Allocate Statement of Work Budgets Using Charge Codes

Prerequisites

Context

Set up **SOW Budget Allocation** on the **SOW Configuration** page. See Set Up Statement of Work Settings.

Statement of work (SOW) managers can allocate their total SOW Budget among charge codes through **Budget Allocation.** They can set a limit on how much money can be approved against each charge code on the SOW within the **Charge Code** tab of their SOW.

The **Charge Code** tab displays for all newly created SOWs and the SOW Total Budget must be fully allocated in order for the SOW to go active.

Note: Enabling this option adds the **Budget Allocation** feature to new SOWs only. Existing SOWs aren't converted in order to avoid misallocating the budget between charge codes.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **New SOW** and complete the workflow to create a new SOW.
3. Select the **Charge Codes** tab on the newly created SOW.
4. Enter the charge code details.
5. (Optional) Click **Add Another** and enter the charge code details until all charge codes have been added.
6. Enter an **Allocated Amount** of the SOW budget to each **Line Item**.

Example

If the total budget for the SOW is $15,000, an SOW manager might choose to allocate the budget in this way:

- Charge Code A can have up to $7,000 approved against it.
- Charge Code B can have up to $5,000 approved against it.
- Charge Code C can have up to $3,000 approved against it.

Next Steps

When an SOW Manager approves the payment, Workday VNDLY checks the remaining budget on the charge code selected on the payment. If there are not enough funds left to cover the payment, the approver sees an error, and must either:

- Select a different charge code to assign to the payment.
- Create a change order to allocate more funds to the charge code.

SOW Workflows

Create Statement of Work Drafts

Prerequisites

Create Statement of Work Templates.

Context

Drafts enable you to set up the scope, timeline, and budget of an SOW, which ensures you'll have all the correct people collaborating on the SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **New SOW**.

3. As you create the new SOW, consider:

Option	**Description**
Select Payment Type(s) for this SOW	Select 1 or more payment type options to determine how the SOW functions. Your selections affect which tabs display in the draft.
Select a Template for the SOW Clauses	Select a template or build your own and add the clauses manually. You can't change this selection after you click **Create SOW**.

4. Click **Create SOW**.
5. As you complete the **Overview** tab, consider:

Option	**Description**
Planned Start Date **Planned End Date**	You must enter a start date and end date to access the **Settings** tab and the payment tabs.
Planned Total Budget	Enter the maximum invoiceable amount for the SOW across all payment types. You must enter a value to access the payment tabs.
Pre-VNDLY Invoiced Amount	Enter the total of items invoiced before you created the SOW.
Non-Billable Contractors	When you select *Track*, we display the **Teams** tab. Note: The **Teams** tab always displays for a Time and Money SOW, regardless of your selection.

6. (Optional) On the **Clauses** tab, click Edit.

   This tab enables SOW admins and managers to add, modify, and delete sections and subsections of clauses in their SOWs.

Add Participants to Statement Of Work

Context

Workday VNDLY enables you to collaborate effectively with your teammates by adding them as participants on the statement of work (SOW).

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the SOW where you want to add participants.
3. Click the icon with your initials in the top-right corner of the page.
4. Click **Add Participant**.
5. Enter the **SOW Participant** and select one or more roles.

Result

The added participant receives a notification that they’re able to access the SOW.

Concept: Statement of Work Participant Role Types

Statement of work (SOW) is a collaboration between different business units. Examples: Legal, finance, procurement, operations. You can add VNDLY users and give them permissions on the SOW level.

To be added as SOW participants, users must:

- Be assigned to a user role that has an SOW Participant role tag.
- Belong to the organization unit to which the SOW is assigned.

You can add an SOW Participant to the SOW by navigating to the SOW and clicking **Add Participant**. You can grant the participant one of these role types:

- *Manager* has full control over the SOW, including making edits, changing the SOW status, and approving SOW payments and contractors.
- *Editor* can edit the majority of the SOW and change order fields during the negotiation cycle, but can’t manage the SOW status or finances.
- *Viewer* can only view SOW information.
- *Contributor* can't edit any fields, but can upload and attach documents and view SOW information.

You can grant Editors, Contributors, and Viewers additional roles to view financial or confidential SOW information. SOW Managers are automatically given permissions to view financial and confidential information, and these permissions can't be removed from the manager role.

SOW participant roles have these permissions by default. You can change these default permissions by navigating to **More** > **Company Settings** > **Security Settings** > **Roles**.

Permissions	SOW Manager	SOW Editor	SOW Contributor	SOW Viewer	SOW View Financials
Budget Read	X				
Contractor Bill Rate Read	X	X		X	X
Dashboards Read	X	X	X	X	
Vendor Co Read	X				
SOW Read	X	X	X	X	X
SOW Create	X				
SOW Edit	X	X			
SOW Manage	X				
SOW Attachment Edit	X	X	X		
SOW Participant Edit	X	X			
SOW Change Request Edit	X	X			
SOW Field Financial Edit	X				
SOW Field Financial Read	X				X

Permissions	SOW Manager	SOW Editor	SOW Contributor	SOW Viewer	SOW View Financials
SOW Accept	X				
Invoice Data Owned Read	X				

Add Roles to Statement of Work

Context

You can add a role to an statement of work (SOW) that a vendor can select to assign a candidate to.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Navigate to the **Team** section of the SOW.
3. Click **Add Role**.
4. Select a role template from the drop-down menu.
5. Fill out the rest of the form.
6. (Optional) Add an attachment.

   You can add a document by clicking the plus sign in the **Documents** window. From there, you can upload a file with these formats:

   - .pdf
   - .docx
   - .jpeg
   - .jpg
7. Click **Create Role**.

Schedule Fixed Price Payments

Prerequisites

- Create a draft statement of work (SOW) with the **Payment Type** of **Fixed Price**.
- Complete the required fields in the **Settings** tab of the SOW.

Context

A fixed price payment is a static payment amount determined by scheduled dates. You can schedule 1 or more fixed payments for an SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired, draft SOW.
3. Select the **Fixed Price Payments** tab.
4. Click **Schedule Payments**.
5. Enter the **Payment Details**.

   Some fields might already be prefilled based on settings and the SOW setup.

Next Steps

Once all details are complete, send the SOW to the vendor for review and modifications by clicking **Send to Vendor**.

Add Milestone Payments

Prerequisites

- Create a draft statement of work (SOW) with the **Payment Type** of **Milestone** selected.
- Complete required fields in the SOW's **Settings** tab.

Context

A milestone is a marker in a SOW project that signifies a change or stage in development. You can schedule 1 or more milestones for payments on a draft SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired appropriate SOW in *Draft*status.
3. Select the **Milestones** tab.
4. Click **Add Milestone**.
5. Enter the **New Milestone** details.

Next Steps

Once all details are complete, send to the vendor for review and modifications by clicking **Send to Vendor**.

Add Units

Prerequisites

- Create a draft statement of work (SOW) with the **Payment Type** of **Unit Price** selected.
- Complete required fields in the **Settings** tab of the SOW.

Context

Setting up units for an SOW involves defining the units along with the price per defined unit. You can create 1 or more unit payment types on a draft SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired, draft SOW.
3. Select the **Units** tab.
4. Click **Add Units**.

   You can upload a .csv file of units to be bulk uploaded by clicking **Bulk Add Units**. You can download the file format by clicking the related link.
5. Enter the **Define a unit** details.

Next Steps

Once all details are complete, send to the vendor for review and modifications by clicking **Send to Vendor**.

Manage Checklist Actions for Statement of Work Contractors

Context

When a statement of work (SOW) is in a status before *Active* in Workday VNDLY, vendors can no longer view or add checklist items to SOW roles. Checklist items can be added to SOW roles by client-side users when the SOW is sent back from the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select the **Team** tab.
4. Locate the contractor.
5. From the **Actions** drop-down menu, select **View Checklist**.

   If the checklist is still in draft mode, click **Complete Check**.
6. Click **View** or **Take Action**.

   In the checklist view, you can filter the checklists by status, assigned, or phase.

Concept: Spend Approval Authority on Statements of Work

Approval workflows rules for **Statement Of Work Acceptance** and **Statement Of Work Payments** should be set up to route the approval properly through the **Default Budget Approver** specified on the statement of work (SOW) **Settings**. You can set up this user's **Spend Approval Authority** limits within the individual user settings—found by selecting **More** > **Users**, and then opening the desired user—to define the maximum values that can be approved by that user. The workflow approval rule then follows their spend authority. Then, if the first budget approver's **Spend Approval Authority** isn't sufficient—or if the approval rule is set up to go to each user defined on the approval rule—then the approval gets sent to the designated users.

Schedule Statement of Work Closures

Context

You can schedule a statement of work (SOW) to close automatically on a date of your selecting.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the SOW and click **Close SOW**.
3. Enter the date that you want to have the SOW close.

   If you want to close the SOW immediately, select a past time on today's date.
4. Click **Next**.
5. At the **Pending SOW Actions** page, view any outstanding SOW approvals, such as open change orders or timesheet approvals.
6. Click **Initiate Closure**.

Result

When you start the closing process, a notification is sent to the SOW's vendor to inform them of the scheduled SOW end date and the deadlines for entering any remaining payment requests.

After the SOW has been scheduled, the SOW automatically closes on the **SOW Effective End Date**, and eligible work orders automatically end on the **Work Order End Date**.

Important: Once the closure process has been initiated, you can't revert it, and you can't create a new change order. You also can't edit the closure details in the Workday VNDLY application. If this process has been started in error, contact the Workday VNDLY Support team.

End Work Orders for Statement of Work Contractors

Context

If you have the permission to end a work order, you can end a work order from within a statement of work (SOW).

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Navigate to the **Team** section.
4. Locate the contractor.
5. From the **Actions** drop-down menu, select **End Work Order**.
6. Select the reason for ending the work order.
7. Click **End Work Order**.

Change Contractor Details in Statement of Work

Context

Once the contractor is active in the statement of work (SOW), the client / MSP has the access to modify certain details of the contractor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select the **Team** section of the SOW.
4. Click the **role** to see one or more contractors tagged to that position.
5. Click the contractor's name to access their profile.
6. Click **Edit** and update the details.
7. Upon completing the changes, click **Save**.

Concept: Editing Organization Units in Statement of Work

You can edit organization units on both *Draft* and *Active* Statements of Work (SOWs).

Editing Organization Units on Draft SOWs

To edit the **Organization Unit** on *Draft* SOWs, navigate directly to a specific SOW's **Overview** tab. Your edits immediately apply to the SOW and any of its roles. If contractors are applied to any of the SOW's roles, your edits also apply to their pending work orders.

Programs with the Workday Integration

If your program uses the Workday integration, you can only change the **Organization Unit** to a unit with a different staffing model if the **Prevent switching between staffing models on SOWs and SOW roles** setting is disabled in the **Workday Settings** section of your VNDLY **Company Settings**.

If an SOW's **Organization Unit** changes from a unit with a **Staffing Model** of *Position Management* and any of the SOW's roles are eligible for provisioning, VNDLY automatically removes any previous Workday position IDs from the roles. You can manually add new Workday position IDs to the roles, or you can wait for the Workday integration to assign Workday position IDs once the SOW is approved. If the SOW's **Organization Unit** changes to a unit with a **Staffing Model** of *Position Management*, you can choose to make all roles eligible for provisioning so that Workday position IDs can be added.

Editing Organization Units Active SOWs

To edit the **Organization Unit** on an *Active* SOW, create a change order. Once the change order is approved, the organization unit updates on the SOW and any of its roles. If contractors are applied to any of the SOW's roles, the organization unit also updates on their pending work orders, but active work orders aren't updated. You can skip the vendor review process for these change orders by selecting *Organization Unit* for the **Skip Vendor Review for Change Orders** field in your **SOW Configuration** settings. We also recommend selecting *Role Resource Manager* for this field, since changing organization units often requires changing resource managers.

Programs with the Workday Integration

If your program uses the Workday integration, you can only change the **Organization Unit** to a unit with a different staffing model if the **Prevent switching between staffing models on SOWs and SOW roles** setting is disabled in the **Workday Settings** section of your VNDLY **Company Settings**.

If an SOW's **Organization Unit** changes from a unit with a **Staffing Model** of *Position Management*, you'll have one of several options to manage any unfilled Workday positions on the SOW's roles The available option depends on your **Close Unfilled Positions on SOW Roles and Close Positions for all Workflows** setting configuration in your integrations settings (**More** > **Company Settings** > **Integrations** > **Configure Integrations** > **Workday** > **General Configuration**):

- If **Close Positions for all Workflows** is enabled, an alert notifies you that all unfilled positions will close automatically.
- If **Close Positions for all Workflows** is disabled and **Close Unfilled Positions on SOW Roles** is enabled, a check box displays for SOW managers to choose if they want to close unfilled positions automatically.
- If **Close Positions for all Workflows** is disabled and **Close Unfilled Positions on SOW Roles** is disabled, an alert notifies you that all unfilled positions will remain open.

If an SOW's **Organization Unit** changes to a unit with a **Staffing Model** of *Position Management*, you have the option to make all roles eligible for provisioning, which allows the Workday integration to add Workday position IDs.

Once the change order is approved internally, VNDLY sends the changes to Workday for approval, and the change order status displays as *Connector in Progress* in VNDLY. While in this status, VNDLY pauses onboarding for SOW roles to prevent onboarding contractors with position IDs that are closed in Workday. If the change order is approved in Workday, the organization unit updates on the SOW and its roles. Additionally, if contractors are applied to any of the SOW's roles, the organization unit updates on their pending work orders, but active work orders aren't updated. If Workday rejects the change order, the organization unit doesn't update in VNDLY.

Review Statements of Work

Context

When a client updates a statement of work (SOW) during review, the vendors can approve changes before accepting the SOW.

When a client sends back the SOW for approval, we disable the **Accept** button when a client saves a change.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.

2. Open and edit the SOW.
3. Click **Save**.
4. Click **Counter SOW** in the header.

Reject Statement of Work

Context

Upon review of the vendor's response to a draft statement of work (SOW), the client / MSP can select to reject the SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW in *Draft-Client Pending* status.
3. Click **Reject** on the header section of the SOW.
4. Select the **Reason** and add comments.
5. Click **Submit**.

   The SOW moves into *Rejected* status.

Onboard Statement of Work Contractor

Context

When the worker is ready to onboard, the client or MSP can select to either onboard the contractor or reject the candidate.

If the**Offer Bill Rate** entered by the vendor for a candidate is greater than the bill rate specified by the client for that position, a field indicating this difference pops up when you try to onboard the worker onto the SOW. You must approve the higher rate before onboarding.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Select an active SOW.
3. On the **Team** tab, select a role.

   You may need to click **View Roles**.
4. Click **Onboard** to activate the contractor on the SOW.

Reject Statement of Work Contractors

Prerequisites

The statement of work (SOW) should be in an *Active* status.

Context

Once the contractor is ready to onboard, the client or MSP can select to reject the contractor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Navigate to the **Team** section of the SOW.

4. Click the role to see 1 or more contractors tagged in that position.
5. Click **Reject** to terminate the worker from the SOW.

Result

The contractor's name gets removed from the **Team** list.

Create Change Order in Statement of Work

Context

Statement of Work (SOW) managers and vendor users can use change orders to update *Active* SOWs, depending on your tenant settings. Each SOW can only have one change order in progress at a time.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the relevant SOW.
3. Click **Create Change Order**.
4. Enter a **Title** and select a **Reason for Change Order**, then click **Next**.
5. Locate the section of the SOW where you want to make changes, then click **Edit**. You can edit sections on any tabs in the SOW.
6. Make your changes and click **Save**.
7. Click **Review and Send** to review your changes.
8. Once you review your changes, click **Send to Vendor**.

   Depending on your **Skip Vendor Review for Change Orders** settings (**More** > **Company Settings** > **Statement of Work** > **SOW Configuration** > **Change Order Configuration**), you can skip the vendor review process for some fields. If you enable this setting and only edit fields that don't require vendor review, the **Send to Vendor** button displays as **Approve Change Order** instead.

Result

Change orders in review display either the *Awaiting Client Review* or the *Awaiting Vendor Review* status. Reviewers can't edit the change order. However, SOW managers can approve or reject it, and vendor reviewers can add comments to it. Once the change order goes through internal approvals, the changes will be made to the SOW.

You can view change orders directly from the specific SOW's **Change Order** tab or on the **Statement of Work** page (**Statement of Work** > **Statement of Work** > **Change Orders**). You can also use the **Statement of Work - Change Orders** dataset in reports.

Approve Change Order in Statement of Work

Context

Upon agreement of both parties, if the client / MSP wishes to approve the change order submitted by the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW in *Awaiting Client Review* status.
3. Click **Accept SOW** once you've reviewed the changes.

   The change order will now move into *Active* status.

Reject Change Order in Statement of Work

Context

Upon review, if the client / MSP wishes to reject the change order submitted by the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select a line item from the **Change Orders** section that you would like to act upon.
4. Click **Review** to take an action.
5. Click **Reject** once the review is completed.
6. Enter the **Reason** for rejection.

   The change order moves into *Rejected* status.

Approve Milestone for Statement of Work

Context

After a milestone is created and the statement of work (SOW) is active, the vendor can request payment on each individual milestone. It works as follows:

1. Vendor requests payment for a milestone.
2. Client approval becomes necessary.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click the **Milestones** tab.
3. Click any milestones with **Pending Approval**.

   The **Approval Status**, on the right side of the page, is where you can accept or reject.
4. Before doing so, one must select to edit, and add the correct **Charge Code**.
   Assuming acceptance, an invoice line item is generated.

Approve Unit Payment Request for Statement of Work

Context

Client’s workflow can decide to approve or reject the milestone.

1. Vendor requests payment for a unit.
2. Client approval becomes necessary.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Navigate to the **Units** tab and click **Payment Requests**.
3. Click the desired payment request.
4. Enter the correct charge codes in the designated areas, then approve or reject on the right.
   Assuming acceptance, an invoice line item is generated.

Reopen a Work Order

Prerequisites

- Configure reopen settings on the Work Order option in the **Work Order Settings** page of **Company Settings**.
- Security: *workorder.reopen* permission.

Context

You can reopen work orders closed within the number of days set in **Reopen within X days of Work Order End** on the **Work Order Settings** page in **Company Settings**. Example: You want to reopen a closed work order to fulfill a labor need.

Note: If the Extended Workforce Management Work Order Modification workflow approval is enabled, it will still be triggered after completing the **Reopen Work Order** pop-up window.

Steps

1. From the header, select **More** > **Work Orders**.
2. Select the work order that you want to reopen.

   You can use the **Filters** to limit the results to work orders in *Ended* status.
3. Click **Reopen**.
4. As you complete the task, consider:

Option	Description
End Date	Enter the new date that the work order should finish.
Reason for Reopen	Indicates why the work order was reopened.
Leave a Note (Optional)	Enter details on why you're reopening the work order.
Current Budget Amount **Budget Change Amount** **Modified Budget Amount** **Total Invoiced Amount** **Remaining Budget Amount**	Displays the available budget, including increases due to reopening the work order. You can't directly update these fields, but you can utilize the **Revise Budget** area to make changes in real time.
Revise Budget	When checked, enables you to enter a new: • **Expense Amount** • **Tax Amount** • **Program Fee** • **Other Amount**

Cancel Statement of Work

Context

The statement of work (SOW) can only be canceled when the SOW is in these statuses:

- *Draft*
- *Draft-Client Pending*

- *Draft-Vendor Pending*
- *Countered*

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click the **three dots** near the top-right of the page.
3. Select **Cancel SOW**.
4. Select the **Reason** and add **Comments**.
5. Click **Submit**.

   The SOW moves into *Cancelled* status.

Adjust Approved Statement of Work Payments

Prerequisites

- The ability to adjust statements of work (SOW) must be configured in your instance.
- A workflow approval rule must exist for the **Statement of Work Adjust Approved Payment**.
- Configure who can approve payment adjustments (**More** > **Company Settings** > **Statement of Work** > **SOW Configuration** > **Payment Configuration**).

Context

You can adjust an incorrect SOW payment for milestone, fixed price, and unit payments that has already been approved. This process enables you to make sure that payments are invoiced correctly and the final total is reflected on the SOW payment and your SOW remaining budget total is updated.

Timesheets should continue to be adjusted directly on the timesheet or through a work order adjustment. There's currently no limit on how many times you can adjust a payment.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **Adjust Payment**.
3. Edit the amount that you want to adjust and click **Save**.
4. Select the **Adjustment Reason** and click **Submit**.

Result

The adjustment is sent to both the client and the vendor where they must review and approve the adjustment before it can go into effect. Once approved by all parties, the adjustment amount is either refunded or deducted from your **SOW Remaining Budget** and **Committed Amounts** so that you have an accurate total of how much money is left to spend on your project. An audit trail is created in a new payment table on the **Payment** page.

At this point, a new invoice transaction is also created in the **Invoice** tab, showing either a debit or credit for the adjustment. If the original payment invoice line item is still **Not Started** when the adjustment is approved, that original invoice transaction is deleted and the new adjusted transaction is created. If the original transaction was already invoiced or is the process, it remains as is, and a new transaction is created with either a debit or credit amount.

Example

This example illustrates an instance where you would adjust an approved SOW payment.

A vendor realizes that they forgot to mark their milestone payment as taxable and you already approved the payment 2 weeks ago. You create an SOW payment adjustment and send it for review to the vendor and any program team members that need to approve it. Once approved, the taxable amount is added to the payment and an audit trail is created in a new payment table on the payment page.

Update the Budget Allocation on Statements of Work

Context

Once a statement of work (SOW) is active and if the SOW Budget Allocation feature is enabled for the instance, you must use a change order to modify details. Example: the **SOW Plan Total Budget** and **Charge Code Budget Allocation** can only be modified through a change order. Users see a banner on the **Charge Code** tab alerting them that a charge order must be created to make any edits.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW and select the **Change Orders** tab.
3. Click **Create Change Order** and enter the **Title** and **Reason for Change Order**.
4. Click **Next**.
5. Select the **Charge Codes** tab and make the appropriate modifications.
6. Click **Save**.
7. When all appropriate changes have been made, click **Review and Send**.

   If you only made changes to the charge code budget allocation, you see a message indicating the change order only requires client review.
8. Click **Send to Vendor** or **Request Approvals** depending on what changes you made.

   The option for **Request Approvals** displays if you only made changes to the charge code budget allocation. Example: Updating amounts or moving allocated funds from one charge code to another.

   The option for **Send to Vendor** displays if you made any changes in addition to the charge code budget allocation. Example: Updating payment types or dates.

Result

Once the change order is approved by all required parties, the changes are reflected on the active SOW.

Worker Profile Management

Create New Worker Profile

Prerequisites

- Worker profile must be enabled and configured in **Company Settings**.

Context

Worker profile management captures headcount and individual worker information—such as candidate details, onboarding checklists, assignments, and start and end dates—for those not tracking time or expenses within Workday VNDLY.

Steps

1. From the header, select **More** > **Worker Profile Management**.
2. Click **Add New Worker Profile**.
3. Check the box for **Is New Worker**, if appropriate.

   The required fields differ depending on if the worker is new or returning.
4. Once you've completed the appropriate fields, click **Create**.

   If enabled in the **Candidate Profile Configuration** settings, Workday VNDLY checks for duplicate worker profiles. If a potential match is found, a pop-up displays that either enables you to continue and **Create** the new profile—and each profile is marked as a *Duplicate* so you can check the match—or **Cancel** to erase the entered data and proceed to the found, matching profile.

   If no match is found, you see the **View Worker** page, which displays the worker tracking as *Pending Verification*.
5. Complete any necessary checklist actions.

   Upon completion, the status updates to *Ready to Onboard*.
6. Click **Onboard**.
7. Complete the fields for the email template. The template generates an email to notify the worker of their start and end dates and their resource manager.

Change Rehire Eligibility

Prerequisites

- Enable the setting **Link Worker Profile to Master Candidate Record** within **More** > **Company Settings** > **People** > **Candidate Profile**.

Context

If a worker, for whatever reason, is no longer eligible for rehire with your organization, you can unmark them as eligible for rehire when you end the worker profile. You can also edit the rehire eligibility within **Worker Profile Management**.

Steps

1. From the header, select **Contractors** > **Workers Summary**.
2. Open the worker's profile.
3. Click **Edit**, and consider:

Option	Description
Rehire Eligible	Select or clear this check box determines whether an *Ineligible for Rehire* warning displays when a user tries to enter a worker that matches this profile.
Rehire Eligible Date (If Specified)	An informational field where you can specify a certain date the worker can be rehired after.
Rehire Eligible Comments	This field becomes required when **Rehire Eligible** is unchecked.

Result

If the worker is marked ineligible for rehiring, and a similar worker profile is entered under **Worker Profile**, a warning displays noting a match and giving the user the option to proceed or cancel.

Reporting

New Report Builder

Manage Reports

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Have these permissions:

- *custom.reports.settings.admin* to edit a report.
- *custom.reports.create.full* to edit a report.
- *custom.reports.create.limited* to sort and download a report.

Context

Use this page to edit the fields of your report or change how the data displays using filters and sorting.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. To edit a report, click the name of the report you want to edit from the list.
3. Click **Fields** to modify the fields of the report or to add more fields. Consider:

Option	Description
Fields	• Click **Add Fields** to select from a list of available fields, or create custom values and calculated fields. • To re-order fields, click into the field item to drag and drop it into the desired position. • To remove or rename fields, click the three dots on each field item and click **Rename** or **Remove**. • You can also rename fields directly on the report by double clicking the column header and entering the desired field name after you add the field.

4. Click **Filters** to manage the filters within your report. When you click **Save** the filters remain in place after you close the report.

   You can quickly filter content by clicking the 3 dots in the column header and entering the **Filter Value**. These filters don't remain after closing the report.

5. Click **Sorts** to manages the order of how VNDLY returns data in your report. When you click **Save** the sorting order remains in place after you close the report.

   You can quickly sort content by clicking the 3 dots in the column header. The sorting order doesn't remain after closing the report.

   Note: When you add sorts from the report editor they can be exported. You can't export sorts that you add from the column header.
6. Click **Save Report**.

Result

We update all changes in real time on the report.

Next Steps

When you download the report, you can change the export format by selecting **More** > **Download As**.

Manage Report Settings

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Have these permissions:

- *custom.reports.schedule.admin* to see and modify other users' report schedules.
- *custom.reports.settings.admin* to modify Report Settings in all reports.

You must be the Report Owner or have shared access.

Context

Use the **Settings** tab to manage details of reports, schedule the delivery of a report or share the report with others.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Select the report that you want to manage.
3. On the **Settings** tab, in the **Report Details** section, click **Edit**.
4. Complete the **Report Details** section:

Option	Description
Report Description	You could use this space to document the types of data the report covers or why you created the report. This displays on the **Reports** page.
Report Owner	You can assign the Report Owner by user, role tag, or role. Assigning by role tag or role enables group ownership.
Report Config Export	You can enable users to share the report with others using a configuration export.
Report Type	Select *Saved Report* to restrict access to the Report Owner and select users.

Option	Description
	Select *Base Report* to enable global access to all users with access to the underlying data.
Hyperlinks in Excel	You can enable the report to automatically convert URLs into hyperlinks when you export it.

5. Schedule Reports.
6. Complete the **Report Sharing** section:

Option	Description
Share with (Roles, RoleTags, Users)	Search by Roles, RoleTags or Users to share the report with. Click the trash can next to a recipient to stop sharing the report with them.
Vendor Companies	Select specific vendor companies from the list to share the report with. This is a multi-select list.
Share with all vendor companies	Select the checkbox to share the report with all vendor companies.

   The report displays on the Reports Home page for the Role Tags, Users, or Vendor Companies you selected.
7. Click **Save** to save the changes for the **Report Sharing** section.

Add Calculated Fields

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must be the report owner or have shared access to the report.
- You must have the *custom.reports.create.full* permission.

Context

You can create calculated fields when adding or editing fields on a report. Calculated fields enable you to:

- Perform a calculation on database
- Create a value that isn't directly stored in VNDLY.
- Filter or aggregate data.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Select the report that you want to edit.
3. Click into the search bar to display available fields.
4. Click **Create a Calculated Field**.
5. Enter a **Calculated Field Name**.
   This displays as the column title on the report.
6. From the **Formula** and **Data Type** prompts, make your selections.
7. In the **Source Data** section, specify the base datasets and values to apply the calculation.
8. Click **Save and Add to Report**.

Example

You want to track how many days it takes for new invoices to get approval. You create a new custom report. For the **Dataset**, you select **Invoice Details**. You add the **Approved Date** and **Creation Date** fields to the report. To display the number of days that each invoice takes to get approval, you create a new calculated field:

Calculated Field Name	*Dates to Approval*
Formula	*Date Diff*
Data Type	*Date*

For **Source Data**, you add these values:

Section	**Value**
Invoice Details	*Creation Date*
Invoice Details	*Approved Date*

You save and add the calculated field to the report. The report displays a new column for **Days to Approval** with the calculated result for each row.

Next Steps

To edit a calculated field, click **Add Fields**, click the 3 dots next to the field, then click **Edit Calculated Field**.

Add Fields to Your Reports

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must be the Report Owner or have shared access to the report.
- You must have the *custom.reports.create.full* permission.

Context

You can add, remove, and modify fields on base reports and custom reports. You can also create custom values and calculated fields for your organization's specific needs.

Note: We continue to support existing reports with multiple joined datasets but you can't add new fields that are outside of the join relationship. If you need to add new fields to your report containing multiple datasets, submit a brainstorm and we'll review your request.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Select the report you want to edit.
3. Click **Fields**.
4. Click **Add Fields**.

5. Click **Add** for each field you wish to add to your report.

   From the list of available fields, click the down arrow next to the Dataset column header to filter the list of fields or click **Browse All Fields**.

   As you search for available fields to add to your report, consider:

Option	Description
Dataset Fields	If you haven't added any fields to the report, we display all available fields and their corresponding datasets within the selected report area. After you add the first field, we display a filtered list of all fields that are available in the starting dataset.
Calculated Fields	Select from calculated fields previously created for this report.
Parameter Fields	Select from the custom parameters to pass a value into the report when executing from the Custom Report API. See Manage Report Settings to set up APIs.
Values	Select from custom values created for this report.
System Variables	Select from fields related to system and report data.
Browse All Fields	View all available fields with descriptions in a full page view.
Create a Value	Add a custom field to the report.
Create a Calculated Field	Add a calculation on report fields.

6. Click **Add to report**.
7. (Optional): You can re-order the fields by dragging them to a new position in the **Report Editor** pane.
8. Click **Save Report**.

Result

We update all changes in real time on the report.

Add Filters to Your Reports

Context

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

You can add filters to reports.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to add filters to.
3. Click **Filters** and click **Add Filter**.
4. Select your **Dataset**, **Field Name**, **Condition**, **Use Parameter** (if applicable), and **Value** (if applicable).

5. Click **Save** to see your filters in your report.
6. Click **Save Report** if you'd like these filters to permanently stay on your report.

Set Up Sort Criteria for Your Reports

Context

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

You can configure sort criteria for reports as needed.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to add sort criteria to.
3. Click **Sorts** and click **Add Sort**.
4. Select your **Dataset**, **Field Name**, and **Sort Direction**.
5. (Optional) Reorder the sort criteria rows by dragging each row to a new position in the list of sorts.
6. Click **Save** to see your sort criteria in your report.
7. Click **Save Report** if you'd like your sort criteria to stay in your report.

Copy Existing Reports

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must be the Report Owner or have shared access to the report.

Context

You can make copies of existing reports instead of creating new reports from scratch. Report copies contain the same data as original reports. We only reset the **Scheduling** and **Report Sharing** sections.

Example: You're recruiting team manages a Global Candidate Report, which tracks information from candidates in all regions. Hiring managers want region-specific versions of the same report that they can edit. You make these copies of the original report to share with the hiring managers:

- AMER Candidate Tracking
- EMEA Candidate Tracking
- JAPAC Candidate Tracking

Steps

1. From the header, select **Reports** > **Reports Home.**
2. Select the report you want to copy.
3. Click **More** > **Save as New**.
4. Enter a **Report Name** and click **Save**.

Next Steps

Modify any fields as necessary. See Manage Reports on page 197.

Create Custom Reports

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must have the *custom.reports.create.full* permission.

Context

Custom reports enable you to select only the required fields and filters you need in a report. This can be helpful when you know exactly what data you're looking for and may be more efficient than starting with a generic base report.

Example: A program team wants to create a quick report that lists all jobs for a certain resource manager. Instead of starting with a base report and removing unneeded fields, they create a custom report that pulls in only the necessary fields such as *Job Title*, *Job ID*, *Dates*, and a filter for the resource manager.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click **Create Custom Report** and select the **Starting Dataset**.
3. Click **Continue**.
4. Search for fields to add to your report.

   Click the down arrow next to the column name to filter the list of fields.

   As you search for available fields to add to your report, consider:

Option	Description
Dataset Fields	If you haven't added any fields to the report, we display all available fields and their corresponding datasets within the selected report domain. After you add the first field, we display a filtered list of all fields that are available in the starting dataset.
Calculated Fields	Select from calculated fields previously created for this report.
Parameter Fields	Select from the custom parameters to pass a value into the report when executing from the Custom Report API. See Manage Report Settings to set up APIs.
Values	Select from custom values created for this report.
System Variables	Select from fields related to system and report data.
All Fields	Select from fields that are available from all datasets in the report domain.
Browse All Fields	View all available fields with descriptions in a full page view.
Create a Value	Add a custom field to the report.
Create a Calculated Field	Add a calculation on report fields.

5. Click **Save Report**.

Next Steps

When you download the report, you can change the export format by selecting **More** > **Download As**.

Sync Reports Across Tenants

Prerequisites

Have the:

- *custom.reports.report_definition.import_export* permission to perform the sync transaction.
- *custom.reports.create.full* permission to import the report definitions file.

Context

You can sync your reports between Test and Production tenants. You can sync your reports by exporting and importing report definitions and transfer the reports between your tenants.

Steps

1. Navigate to the tenant with the report definitions you want to export.
2. From the header, select **Reports** > **Reports Home**.
3. Select the reports that you want to transfer.
4. Click **Export Report Definition**.
5. Click **Download**.
   The .json format file downloads.
6. Navigate to the tenant that you want to import the report definitions.
7. From the header, select **Reports** > **Reports Home**.
8. Click **Actions** > **Import Report Definition**.
9. Select the .json file you downloaded from the other tenant.
10. Click **Import**.

    You're now the report owner.

    VNDLY automatically adds the report as a saved report.
11. To view the list of your reports select **Saved Report** filter option.
    VNDLY displays the imported reports at the top of the list.

Create Reports from Templates

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must have the *custom.reports.base.report.manage* permission.

Context

VNDLY has many prebuilt, base reports that you can use as templates for different reporting needs. Base reports can save you time, since they already contain the relevant fields, which might include calculated fields, sorts, and filters. Example: The **Contractor Daily Hours** base report has 18 fields already added and sorted on the report, including a pre-made calculated field for **Contractor Name**.

You can use base reports as-is, or modify them into a new custom report. Modified base reports save as a copy, not as a new template. You can keep the report as a saved report, or change the report type to convert it into a base report template.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click **Create from Report Template**.
3. Enter a **Report Name**.
4. In the **Choose Base Report** section, search or select from the list of base reports.
5. Click **Create New Report**.
6. Click **Save Report**.

Next Steps

Modify any fields as necessary. See Manage Reports on page 197.

Change Report Types

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- You must be the Report Owner or have permissions to access and edit the report.
- You must have the *custom.reports.create.full* permission.

Context

You can change report types to allow or restrict global access to reports.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Select the report you want to change.
3. On the **Settings** tab, in the **Report Details** section, click **Edit**.
4. As you select a **Report Type**, consider:

Option	Description
Saved Report	• Only accessible to the Report Owner and users with shared access to the report. • Example: You create a Custom Work Order Report that enables you and some of your team members to view data specific to the vendors that you manage. Save it as a **Saved Report**.
Base Report	• Globally accessible to all users in a tenant who have permission to access the underlying data. • Example: You create a Global Expense Report template that can be used by anyone in your company. Save it as a **Base Report**.

5. Click **Save**.

Result

In the **Reports Home**, you can filter the reports that display by **Report Type**.

Manage Report Versions

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

- Set up **Version History** in your environment.
- To manage versions for a specific report, you must be the Report Owner.
- To manage versions for all reports, you must have the *custom.reports.settings.admin* permission.

Context

The **Version History** section of a report enables you to:

- View the history of a report.
- Track changes every time a user saves the report.
- View or revert to earlier versions of reports.
- Export an earlier version of a report.
- Create a new report using an earlier version as a template.

Note: Version history displays earlier versions of the report with current data. Older versions don't show older data.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Select the report with versions you want to manage.
3. Click **More** > **Version History**.
4. When you click on a version of the report, you can view updates for that report in the **Changes** section.
5. When you select **View Version**, consider:

Option	Description
Back to current version	There are no changes to the selected version. Return to the most recent version of the report.
Make this the current version	Replace the current version of the report with the selected version.

6. To save the selected version of the report, consider:

Option	Description
Download	Export the selected version of the report as a spreadsheet.
More > Save As New	Create a copy of the selected version as a new report.

Example

The Payroll team uses an Invoicing report and modifies it a few times throughout the year due to process changes. As part of an audit, you want to compare how the report was structured in the beginning of the year to how the report is structured now. You access the report's **Version History** to find an earlier version and export it for comparison with the current version.

Download Report Builder Schema

Context

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

You can download and export a list of each dataset available in **Custom Reports**. These downloads include a list of fields and their descriptions for each dataset.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click **Actions** and click **Reports Schema**.
3. View the datasets or fields and their related information.

   You can use the filters, search bar, or page navigation arrows as needed.
4. Select an export option.

Option	Description
Export Report Schema Datasets	This option displays on the **Datasets** tab. Download a spreadsheet with all report datasets and related information. The format of the exported file depends on the configurations for your environment.
Export Report Schema Fields	This option displays on the **Fields** tab. Download a spreadsheet with all report fields and related information. The format of the exported file depends on the configurations for your environment.

Configure Reports

Context

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Reports Settings is where administrator users can manage preferred date formats, shareable role tags, and export results for their reports. The **Activity Log** displays any recent changes to this page.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Reports**.
3. Make your adjustments and click **Save**.

Schedule Reports

Prerequisites

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Have these permissions:

- *custom.reports.schedule.admin* to update report schedules owned by other users.
- *custom.reports.settings.admin* to modify Report Settings in all reports.
- *custom.reports.admin* to see and modify report schedules saved by other users.

Context

When scheduling reports, you can have them delivered by email or SFTP. To have a scheduled report delivered by SFTP, contact the VNDLY Support team to have the SFTP location configured in VNDLY. Currently, SFTP endpoints are only available to Administrator and MSP users.

VNDLY can only schedule a report that is saved.

After scheduling a report, you can choose to run the report now for ad-hoc reporting between the scheduled dates. Only the Schedule Owners can perform this task.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you want to schedule.
3. On the **Settings** tab, in the **Scheduling** section, click **Add Schedule**.
4. Fill out the schedule form and click **Create Schedule**.

   In the **Report Delivery** section, to select the **SFTP** delivery method, you must have SFTP endpoints configured on VNDLY. To configure endpoints, contact the VNDLY Support team.
5. (Optional) To run a scheduled report now:
   a) On the **Settings** tab, in the **Scheduling** section, click the 3 dots and select **Run Now**.

      A message confirms that the schedule has been successfully triggered. A record of the *Run Now* action is available in the report history for tracking. Using the *Run Now* option won't change a scheduled run of that report.

Result

When a report is delivered (either on a schedule or by using the **Run Now** option), VNDLY generates a log record under the **Report History** tab on the **Reports** page. You can click **Download** to download the report.

Note: If a report generates zero records, an empty file is sent to the SFTP server to confirm that there wasn't an error with the file generation process.

Concept: Activity Log for Reports

Note: We’re in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

In VNDLY, every workflow action is captured and tracked in the **Activity Log**.

You'll see our **Activity Log** feature for units, such as:

- Jobs
- Timesheets
- Work Orders
- Expenses, Invoices.

VNDLY also captures changes for every edit or change, such as:

- Field Name
- Change From
- Change To

- Changed By
- Changed On

You can create a custom report to export **Activity Logs** using the **Create Custom Report** task. Select the **Activity Log** dataset and add the fields you want to export. Click **Download**.

Note: The file size available for downloading reports VNDLY is limited by Microsoft Excel's specifications. The maximum worksheet size is 1,048,576 rows by 16,384 columns. Some reports may be larger than this and can't be downloaded.

Concept: Reporting Permissions

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

You can grant and be given varying levels of access to different capabilities and data within reporting and the report builder. Typically, users have multiple permissions working together to enable functionality. The least privileged user has only *custom.reports.execute* and the most privileged user has all permissions. Find the full list of VNDLY permissions and their descriptions by selecting **More** > **Company Settings**, clicking **Security Settings** under the **Security** section, and then selecting the **Permissions** tab.

Vendor and Contractor Users

While users such as resource managers can have reporting permissions added and removed from their **Roles** under **Security Settings**, vendor users get these reporting permissions by default:

- *custom.reports.execute*
- *custom.reports.export*
- *custom.email.schedule*
- *custom.reports.create.limited*
- *custom.reports.create.full*
- *custom.reports.share*
- *custom.sftp.schedule*

If you need to revoke any of these permissions for your VNDLY environment, please contact the VNDLY Support team.

Contractors have no access to reporting.

Dataset, Field, and Record Level Access

Having permissions to create, execute, and manage reports enables you to perform those actions, and to see the resulting data within the reports. You must also have the permissions related to the relevant area of VNDLY. This access is controlled in 3 levels or access: by dataset, by field, and by record.

Dataset and Field Access

You need permissions for a specific dataset or field, such as work orders or the budget field, to see the data in the report builder. Example: To see information around the work orders dataset, you'd need either the *workorder.owned.read* or *workorder.read* permission. To see information around the **Budget** field, you'd need the *budget.read* permission.

To view the required permissions for reporting datasets and fields, go to **Reports** > **Reports Home**, click **Actions** > **Report Schema**. On the **Datasets** tab, these permissions are in the **Access Permissions** column, and in the **Fields** tab, you can find them in the **Field Permissions** and **Dataset Permissions** columns.

Manage permissions for custom fields through the **Permissions** section of the **Custom Fields** page. See Create Custom Fields in Settings in Workday VNDLY for more information.

Record Access - Full Read Versus Owned

For many datasets, there's an option to limit records based on users who have some ownership of—or association to—the records. Otherwise, you can give them access to all records in a dataset that have data, not just the ones they're associated to.

Full-read permissions use a naming convention that doesn't include owned in the permission name. Example: *checklists.read*. When assigned a role that contains a full-read permission, you acquire read access to the data based on the **Organization Unit** where the role was assigned to you, giving you access to any **Organization Unit** that's a descendant of yours.

Owned permissions use a naming convention that includes owned in the permission name. Example: *checklists.owned.read*. When assigned a role that contains an owned read permission, read access to the data is based on 2 criteria:

- The **Organization Unit** where the role is assigned.
- Ownership of the records in the dataset reported.

This access does generate for the descendants of the related **Organization Unit**, but both criteria must be satisfied. Examples of ownership (though not a comprehensive list):

- Resource managers are considered owners of jobs and work orders.
- A user who created a job is also considered an owner of that job and any work orders under it.
- Expense approvers are considered owners of an expense report record.

You can further enable **Reporting Hierarchy Access** on owned-read permissions, by going to **More** > **Company Settings**, selecting **Security Settings** under the **Security** section, and navigating to the **Configuration** tab. When you check the boxes in-line with each module, anyone with an owned-read permission passes that permission up their reporting line, according to the field **Report to User** in the user profile.

Reference: Calculated Fields in Reports

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Calculated fields use dataset fields to create additional points from your existing data.

A calculated field can either:

- Perform a calculation on database fields to create a value that isn't directly stored in VNDLY.
- Select values in database fields based on customized criteria.

A few of the reasons why you might want to use calculated fields include:

- The metrics you need aren't directly stored in VNDLY.
- You want to examine data across multiple dataset fields in your report.
- You want to filter or aggregate data.

These formulas are available in VNDLY for calculated fields:

Formula	Description	Example Use Case
Add	Add up multiple numeric fields. Displays total of fields combined into column format. You can add up to 5 numeric fields.	You need to display a combined value of the Client VMS Amount and Client Amount fields.
Age	Number of days since a date.	Display the number of calendar days since an approved value was logged. Example: Age of

Formula	Description	Example Use Case
	Note that only 1 age value can be used per calculated field.	current date - approved date = 18 days.
Array To String	Formats an array into a string of comma-separated values.	
Avg	Averages the values.	You need the average bill rate for a resource manager. Average *client rate*.
Case	Transform values based on conditional statements. Operates as an if/and statement. Typically used to populate values if a client needs something specific for a business unit, hiring manager, and so on. You can use additional if/then statements within case statements.	If the hiring manager equals Ashley Smith, you want the value marked as "Case Testing", if it doesn't equal Ashley Smith, leave blank.
Coalesce	Returns from a group of fields the value of the first field that isn't null.	
Concatenate	Concatenate, or combine, multiple string-type fields into 1 field. This option can be used up to 7 times in 1 formula. Defaults to adding a space as the separator.	You need to combine invoice number with the vendor name, this calculated field would display both values combined into a single field.
Count	Count occurrences of the selected field value in a selected group of fields.	You need a count of how many system IDs there are in each source type.
Date Diff	Date difference in days.	Displays the different between invoice creation date and approved date.
Date Trunc	Truncate a date field to a specified level of precision.	You only need the month from the date field.
Divide	Divide 2 numeric fields. This operates similarly to Sum.	You need to obtain the value of the client amount divided by the MSP tax amount.
Min	Minimum value in the group of values.	You want to display the earliest date of timesheet values, so the min calculated field removes the timesheets that aren't the smallest values.
Max	Maximum value in a group of values.	You want to display the latest date of timesheet values, so the max calculated field removes the timesheets that aren't the largest values.

Formula	Description	Example Use Case
Multiply	Multiply values of selected fields. This option operates opposite of Divide.	Display an increased bill rate comparison by creating a separate **Value** field with the suggested increase. Example: a 20% increase, so the **Value** would be an integer of 1.5. Then use this formula to multiple the source of the created value against the source of the bill rate.
Pad Text	Add padding to the text of the values selected. Operates like SubString formulas.	
Round	Rounds a value to its nearest integer or number with closest number of decimal places. Precision can also be a negative.	You need the number to round by 1 precision, which then displays the rounded number after decimal.
Subtract	Subtracts 2 numeric fields. Displays total of fields subtracted in a single column format. You can subtract up to 5 numeric fields.	You need to display a subtracted value of the Client Amount from the Client VMS Amount field.
SubString	Sequence of characters in a string extracted from the left, middle, or right of a specified value.	You need the first 3 letters of the **Approved By** person.
Sum	Aggregate function to sum values of a field in the group.	
Date To String	Formats the input expression as a string, converting a value into text.	
Un Nest	Splits multiple values in a field into multiple rows.	

These data types are available in VNDLY:

Data Type	Description
Integer	Returns a whole number, no decimals.
Number	Returns a number, including decimals.
String	Returns a series of characters.
Date	Returns a date. Example: 15 Jun 2021
Date and Time	Returns a date and time. Example: 15 Jun 2021 05:38:07 PM

Reference: Reports Page

Note: We're in the process of improving the reporting module. The new reporting module is not available to all customers at this time. Check with your VNDLY administrator if the new reporting module is available in your environment.

Navigate to the Reports page by selecting **Reports** > **Reports Home** from the header. From the **Reports** page, you can:

- Select an existing base or custom report to view, modify, or export.
- Create a report from a report template.
- Create a custom report.
- View report settings.

After selecting a report, you see several tabs and buttons. The options used to adjust report primary settings and results are:

- Table tab:
  - Fields
  - Filters
  - Sorts
- Settings tab

Fields Button

The **Fields** button manages the base dataset, calculated fields, parameter fields, values, and system variables for your report. You can rearrange, rename, add, and remove fields on your report from this button.

Options available to you on the **Fields** button include:

Field	Description
Dataset Fields	The base dataset used for this report. You can rearrange, rename, add, and remove fields on your report.
Calculated Fields	Displays calculated fields applied to your report. You can also add additional calculated fields here.
Parameter Fields	Displays API parameter fields available as well as ones already added to the base dataset.
Values	Displays datasets that you might find valuable in addition to your base dataset.
System Variables	Displays field names that can be used to customize the report. Example: You could insert *The report run date* system variable to customize the report to include the report date automatically.

Filters Button

The **Filters** button manages the filters within your report. When you use filters, you can further control what data returns when you run your report.

Options available to you on the **Filters** button include:

Field	Description
Dataset	Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The filter will only pull information from this dataset.
Field Name	The name of the data that displays as a field name.
Condition	Triggers for including specific data in a report. You can use relative dates in this field as well.
Use Parameter	Enables you to use custom parameters to pass a value into the report when executing from the Custom Report API.
Value	Further defines filter in relation to condition. Depending on the **Condition** you select, this field can be unavailable.

Sorts Button

The **Sorts** button manages the order of how VNDLY returns data in your report.

Options available to you on the **Sorts** button include:

Field	Description
Dataset	Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The sort criteria will only pull information from this dataset
Field Name	The name of the data that displays as a field name
Sort Direction	The criteria that determines which direction the data returns in your report (ascending or descending).

Settings Tab

The **Settings** tab manages the information that your report displays on the Reports Home page. Options available to you on the **Settings** tab include:

Field	Description
Report Name	The name of the report that displays on the **Reports** page.
Report Description	Although this box is optional, you could use this space to document the types of data the report covers or why you created the report. This displays on the **Reports** page.
Report Owner	This option enables you to change the user with ownership of the report.
Report Section	This prompt aids with filtering on the **Reports** page. Depending on the selection you make, the report displays when you select the corresponding type under the **Report Section** filtering options.

Field	Description
	Example: If you select **Contractors** for the **Report Section** field, and then click **Contractors** under the **Report Section** filter, the report displays in the list
Report Type	This option enables you to change the report type between **Saved Report** and **Base Report**. A **Base Report** is globally visible to users who have access to the underlying data.
Hyperlinks in Excel	This option enables you to include or exclude hyperlinks in downloaded Excel files.
API Parameter Fields	This option enables you to manage API Parameter fields.

Legacy Report Builder

Manage Reports Settings

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

Reports Settings is where administrator users can manage preferred date formats, shareable role tags, and export results for their reports. The **Activity Log** displays any recent changes to this page.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Reports**.
3. Make your adjustments and click **Save**.

Change Base Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

Workday VNDLY has many prebuilt, base reports that you can use as-is, but you might determine a base report doesn’t meet your reporting needs. You can then modify these base reports into a new custom report. These modified base reports save as a copy, not as a new template. Users can keep that report as a saved report or they might convert the report to a base report template.

Steps

1. From the header, select **Reports** > **Reports Home**.

2. Click **Create New Report**.
3. Enter a **Report Name** and, if desired, a **Report Description**.
4. Under the **Choose Base Report** section, use the search bar or categories to search and select a base report to modify.
5. Click **Create Report**.
6. Navigate between the tabs of the new report to modify and add report data, and consider these tabs:

Option	Description
Report	Modify report details such as the **Name**, **Description**, and **Report Type**.
Dataset	Join related datasets, add calculated fields and API parameter fields. For **Calculated Fields** and **API Parameter Fields**, click the section to expand and add. Note: Once you create a calculated field, you must add it as a **Field** to return it in the result set.
Fields	Add, modify, and clear report fields. You can reorder them to display differently in the result set using drag and drop.
Filters	Add, modify, and delete report filters that control what data returns in the result set.
Sort	Add, modify, and delete report sort criteria.
Results	Displays report results.
Schedule	Create or modify report schedules.
Share	Share modified reports with other users or vendors.

7. Once you've created the desired report configuration, click **Run**. The **Results** tab opens to display the report data.
8. (Optional) Click **Save** to keep the report for future use.

Create Custom Reports in Workday VNDLY

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

Custom reports give you additional flexibility outside of our base reports. We recommend modifying a base report before attempting to create a custom report from scratch.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click **Create New Report**.
3. Click **Create Custom Report** to open the **Custom Report Builder**.
4. Use the **Dataset** drop-down to select the base dataset.

5. Modify and add report data by navigating between tabs and consider:

Option	Description
Dataset tab	Join related datasets, add calculated fields, and API parameter fields. The **Related Datasets** section is empty if there are no datasets with a relationship to the dataset selected.
Fields tab	Add, modify, and clear report fields. The exclamation point warning in the tab header indicates that fields must be selected before running this report.
Filters tab	Add, modify, and delete report filters.
Sort tab	Add, modify, and delete report sort criteria.

6. Navigate to the **Results** tab to view data results.
7. (Optional) Click **Save** to keep the report for future use.

   Enter a **Name** and **Description**.

Edit a Report

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

In order to edit a report, you must have the correct permissions.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you wish to edit from the list.
3. Select the tab where you wish to make edits.
4. Make your edits and click **Save**.

Add Fields to Your Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can add fields to reports.

Steps

1. From the header, select **Reports** > **Reports Home**.

2. Click the report that you wish to add fields to.
3. Click the **Fields** tab and click **+Add Field**.
4. Select the **Dataset**, **Field Name**, **Custom Name** (if applicable), and **Aggregate** rule (if applicable).
5. Click **Save** to permanently add the field to your report.
6. Click **Run** to see your new field in your report.

   To rearrange your fields in the list, click and drag the field to the position you want.

Add Filters to Your Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can add filters to reports.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to add filters to.
3. Click the **Filters** tab and click **+ Add Filter**.
4. Add your **Dataset**, **Field Name**, **Aggregate** function (if applicable), **Condition** (if applicable), and **Value** (if applicable).
5. Click **Run** to see your filters in your report.
6. Click **Save** if you'd like these filters to permanently stay on your report.

Set Up Sort Criteria for Your Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can configure sort criteria for reports as needed.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to add sort criteria to.
3. Click the **Sort** tab and click **+Add Sort Field**.
4. Select your **Dataset**, **Field Name**, and **Sort Direction**.
5. Click **Run** to see your sort criteria in your report.
6. Click **Save** if you'd like your sort criteria to stay in your report.

View Results in Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can view the results of a report as needed.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to review results for.
3. Click the **Results** tab.
4. If you wish to view the results in a different format, click **Export**.

Result

If you or another user whom the report is shared with can't see results, it could be due to their user permissions.

Copy Existing Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

At least one of the following must be true:

- You must be the owner of the report.
- You must have shared access to the report.

Context

You can duplicate an existing report by copying it.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you wish to copy from the list.
3. From the **Actions** drop-down, select **Save as New**.
4. Modify any fields as necessary.
5. Click **Save** to make a copy of the original report.

Create New Reports From Older Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Version History set up in your tenant.

Context

You can create a new report using an older report as a template.

Note: A new report created with **Version History** displays an updated version with current data. Older versions of the report don't display older data.

Steps

1. From the **Reports** menu, select the report that you want to use as a template.
2. Select **Version History** from the **More** menu and select the version that you want to copy.
3. Close the **Version History** window and from the **More** menu, select **Save As New**.
4. Click **Save** to make a copy of the original report.

Track Changes Within Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

- **Version History** set up in your environment.
- Administrator permissions if you want to view all changes in version history for all reports. Other users can view the changes only on their reports that they had created.

Context

You can track changes within a report by viewing that report's version history.

Note: Version history displays updated version of the report with current data. Older versions don't displays older data.

Steps

1. From the **Reports** menu, select the report that you want to view earlier versions.
2. Select **Version History** from the **More** menu and select the version that you want to view to see what changes have been made.

Example

Example, you run a report listing all timesheets. By looking at the **Version Control** of the report, you can select a timesheet report from the previous quarter, export that report, and compare the fields with the current quarter's report. Remember that the data within an older report is current data, not historical data.

Schedule Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

When scheduling reports, you can have them delivered by email or SFTP. To have a scheduled report delivered by SFTP, contact the VNDLY Support team to have the SFTP location configured in VNDLY. Currently, SFTP endpoints are only available to Administrator and MSP users.

A report must be saved for the **Schedule** tab to display.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you wish to schedule from the list.
3. Click the **Schedule** tab.
4. Click the **Create Schedule** button.
5. Fill out the schedule form and click **Create Schedule**.

   Note: If a report generates zero records, an empty file is sent to the SFTP server to confirm that there wasn't an error with the file generation process.

Result

When a report is delivered, a log record is generated under the **Report History** tab.

Share Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can share reports.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you wish to share from the list.
3. Click the **Share** tab.
4. Select the **Role Tags**, **Users**, and **Vendor Companies** you want to share the report with.
5. Click **Share**.

Result

The report displays on the **Reports Home** page for the **Role Tags**, **Users**, or **Vendor Companies** you selected.

Add Calculated Fields to a Report

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

A calculated field can:

- Perform a calculation on database fields to create a value that isn't directly stored in Workday VNDLY.
- Select values in database fields based on customized criteria.

Example: If you select the **Active Job List** base dataset under **Jobs** and you want to know how many days have occurred since the start date of a particular job. You would select:

Field	Input
Formula	`Age`
Data Type	`Date`
Source	`Job`
Value	`Start Date`

Then, you would add your new calculated field as a field to your report. When you run the report, you'll see the total number of days that have occurred since the start date under the name you selected for your calculated field.

See the article About Calculated Fields for more information on formulas and data types.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the report that you wish to add calculated fields to.
3. Click the **Dataset** tab and click **Calculated Fields**.
4. Click **New Calculated Field**.
5. Name your calculated field.

   We recommend naming your field based on the data that you would like it to create.
6. Select the **Formula** and **Data Type** you wish to use.
7. Add your **Sources** and **Values**.

Make Calculated Fields Display in Your Report

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

- A calculated field must exist.

Context

Before a calculated field will display on your report, you'll need to add it to the report.

Steps

1. Click the **Fields** tab in the report.
2. Click **+Add Field** button.
3. In the **Dataset** column, change the drop-down selection to *Calculated Fields*.
4. In the **Field Name** column, select the name of the calculated field you'd like to add to your report.
5. Click **Save** to save the changes to your report.

6. Click **Run** to see your calculated field in your report.

Join Datasets in Reports

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

Joining datasets to your base dataset can make your report more comprehensive. VNDLY suggests datasets that might be applicable to your base dataset on the **Dataset** tab under **Related Datasets**.

Note: We suggest limiting joins to one or two. The more datasets that you join to your report, the more you risk running into duplicate data.

Sometimes duplicates might be caused due to one to many relations. If you're attempting to join something that has multiple, you'll get duplicates. Example: timesheet > invoice details.

Below is a list of known joins that cause duplicate data. We recommend avoiding these joins:

- Timesheet > Invoice Details
- Jobs > Work Order (WO)

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report you wish to edit.
3. Click the **Dataset** tab.

   VNDLY suggests datasets that might be relevant to your base dataset under **Related Datasets**.
4. Click **Join** next to the datasets you wish to join to your report.

Send Reports to SFTP

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

- Have your SFTP end points set up by your Workday VNDLY representative.

Context

A secure file transfer protocol (SFTP) ensures a secure and reliable method of sharing reports between VNDLY and other systems.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the report that you wish to send to SFTP.
3. Click the **Schedule** tab.

   If no schedules exist, click **Create Schedule**. If a schedule has been created, select the schedule you wish to add SFTP to as a delivery option.
4. Click **Deliver by SFTP**.
5. Select your **SFTP Destination**.

6. (Optional) Select whether you want to add a time stamp to the report.

   Note: You can enter a Remote File Name, which overrides the default filename. Also, you can enter a Remote File Path, which creates a path for where the file will go. These fields are optional.
7. Click **Create Schedule** if it's a new schedule or **Update Schedule** if adding SFTP delivery to an existing schedule.

Change Report Types

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

Workday VNDLY report types determine which users can see a report, granted they have permissions to see the reports underlying data. Admin users can change a report's type to either allow or restrict global access to a report.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Open the appropriate report.
3. Select the **Reports** tab.
4. When selecting the **Report Type**, consider:

Option	Description
Saved Report	Reports owned by a specific user, which aren't shared, unless selected by the owner, and aren't globally visible to all users in an instance.
Base Report	Reports globally visible to all users in an instance who have access to the underlying data. Privileged users can modify or delete base reports.

Download Report Builder Schema

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Context

You can download and export a list of each dataset available in **Custom Reports**. These downloads include a list of fields and their descriptions for each dataset.

Steps

1. From the header, select **Reports** > **Reports Home**.
2. Click the 3 dots next to **Create New Report** and click **Reports Schema**.

3. View the dataset or fields and their related information.

   You can use the filters, search bar, or navigation arrows as needed.
4. Select an export option.

Option	Description
Export Report Schema Datasets	This option displays on the **Datasets** tab. Download a spreadsheet with all report datasets and related information.
Export Report Schema Fields	This option displays on the **Fields** tab. Download a spreadsheet with all report fields and related information.

Revert Reports to Earlier Versions

Prerequisites

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

- **Version History** set up in your environment.
- Administrator permissions if you want to revert any report, regardless of creator. Other users can revert the reports that they had created.

Context

You can revert a report to an earlier version. This ability allows you to access the older history of a report.

Note: **Version History** displays updated version of the report with current data. Older versions don't display older data. If you revert to an earlier version, you'll view the current data, not historical data.

Steps

1. From the **Reports** menu, select the report that you want to view earlier versions.
2. Select **Version History** from the **More** menu and select the version that you want to revert.
3. Close the **Version History** window and click **Revert**.

Example

Example: say that you've created a new invoice report where you added the **Approved By** and **Approved Date** fields. But you'd like to bring in several custom fields that are in an earlier report. You could add those fields to the current report, but it would take some time. Instead, you could revert the current report to the earlier version with the added custom fields and view the information that you want.

Concept: Activity Log for Reports

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

In Workday VNDLY, every workflow action is captured and tracked in the **Activity Log**.

You'll see our **Activity Log** feature for units, such as:

- Jobs
- Timesheets
- Work Orders

- Expenses, Invoices.

Workday VNDLY also captures changes in the system for every edit or change, such as:

- Field Name
- Change From
- Change To
- Changed By
- Changed On

You can create a custom report to export **Activity Logs** using the **Create Custom Report** task. Select the **Activity Log** dataset and add the fields you want to export. Run the report and select **Export**.

See the article for How to Create a Custom Report for more information.

Concept: Reporting Permissions

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

You can grant and be given varying levels of access to different capabilities and data within reporting and the report builder. Typically, users have multiple permissions working together to enable functionality. The least privileged user has only *custom.reports.execute* and the most privileged user has all permissions. Find the full list of VNDLY permissions and their descriptions by selecting **More** > **Company Settings**, clicking **Security Settings** under the **Organization** section, and then selecting the **Permissions** tab.

Vendor and Contractor Users

While users such as resource managers can have reporting permissions added and removed from their **Roles** under **Security Settings**, vendor users get these reporting permissions by default:

- *custom.reports.execute*
- *custom.reports.export*
- *custom.email.schedule*
- *custom.reports.create.limited*
- *custom.reports.create.full*
- *custom.reports.share*
- *custom.sftp.schedule*

If any of these permissions need to be revoked for your VNDLY environment, please contact the VNDLY Support team.

Contractors have no access to reporting.

Dataset, Field, and Record Level Access

Having permissions to create, execute, and manage reports enables you to perform those actions, and to see the resulting data within the reports, you must also have the permissions related to the relevant area of VNDLY. This access is controlled in 3 levels or access: by dataset, by field, and by record.

Dataset and Field Access

You need permissions for a specific dataset or field, such as work orders or the budget field, in order to see the data in the report builder. Example: To see information around the work orders dataset, you'd need either the *workorder.owned.read* or *workorder.read* permission. To see information around the **Budget** field, you'd need the *budget.read* permission.

To view what permissions are needed for reporting datasets and fields, go to **Reports** > **Reports Home**, click the 3 dots in-line with the **Create New Report** button, and select **Report Schema**. On the **Datasets** tab, these permissions are in the **Access Permissions** column, and in the **Fields** tab, you can find them in the **Field Permissions** and **Dataset Permissions** columns.

Manage permissions for custom fields through the **Permissions** section of the **Custom Fields** page.

Record Access - Full Read Versus Owned

For many datasets, there's an option to limit records based on users who have some ownership of—or association to—the records. Otherwise, you can give them access to all records in a dataset that have data, not just the ones they're associated to.

Full-read permissions use a naming convention that doesn't include owned in the permission name. Example: *checklists.read*. When assigned a role that contains a full-read permission, you acquire read access to the data based on the **Organization Unit** where the role was assigned to you, giving you access to any **Organization Unit** that's a descendant of yours.

Owned permissions use a naming convention that includes owned in the permission name. Example: *checklists.owned.read*. When assigned a role that contains an owned read permission, read access to the data is based on 2 criteria:

- the **Organization Unit** where the role is assigned.
- ownership of the records in the dataset reported.

This access does generate for the descendents of the related **Organization Unit**, but both criteria must be satisfied. Examples of ownership (though not a comprehensive list):

- Resource managers are considered owners of jobs and work orders.
- A user who created a job is also considered an owner of that job and any work orders under it.
- Expense approvers are considered owners of an expense report record.

You can further enable **Reporting Hierarchy Access** on owned-read permissions, by going to **More** > **Company Settings**, selecting **Security Settings** under the **Security** section, and navigating to the **Configuration** tab. When you check the boxes in-line with each module, anyone with an owned-read permission passes that permission up their reporting line, according to the field **Report to User** in the user profile.

Reference: Report Tabs

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

From the **Reports** page, when you change a base report, create a new custom report, or select an existing base or custom report, you see several tabs. Tabs used to adjust report primary settings and results are:

- Report
- Dataset
- Fields
- Filters
- Sort

Report Tab

The **Report** tab manages the information your Report displays on the Reports Home page. Options available to you on the **Report** tab include:

- **Name -** The name of the report that displays on the **Reports** page.
- **Enable Config Export -** Enables users to share this report with other clients using a configuration export.
- **Description -** Although this box is optional, you could use this space to document the types of data the report covers or why you created the report. This displays on the **Reports** page.

- **Report Type** - This option enables you to change the report type between **Saved Report** and **Base Report**. A **Base Report** is globally visible to users who have access to the underlying data.
- **Section** - This drop-down aids with filtering on the **Reports** page. Depending on the selection you make, the report displays when you select the corresponding type under the **Report Section** filtering options.
    - Example: If you select **Contractors** for the **Section** field, and then click **Contractors** under the **Report Section** filter, the report displays in the list.
- **Report Owner** - This option enables you to change the user with ownership of the report.

Dataset Tab

The **Dataset** tab manages the base dataset, joins, calculated fields, and API parameter fields for your report.

Options available to you on the **Dataset** tab include:

- **Dataset** - The base dataset used for this report. The dataset can be changed after report creation if no fields, sorts, filters, joins, or calculated fields are currently used.
- **Joins** - Displays datasets joined to base dataset.
- **Related Datasets** - Displays datasets that you might find valuable in addition to your base dataset.
- **Calculated Fields** - Displays calculated fields applied to your report. You can also add additional calculated fields here.

Fields Tab

The **Fields** tab manages the fields within your report. You can rearrange, add, and delete fields on your report from this tab. Clicking **Clear Fields** deletes all fields from your report.

Options available to you on the **Fields** tab include:

- **Dataset** - Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value.
- **Field Name** - The name of the data that displays as a field name
- **Custom Name** - Overrides the Field Name when running a report.
- **Aggregate** - Controls how the field gets grouped in the report.

Filters Tab

The **Filters** tab manages the filters within your report. When you use filters, you can further control what data returns when you run your report.

Options available to you on the **Filters** tab include:

- **Dataset** - Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The filter will only pull information from this dataset.
- **Field Name** - The name of the data that displays as a field name
- **Aggregate** - Controls how the field gets grouped in the report.
- **Condition** - Triggers for including specific data in a report. You can use relative dates in this field as well. You can use relative dates in this field as well.
- **Value** - Further defines filter in relation to condition. Depending on the **Condition** you select, this field can be unavailable.

Sort Tab

The **Sort** tab manages the order of how data returns in your report.

Options available to you on the **Sort** tab include:

- **Dataset -** Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The sort criteria will only pull information from this dataset.
- **Field Name -** The name of the data that displays as a field name
- **Sort Direction -** The criteria that determines which direction the data returns in your report (ascending or descending).

Reference: Calculated Fields in Reports

Note: We're in the process of improving the reporting module. We plan to retire this topic in a future release. Check with your VNDLY administrator if the new reporting module is available in your environment.

Calculated fields use dataset fields to create additional points from your existing data.

A calculated field can either:

- Perform a calculation on database fields to create a value that isn't directly stored in VNDLY.
- Select values in database fields based on customized criteria.

A few of the reasons why you might want to use calculated fields include:

- The metrics you need aren’t directly stored in VNDLY.
- You want to examine data across multiple dataset fields in your report.
- You want to filter or aggregate data.

These formulas are available in VNDLY for calculated fields:

Formula	Description	Example Use Case
Add	Add up multiple numeric fields. Displays total of fields combined into column format. You can add up to 5 numeric fields.	You need to display a combined value of the Client VMS Amount and Client Amount fields.
Age	Number of days since a date. Note that only 1 age value can be used per calculated field.	Display the number of calendar days since an approved value was logged. Example: Age of current date - approved date = 18 days.
ArrayToString	Formats an array into a string of comma-separated values.	
Avg	Averages the values.	You need the average bill rate for a resource manager. Average *client rate*.
Case	Transform values based on conditional statements. Operates as an if/and statement. Typically used to populate values if a client needs something specific for a business unit, hiring manager, and so on. You can use additional if/then statements within case statements.	If the hiring manager equals Ashley Smith, you want the value marked as "Case Testing", if it doesn’t equal Ashely Smith, leave blank.
Coalesce	Returns the value of the first field that isn't null.	

Formula	Description	Example Use Case
Concat	Concatenate, or combine, multiple string-type fields into 1 field. This option can be used up to 7 times in 1 formula. Defaults to adding a space as the separator.	You need to combine invoice number with the vendor name, this calculated field would display both values combined into a single field.
Count	Count occurrences of the selected field value in a selected group of fields.	You need a count of how many system IDs there are in each source type.
DateDiff	Date difference in days.	Displays the different between invoice creation date and approved date.
DateTrunc	Truncate a date field to a specified level of precision.	You only need the month from the date field.
Divide	Divide 2 numeric fields. This operates similarly to Sum.	You need to obtain the value of the client amount divided by the MSP tax amount.
Max	Maximum value in a group of values.	You want to display the latest date of timesheet values, so the max calculated field removes the timesheets that aren't the largest values.
Min	Minimum value in the group of values.	You want to display the earliest date of timesheet values, so the min calculated field removes the timesheets that aren't the smallest values.
Multiply	Multiply values of selected fields. This option operates opposite of Divide.	Display an increased bill rate comparison by creating a separate **Value** field with the suggested increase. Example: a 20% increase, so the **Value** would be an integer of 1.5. Then use this formula to multiple the source of the created value against the source of the bill rate.
PadText	Add padding to the text of the values selected. Operates like SubString formulas.	
Round	Rounds a value to its nearest integer or number with closest number of decimal places. Precision can also be a negative.	You need the number to round by 1 precision, which then displays the rounded number after decimal.
SubString - Left	Sequence of characters in a string extracted from the left side of the value.	You need the first 3 letters of the **Approved By** person.

Formula	Description	Example Use Case
SubString - Mid	Sequence of characters in a string from the start index to the length specified.	
SubString - Right	Sequence of characters in a string extracted from the right side of the value.	You need the last 3 letters of the name of the **Approved By** person.
Subtract	Subtracts 2 numeric fields. Displays total of fields subtracted in a single column format. You can subtract up to 5 numeric fields.	You need to display a subtracted value of the Client Amount from the Client VMS Amount field.
Sum	Aggregate function to sum values of a field in the group.	
ToString	Formats the input expression as a string, converting a value into text.	
UnNest	Splits multiple values in a field into multiple rows.	
Value	Specifies a static value.	You need to have the project codes listed out by row instead of Used for clients who are dropping reports into a database. You need to have the project codes listed out by row instead of combined.

These data types are available in VNDLY:

Data Type	Description
String	Returns a series of characters.
Date	Returns a date. Example: 15 Jun 2021
Date and Time	Returns a date and time. Example: 15 Jun 2021 05:38:07 PM
Integer	Returns a whole number, no decimals.
Number	Returns a number, including decimals.

Troubleshooting: Custom Reports Via APIs

The API call times outs.

If the API call isn't processed under 60 seconds, the call times out and you'll receive an error.

Cause	Solution
You have too many joins across datasets.	Limit the number of joins used across datasets. (do we have a max suggested joins?)

Cause	Solution
You're retrieving a report with more than 20 fields.	Restrict the number of fields in a report to 10 to 20 fields maximum. If the field count is more than 20, use SFTP to retrieve the report.
You have an irregular data shape. Example: You have a large number of nested organizations.	Avoid retrieving abnormally large datasets.
You have a report without a filter	Use appropriate filters to contain growth in data size. Example: Retrieve data modified with a filter defining a smaller time frame, such as **Yesterday** or **Today**.
You've made a request within minutes of a prior request. This is especially true for reports that return large volumes of data or have multiple joins.	Avoid making multiple API request within a short timespan. (Do we have a recommended waiting time?)
You're retrieving reports with multiple pages of data.	The reporting APIs are intentionally designed to return paged datasets. This is a standard constraint for all VNDLY HTTP based APIs. To avoid this issues: • Use limit (number of rows to return) and offset (starting row count) to retrieve a single page of data. • Limit the number of fields included in the report. • Use SFTP instead of the reporting API to retrieve large reports without the need for paging.

Cause: Cause: Performance issues may not be apparent in Test tenants because the data load will be less in a Test tenant than a Production tenant.

You're getting performance issues retrieving data from you Production tenants, but not your Test tenants.

Solutions:

- Verify report performance after production go-live to verify the results are similar to Test tenants.
- Load the Test tenant with test data with a size representative of production load.
- Plan for scaling in production. Factor in the anticipated load size and complexity of a report with production data. Reports that execute near the threshold will likely exceed that as the program matures or after going live.

Solution:

Request for Proposal

Add a Request for Proposal

Context

You can create a new request for proposal (RFP) to send to vendors for bidding.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Click **New RFP**.
3. Complete the required fields to fill out basic information for the RFP.
4. Click **Save**.
5. Select **Add Requirements** from the **Next Steps** section.
6. Click **Add a New Section**. As you complete the section, consider:

Option	Description
Knockout Requirement	When selected, the requirement is included in the knockout criteria of the RFP.
Add Another Requirement	Include another requirement within this section.
Mark as Confidential	When selected, all responses in this section are visible only to RFP managers.
Response Required	When selected, the vendor must respond to all requirements in the section.

7. Select **Add Vendors** from the **Next Steps** section on the **Overview** tab.
8. Select the vendors who can bid on the RFP.
9. Click **Save**.
10. (Optional) Add and review documents.
11. (Optional) Review the Vendor RFP experience.

    See Request for Proposal – Vendor Guide.
12. Click **Send to Vendors** from the **Next Steps** section.

    You can't unsend the RFP to vendors.

Result

Workday VNDLY changes the RFP status to *Sourcing* and sends an invite notification to each vendor. You can see whether the vendors accept or reject the invitation in the **Vendors** section.

The RFP will remain in *Sourcing* status until either:

- The **Vendor Proposals Due** date.
- All vendors who RSVP-ed yes have submitted their proposal.

Add Vendors to an Active Request for Proposal

Context

You can add vendors to a request for proposal (RFP) after you've already distributed it to other vendors.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Open the RFP.
3. Under **Next Steps**, click **Add Vendors**.
4. Click the **Send to New Vendors** button.

Result

Workday VNDLY sends the RFP request to the new vendors that you selected and adds them to the **Vendors** section on the RFP.

Creating Vendor Groups for Request for Proposal

Context

You can create vendor groups to be available for selection within a request for proposal (RFP).

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, select **Vendor Distribution & Groups**.
3. Click **New Group**.
4. Complete the task:

Option	Description
Group Assignment	**Jobs** is enabled for the vendor if you've set up the **Contingent Staffing** authorized service. **RFP** is enabled for the vendor if you've set up the **RFP/SOW** authorized service.
Add Vendor	When you select vendors without authorized services for the **Group Assignments** selected, Workday VNDLY displays an alert with instructions on how to resolve it. You can ignore the alert and create the group. However, when you use the distribution group, Workday VNDLY won't send the RFP to vendors without authorized services for RFP.

Duplicate a Request for Proposal

Prerequisites

You have *rfp.create* security permissions.

Context

You can duplicate an existing request for proposal (RFP). The status of the RFP does not affect the ability to duplicate it.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Select the **Actions** drop-down menu for the appropriate RFP.
3. Select **Duplicate RFP**.

Result

- Workday VNDLY will duplicate the **Organization Unit**, **Contacts**, and **Requirements**.

- Workday VNDLY won't duplicate the **Participants**, and any **Documents**.

Concept: Responding to Requests for Proposal

Once vendors have submitted their proposals to your request for proposal (RFP), there are several actions available.

You must have *rfp.edit* security permissions.

Responding to a Single Proposal

Select a single proposal by:

- Using the **Actions** drop-down menu on the proposal.
- Selecting the check box next to the proposal.
- Opening the proposal and accessing the **Actions** drop-down menu directly from the proposal.

Action	Description
Review & Score	Only available through the **Actions** drop-down menu on the **Proposals** tab of the RFP. Enables you to review and score the individual responses.
Award	Enables you to select the vendor who wins the work outlined in the RFP. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.
Reject	Enables you to reject the vendor proposal. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.
Shortlist	Enables you to add the vendor proposal to a shortlist. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.

Responding to Multiple Proposals

On the **Proposals** tab for the RFP, you can select multiple proposals using the check boxes.

You can respond to multiple proposals.

Action	Description
Award	Enables you to select multiple vendor proposals. Those vendors win the work outlined in the RFP. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.
Reject	Enables you to reject multiple vendor proposals. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.

Action	Description
Shortlist	Enables you to add multiple vendor proposals to a shortlist so that you can evaluate them. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.

Proposal Status

You can view the status of the proposals on the **Proposals** tab of the RFP.

Status	Description
Award	The vendor has won the work based on their proposal. You can't undo this action, and the proposal can't be rejected or shortlisted.
Reject	You rejected the proposal from the vendor. You can't undo this action, and the proposal can't be awarded or shortlisted.
Shortlist	The vendor proposal has succeeded in an initial round of selection. You can reject or award the proposal.

Workday VNDLY Workforce Connector

Steps: Set Up Workday VNDLY Workforce Connector

Prerequisites

Administrator access for both the Workday and Workday VNDLY environments. Review the security configuration documents of Workday VNDLY.

Context

The Workforce Connector enables both foundational and transactional data to flow between Workday VNDLY and Workday HCM.

The Workday VNDLY Workforce Connector (Workforce Connector) is set up when your Workday VNDLY environment is first deployed or when there's a new Workforce Connector deployment to your environment. Consult with Workday VNDLY Professional Services before attempting any changes to the Workforce Connector.

Steps

1. Create Integration System User Account for Workday VNDLY.
2. Create Integration System Security Groups.

   We recommend using an **Unconstrained** security group for the type of **Tenanted Security Group**. If you need to create a **Constrained** security group, contact your integration team to ensure that constrained security groups are supported for your integration.

3. (Optional) Create API Client with OAuth Authentication for Workday VNDLY.

   Create an API Client if you want to use OAuth instead of Basic as the authentication method to connect to the Workforce Connector.
4. Access the **View Domain** report.

   Locate the domain of each environment that you want to integrate. From the related actions menu of the domain, select **Edit Security Policy Permissions**. Add the created security group access to the **Integrations Permissions** and select **Get**, **Put** or both.

   See Reference: Workday VNDLY Workforce Connector Domain Security.

   Security: *Security Configuration* and *Security Activation* domains in the System functional area.
5. Access the **Edit Business Process Security Policy** task for each business process required by this integration.

   Select the business process to edit and add the security group to the actions in the business process. This grants the users in the security group access to the business process.

   See Reference: Workday VNDLY Workforce Connector Business Process Security.

   Security: *Security Configuration* domain in the System functional area.
6. Set up Workday integrations in Workday VNDLY by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**.

   Select the **Workday Integration** check box.
7. Set up the Connector Configuration Tab in Workday VNDLY Settings.
8. Set up the Scheduling Configuration Tab in Workday VNDLY Settings.
9. Set Up the General Configuration Tab in Workday VNDLY Settings on page 241.

Create Integration System User Account for Workday VNDLY

Prerequisites

Administrator access to the Workday environment.

Context

You can create an integration system user (ISU) in Workday for Workday VNDLY. An ISU is needed to use the Workday VNDLY Workforce Connector. Assign the ISU to a security group with permissions to access all tasks and reports that the Workforce Connector requires.

Steps

1. Access the **Create Integration System User** task

   Security: *Integration Security* domain in the Integration functional area.
2. Enter a username and password for the new user.
3. Leave **Require New Password at Next Sign In** check box cleared, as this user will sign on programmatically.
4. Select the **Do Not Allow UI Sessions** option.

   This option is an additional security layer, since integration system users should not be accessing the Workday user interface.

Next Steps

Continue with the step 2 of the Steps: Set Up Workday VNDLY Workforce Connector topic.

Create API Client with OAuth Authentication for Workday VNDLY

Prerequisites

Administrator access to the Workday environment.

Context

You can create an API client with OAuth authentication in Workday. Complete this process to obtain a client ID, client secret, and refresh token for Workday VNDLY to communicate securely with Workday.

Steps

1. Access the **Register API Client for Integrations** task.
2. Enter the **Client Name** (such as VNDLYSandbox) and select **Non-Expiring Refresh Tokens**.
3. Select the following functional areas:
   - Common Financial Management
   - Contact Information
   - Integration
   - Jobs & Positions
   - Organizations and Roles
   - Pre-Hire Process
   - Staffing
   - Suppliers
   - Tenant Non-Configurable
   - Worktags
4. On the **Register API Client for Integrations** page, record the **Client ID** and **Client Secret**. You'll use this information in the Workforce Connector setup.
5. Access the **View API Clients** report to get the refresh token.
6. Select the link of the API client that you've created.
7. From the drop-down menu on the **View API Client** page, select **API Client** > **Manage Refresh Tokens for Integrations**.
8. Select your Integration System User as the **Workday Account**.
9. Select **Generate New Refresh Token**. Record the refresh token. You'll use this information in the Workforce Connector setup.

Next Steps

Continue with step 4 of the Steps: Set Up Workday VNDLY Workforce Connector topic.

Set Up the Connector Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Select the **Workday Integration** check box.

Context

You can enter the environment details about your Workday environment in the **Connector Configuration** tab for the Workday VNDLY Workforce Connector. You need these details for Workday VNDLY to be able to connect to the Workday environment.

In order to send non-effective dated custom objects from VNDLY to Workday via the Connector, you must select an **Authentication Method** of*OAuth*. If you select *Basic*, you are only able to send effective-dated custom objects.

Steps

1. Go to the **Connector Configuration** tab by navigating to **More** > **Company Settings** > **Integrations** > **Workday**.
2. As you complete the tab form, consider:

Option	Description
Workday Host Name	The host name for the Workday service URL for your environment. Find the location URL by following the instructions in the Workday Community Getting Started documentation. Example: An example URL might be *https://wd2-impl-services1.workday.com/ccx/service/vndly_dpt1/Human_Resources/v34.0* where the host name is *wd2-impl-services1.workday.com.*
Workday Tenant Name	Your Workday organization ID. Find this ID by selecting your profile in the upper right corner in the Workday environment, and going to **My Account** > **Organization ID**.
Authentication Method	Before selecting the authentication method, you must create an integration systems user (ISU) and set up the integration security group to set up the appropriate security permissions. You have these options to authenticate: • Basic: Enter the ISU username and password. • OAuth: Enter the Client ID, Client Secret, and token. For more information, see Create API Client with oAuth Authentication for Workday VNDLY.

Set Up the Scheduling Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to: **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Enable the **Workday Integration** toggle.

Context

You can schedule different integrations for the Workday VNDLY Workforce Connector. Scheduling integrations enables Workday VNDLY to import foundational data and certain contingent worker data from Workday. Some integrations are mandatory, while others are optional.

Steps

1. Go to the **Scheduling Configuration** tab by navigating to **More** > **Company Settings** > **Integrations** > **Workday**.
2. Set up the schedules for the integrations that you want to enable. As you select the type of schedule that you want, consider:

Option	Description
Daily Schedule	Select a specific time to schedule the integration from various 5 minute intervals.
Fixed Interval	Select either hours, minutes, or seconds and specify the interval length. **Example: Interval: Hours** and **Interval Length: 8** if you want the integration to trigger every 8 hours.
Custom Cron	Enter a specific cron expression to schedule the integration as a cron job. Example: **Cron Expression: 0 00 06 ? * MON-FRI** if you want the integration to trigger at 6 am on Monday through Friday.

3. As you complete the tab form, consider:

Option	Description
Load Custom Data Sources	Required.
Load Organization Unit	Required.
Load Charge Codes	Optional. Charge codes might be needed if specific organizations (such as cost center, company, region, or custom HCM organization types) are required when creating a position or contracting the contingent worker. Consult a Workday VNDLY Technical Consultant.
Load Employee Users	Optional, but recommended.
Load Work Sites	Required.
End Contracts from Workday	Optional, but recommended.
Load Open Positions	Optional, but recommended when position management is being used as a staffing model in a customer's Workday environment.
Create Jobs From Job Requisitions	Required when hiring managers are creating job requisitions in Workday to be imported as draft jobs into VNDLY.
Close Jobs From Job Requisitions	Optional. Recommended for jobs to be closed in Workday VNDLY when the corresponding Job Requisitions are closed in Workday.
Load Contractor Changes	Optional, but recommended.
Load Custom Objects Definition	Required when sending custom fields to Workday. The definition is retrieved from a WSDL file which contains the schema information of custom objects defined in Workday.

Set Up the General Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Select the **Workday Integration** check box.

Context

You can specify more settings for the Workday VNDLY Workforce Connector in the **General Configuration** tab. For more information about this tab, see:

- Reference: General Settings in the General Configuration Tab.
- Reference: Contingent and Worker Profile Management Settings in the General Configuration Tab.

Bulk Update Work Orders with Workday Position Management

Prerequisites

Administrator or superuser permissions.

Context

For tenants that have the Workday integration enabled, you can bulk update the organization unit, regardless of the staffing model. This means you can bulk update the organization unit and change it from:

- A job management organization unit to a position management organization unit.
- A position management organization unit to a job management organization unit.
- One position management organization unit to another position management unit.
- One job management organization unit to another job management organization unit.

We've placed multiple validation checks when the bulk update of this field is submitted to ensure they're permitted by tenant level Workday configurations. You control those validation checks by tenant-level settings in the **General Configuration** tab of the **Workday** settings page in Workday VNDLY. Bulk updates on the staffing model field work orders that don't have the proper settings will fail.

When a job or SOW role is created, there are two staffing models:

- **Job Management Staffing Model -** No Workday position IDs are created or assigned for this model, and work orders created with this model aren't assigned Workday position IDs.
- **Position Management Staffing Model -** Workday position IDs are added to the job or role based on the number of positions that the job or role has, and as work orders are created on the job or role, they're assigned one of the Workday position IDs.
  - **Eligible for Provisioning** must be marked **Yes** in the job or role.
  - Position IDs may be manually selected at the time of job/role creation or may be added via the Workday Connector after the job/role creation
  - You can't bulk update a work order to position management if the work order has a start date set in the future.

Steps

1. From the header, go to **More** > **Company Settings**. From the **Integrations** section, select **Workday**.
2. On the **General Configuration** tab, locate the **Prevent switching between staffing models on provisioned work orders for Employers** checkbox under the **Position Management** section. If you

want work orders to be able to be moved to organization units with different staffing models, make sure that checkbox is cleared.

3. Depending on which staffing model you want to change, consider:

Changing Supervisory Organization section	Action
Position Management To Position Management	Select any or both of the following: • **Use Current Position** - This lets Workday VNDLY move the existing Workday Position ID to the newly selected organization unit. • **Create a new position (Workday generated)** - This lets Workday VNDLY assign a new Workday Position ID from the newly selected organization unit for the work order. **Note:** With bulk update, you can't select from available positions in Workday VNDLY. To select from available positions in Workday, you must complete a manual work order modification for each work order.
Job Management To Position Management	Select the following: • **Create a new position (Workday generated)** - This lets Workday VNDLY move the existing Workday Position ID to the newly selected organization unit.

4. Create Bulk Updates. For the action in the **Bulk Update Wizard**, select **Update Organization**.
5. Select the **Allow Staffing Model Changes** checkbox. If not checked, any work orders that are moving staffing models will fail.
6. As you choose the staffing position to update, consider:

Option	Action
Position Type	For changing to position management, select the position type. Depending on how your tenant is set up determines whether you can choose to use the current position or create a new position. **Note:** If you're changing to an organization unit using job management, this option won't appear because job management doesn't require Workday position IDs.
Close Old Position	This option is selected by default, to ensure that old unused Workday position IDs don't linger in the system. If you want to clear this checkbox, you must have the **Close Position for all Workflows** checkbox cleared in the **Workday** settings page (**General Configuration** tab)
Disable Connectors	If this is selected, the organization unit change is only updated in Workday VNDLY, and is not sent to Workday. You may want to use this option if Workday organization units are current and you need to update Workday VNDLY to align with Workday.

Option	Action
Resource Manager	This menu only appears if **Restrict Resource Manager to Organization Hierarchy mapping** is selected in the**Job Form Config**page. (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations**).

Steps: Send VNDLY Custom Fields to Workday

Prerequisites

- The *Edit Worker Additional Data* business process definition must include an **Edit Additional Data** step for each effective-dated custom object which needs to be sent to Workday.
- These security domains must be set up in Workday:
  - On the *Edit Worker Additional Data* business process, give the VNDLY security group **Initiate** access.
  - For each object's security domain, give the VNDLY security group **Get** and **Put** access.
  - Configure the **Custom Object Management** security domain and give **Get Only** access.
- If you are using *OAuth* as the **Authentication Method**, you must:
  - Grant permission to API Clients for the functional area of the security domain of each custom object.
  - Add the functional area system of the security domain to the API Client's Scope.
- Define the custom objects and custom fields in Workday.
  - See: Steps: Set Up Custom Objects.

Context

You can now send VNDLY custom fields related to the worker to Workday via the Workforce Connector. This change minimizes the need to employ custom integrations catering to unique provisioning requirements related to contingent workers.

Customers can take the following actions:

- Import effective-dated or non-effective dated custom object definitions related to the worker object from Workday to VNDLY (via a WSDL).
- Create new custom fields in VNDLY corresponding to these imported object definitions or map existing custom fields in VNDLY with these Workday objects.
- Configure in which forms (Candidate, Contractor, Work Order, Worker, Worker Profile) these fields show up in VNDLY and other options available in the standard custom field settings user interface.
- Send custom field data from VNDLY to Workday via the connector in the following scenarios:
- - Contractor or Worker is onboarded.
  - Work order or Worker Profile is updated.
  - Candidate, Contractor, or Worker data is updated on their profiles.
  - Work Order or Worker Profile is ended.

Steps

1. Set Up the Scheduling Configuration Tab in Workday VNDLY Settings.
2. Configure Custom Objects Settings.

Configure Custom Objects Settings

Context

You can configure the settings for sending custom objects to Workday. You can map VNDLY custom fields to Workday custom objects for both Worker Profile Management and Contingent.

Steps

1. From the header, select **Menu** > **Company Settings**.
2. Under **Integrations**, select **Workday**.
3. Select the **General Configuration** tab.
4. Under the **Contingent** or **Worker Profile Management** module, go to **Custom Objects Configuration**.
5. Click **Add** to configure the mapping settings for a custom object and consider:

Option	Description
Custom Object	Indicates the custom field name in Workday that you want to map to a VNDLY custom field.
Mapping Category	You can indicate how to map VNDLY custom fields to Workday custom objects.
Associated With	For every custom object, associate the object with a candidate, contractor, or work order if the module is Extended Workforce Management (EWM) or with a worker or worker profile if the module is Worker Profile Management.

6. Configure the custom field definitions corresponding to the custom objects imported from Workday by navigating to **More** > **Company Settings** > **Job Workflows** > **Custom Fields**.

Concept: Workday VNDLY Workforce Connector

The Workday VNDLY Workforce Connector enables you to manage your organization's contingent workforce and process new talent. The Workforce Connector enables data to flow between Workday VNDLY and Workday HCM. Connecting the two system provides customers of both products the ability to manage their unified workforce, saving them time and increasing workforce visibility. By bringing the contingent workforce data into Workday, you can lay the foundation for total talent management with access to both full-time employee and contingent worker data in a single place.

The Workforce Connector is for organizations using:

- Workday VNDLY to manage their extended workforce including:
  - Workday VNDLY Extended Workforce Management
  - Workday VNDLY Statement of Work
  - Workday VNDLY Worker Profile Management
- Workday Human Capital Management (HCM) to manager their FTE population.

The Workday-native Application Programmable Interfaces (APIs) allow for automated communication between the two platforms for a seamless management experience. Note: Not all changes can be synced fro one platform to the other. Some fields that are specific to VNDLY, such as custom fields, cannot be synced to Workday unless there is an SFTP export in place.

By using all of the configuration capabilities of the Workforce Connector, you can establish a technology ecosystem where all departments involved in extended workforce management can work together, whether the majority of functions originate in Workday or VNDLY.

The Workforce Connector is built with specific capabilities to successfully support your company's extended workforce management program. We've made sure you can:

- Import foundational and reference data on a scheduled basis to query from Workday and update VNDLY.
- Keep Workday up to date, in real-time, with contingent worker data as worker related changes happen in VNDLY.
- Keep tabs on integration activity through VNDLY's audit log.

Example: A hiring manager has opened a new job in VNDLY to source for a contractor and their organization uses the Workforce Connector and the Position Management staffing model in Workday HCM. When the new job is approved in VNDLY, it triggers the Create Position API and there is a real-time Connector Status visual on the job in VNDLY. Once the connector has successfully run and Workday has created the position, the **Position ID** is logged on the job in VNDLY. There is also an **Activity Log** entry on the job to document the Workday event.

There are two main types of data related to the Workday VNDLY Workforce Connector: Foundational and Transactional.

Foundational: Foundational data includes all basic contingent worker data in Workday. The Workforce Connector integrates foundational data from Workday into the related modules in VNDLY. You can enable and schedule when these integrations are required to use transactional data integrations. You can view Foundational Data Integration details in the **Reference: Workday VNDLY Workforce Connector Integrations** topic.

Transactional: Transactional data consists of event-driven contingent worker data. Most of these integrations are triggered by data changes in VNDLY. These changes load in Workday and initiate the related business process to update the related data source in Workday. Some of the integrations can also work the other way around, from Workday to VNDLY. You can view Transactional Data Integration details in the **Reference: Workday VNDLY Workforce Connector Integrations** topic.

Concept: Override Workforce Connector Errors

Users with the *connectorerror.override* permission in Workday VNDLY have the ability to override all VNDLY errors related to the Workforce Connector. This permission provides designated users with greater control to clear common Workforce Connector errors without the need to create support tickets each time.

VNDLY super users have this permission by default. Otherwise, this permission is restricted to client roles and must be manually assigned. When you assign this permission to client roles, VNDLY recommends the following:

- Assign this permission to program administrators only, as overriding errors incorrectly might result in unintended consequences.
- Ensure that the user understands the downstream impacts of overriding Workforce Connector errors.
  - Example 1: When you override a Workforce Connector error during the *Job Publish* workflow by selecting **Assume this task will never succeed**, VNDLY closes the job.
  - Example 2: When you override a Workforce Connector error when extending the work order date by selecting **Assume this task has already been completed manually**, VNDLY won't send the date extension to Workday.

Consider the following scenarios and the downstream impacts of overriding errors.

Scenario 1: Create Position API fails when publishing a job, Statement of Work (SOW) role, or worker profile.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this option, the Workforce Connector won't proceed with the required *Create Position* actions in Workday. In addition, VNDLY automatically completes these transitions: • The *Publish Job* workflow transitions to *Active* status. • The SOW role transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Create the required number of positions in Workday. • Update the corresponding VNDLY job, SOW role, or worker profile with the Workday Position IDs. Depending on the data that needs to be updated, you can use the Bulk Update Jobs workflow or Bulk Update Wizard in VNDLY. If the error persists, create a VNDLY support ticket.
Assume the task will never succeed	If you select this option, the Workforce Connector won't proceed with the required *Create Position* actions in Workday. In addition, VNDLY automatically completes these transitions: • The *Publish Job* workflow transitions to *Closed* status. • The SOW role reverts to *Awaiting Client Review* status. • The worker profile transitions to *Approval Denied* status.

Scenario 2: Contract Contingent Worker API fails when onboarding a worker.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the required *Contract Contingent Worker* actions in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks:

Override Option	Downstream Impacts
	• Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Contract the contingent worker with rectified data in Workday, referencing an existing pre-hire ID or creating a new pre-hire record. • Perform required updates in VNDLY to reflect the Workday contract details and IDs, such as the pre-hire ID, contingent worker ID, or position ID on the corresponding work order, worker profile, or contractor profile.
Assume task will never succeed	If you select this override option, the Workforce Connector won't proceed with the required *Contract Contingent Worker* actions in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Rejected* status. • The worker profile transitions to *Ready to Onboard* or *Approval Denied* status.

Scenario 3: Change Job API fails when updating the worker profile or work order data.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the *Change Job* action in Workday. VNDLY saves the changes, and automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Update the Workday contingent worker record using the *Change Job* business process. • Perform required updates in VNDLY to align the work order or worker profile to the updated contingent worker details in Workday. Depending on the data that needs to be updated, you can use the Bulk Update Jobs workflow or Bulk Update Wizard in VNDLY. If the error persists, create a VNDLY support ticket.
Assume task will never succeed	If you select this override option, the Workforce Connector won't proceed with the *Change Job* action in Workday. In addition, VNDLY won't save

Override Option	Downstream Impacts
	the changes, and automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. To re-submit a VNDLY work order or worker profile update with rectified data, you must first correct any erroneous data or configuration in Workday or VNDLY.

Scenario 4: End Contingent Worker Contract API fails when ending a worker order or worker profile.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the *End Contingent Worker Contract* action in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Ended* status. • The worker profile transitions to *Ended* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Perform the required *End Contingent Worker Contract* action in Workday.
Assume task will never succeed	If you select this override option, the work order or worker profile remains in *Active* status in VNDLY, and the Workforce Connector won't proceed with the *End Contingent Worker Contract* action in Workday.

Scenario 5: Rescind action fails when canceling a worker order.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't rescind the *Contract Contingent Worker* event in Workday for a cancel action in VNDLY. In addition, VNDLY automatically transitions the work order to *Canceled* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday.

Override Option	Downstream Impacts
	• Rescind the *Contract Contingent Worker* event for a cancel action.
Assume task will never succeed	If you select this override option, the work order remains in *Active* status in VNDLY, and the Workforce Connector won't rescind the *Contract Contingent Worker* event for a cancel action.

Scenario 6: Change Job API or Rescind action fails when reopening a work order or worker profile.

Override Option	Downstream Impacts

Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with these actions:
	• Rescind the *End Contingent Worker Contract* event.
	• *Change Job* to update the contingent worker with details to reopen the work order or worker profile.
	In addition, VNDLY automatically completes these transitions:
	• The work order transitions to *Active* status.
	• The worker profile transitions to *Active* status.
	You must manually complete these tasks:
	• Identify the root causes of the error in Workday and VNDLY.
	• Correct any erroneous data or configuration in Workday.
	• Perform the following actions in Workday:
	  • Rescind the *End Contingent Worker Contract* event.
	  • *Change Job* to update the contract details with the details that match the reopened work order or worker profile in VNDLY (Example: New End Date).

Assume task will never succeed	If you select this override option, the work order or worker profile remains in *Ended* status in VNDLY, and the Workforce Connector won't proceed with these actions: • Rescind the *End Contingent Worker Contract* event. • *Change Job* to update the contingent worker record with details to reopen the work order or worker profile.

Reference: Workday VNDLY Workforce Connector Business Process Security

To configure transactional data integrations, add these permissions to the Integration System User account:

Functional Area	Business Process	Permissions	Description
Contact Information	*Contact Change*	• **Maintain Contact Information (Web Service)** • **View All**	• **Maintain Contact Information (Web Service)** provides access to create or update the contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the contact change event, such as the email address, phone number, and physical address.
Contact Information	*Work Contact Change*	• **Change Work Contact Information (Web Service)** • **View All**	• **Change Work Contact Information (Web Service)** provides access to create or update work contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the work contact change event, such as the work email address and work physical address.
Contact Information	*Home Contact Change*	• **Change Home Contact Information (Web Service)** • **View All**	• **Change Home Contact Information (Web Service)** provides access to create or update home contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the home contact change event, such as the home phone number and home physical address.
Contact Information	*Legal Name Change*	• **Change Legal Name (Web Service)** • **View All**	• **Change Legal Name (Web Service)** provides access to change a worker's legal name in Workday if it changes in VNDLY. • **View All** provides access to view information related to the

Functional Area	Business Process	Permissions	Description
			name change event, such as the worker's legal name.
Contact Information	*Preferred Name Change*	• **Change Preferred Name (Web Service)** • **View All**	• **Change Preferred Name (Web Service)** provides access to change a worker's preferred name in Workday if it changes in VNDLY. • **View All** provides access to view information related to the name change event.
Staffing	*Change Job*	• **Change Job (Web Service)** • **Rescind (Web Service)** • **View All**	• **Change Job (Web Service)** provides access to perform job changes for workers in Workday, such as contract extensions or transfers, if this information changes in VNDLY. Can also be initiated from Workday to VNDLY. • **Rescind (Web Service)** provides access to revert changes when a job change workflow fails. • **View All** provides access to view information related to job change events, such as the Position ID.
Staffing	*Contract Contingent Worker*	• **Contract Contingent Worker (Web Service)** • **Rescind (Web Service)** • **View All**	• **Contract Contingent Worker (Web Service)** provides access to contract an existing pre-hire into a contingent worker position or job in Workday if this information changes in VNDLY. • **Rescind (Web Service)** provides access to rescind the contracting event for the worker. • **View All** provides access to view information related to the contract worker event, such as the Pre-Hire ID.
Staffing	*Create Position*	• **Create Position (Web Service)** • **View All** • **Rescind (Web Service)**	• **Create Position (Web Service)** provides access to create a position in a supervisory organization in Workday when a worker is hired in VNDLY. • **View All** provides access to view information related to the

Functional Area	Business Process	Permissions	Description
			create position event, such as the Position ID. • **Rescind (Web Service)** provides access to revert changes when a create position workflow fails.
Staffing	*End Contingent Worker Contract*	• **End Contingent Worker Contract (Web Service)** • **Rescind (Web Service)** • **View All**	• **End Contingent Worker Contract (Web Service)** provides access to end a contingent worker contract in Workday when the worker is terminated in Workday VNDLY. Can also load from Workday to VNDLY. • **Rescind (Web Service)** provides access to rescind the end contract event. • **View All** provides access to view information related to the end contract event, such as the Contract End Date.
Staffing	*Close Position*	• **Close Position (Web Service)** • **View All** • **Rescind (Web Service)**	• **Close Position (Web Service)** provides access to close a position for a supervisory organization in Workday when using the position management staffing model. • **View All** provides access to view information related to the close position event, such as the Position ID. • **Rescind (Web Service)** provides access to revert changes when a close position workflow fails.

Reference: Workday VNDLY Workforce Connector Domain Security

Domain Security for Foundational Data Integrations

To configure foundational data integrations, add these permissions to the Integration System User account:

Functional Area	Domain	Operation	Description	Example
Integration	*Integration Build*	**Get**	Provides access to load Workday business process events as Workday VNDLY Connector Events.	*Event ID* from Workday as *Event Workday ID* in Workday VNDLY.
Jobs and Positions	*Job Information*	**Get**	Provides access to load Workday job profile data as	*Job Family Name* from Workday as

Functional Area	Domain	Operation	Description	Example
			Workday VNDLY Job Profile data.	*Job Family Name* in Workday VNDLY.
Organizations and Roles	*Create: Cost Center*	**Get**	Provides access to load Workday cost center data as Workday VNDLY Cost Centers data.	*Cost Center - Name* from Workday as *Cost Center - Name* in Workday VNDLY.
Organizations and Roles	*Manage: Location*	**Get**	Provides access to load Workday location data as Workday VNDLY Location data. *Workday Location Usage Ref ID* must be set to **BUSINESS SITE** to load the data into Workday VNDLY.	*Location Reference ID* from Workday as *Location Code* in Workday VNDLY.
Organizations and Roles	*Manage: Organization Integration*	**Get**	Provides access to load Workday organizations data as Workday VNDLY Organizations data.	*Supervisory Organization* from Workday as *Business Units/ Organizations* in Workday VNDLY. Also loads *Company, Cost Center* and *Organizations* from Workday as *Charge Code* information in Workday VNDLY.
Pre-Hire Process	*Job Requisition Data*	**Get**	Provides access to load Workday job requisition data as Workday VNDLY Jobs data.	*Job Requisition Primary Location* from Workday as *Job Location* in Workday VNDLY.
Staffing	*Worker Data: All Positions*	**Get**	Provides access to load Workday position management data as Workday VNDLY Positions data.	*Position Location* from Workday as *Position Location* in Workday VNDLY.
Staffing	*Worker Data: Current Staffing Information*	**Get**	Provides access to load Workday worker data as Workday VNDLY Workers data.	*Worker's Position ID* from Workday as *Worker's Position ID* in Workday VNDLY.
Staffing	*Worker Data: Public Worker Reports*	**Get**	Provides access to load Workday worker data as Workday VNDLY Workers data.	*Contingent Worker Contract - Contingent Worker ID* from Workday as *Contractor - Client Contractor ID* in Workday VNDLY.
Staffing	*Worker Data: Workers*	**Get**	Provides access to apply contextual security to load Workday worker data as	

Functional Area	Domain	Operation	Description	Example
			Workday VNDLY Worker data.	
Suppliers	*Reports: Supplier*	**Get**	Provides access to load Workday data on fully defined suppliers as Workday VNDLY Worker Profile Management data.	*Supplier ID* from Workday as *Worker Profile Management Workday ID* in Workday VNDLY.
Worktags, Common Financial Management	*Set Up: Basic Supplier Worktag*	**Get**	Provides access to load Workday data on basic suppliers as Workday VNDLY Worker Profile Management data.	*Supplier ID* from Workday as *Worker Profile Management Workday ID* in Workday VNDLY.

Domain Security for Transactional Data Integrations

Functional Area	Domain	Operation	Description	Example
Pre-Hire Process	*Manage Pre-Hire Process: Manage Pre-hires*	**Get** and **Put**	**Get** permission provides access to load Workday pre-hire profile data as Workday VNDLY Pre-Hire data. **Put** permission provides access to create or update pre-hire data in Workday with data from Workday VNDLY.	Get: *Pre-Hire ID* from Workday as *Pre-Hire ID* in VNDLY.
Staffing	*Staffing Actions: Correct Contract Contingent Worker and Hire*	**Get** and **Put**	**Get** permission provides access to load Workday start dates as Workday VNDLY Start Dates. **Put** permission provides access to change Workday start dates with any changes to the Workday VNDLY Start Dates. For this integration to work, the Workday API version must be V39.2 or above.	

Reference: Workday VNDLY Workforce Connector Integration

The Workday VNDLY Workforce Connector consists of 32 prebuilt APIs that exchange data between Workday and Workday VNDLY. These APIs are classified as either Foundational or Transactional Data.

Foundational Data APIs

Foundational data APIs load these basic organizational data from Workday to VNDLY:

API Name	Description
Supervisory Organizations	Loads supervisory organizations from Workday into VNDLY Organizations.
Locations	Loads business sites from Workday into VNDLY Work Sites.
Company, Cost Center, Region, Business Unit, Project, Program	Loads standard organization types from Workday into VNDLY Charge Codes. This action is optional, and you can configure which organization types are imported on a per-type basis from VNDLY. You might need charge codes if specific organization types (such as cost center, company, region, or custom HCM organization types) are requirements when creating a position or contracting a contingent worker. For more information, consult with a VNDLY Technical Consultant.
Custom Organization Types	Loads custom organization types from Workday into VNDLY Charge Codes. This action is optional, and you can configure which organization types are imported on a per-type basis from VNDLY. Charge codes might be required if specific organization types (such as cost center, company, region, or custom HCM organization types) are requirements when creating a position or contracting a contingent worker. For more information, consult with a VNDLY Technical Consultant.
Employees	Loads employees from Workday into VNDLY Users Profiles.
Job Profiles	Loads job profiles from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, Statement of Work (SOW) roles, work orders, and Worker Profile Management.
Contingent Worker Types	Loads contingent worker types from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.

API Name	Description
Time Types	Loads time types from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.
Frequency	Loads pay frequencies from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.
Create Position Reasons	Loads Create Position Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions and SOW roles.
Contract Worker Reasons	Loads Contract Worker Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to Workday VNDLY job requisitions and SOW roles.
Change Job Reasons	Loads Change Job Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY work orders and Worker Profile Management.
End Contract Reasons	Loads End Contract Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY work orders and Worker Profile Management.
Phone Device Type	Loads phone device types from Workday into a VNDLY Custom Data Source. This information can then be linked to phone device types for contingent workers in VNDLY.
Suppliers	Loads supplier names and reference IDs from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY Worker Profile Management.
Close Position Reasons	Loads Close Position Reasons from Workday into a Workday VNDLY Custom Data Source. This information can then be linked to Workday VNDLY jobs.

Transactional Data APIs

Transactional data APIs typically load event-driven data between Workday VNDLY and Workday. APIs that load data from VNDLY to Workday occur in real time, while APIs that load data from Workday to VNDLY don't. Enable transactional data for these APIs to work as intended. Some integrations from Workday to VNDLY are dependent on your tenant's requirements.

API Name	Description
Create Position	Creates open positions in Workday when objects are approved in VNDLY Extended Workforce Management, Statement of Work (SOW), and Worker Profile Management. This API is required when using the Position Management staffing model in Workday.
Create Position - Assign Organizations Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management.
Create or Update Applicant (Pre-Hire)	Creates or updates pre-hire records in Workday when workers are onboarded in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management.
Contract Contingent Worker	Contracts workers in Workday when they're onboarded in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
Contract Contingent Worker - Assign Organizations Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in Workday VNDLY. This API is optional.
Change Job	Changes information about workers' contract details in Workday when work order information changes in Workday VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
Change Job - Assign Organization Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in VNDLY. This is optional.
Change Legal Name	Changes a worker's legal name in Workday when their legal name changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.
Change Preferred Name	Changes a worker's preferred name in Workday when their name changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.
Maintain Contact Information	Changes a worker's home and work contact information in Workday when this information changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.
Job Requisitions	Loads job requisitions created in Workday as a draft job in VNDLY. Also closes jobs in VNDLY

API Name	Description
	when the corresponding job requisitions close in Workday. This integration doesn't occur in real time from Workday to VNDLY.
Load Open Positions	Loads open positions from Workday into VNDLY. When you use this integration, you must still create a job, SOW role, or Worker Profile Management record to link the position in VNDLY. This integration doesn't occur in real time from Workday to VNDLY.
Contractor Organization Change Import (from Workday)	Loads any changes to a worker's supervisory organization and updates the work order in VNDLY when a worker moves to a different supervisory organization in Workday. Also loads other worker data changes in Workday into VNDLY work orders and Worker Profile Management. This integration doesn't occur in real time from Workday to VNDLY.
End Contingent Worker (from Workday VNDLY)	Ends the contract for a contingent worker in Workday when a work order ends in Workday VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
End Contingent Worker (from Workday)	Loads the termination event and closes the related work order in VNDLY when a contingent worker contract ends in Workday. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. This integration doesn't occur in real time from Workday to VNDLY.
Close Position	Closes unfilled positions with the *Close Position* business process in Workday when a job closes in VNDLY.

Reference: General Settings in the General Configuration Tab

Navigate to the General Configuration settings in Workday VNDLY from **More** > **Company Settings** > **Integrations** > **Workday** > **General Configuration**. You can manage tenant-wide settings for the Workday VNDLY Workforce Connector in these areas:

- API Settings on page 259
- Position Management on page 259
- Data Mapping on page 262
- Modules on page 263
    - Organization Hierarchy on page 263
    - Work Sites on page 264
    - Charge Codes on page 265
    - Employee Users on page 266
    - Custom Data Sources on page 267
    - Rescind on page 269

API Settings

Field	Description
Version	The minimum API version must be 34.0 or 39.2. We recommend always using the most up-to-date version. Manually update this field each time you adopt a new API version.

Position Management

Field	Description
Create New Position in Workday	Creates a new position in Workday when a job requisition is published in VNDLY.
Select from Available Positions in VNDLY	Displays available positions from Workday when creating a job in VNDLY. When enabled, you must also select the **Load Open Positions** setting in the **Scheduling Configurations** tab.
Staffing Models	Prevents specific users from changing the staffing model for a supervisory organization on a VNDLY work order. • *Prevent switching between staffing models on provisioned work orders for Employers* prevents employers from switching the staffing model. • *Prevent switching between staffing models on provisioned work orders for Vendors* prevents vendors from switching the staffing model.
Close Position for all Workflows	Enforces the *Close Position* business process event in Workday for these workflows in VNDLY: • *End Work Order* on an active work order or worker profile. • *Make Organization Changes* for the work order or worker profile. • *Change Primary* on an active work order. • *Select New Primary* while ending the work order. • *Select New Primary* while canceling the work order. When enabled, the **Close Position** check box grays out for these workflows and users can't make changes.
Close Unfilled Positions on Job	Enables users to close all unfilled positions in Workday when ending a job in VNDLY.
Changing Supervisory Organization	When changing a supervisory organization on a worker order or worker profile, permissioned users can take certain actions on the contingent worker's position. This section lists all available actions that they can select from, and enables you to configure them. **Position Management to Position Management**

Field	Description
	You can enable the following actions to apply if a supervisory organization using position management changes to another supervisory organization using position management: • *Use Current Position* • *Create a new position (Workday generated)* • *Select from Available Positions in VNDLY* **Job Management to Position Management** You can enable the following actions if a supervisory organization using job management changes to another supervisory organization using position management: • *Create a new position (Workday generated)* • *Select from Available Positions in VNDLY* To enable the **Select from Available Positions in VNDLY** option, you must select the **Load Positions** setting in the **Scheduling Configurations** tab.
Changing Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on the primary work order uses position management, and the worker changes to a new primary work order that also uses position management: • *Transfer Position from existing Primary Work Order* • *Create a new position (Workday generated)* • *Choose existing position from the new work order* **Job Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on a primary work order uses job management, and the worker changes to a new primary work order that uses position management: • *Create a new position (Workday generated)* • *Choose existing position from the new work order* Example: A resource manager changes a contingent worker's primary work order from

Field	Description
	WO123 to WO456. If they select *Transfer Position from Existing Primary Work Order*, then VNDLY applies the existing position from WO123 to the contingent worker's position on WO456 and Workday.
Ending Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order ends and changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on an ending work order uses position management, and the worker changes to a new primary work order that also uses position management: • *Transfer Position from existing Primary Work Order* • *Create a new position (Workday generated)* • *Choose existing position from the new work order* **Job Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on an ending work order uses job management, and the worker changes to a new primary work order that uses position management: • *Create a new position (Workday generated)* • *Choose existing position from the new work order* Example: A resource manager closes a contingent worker's primary work order WO123 and selects a new work order, WO456. If they select *Create a New Position (Workday generated)*, then VNDLY doesn't use the positions from WO123 or WO456. Instead, VNDLY generates a new position and applies it to WO456 and Workday.
Canceling Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order is canceled and changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management**

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>You can enable the following actions to apply if a worker's supervisory organization on a canceled work order uses position management, and the worker changes to a new primary work order that also uses position management:

• Transfer Position from existing Primary Work Order
• Create a new position (Workday generated)
• Choose existing position from the new work order

Job Management to Position Management

You can enable the following actions to apply if a worker's supervisory organization on a canceled work order uses job management, and the worker changes to a new primary work order that uses position management:

• Create a new position (Workday generated)
• Choose existing position from the new work order

Example: A resource manager cancels a contingent worker's primary work order WO123 and selects a new primary work order, WO456. If they select Choose existing position from the new work order, then VNDLY will apply the existing position from WO456 to the contingent worker's position in WO456 and Workday.</td></tr>
</table>

Data Mapping

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Event States</td><td>Configures Workday event state IDs. VNDLY requires these IDs to determine when an event completes in Workday and to identify the state of completion. Workday automatically generates these IDs. Don't modify these fields.</td></tr>
<tr><td>Worker Types</td><td>Configures Workday reference IDs for employees (EE) and contingent workers (CW). These IDs are set by default. Don't modify these fields.</td></tr>
<tr><td>Pay Type to Frequency</td><td>Maps VNDLY Pay Types to Workday Pay Frequencies. The field values are for VNDLY. You can configure them as:

• Hourly: Hourly
• Daily: Daily
• Weekly: Weekly
• Monthly: Monthly
• Salaried: Annual

Note: VNDLY doesn't support fixed pay frequencies.</td></tr>
</table>

Field	Description
	Any values other than the default configuration requires testing in the tenant to verify functionality.
Organization Roles	Indicates the role name that VNDLY uses to identify managers in Workday. This information is used together with the **Security Roles** settings.
Security Roles	Assigns VNDLY security roles to 3 types of worker roles in Workday. • **Managers**: Employees that are managers in Workday can be mapped to the selected roles that are configured in VNDLY. • **Non-Managers**: Employees that are not managers in Workday can be mapped to the selected roles that are configured in VNDLY. • **Everyone**: All employees that load into VNDLY from Workday can be mapped to the selected roles that are configured in VNDLY. You can assign multiple security roles to a worker type. Example: **Managers** can have a Hiring Manager and Resource Manager role. You can also use the roles in combination. Example: A user that is a manager will include roles from both **Manager** and **Everyone**.
Reasons	Indicates the default reasons that display in VNDLY when these events occur in Workday: • *Change Job (Edit, Modify, Transfer)* • *Close Position* • *End Contract* • *Create Contingent Worker (Contract Worker)* VNDLY automatically loads these reason codes from Workday to a custom data source table. Then, you must configure the reason codes in the **Custom Data Sources** section in the **General Configurations** tab.

Modules

The sections under **Modules** enable you to configure the data types that loads between Workday and Workday VNDLY at a more granular level.

Organization Hierarchy

This section configures how Workday supervisory organizations load into VNDLY Organizations.

Field	Description
Include Inactive	Includes inactive organizations to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.

Field	Description
Exclude Missing Reference IDs	Excludes any supervisory organizations with missing reference IDs. Each supervisory organization has a reference ID in Workday. When this setting is enabled, any supervisory organization with a missing reference ID won't load into VNDLY. You must enable this setting to prevent integration errors.
Organization Type Reference ID	Indicates the reference ID to map Workday supervisory organizations to VNDLY organizations. This field must always be *SUPERVISORY*.
Minimum Organization Level	Indicates the minimum organization level that should load from Workday to VNDLY. • You can locate the level of organization in VNDLY from **Company Settings** > **Organization** > **Organization Hierarchy** > **Organization Levels**. • Enter numeric values only. • When contingent worker integrations are enabled, this value must be zero. Example: You enter the value 3 in the field. VNDLY only loads supervisory organizations from Workday that are organization level 3, organization level 4, and above.
Filter Regex	Filters specific organizations to load from Workday to VNDLY. These filter rules match patterns by comparing to the supervisory organization by Reference ID or Name. These filter rules apply to every organization in the supervisory organization hierarchy: • **Filter Regex by Reference ID** • **Filter Regex by Name** These filter rules apply to the parent supervisory organization and all child organizations: • **Filter Regex by Reference ID or is a child organization of a match** • **Filter Regex by Name or is a child organization of a match**

Work Sites

This section configures how Workday locations load into VNDLY Work Sites.

Fields	Description
Match Location Usage Reference ID	Indicates the reference ID to map Workday business sites to VNDLY Work Sites. This field must always be *BUSINESS SITE*.

Fields	Description
Include Inactive	Includes inactive locations to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.
Filter Regex	Filters specific locations to load from Workday to VNDLY. These filter rules match patterns by comparing the location by Reference ID or Name. These filter rules apply to every location that loads from Workday: • **Filter Regex by Reference ID** • **Filter Regex by Name**
Filter by Country Codes	Filters locations that load from Workday to VNDLY by country.

Charge Codes

This section enables you to configure these organization types to load into VNDLY Charge Codes:

- Cost Center (HCM)
- Cost Center For Company (Finance)
- Company (HCM)
- Region (HCM)
- Business Unit (HCM)
- Project (HCM)
- Program (HCM)
- Custom HCM Organization Types

Field	Description
Enabled	Loads Workday organization types to VNDLY Charge Codes. Select this check box if the **Load Charge Codes** setting is enabled in the **Scheduling Configuration** tab.
Exclude Missing Reference Ids	Excludes any charge codes with missing reference IDs. Each charge code has a reference ID in Workday. When this setting is enabled, any charge code with a missing reference ID won't be loaded into VNDLY. You must enable this setting to prevent integration errors.
Send charge codes as organization assignment	Loads charge codes from VNDLY as organization data in Workday. When this setting is enabled, you must also select the **Enabled** field for each module and subprocess module under Contingent settings and Worker Profile Management settings.

Each organization type has these configuration options:

Field	Description
Enabled	Loads the related organization data from Workday to the VNDLY charge code table.

Field	Description
Include Inactive	Includes inactive organization data to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.
Organization Type Reference ID	Indicates the reference ID to use when mapping the organization type from Workday to VNDLY. This field is required if the **Enabled** check box is selected for the organization type.
Name	Indicates the name of the organization type to use in VNDLY. Displays as the title of the related charge code table. This field is required if the **Enabled** check box is selected for the organization type.
Filter Regex	Filters specific organization types that load from Workday to VNDLY using the Reference ID or Name. You can configure these rules for each of the organization types in this section except for **Cost Center For Company (Finance)**: • **Filter Regex by Reference ID** • **Filter Regex by Name**
Requires Visibility IDs	Indicates the Workday IDs used to filter the data load results.

Employee Users

This section configures how Workday employee data loads into VNDLY. The settings in this section only apply to employees and don't apply to contractors and contingent workers.

Field	Description
Assign User to the Organization	Indicates which organization you want to assign the employee to when their data loads into VNDLY: • *They are a member of* assigns the employee to the supervisory organization they're a member of in Workday. • *They are a manager of* assigns the employee to the highest level of supervisory organization that they help manage in Workday. If they manage multiple supervisory organizations with the same hierarchy level, VNDLY assigns them to the first organization they manage, sorted by alphabetical order. If they manage multiple supervisory organizations with different hierarchy levels, VNDLY assigns them to the highest level.
Filter by organization role assignment	Filters employees that load into VNDLY based on their organization assignment. This setting is only applicable if employees have a specified role configured in the **Filter by Roles** setting.

Field	Description
	• If you select *All*, employees with assigned or inherited organizations will load into VNDLY. • If you select *Assigned*, only employees with explicitly assigned organizations in Workday will load into VNDLY.
Exclude Private Contact Information	Excludes employee data marked as **Private** in Workday. Private information might include phone numbers and email.
Use user email address as username	Uses the employee's primary work email address in Workday as their username in VNDLY. You can enable this setting when users want to use their primary work email for Single Sign-On purposes. Example: When enabled, users can use their Workday email address to sign in to Workday, VNDLY, and other identity providers like Okta or Microsoft directory. **Note:** If the **Exclude Private Contact Information** settings is also enabled, Workday will exclude any primary work email address marked as **Private**. This might result in a blank email address for the employee in VNDLY.
Incremental Load Data	Incrementally loads user data into VNDLY for user profile creation and profile updates. You can enable this setting to decrease load times when there are a large number of users.
Import All Supervisory Organizations Assigned to Managers as Security Roles	Enables multiple security roles to load for managers in VNDLY, based on the supervisory organizations they're assigned to in Workday. The organizations assigned for the security role might differ based on the **Filter by organization role assignment** setting. This setting works together with the **Security Roles** setting in the **Data Mapping** section in the **General Configuration** tab.
Filter by Work Site Country Codes	Filters employees that load into VNDLY by country. When enabled, VNDLY sends the *Country_Reference* request criteria to the *Get_Workers* web service in Workday. To use this filter, the **Incremental Load Data** setting must be unchecked.
Filter by Roles	Filters employees that load into VNDLY based on their Organization_Role_ID in their supervisory organization in Workday. Example: Manager.
Filter Regex by Email	Filters employees that load into VNDLY based on their email addresses and domains.

Custom Data Sources

This section enables you to configure how these custom data sources load into VNDLY:

- Worker Profile Vendor/Suppliers

- End Contingent Contractor Reason
- Worker Profile End Contingent Contractor Reason
- Frequency
- Time Type
- Worker Profile Contract Contingent Reason
- Contract Contingent Reason
- Worker Type
- Job Family & Profile
- Change Job Reasons
- Phone Device Type
- Close Position Reason
- Contingent Worker Type
- Create Position Reason

If contingent worker integrations are enabled for VNDLY Worker Profile Management and Statement of Work, you must enable all data sources in this section. Each custom data source has these configuration options:

Field	Description
Enabled	Loads the related data source from Workday to the VNDLY custom data source table.
Sourced from Workday	Applies if the **Enabled** check box is selected. Loads the data source from Workday to VNDLY.
Allow manual changes	Enables manual edits to the custom data source table in VNDLY.
Show extra Vendor Fields	Applies to the **Worker Profile Vendor/Suppliers** section only. Displays the vendor email and phone number as additional fields on the *Worker Profile - Workday - Vendors* table.
Filter Regex	Filters specific data source values to load from Workday to VNDLY using the Reference ID and Descriptor: • **Filter Regex by Reference ID** • **Filter Regex by Descriptor**
API used to source suppliers	Applies to the **Worker Profile Vendor/Suppliers** section only. Indicates the API that VNDLY uses to source the supplier data. • Select *Advanced* if you have Workday Financial Management. • Select *Basic* if you don't have Workday Financial Management. • The *Reference* option pulls data from the general references API if the integration can't pull data using *Basic* or *Advanced*. This option might be used to test functionality when the other options fail.
Reference ID type for suppliers	Applies to the **Worker Profile Vendor/Suppliers** section only. Indicates the reference ID used in Workday to identify suppliers.

Rescind

Field	Description
Suppress Notifications	Suppresses Workday notifications during the rescind process. This field isn't required. The Workforce Connector automatically completes the rescind process in Workday, so Workday doesn't send any rescind notifications to VNDLY.

Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab

Navigate to the General Configuration settings from **More > Company Settings > Integrations > Workday > General Configuration**. You can manage settings for the Contingent module and Worker Profile Management module for the Workday VNDLY Workforce Connector in these areas:

- General Settings on page 269
- Change Legal Name on page 270
- Change Preferred Name on page 271
- Maintain Contact Information on page 271
- Position Configuration on page 272
- Subprocess Configuration for Position Configuration on page 273
- Close Position on page 273
- Contract Worker Config on page 274
- Subprocess Configuration for Contract Worker Config on page 274
- Job Change Configuration on page 275
- Subprocess Configuration for Job Change on page 275
- End Worker Contract Configuration on page 276
- Subprocess Configuration for End Worker Contract on page 276
- Job Import on page 277
- Contractor Import on page 277
- Segment Mappings on page 277

These settings apply to both the Contingent and Worker Profile Management modules unless otherwise specified.

General Settings

Field	Description
Enabled	Enables the Contingent or Worker Profile Management module for the Workforce Connector. When this setting is unchecked, the Workforce Connector deactivates the Contingent or Worker Profile Management module.
Contract Contingent Worker after Approval	For the Contingent module, this setting initiates the *Contract Contingent Worker* business process in Workday when the worker accepts the job offer. For the Worker Profile Management module, this setting initiates the *Contract Contingent Worker*

Field	Description
	business process in Workday when the worker profile is created in VNDLY.
Use Vendor as supplier reference	This setting only applies to the Worker Profile Management module. Enables the Vendor External ID in VNDLY when creating a contingent worker. This allows contingent workers to be linked to suppliers in Workday. You should only enable this when the same list of suppliers are configured in both VNDLY and Workday. When you select this setting, entering any value other than the valid Workday ID will cause the transaction to fail.
Workflow Enabled	Enables API transactions in the Contingent or Worker Profile Management module for the Workforce Connector. This setting is required to load transactional data. Similar to the **Enabled** setting, when this setting is unchecked, the Workforce Connector can't load any transactional data between Workday and VNDLY and deactivates the Contingent or Worker Profile Management module.
Make Pre-Hire ID editable	Enables permissioned users to edit the pre-hire ID for candidates and contractors in VNDLY. By default, you can't edit the pre-hire IDs in VNDLY.
Allow editing of protected integration fields	Allows you to edit a contingent work's Job Profile, Worker Type, and Time Type in VNDLY. When you make changes to these protected integration fields, it triggers the Change Job API to update the associated fields in Workday.
Send bill rate as pay rate	This setting only applies to the Contingent module. Loads the contingent worker's bill rate from VNDLY as the pay rate in Workday.
Map Vendor external ID to Workday supplier reference	Enables the Vendor External ID in VNDLY to load into Workday as the Supplier Reference ID. This should only be enabled when the same list of suppliers are configured in both VNDLY and Workday. This is a required setting to ensure that vendors exist in both systems. You can reference vendors by using the *Supplier_ID* or *Supplier_Reference_ID*.

Change Legal Name

Field	Description
Autocomplete	Automatically processes the *Change Legal Name* business process in Workday. This means that all

Field	Description
	approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.

Change Preferred Name

Field	Description
Autocomplete	Automatically processes the *Change Preferred Name* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Contact Information Web Service	Indicates which contact web service to use to load workers' contact information between VNDLY and Workday. We recommend selecting the *Change Home/Work Contact Information* option, which uses individual web services for contact information changes, over the *Maintain Contact Info* option, which uses a single web service.
Default Fallback Email Address	This setting only applies to the Contingent module. Workday requires an email address to create the pre-hire record. This field can be used to indicate the primary vendor's email address to create the worker's pre-hire record in Workday when the worker's contact information is missing.

Maintain Contact Information

Field	Description
Autocomplete	Automatically processes the *Maintain Contact Information* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Send Home Address to Workday	This setting only applies to the Contingent module.

Field	Description
	Loads the worker's home address in VNDLY to Workday (**Contingent Worker > Home Contact Information > Addresses section**).
Communication Usage (Email)	Loads the worker's home or work email from their candidate profile in VNDLY to the contractor's contact information in Workday. This email is used on both pre-hire records and worker records in Workday.
Communication Usage (Phone)	Loads the worker's home or work phone number from their candidate profile in VNDLY to the contractor's contact information in Workday. This phone number is used on both pre-hire records and on the worker record.
Phone Type	Indicates the worker's phone device type in Workday.

Position Configuration

This section configures settings related to the *Create Position* business process in Workday when it's triggered by VNDLY.

Note: VNDLY only pulls position data from the worker's primary work order in VNDLY. If a worker has multiple work orders, only the primary work order in VNDLY will be connected to Workday.

Field	Description
Autocomplete	Automatically processes the *Create Position* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. I If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Use Workday VNDLY to generate position IDs	Enables you to configure a sequence number in VNDLY to generate the Workday Position ID. The VNDLY sequence number replaces the sequence defined in Workday for newly created positions. This setting enables you to use different numbering conventions that are specific to VNDLY Position IDs so you can easily identify them in Workday. We recommend leaving this setting unchecked unless there is a specific need. Example: In VNDLY, you might have a work order displayed as WO00083. In Workday, a newly created position ID might display as P-10494. When this setting is enabled, the VNDLY ID loads into Workday to replace the position ID, so the position ID would display WO00083.

Field	Description
Restrict Job Profile **Restrict Job Profile Family** **Restrict Worker Type** **Restrict Worker Subtype** **Restrict Location** **Restrict Time Type**	Restricts position attributes that load from VNDLY to Workday when a new position is created from the Create Position API. When you enable these settings, the new position in Workday is restricted to the specific position values pulled from the corresponding fields on the VNDLY Job, SOW role, or Worker Profile. Example: If the **Restrict Job Profile** setting is enabled, then the VNDLY Job Profile ID loads into Workday when creating a position. **Note:** You must enable the **Restrict Location** setting to ensure that you can only hire workers in the indicated location.

Subprocess Configuration for Position Configuration

This section configures which action VNDLY should take when each of the following *Create Position* subprocesses run in Workday:

- Assign Pay Group.
- Edit Assign Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Edit Assign Organization - Send charge codes as organization assignment (must also be enabled in the charge code module).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Assign Costing Allocation.
- Request Default Compensation.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won’t change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Close Position

This section only applies to the Contingent module.

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Close Position* business process.

Field	Description
	If you don't select this setting, VNDLY can’t close out positions until the business process completes in Workday.

Contract Worker Config

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Contract Contingent Worker* business process. If you don't select this setting, VNDLY can’t contract workers until the business process completes in Workday.
Use job title as position title	Uses the Job Title in VNDLY as the Position Title in Workday.
Use job title as business title	Uses the Job Title in VNDLY as the Business Title in Workday.

Subprocess Configuration for Contract Worker Config

This section configures which action VNDLY should take when each of the following *Contract Contingent Worker* subprocesses run in Workday:

- Edit License.
- Edit Custom IDs.
- Onboarding Setup.
- Edit Service Dates.
- Edit Government IDs.
- Remove Retiree Status.
- Update ID Information.
- Create Workday Account.
- Edit Assign Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Edit Assign Organization - Send charge codes as organization assignment (must also be enabled in the charge code module).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Edit Passports and Visas.
- Assign Matrix Organization.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won’t change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews

Action	Description
	and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Job Change Configuration

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Change Job* business process. When this setting is unchecked, VNDLY can't process any job changes until the business process completes in Workday.
Use job title as position title	Uses the Job Title in VNDLY as the Position Title in Workday. We recommend enabling this setting if the **Use Job Title as Position Title** setting is enabled in the **Contract Worker Configuration** section.
Use job title as business title	Uses the Job Title in VNDLY as the Business Title in Workday. We recommend enabling this setting if the **Use Job Title as Business Title** setting is enabled in the **Contract Worker Configuration** section.

Subprocess Configuration for Job Change

This section configures which action VNDLY should take when each of the following Change Job subprocesses run in Workday:

- Assign Roles.
- Assign Pay Group.
- Onboarding Setup.
- Switch Primary Job.
- Change Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Change Organization - Send charge codes as organization assignment (must also be enabled in the charge code modules).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Edit Notice Period.
- Request Stock Grant.
- Propose Compensation.
- Check Position Budget.
- Check Job Requisition.
- Manage Union Membership.
- Request One Time Payment.
- Assign Costing Allocation.
- Assign Organization Roles.

- Assign Matrix Organizations.
- Maintain Employee Contracts.
- Update Academic Appointment.
- Assign Superior Organization.
- Student Employment Eligibility.
- Manage Employee Probation Period.
- Assign Employee Collective Agreement.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won't change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

End Worker Contract Configuration

Field	Description
Autocomplete	Automatically completes the *End Contingent Worker* business process. If you select this setting, VNDLY skips the subprocesses and ends the worker's contract. If you don't select this setting, VNDLY can't close out the worker contract until the business process completes in Workday.
Check for Position Closure in Workday	Checks if the position related to the *End Worker Contract* business process is closed in Workday. This setting works together with the **End Contacts from Workday** option on the **Scheduling Configurations** tab.
Check for Position Upon Auto-End	Indicates if the position should be closed in Workday. When this option is unchecked, the position will be left open in Workday, and enables you to select the position when a new job is created in VNDLY.

Subprocess Configuration for End Worker Contract

This section configures which action VNDLY should take when each of the following *End Worker Contract* subprocesses run in Workday:

- **Create Job Requisition**.
- **Assign Organizational Roles**.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won't change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess. This means that all approvals will be automatically approved, all reviews and to-do's will be automatically bypassed, and all notifications will be automatically suppressed in Workday.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Job Import

Field	Description
Import Charge Codes from Workday	Loads cost center changes in Workday to job requisitions in VNDLY (charge code data).

Contractor Import

Field	Description
Import Charge Codes from Workday	Loads contractor organization changes from Workday to VNDLY work orders or worker profiles. You must enable this setting and also configure the **Segment Mappings** settings to ensure that changes load correctly. Changes will only apply to the contractor's primary work order, unless the **Update primary work orders** value under Work Order Settings in VNDLY is set to *False*.
Charge Code Table	Indicates the charge code table fields that should load from Workday to VNDLY as configured in the **Segment Mappings** settings.
Import Supervisor/Manager from Workday	Indicates if data for the contractor's manager should load into VNDLY when the contractor data loads into Workday.

Segment Mappings

Field	Description
Segment Table	Indicates the name of the charge code table. This field is required if you have segment mapping enabled.
Segment Field	Indicates the property name of the charge code field on the segment code table. This field is required if you have segment mapping enabled. To obtain the VNDLY Segment Field, submit a support case in Community.

Field	Description
Charge Code Field	Indicates the name of the charge code field on the accounting code table. This field is required if you have segment mapping enabled. To obtain the VNDLY Charge Code Field, submit a support case in Community.

Reference: Workday to VNDLY Foundational Field Mapping

The Workforce Connector integrates foundational data from Workday into the related modules in Workday VNDLY. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

Supervisory Organization

This table identifies fields on the Workday Supervisory Organization and how they map to the fields on the VNDLY Organization.

Workday	VNDLY	Description
Reference ID	Code	
Name	Name	
Superior	Parent	Refers to the parent supervisory organization in VNDLY.
Inactive	Active	This information is inverted from Workday.
Staffing Model	Generic Fields - Staffing Model	
Resource Manager	Name (Resource Manager)	Displays the name of the resource manager next to the name of the supervisory organization.

Locations

This table identifies fields on the Workday Location and how they map to the fields on the VNDLY Work Site object.

Workday	VNDLY	Description
Reference ID	Code	
Name	Name	
Address Line 1	Address Line 1	
Address Line 2	Address Line 2	
Address Line 3	Address Line 3	Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local	Region Subdivision Two Address Line One Local Address Line Two Local	Additional address fields may be sent through the Connector. For these additional address fields, the field name in VNDLY is

Workday	VNDLY	Description
Address Line Three Local Address Line Four Local City City Subdivision One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Address Line Three Local Address Line Four Local City City Subdivision One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	dependent on the country of the address. Examples: • For Japan, the Address Line One Local field would display Address Line One - Kanji. • For Serbia, the Address Line One Local field would display Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	City	
County	County	Contact VNDLY to configure this setting.
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
Subdivision Code	State	
Country Code	Country Code	
Postal Code	Zip	

Company, Cost Center, Region, Business Unit, Project, Program

This table identifies fields on the Workday Organizations and how they map to the fields on the VNDLY Charge Codes.

Workday	VNDLY
Reference ID	Code
Name	Name

Custom Organization Types

This table identifies fields on the Workday Custom Organization and how they map to the fields on the VNDLY Charge Codes.

Workday	VNDLY
Reference ID	Code
Name	Name

Workers (Employees)

This table identifies fields on the Workday Workers (Employees) and how they map to the fields on the VNDLY Users object.

Workday	VNDLY	Description
Employee ID	User External ID	
Business Title	User Position Title	The Business Title associated with the contract.
User Account	User Username	
Work Email	User Email	
First Name	User First Name	
Middle Name	User Middle Name	
Last Name	User Last Name	
Preferred First Name	Preferred First Name	
Preferred Last Name	Preferred Last Name	
Work Phone Country Code	User Phone Country Code	
Work Phone Number	User Phone Number	
Work Phone Extension	User Phone Extension	
Location	User Work Site	
Supervisory Organization	User Organization	The supervisory organization in Workday in which the position is created.
Manager	Report to User	Indicates the manager of the employee user.
Organization Custom Organizations	Charge Codes	Organization and Custom Organizations are imported to help drive what information is auto-populated when a resource manager is selected on the Job form in VNDLY. These fields aren't visible in the UI.
Worker Status	Is Active	Inactive when the Worker status is terminated.

Job Families and Job Profiles

This table identifies fields on the Workday Job Families and Job Profiles and how they map to the fields on the VNDLY Custom Data Source - Workday - Job Profiles object.

Workday	VNDLY
Job Family Name	Job Family Name
Job Profile Title	Job Profile Title
Job Family ID	Job Family ID
Job Profile ID	Job Profile ID
Reference ID Type	Workday Type

Worker Type

The table identifies fields on the Workday Worker Type and how they map to the fields on the VNDLY Custom Data Source - Workday - Worker Type object.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Contingent Worker Type

This table identifies fields on the Workday Contingent Worker Type and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Contingent Worker Type.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Time Types

This table identifies fields on the Workday Time Type and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Time Type.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Frequency

This table identifies fields on the Workday Frequency and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Frequency.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Phone Device Type

This table identifies fields on the Workday Phone Device Type and how they map to the VNDLY Object - Custom Data Source - Workday - Phone Device Type.

Workday	VNDLY
ID	Workday ID
Reference ID Type	Workday Type

Workday	VNDLY
Referenced Object Descriptor	Workday Name

Suppliers

This table identifies fields on the Workday Suppliers and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Vendors. This information is only used in the VNDLY Worker Profile Management module.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Create Position Reasons

This table identifies fields on the Workday General Event Subcategory - Create Position Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Create Position Reasons.

Workday	VNDLY
Reference Object Descriptor - Prefix	Group
Reference Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Contract Worker Reasons

This table identifies fields on the Workday Contract Worker Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Job Reason for Hire.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Worker Profile Reason for Hire

This table identifies fields on the Workday Worker Profile Reason for Hire and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracker Reason for Hire.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Change Job Reasons

This table identifies fields on the Workday Change Job Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Change Job Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Close Position Reasons

This table identifies fields on the Workday Close Position Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Close Position Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Contingent Worker Termination Reasons

This table identifies fields on the Workday Contingent Worker Termination Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Terminate Contingent Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Worker Profile End Reason

This table identifies fields on the Workday Worker Profile End Reason and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Terminate Contingent Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Reference: Workday to VNDLY Transactional Field Mapping

In the Connector, some changes initiate data transfer from Workday to VNDLY. All transactional data from Workday is imported to VNDLY based on a schedule. To review schedules, see Set Up the Scheduling Configuration Tab in Workday VNDLY settings. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

Load Contractor Changes

This table identifies fields related to the contingent worker in Workday and how they map to the fields on the **Work Order** or **Worker Profile** in VNDLY. It's recommended that you make changes in VNDLY as opposed to Workday to avoid confusion on which changes should be made in which system.

Workday	VNDLY	Description
Supervisor Employee Number	External ID	External ID of the **Resource Manager**.
Supervisor Username	Username	Username of the **Resource Manager**.
Organization Code	Organization Unit	User-defined code of the organization unit associated with the work order.
Workday Position ID	Position ID	The ID of the related position used in Workday, if Position Management is used. This should be blank if the organization of the work order or worker profile isn't using Position Management within the **File Transfer** report in VNDLY.
Workday Title	Position Title	The Job Title of the contingent worker, which can be found on the contract record in Workday. This change updates the position title on both the work order and worker profile in Workday VNDLY.
Workday Contingent Worker Type	Worker Type	This information is sent whenever there's a change to the Workday Contingent Worker Type.
Workday Time Type	Time Type	The ID of the time type used for the contingent worker in Workday. This information is sent whenever there's a change to the Workday Time Type field.
Job Family	Job Family	The job family is populated based on the job profile selected. This can be blank or populated.
Job Profile	Job Profile	This information is sent whenever there's a change to the Job Profile.

Workday	VNDLY	Description
Workday Location	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within Workday VNDLY.
Company Cost Center Region Business Unit Project Program Custom Organizations	Company Cost Center Region Business Unit Project Program Custom Organizations	

End Contractors from Workday

This table identifies fields on the Workday End Contingent Worker Contractor task and how they map to the fields on the VNDLY Work Order End modal. This process is necessary when full-time employee conversions need to be made in Workday, and the worker's work order must be closed in VNDLY.

Workday	VNDLY	Description
Reference ID	Client Contractor ID	The ID of the contingent worker that is being terminated in Workday.
Termination Date	End Date	The date the contract is being terminated.
Termination Reason Subcategory	End Reason	The termination reason for the contract.
Position ID	Position ID	Indicates whether the associated position is to be closed on contract termination.

Create Jobs from Job Requisitions

This table identifies fields on the Create Job Requisition task and how they map to the fields on the VNDLY job. When job requisitions are imported to VNDLY, the job in VNDLY is created in a draft status.

Workday	VNDLY	Description
Organization Code	Organization Unit	User-defined code of the organization unit associated with the work order.
Number of Positions	Number of Positions	Defines the number of positions for a job.
Reason for Hire	Reason for Hire	The reason for hire for the contingent worker. The reason for hire is set based on the **Default**

Workday	VNDLY	Description
		Contract Worker Reason setting.
Start Date	Start Date	The date the contractor is being hired.
End Date	End Date	The date the contract is being terminated.
Workday Title	Position Title	The job title of the contingent worker, which can be found on the contractor record in Workday.
Category	Job Category	The job category for the VNDLY job. When the jobs are drafted in VNDLY, the job category is set to *Default*.
Summary	Job Summary	Workday job profile summary. The job summary can be displayed in VNDLY when configured in **More** > **Company Settings** > **Job Form Configurations**.
Description	Job Description	Workday job profile description.
Location Code	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within VNDLY.
Standard Hours per Week	Standard Hours per Week	Number of hours that the contingent worker is working regularly per week.
Resource Manager	Resource Manager	Manager of the supervisory organization.
External ID	External ID	Job requisition reference ID from Workday.
Currency Code	Currency	Three letter currency code that defines the VNDLY job currency. The three letter currency code is defined based on the setting indicated in **More** > **Company Settings** > **Currency**.
Workday Positions	Position	The ID of the related position used in Workday, if Position Management is used. This should be blank if the organization of the work order or worker profile isn't using Position Management within the File Transfer report in VNDLY.

Workday	VNDLY	Description
Publishing Source	Publishing Source	Indicates the system in which the data was published. Publishing source gets set as Workday when job requisitions are created in Workday.
Worker Type	Worker Type	The ID of the workday contingent worker type used for the contingent worker in Workday.
Time Type	Time Type	The ID of the time type used for the contingent worker in Workday.
Job Family Reference ID	Job Profile	The ID of the job family used for the contingent worker in Workday.
Job Profile Reference ID	Job Profile	The ID of the job profile used for the contingent worker in Workday.
Company Cost Center Region Business Unit Project Program Custom Organizations	Company Cost Center Region Business Unit Project Program Custom Organizations	

Close Jobs from Job Requisitions

This table indicates fields use to identify the VNDLY job that should be closed when the job requisition is closed in Workday.

Workday	VNDLY	Description
External ID	External ID	Workday job requisition reference ID.
Publishing Source	Publishing Source	Indicates the system in which the data was published. Publishing source gets set as Workday when job requisitions are closed in Workday.

Load Open Positions

This table identifies fields on the Workday Position and how they are mapped to the VNDLY Position. Once positions are imported from Workday, a list of available positions is selectable when creating the job in VNDLY. The **Select from Available Positions** setting must be configured to view the list of available positions when creating the job. You can view Reference: General Settings in the General Configuration Tab for more details.

Workday	VNDLY	Description
Reference ID	Position	The ID of the related position used in Workday, if Position Management is used. This should be blank if the organization of the work order or worker profile isn't using Position Management within the **File Transfer** report in VNDLY.
Workday Title Title	Position Title	The job title of the contingent worker, which can be found on the contractor record in Workday.
Organization	Organization Unit	User-defined code of the organization unit associated with the work order.
Worker Type		The worker type gets set as a contingent worker for workers in VNDLY.
Worker Subtype	Worker Type	The ID of the workday contingent worker type used for the contingent worker in Workday.
Time Type	Time Type	The ID of the time type used for the contingent worker in Workday.
Job Profiles	Job Profile	The ID of the job profile used for the contingent worker in Workday.
Locations	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within VNDLY.

Reference: VNDLY to Workday Transactional Field Mapping

This information applies to both the Worker Profile Management and Extended Workforce Management modules. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

Create Position

This table identifies fields on the VNDLY Job form and how they map to fields on the Workday Create Position task.

VNDLY	Workday	Description
Organization	Supervisory Organization	Represents the supervisory organization in Workday in which the position is created.
Create Position Reason	Position Request Reason	The reason specified for opening the position in Workday.

VNDLY	Workday	Description
Title	Job Posting Title	The job posting title on the Position.
Start Date Current Date	Availability Date	The earliest start date of a worker in the position. The Start Date or Current Date may be used, whichever is earlier.
Start Date Current Date	Earliest Hire Date	The earliest date a worker can be hired. this is different from the Start Date which can be the same or later. The Start Date or Current Date may be used, whichever is earlier.
Worker Type	Worker Sub-Type	Only worker types associated with contingent workers are mapped. This is typically used to segment contingent workers by role, access, etc.
Location	Location	This is the business site assigned to the worker.
Time Type	Time Type	Identifies full-time or part-time.
Job Family	Job Family	This is the job family assigned to the worker.
Job Profile	Job Profile	This is the job profile of the worker.
List of Position IDs	Position ID	When a job is sent to Workday, Workday creates a position and the Position ID is retrieved from Workday and sent back to VNDLY to be reflected on the job.

Create / Update Pre-Hire

This table identifies fields on the VNDLY Add a Candidate form and how they map to the Create Pre-Hire task in Workday.

VNDLY	Workday	Description
First Name	First Name	Legal First Name of pre-hire in Workday.
Middle Name	Middle Name	Legal Middle Name of pre-hire in Workday.
Last Name	Last Name	Legal Last Name of pre-hire in Workday.
Email	Email Address	Candidate Personal Email maps to either Home or Work Contact Email based on the

VNDLY	Workday	Description
		Maintain Contact Information configuration. The visibility of this field is set to private.
Phone (Country Code + Phone Number)	Country Phone Code Phone Number	Candidate Phone Number maps to either Home or Work based on configuration. Phone Device Type is set based on configuration. The visibility of this field is set to private.
Address Line 1	Home - Address Line 1	Address Line 1 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 2	Home - Address Line 2	Address Line 2 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 3	Home - Address Line 3	Address Line 3 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private. Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Additional address fields may be sent through the connector. For these additional address fields, the field name in VNDLYis dependent on the country of the address. Examples: • For Japan, the Address Line One Local field displays as Address Line One - Kanji. • For Serbia, the Address Line One Local field displays as Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	Home - City	City of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
County	County	Contact VNDLY to configure this setting.

VNDLY	Workday	Description
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
State	Home - State	State of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Zip Code	Home - Postal Code	Postal Code of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Country	Country	Country of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Prehire ID	Pre-Hire Id	Pre-Hire/Applicant Id retrieved after the creation of the pre-hire in Workday or pre-populated in VNDLY prior to onboarding.

Contract Contingent Worker

This table identifies fields on the VNDLY Work Order and how they map to the Contract Contingent Worker task in Workday.

VNDLY	Workday	Description
Organization	Supervisory Organization	Represents the supervisory organization in Workday in which the position is created.
Start Date	Start Date	The Contractor Start Date of the contract or job in Workday.
Contract Contingent Reason	Reason	The reason associated with the specific worker and contract. Note: This is different than the Create Position Reason.
Position ID	Position ID	The Position ID from the Job that is being used to staff the worker. Note: Positions only apply to Supervisory Organizations with a Position Management Staffing Model.
Worker Type	Worker Type	Maps to the Contingent Worker Type.
Job Profile ID	Job Profile ID	Maps to the Workday Job Profile assigned to the contract.
Time Type	Time Type	Identifies full-time or part-time.
Location	Location	This is the business site assigned to the worker.

VNDLY	Workday	Description
Supplier	Supplier	This is optional and identifies the Supplier that the worker is contracted through.
End Date	Contract End Date	The Contract End Date of the worker.
Title	Job Title	The Job title associated with the contract.
Title	Business Title	The Business Title associated with the contract.
Scheduled Weekly Hours	Scheduled Weekly Hours	Populates the Scheduled Weekly Hours on the contract.
Prehire ID	Prehire ID	The Prehire Id that identifies the applicant that is being contracted and is reflected on the Contractor Profile in VNDLY.
Bill Rate	Pay Rate	Optionally populates the Contract Pay Rate of the worker.
Pay Type	Pay Frequency	Optionally populates the Frequency of the Pay of the worker.
Currency	Pay Currency	Optionally populates the currency of the pay of the worker in Workday.
Client Contractor ID	Contingent Worker Id	The Contingent Worker ID that is created in Workday is retrieved via API using the Event Id and reflected on the Contractor Profile as well as displayed on the Work Order in VNDLY.

Maintain Contact Information - Email

This table identifies the field on the VNDLY Edit Contractor Profile and how it maps to the Maintain Contact Information API task in Workday.

VNDLY	Workday	Description
Email	Email Address	Candidate Personal Email maps to either Home or Work Contract Email based on configuration. The visibility of this field is set to private.

Maintain Contact Information

This table identifies fields on the VNDLY Edit Candidate and how they map to the Maintain Contact Information API task in Workday. Note: If there are home address and phone number updates, two Maintain Contact Information API calls are made to Workday.

VNDLY	Workday	Description
Phone (Country Code + Phone Number)	Country Phone Code Phone Number	Candidate phone number maps to either home or work based on configuration. Phone Device Type is set based on configuration. The visibility of this field is set to private.
Address Line 1	Home - Address Line 1	Address Line 1 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 2	Home - Address Line 2	Address Line 2 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 3	Home - Address Line 3	Address Line 3 of the Home Address of the pre-hire in Workday. Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Additional address fields may be sent through the connector. For these additional address fields, the field name in VNDLYis dependent on the country of the address. Examples: • For Japan, the Address Line One Local field displays as Address Line One - Kanji. • For Serbia, the Address Line One Local field displays as Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	Home - City	City of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
County	County	Contact VNDLY to configure this setting.
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
State	Home - State	State of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.

VNDLY	Workday	Description
Zip Code	Home - Postal Code	Postal Code of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Country	Country	Country of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.

Change Job

This table identifies fields on the VNDLY Work Order Edit form and how they map to the Change Job task in Workday.

VNDLY	Workday	Description
Start Date Current Date	Effective Date	Represents the effective date on which the change takes effect in Workday. Contact VNDLY to configure this setting. The Start Date is sent via the Correct Contract contingent Worker and Hire process.
Title	Job Posting Title	Updates on the Job Posting Title on the Position.
Title	Business Title	Updates on the Business Title on the Position.
VNDLY Workday Settings	Change Job Reason	This is the default Change Job Reason configured in Settings that is sent via the API.
Location	Location	Updates the Business Site assigned to the worker.
Standard Hours/Week	Schedule Hours	Updates the scheduled weekly hours on the contract.
End Date	Contract End Date	Updates the Contract End Date of the worker.
Bill Rate	Contract Pay Rate	Updates the Contract Pay Rate of the worker.
Company Cost Center Region Business Unit Project Program	Charge Codes	

VNDLY	Workday	Description
Custom Organizations		
Job Profile	Job Profile	
Worker Type	Worker Type	
Time Type	Time Type	

End Contingent Worker

This table identifies fields on the Work Order End modal and how they map to the End Contingent Worker Contract task in Workday.

VNDLY	Workday	Description
Client Contractor ID	Contingent Worker ID	Identifies the contract that is being terminated in Workday.
End Date	Contract End Date	Identifies the date the contract is being terminated.
End Reason	Reason	Identifies the termination reason for the contract.
End Date	Notify Worker By	Identifies the date by which to notify the worker. It is always mapped to the End Date.
End Date	Last Day of Work	Identifies the last day of work for the contract. It is always mapped to the End Date.
Close Position	Close Position	Indicates whether the associated position is to be closed on contract termination.

Close Position

This table identifies fields on the End Job in VNDLY for Contingent Labor and how they map to the Close Position task in Workday. These fields are only set to Workday when you end a job with unfilled positions.

VNDLY	Workday	Description
Current Date	Close Date	Close Date is always set to the current date.
Default Close Position Reason	Close Reason	

Correct Start Date

This table identifies fields on the VNDLY Work Order and how they map to the Correct Start Date in Workday.

VNDLY	Workday	Description
Start Date	Start Date	This task is trigged only when the Workday Version is V39.2.

VNDLY	Workday	Description
		Contact VNDLY to assist with configuration.
Correction Reason	Leave a Note	(Optional) If the **Leave a Note** field is populated while modifying the work order, then it is populated else Workday adds the Default Comment to the correction.

