

# Employee Self Service Participant Guide

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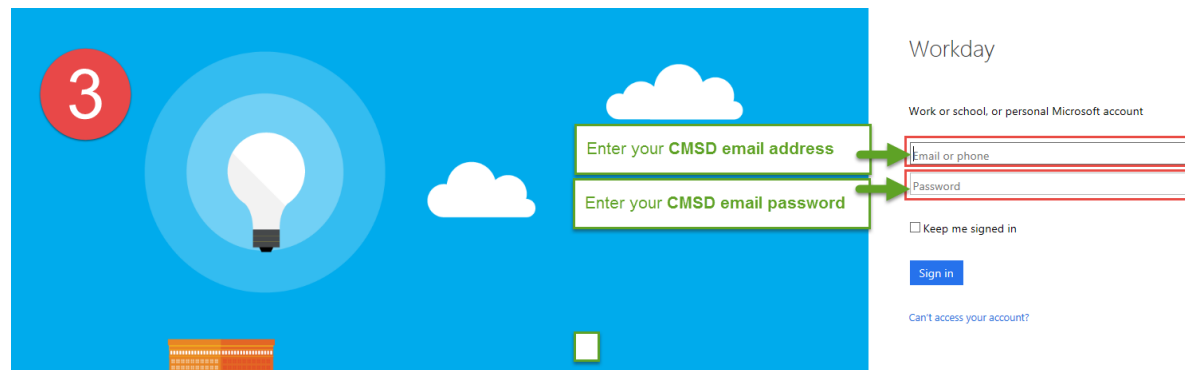
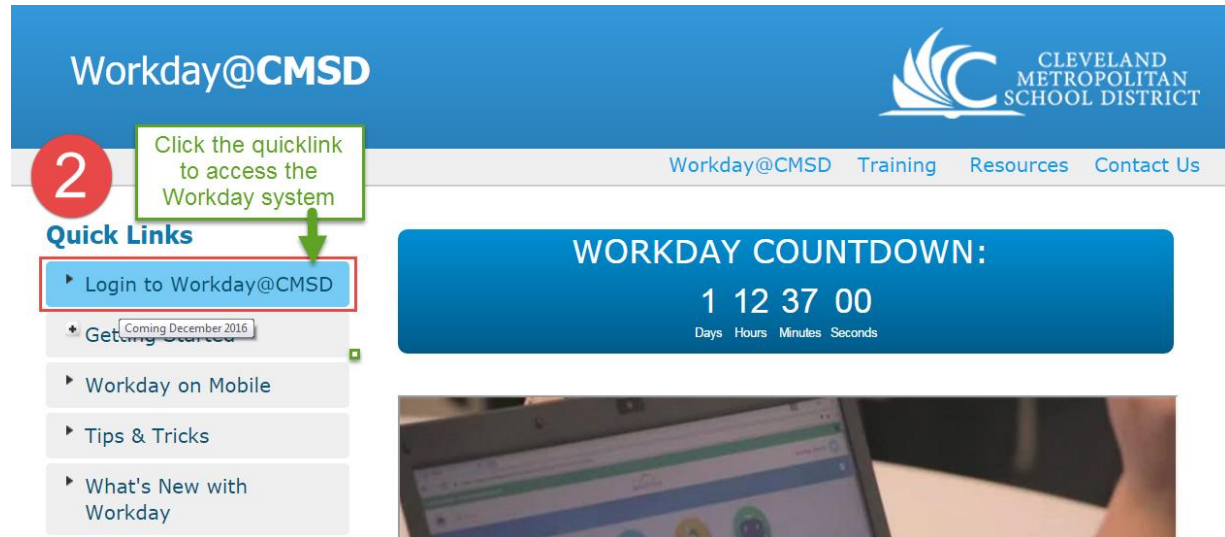
# PARTICIPANT GUIDE

## ABOUT THIS GUIDE


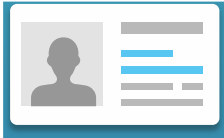



This guide includes Participant Activities to work through as self-directed Employee Self Service training. Follow along in the system to practice transactions.



## LOG IN TO THE WORKDAY SYSTEM

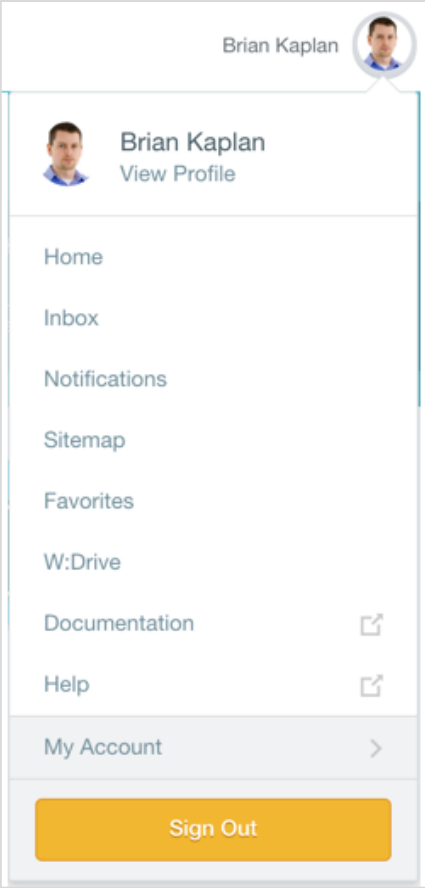
Follow these steps to log in to Workday:








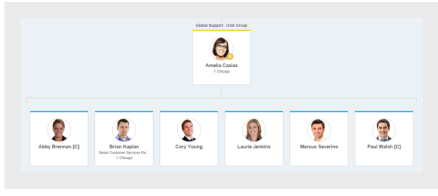
## GLOSSARY

|   | Name                 | Icon  | Description   |
|---|----------------------|---|---|
| 1 | Inbox                |    | View Actions you must take and Archives of past actions you have taken including business processes initiated by you.   |
| 2 | Personal Information |    | Change your contact and personal information (such as addresses, email, and phone numbers,) emergency contacts, photo, legal name, preferred name, and government IDs.                      |
| 3 | Pay                  |   | Access withholding elections and payment elections. View payslips, total compensation, bonus and one-time payment history, tax documents, and allowance plans.                              |
| 4 | Time                 |  | Enter your work time and information about supplemental pays. Employees not using SmartFind Express can also enter their absences in this worklet.  |
| 5 | Directory            |  | View information about other workers in the company, including work address and phone number. Also, view your organizational chart, management chain and organizations to which you belong. |

|   | Name     | Icon  | Description   |
|---|----------|---|---|
| 6 | Time Off |  | View your time off and time off balance. Request time off (if appropriate for your role), including time off corrections and Leaves of Absence. |
| 7 | Benefits |  | Change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.  |

|   | Name                      | Icon   | Description   |
|---|---------------------------|--|---|
| 8 | Profile Photo (Main Menu) |  | <p>Displays your profile photo with a blue badge for pending Notifications and red count badge for Inbox items, and these menu options:</p> <ul style="list-style-type: none"> <li>• View Profile - displays your worker profile.</li> <li>• Home - displays the Home landing page.</li> <li>• Inbox – These are items requiring an action from you.</li> <li>• Notifications – These are items to be aware of but may not require action from you.</li> <li>• Sitemap - a list of the standard reports and tasks available to you, sorted by category.</li> <li>• Favorites - a configurable list of favorite tasks, reports, business objects, and custom / shared custom reports available to you, sorted by category.</li> <li>• W: Drive - a virtual drive (not a mapped drive on your computer) where you can store generated reports.</li> <li>• Documentation - a link to the Workday Documentation on Workday Community.</li> <li>• Help – depending on your set up, this is a link to a third party or internal resource.</li> <li>• My Account - provides access to these account management tasks: <ul style="list-style-type: none"> <li>○ Change Password</li> <li>○ Change Preferences</li> <li>○ Switch Accounts (if you are a delegate)</li> </ul> </li> <li>• Sign Out</li> </ul> |



|    | Name            | Icon  | Description   |
|----|-----------------|---|---|
| 9  | Home            |    | Navigates you back to the home page.  |
| 10 | Search          |    | Find and go directly to the tasks and reports of interest to you.   |
| 11 | Workday Logo    |    | Display your home page.   |
| 12 | Related Actions |    | Perform additional actions on an object. Possible actions include viewing your current benefit elections, editing your contact information and requesting time off.   |
| 13 | Worklets        |    | Access tasks and information you use on a regular basis via a "tile" on the My Workday page. Worklets link to configured reports and related tasks and links within Workday.<br>Ex. Benefits, Pay, Time and Expenses Worklets |
| 14 | Org Chart       |  | View how an organization is structured. It outlines the roles, responsibilities, and relationships between individuals within an organization.  |

## NAVIGATION

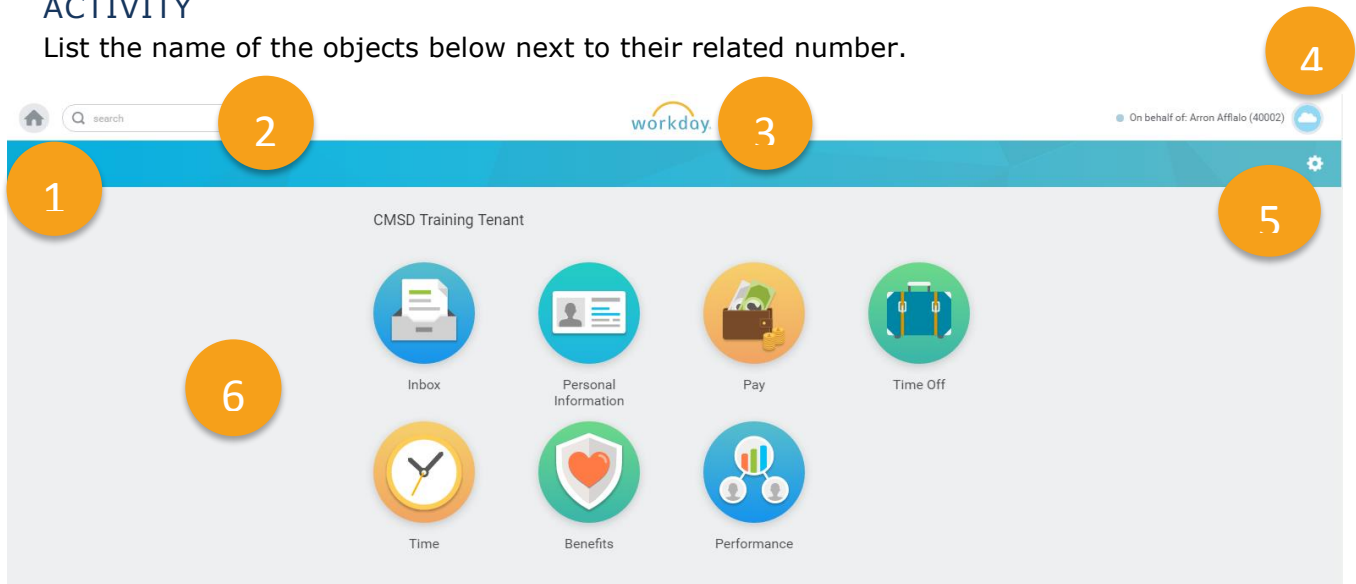
### OVERVIEW

When you log in to Workday, the Home page displays. From the Home page, you access all personal information, such as emergency contacts, paid time off balances, payment elections, federal tax information, name and address, and much more. The banner contains Workday global navigation functions, such as Search, Home, and your main menu, which provides access to your Inbox, Worker Profile, and Notifications.

The icons on your Home page provide access to worklets – groups of related tasks, reports, and links. These worklets are organized by functional category and represent different tasks or work you can perform.

### ACTIVITY

List the name of the objects below next to their related number.

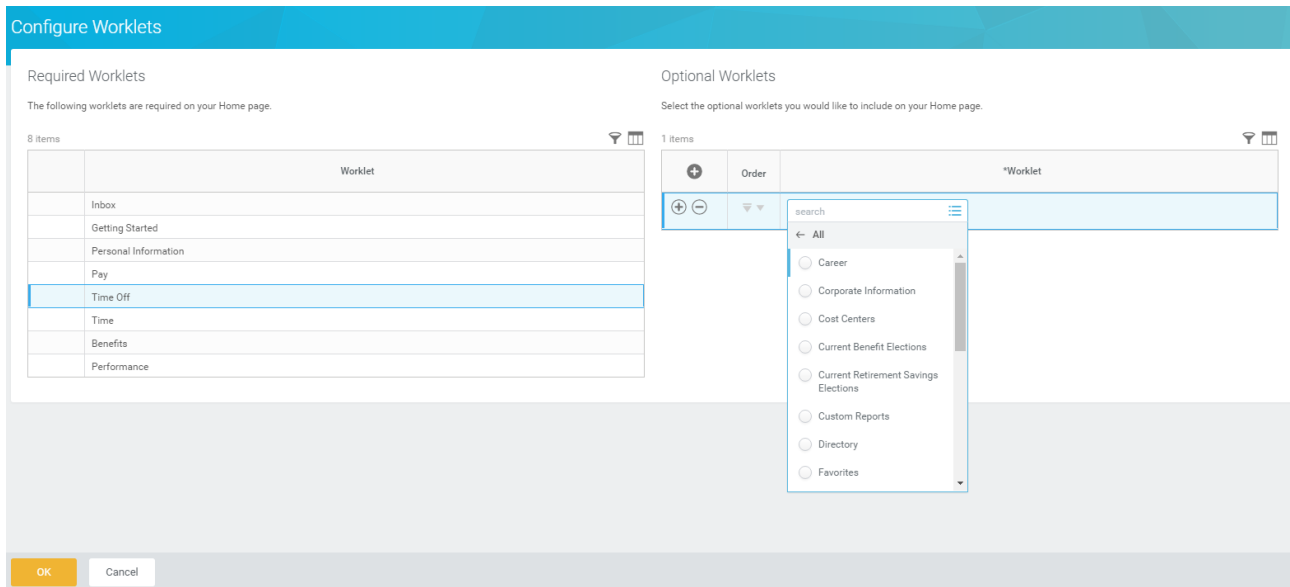


| # | Name | Notes |
|---|------|-------|
| 1 |      |       |
| 2 |      |       |
| 3 |      |       |
| 4 |      |       |
| 5 |      |       |
| 6 |      |       |

## CONFIGURE WORKLETS

### OVERVIEW

You can add and change the position of Worklets appearing on your home page by using the gear icon just below your photo. Click the gear and click the plus sign under the Optional Worklets column. Search for worklets using the prompt list or type the name of the one you want. Click OK and then Done.



**Configure Worklets**

**Required Worklets**  
The following worklets are required on your Home page.

8 items

| Worklet              |
|----------------------|
| Inbox                |
| Getting Started      |
| Personal Information |
| Pay                  |
| Time Off             |
| Time                 |
| Benefits             |
| Performance          |

**Optional Worklets**  
Select the optional worklets you would like to include on your Home page.

1 items

Order \*Worklet

search

- ← All
- Career
- Corporate Information
- Cost Centers
- Current Benefit Elections
- Current Retirement Savings Elections
- Custom Reports
- Directory
- Favorites

OK Cancel

### ACTIVITY

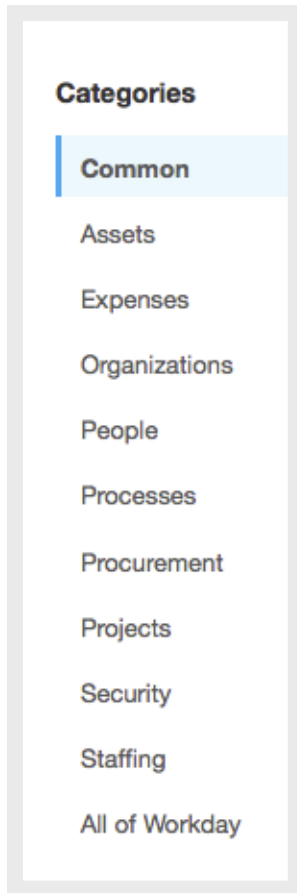
- Add the **Directory Worklet** to your home page.

## SEARCH

### OVERVIEW

You can perform searches on targeted areas of Workday, or expand them to include all of Workday. By default, the focus of a typical search is on the most common areas of Workday.

To change the focus of your search, you can select the distinct area of Workday to search from the **Categories** list. Or, you can expand your search by selecting **All of Workday**.




## ACTIVITY

- Search for a person by using a common name where you may get several results and select **All of Workday** to view results in your entire organization.

*Search for a school.*

## RELATED ACTIONS

### OVERVIEW

When the **Related Actions** icon  displays next to an object, other actions and tasks are available related to that object. Employees can use the Related Actions functionality to view data and accomplish tasks related to their own employee records, such as changing a legal name, requesting time off, or submitting an expense report.

### ACTIVITY

Click the Actions icon under your name in your Worker Profile and view your total compensation, current benefits and beneficiaries, and personal information.

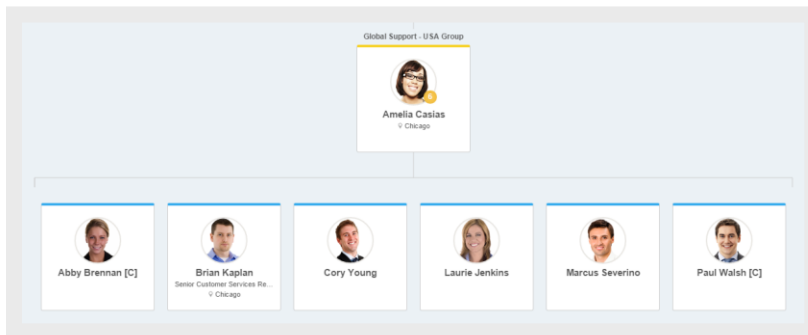
## ORG CHART

### OVERVIEW

- *Below is an example of a supervisory structure.*
- *Each box is a position. The boxes with yellow at the top represent a supervisor and those with blue are individual contributors. Supervisory organizations list the organization's name above the box.*
- *It groups workers into a management hierarchy.*

From your Worker Profile, select **View Team** to view your organization's org chart. The chart will allow you to see your team and other teams that are connected to yours.

You may use the Related Actions button to view the Org Chart for any Supervisory Organization in Workday.



### ACTIVITY

- *Use the Team button to find the Org Chart for your school or work location.*
- *Who is your manager's manager? \_\_\_\_\_*

## PERSONAL INFORMATION WORKLET

### OVERVIEW

The Personal Information Worklet contains your Personal and Emergency Contact Information. Employees are able to update this information real-time so this information remains current.

### ACTIVITY

- *Add the name and phone number of an Emergency Contact.*

## WORKER PROFILE

### OVERVIEW

Your Worker Profile contains personal information about you, your job, your career and more.

From the upper right hand corner of the screen, click the **Profile icon** > **View Profile** to access your Worker Profile page.

Each section in the Worker Profile contains tabs and links, organized by categories such as Job, Contact, Career, and Time Off.

### ACTIVITY

- ***Under the Contacts tab, view Support Roles. List one person identified as your Absence Partner:***

---

## INBOX

### OVERVIEW

The Inbox contains Actions for you to complete and an Archive of all Business Process actions you have taken.

## FEATURED WORKLETS

### OVERVIEW

Common worklets you can take actions and views from include:

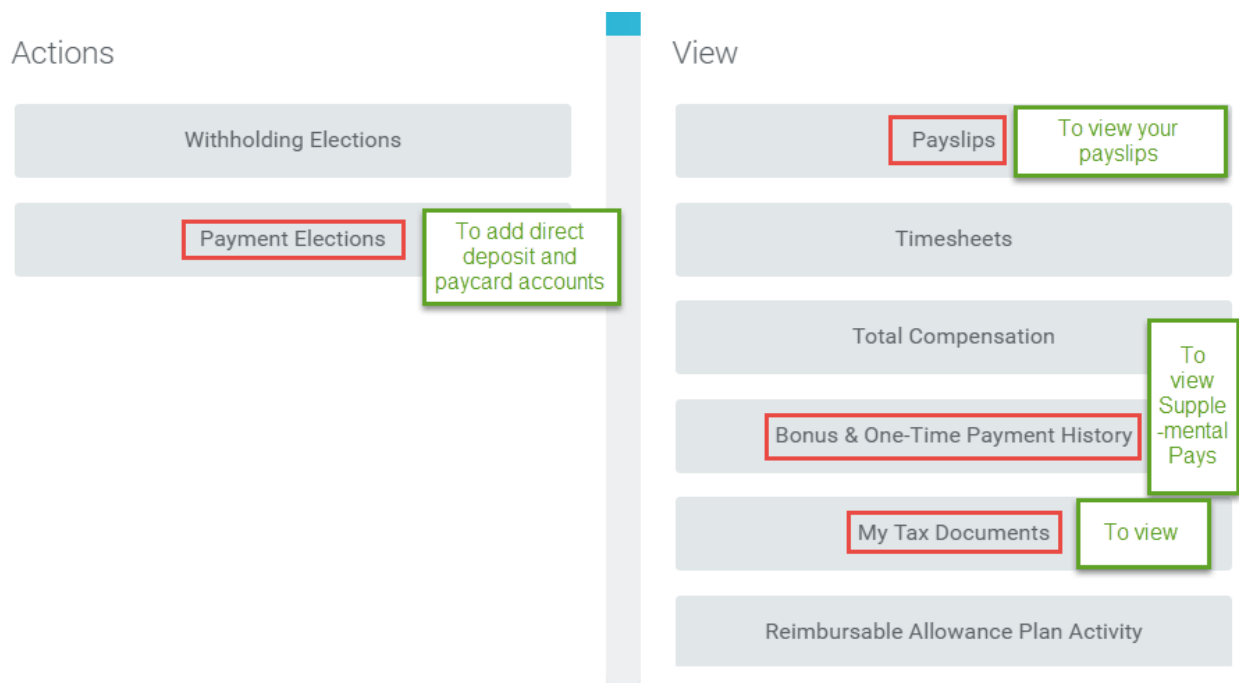
- *Personal Information –update emergency contact information and more*
- *Benefits –view and change benefits elections in cases of life change*
- *Pay –view pay slips and change direct deposit/paycard information*
- *Time –enter & submit time worked*
- *Time Off –view your leave balance and request time off, if applicable*
- *Career –find jobs and apply for jobs at CMSD*

## PAY WORKLET

### OVERVIEW

The Pay worklet allows employees to view payslips, total compensation, their one-time payment history, tax documents, and allowance plans. Employees are also able to change their withholding elections and payment elections. You are able to update your pay card and bank account information at any time.

Payslips will be accessed 24/7 from the Pay worklet; payslips will no longer be mailed. Current direct deposit and paycard account information will be carried over into Workday.



### VIEW PAYSリップ AND TAX DOCUMENTATION: ACTIVITY

- Locate your payslip. How many payslips currently exist? \_\_\_\_\_
- View your One-Time Payment History. Although it is blank now, this is where you will see Differentials and Supplemental Pays.
- Navigate to your tax documents.

## ADD/MODIFY PAYMENT ELECTION (DIRECT DEPOSIT/PAYCARDS): OVERVIEW

Employees may elect to send payments to multiple accounts. When you have multiple accounts listed, there can only be one "Balance" election and it must always be last on the list after any percentage or fixed amount elections. Your elections should look something like this:

The screenshot shows a table titled "Payment Elections" with 3 items. The table has columns for Order, Country, Currency, Payment Type, Account, and Balance/Amount/Percent. The first row is selected and shows a fixed amount election of 50.00 for a Wells Fargo account. The second row shows a percentage election of 5% for a Personal Savings account. The third row shows a fixed amount election of 0.00 for a Primary Checking account.

| Order | *Country                 | *Currency | *Payment Type  | Account               | *Balance / Amount / Percent   |
|-------|--------------------------|-----------|----------------|-----------------------|---|
| +     | United States of America | USD       | Direct Deposit | Wells Fargo *****6789 | <input type="radio"/> Balance<br><input checked="" type="radio"/> Amount <input type="text" value="50.00"/><br><input type="radio"/> Percent <input type="text" value="0"/> |
| +     | United States of America | USD       | Direct Deposit | Personal Savings      | <input type="radio"/> Balance<br><input type="radio"/> Amount <input type="text" value="0.00"/><br><input checked="" type="radio"/> Percent <input type="text" value="5"/>  |
| +     | United States of America | USD       | Direct Deposit | Primary Checking      | <input checked="" type="radio"/> Balance<br><input type="radio"/> Amount <input type="text" value="0.00"/><br><input type="radio"/> Percent <input type="text" value="0"/>  |

Note: Accounts with fixed amounts are entered first. You must select the "Balance" for your last account.

## TO ADD/MODIFY PAYMENT ELECTION: ACTIVITY

- o Add an additional account for vacation fund.
  1. Click the **Payment Elections** button under **Actions**.
  2. Click the **Add Account** button and enter the following information:

| Field Name                    | Entry Value |
|-------------------------------|-------------|
| <b>ACCOUNT TYPE</b>           | Checking    |
| <b>BANK NAME</b>              | Wells Fargo |
| <b>ROUTING TRANSIT NUMBER</b> | 121000248   |
| <b>ACCOUNT NUMBER</b>         | 123456789   |

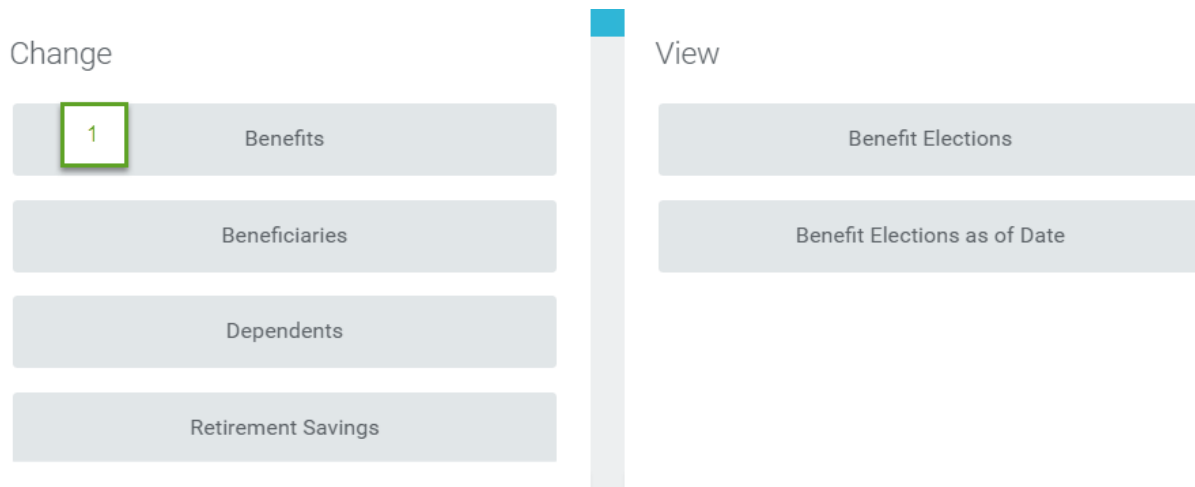
3. Click **OK > Done** to save.



## BENEFITS WORKLET

With the advent of Workday, benefits deductions will be prorated for both 10 and 12 month employees, respectively, ending the need for double deductions in May and June!

Workday allows employees to view their benefits elections and print benefits statements real-time. In cases of qualifying life events, employees can update their benefits elections independently by following the prompts in Workday and uploading the required documentation within 30 days of the qualifying life event. Change your benefits elections by clicking on Change > Benefits (Step 1 in screen shot below).



Information about employee retirement plans and investment contributions may also be viewed from the Benefits worklet. Employees with retirement plans may update their beneficiary information at any time.

## MOBILE

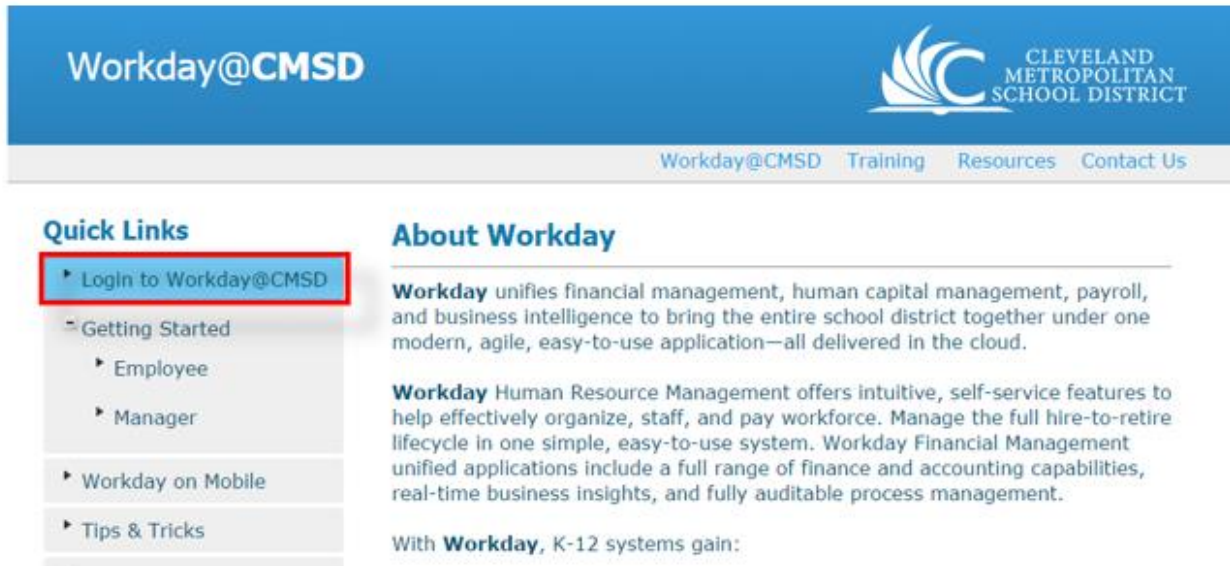
Employees can use the mobile version of Workday for many functions. Use the Job Aid on the Workday@CMSD website > Getting Started to download and get connected!

However, remember... Non Exempt employees in areas with time clock units (Bus Depot, Central Kitchen) **must use time clocks for time tracking** if clocks are operational.

Note: Some functionality may not be available on the mobile app.

## GETTING STARTED AT GO-LIVE

When CMSD goes live with Workday, you will access the system from the CMSD Workday Webpage or from a time clock at select high-volume locations. **You will use your CMSD Network Password to log in. If you use a shared computer, please be sure to log out after each use so that your information remains private.**



**Workday@CMSD** CLEVELAND METROPOLITAN SCHOOL DISTRICT

Workday@CMSD Training Resources Contact Us

### Quick Links

- ▶ Login to Workday@CMSD
- ▾ Getting Started
  - ▶ Employee
  - ▶ Manager
- ▶ Workday on Mobile
- ▶ Tips & Tricks

### About Workday

**Workday** unifies financial management, human capital management, payroll, and business intelligence to bring the entire school district together under one modern, agile, easy-to-use application—all delivered in the cloud.

**Workday** Human Resource Management offers intuitive, self-service features to help effectively organize, staff, and pay workforce. Manage the full hire-to-terminate lifecycle in one simple, easy-to-use system. Workday Financial Management unified applications include a full range of finance and accounting capabilities, real-time business insights, and fully auditable process management.

With **Workday**, K-12 systems gain:

When we go live, you will use your **CMSD Network Password** to log in.



**Important: For shared computers, be sure to log out after using!**

Here is what you will need to do at Go-Live:

### Day One of Go-Live

- Log in and enter your time worked
- Update your emergency contact & other personal info
- Validate your benefit information and leave balances
- Validate your direct deposit or paycard information
- Validate info on your position title and organizational structure

*If title or org structure is not correct, use "**Contact Us**" to let us know!*

### Ongoing

- Enter and submit your time worked for your manager approval

## RESOURCES AND OTHER HELPS

Find additional Employee Self Service training helps including videos and step by step instructions 24/7 on the Workday@CMSD [Getting Started > Employee Webpage](#).

Have comments or suggestions for improvement? Share them with us by using the Contact Us link on the CMSD Workday Webpage!



The screenshot shows the top navigation bar of the Workday@CMSD website. The header is blue with the 'Workday@CMSD' logo on the left and the Cleveland Metropolitan School District logo on the right. Below the header is a white navigation bar with links for 'Workday@CMSD', 'Training', 'Resources', and 'Contact Us'. The 'Contact Us' link is highlighted with a red box. Below the navigation bar is a 'Quick Links' section with a list of links: 'Login to Workday@CMSD', 'Getting Started' (highlighted with a red box), 'Employee', 'Manager', 'Workday on Mobile', 'Tips & Tricks', 'What's New with Workday', 'FAQ's', and 'Reports'. To the right of the quick links is a banner for 'Enabling Effective, Efficient Education' featuring a photo of a young boy holding a paper with a drawing of a crocodile and the word 'CROCODILE' written vertically. Below the photo is the text 'EFFECTIVE Workday will improve accuracy across multiple departments'.

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Workday@CMSD Training Resources **Contact Us**

**Quick Links**

- Login to Workday@CMSD
- ▾ Getting Started**
  - Employee
  - Manager
- Workday on Mobile
- Tips & Tricks
- What's New with Workday
- FAQ's
- Reports

**Enabling Effective, Efficient Education**

**EFFECTIVE**  
Workday will improve accuracy across multiple departments