Workday HCM Training

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Module 1: NAVIGATION BASICS

POWER OF ONE

At Workday, all customers are on one version of software. Released twice a year, each Workday version encompasses our most up-to-date Workday Financial Management and analytics applications. Since every customer is on the same version, with the same codeline, customers benefit from a one-to-many Workday HCM, planning any model. Improvement for one customer is improvement for all customers. This concept is the "Power of One.“

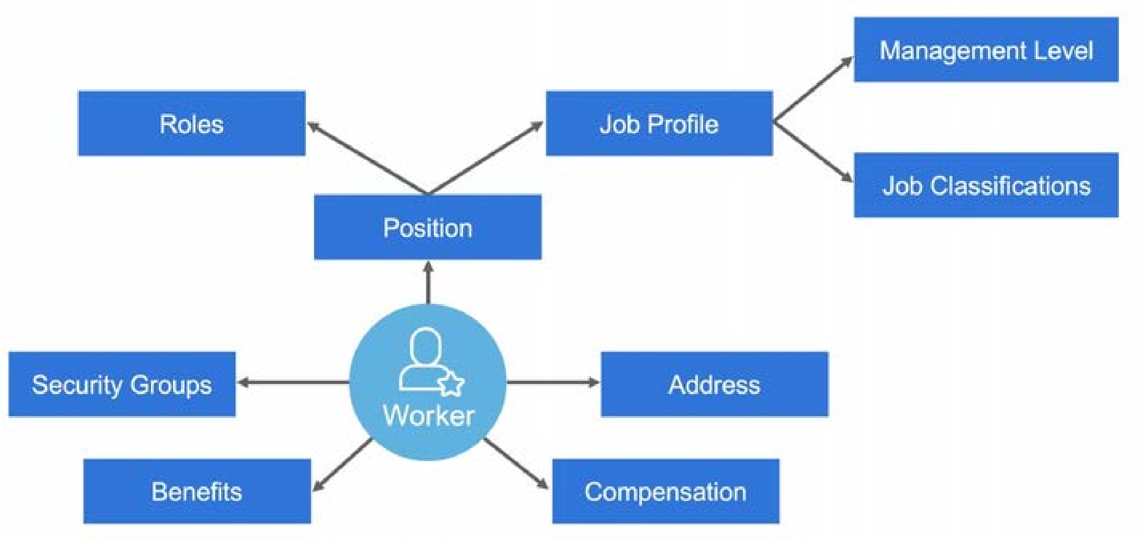
The Power of One extends to your organization's data as well. When all your data, from compensation to benefits, is in one system, you control navigation and reporting with ease and efficiency.

POWER OF OBJECTS

Workday stores data as business objects (e.g., organizations, workers, positions) that are similar to database tables or Microsoft Excel worksheets. Just as a table or worksheet has columns and rows, a business object has fields and instances. Workday automatically links related business objects together, creating a web of interrelated objects. Objects make your data contextual and actionable: when you see something in Workday, you can often perform an action on it or find related data. This concept is the "power of objects."

In Workday HCM, a worker is associated with a position and that position is associated with a job profile. That job profile is then associated with a management level, job classification, exempt status, and more.

In the diagram below, the Worker is the primary business object, and the attached rectangles are examples of related business objects.



Related Actions

The Workday object model drives navigation and reporting. For example, when you view a page in Workday, the page often consists of many links, or objects. Some of those objects have a Related Actions icon next to them, which you can use to take action on that object. The actions available to you depend on your security. Find the Related Actions: By hovering over an object's link. In the blue header bar of a task or report.

ACTIVITY 1.1 - NAVIGATION

Business Case: You are a new Workday user. Sign in to the system and begin exploring, searching, and navigating in Workday.

Task #1: Searching Workday

1. Sign in as Logan McNeil

2. In the Search box, type termination, then click the magnifying glass or press the Enter key on your keyboard. How many search results do you receive?

3. In the Search box, use a search prefix by typing bp: termination, then click the magnifying glass.
A. How many search results do you receive?
B. What type are these search results?

4. In the Search box, type Benefit Events Status Report. Without pressing Enter or clicking the magnifying glass, view the predictive search results that appear below the Search box. Then in the Search box, enter ben even stat and note your results. Notice that searching using partial words still returns the correct result.

5. In the Search box, type 21123 and notice that Sharon Kwang appears in the predictive search results. By searching for an Employee ID number, you can find an exact match.

6. In the Search box, type betty liu and press your Enter key. View the search results using the current default category All of Workday.

7. Change the Category on the left side of your search results to People.
A. How many search results do you receive?
B. What type are these search results?

Task #2: Navigating Workday

1. From the Home page, click the Configure Applications gear icon.

2. Review the applications currently on your Home page and verify that the Compensation Dashboard is included. We will use the Compensation Dashboard in the next activity.

3. Remove any other applications that you do not think you will use in your initial deployment (e.g., Learning Trainer).

4. Click OK and Done.

5. Find the supervisory organization that handles payroll. How many workers are in this organization?

6. Navigate to worker Julie Boyer, a member of the Payroll Department. From her Worker Profile, answer the following questions:
A. What is Julie's position?
B. Who is her manager?
C. Where is she located?
D. When was Julie hired?

Reporting Basics

Reports in Workday have an easy-to-use, consumer-friendly interface with the functional user in mind. Reports exist as built-in features in the application, which allow users to take action on the report output directly from the user interface. Reports in Workday leverage your security configuration, allowing you to access real-time, relevant data.

You can build custom reports using the Report Writer tool. You can embed reports in your business process transactions to provide relevant data for decision-making at the time of decision. You can also enable reports as worklets and display them on dashboards. In addition, you can use scorecards to display a snapshot of important metrics for a specific organization for a particular period. These metrics are sometimes called Key Performance Indicators, or KPIs.

The Workday reporting ecosystem supports many features:

- You can use reports in outbound integrations (Reporting-as-a-Service).
- Mobile devices can access reports.
- Workday allows you to associate layouts with your custom reports, which it uses to generate PDF files. In Workday, these designs are business form layouts. You can define a business form layout using the Report Designer (BIRT) tool in Workday Studio.

- You can use Prism Analytics to analyze data from both Workday and external sources.
- Workday helps you automate your Excel processing and formatting when exporting a Workday custom report. Excel templates reduce the time and effort needed to deliver Excel workbooks based on Workday custom reports. This is especially valuable in cases where you export a report on a regular basis and then reformat the data in Excel. This feature supports any macros, calculations, and formatting defined in the associated workbook template.

ACTIVITY 1.2 - RUN HCM REPORTS

Task #1: Explore HCM Reports

1. Sign in as Logan McNeil (lmcneil).

2. Search for and select the Address Change Report.

3. Run the Address Change Report with no date criteria. Who had the most recent address change?
Hint: Use the report's Sorting feature instead of scrolling down the list.

4. Run the Total Rewards report for Jared Ellis, and answer the following questions:
A. What is Jared's base pay?
B. What percentage of Jared's total rewards is his base pay?
Hint: Hover over the relevant pie chart section.

Task #2: Run a Search Report

1. Navigate to the IT HelpDesk Department supervisory organization.

2. From the Staffing tab, in the first table, confirm that there are two IT HelpDesk Specialist (Unfilled) positions located in San Francisco.

3. In the Search box, search for and select the Find Workers report. Answer the following questions:
A. How many search results display?
B. Does Logan have any Saved Searches?

4. Using the search facets, filter the results by all three following criteria:
A. Competency > Problem Solving
B. Management Level > 8 Individual Contributor
C. Supervisory Organization > Global Support - USA Group

5. Select the checkbox next to each worker, then click the Compare button.

6. Review the transposed report to determine if either of these workers can be considered as an internal candidate for the IT HelpDesk Specialist position.

LANGUAGE AND TERMINOLOGY CONSIDERATIONS

The default language in most Workday tenants is English. However, Workday provides several terminology and translation configuration options.

TRANSLATIONS:
Workday can deliver Employee Self-Service and Manager Self-Service in over 30 languages. Restrict language choices using the Edit Tenant Setup - Global task. Note that while Workday maintains Workday-delivered translations, you will need to maintain any translations specific to your configuration and business data.
Languages are primarily assigned based on the location a worker is hired into. However, an individual worker can change their system language from the Change Preferences task, accessible via the Worker Profile menu > My Account. Using this task, you can set a Preferred Locale and a Preferred Display Language.

CUSTOM LABELS:
If certain Workday terms are not compatible with your organization's language, you can override those Workday terms with custom labels in various tasks and reports. Use the Maintain Custom Labels task to create, edit, and delete custom labels. Note that you can also define override values for variations of the Workday term when necessary, such as the singular, plural, and possessive forms of the term. We also provide a Preserve Case option that always displays the custom label in the case you define.

SYNONYMS:
You can define synonyms to map your organization's terminology with Workday terminology. For example, you can define the synonym zip code for the Workday term postal code. When you search for zip code, Workday tasks, reports, and objects with postal code in the title appear in the search results.
Maintain your synonyms using the Edit Tenant Setup - Search task.

Module 1: Test

1. True or False? Search lets you use partial searches, abbreviations, and misspelled words.

2. What is the name and location of the icon you select when acting on or making changes to an object?

3. What is the name of the report that displays Workday-delivered reports?