UCF

Knight Vision

knightvision.it.ucf.edu

workday®

Roadmap for Success

AN ONBOARDING GUIDE TO WORKDAY

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WELCOME TO WORKDAY AT UCF

ABOUT OUR WORKDAY ROADMAP TO SUCCESS!

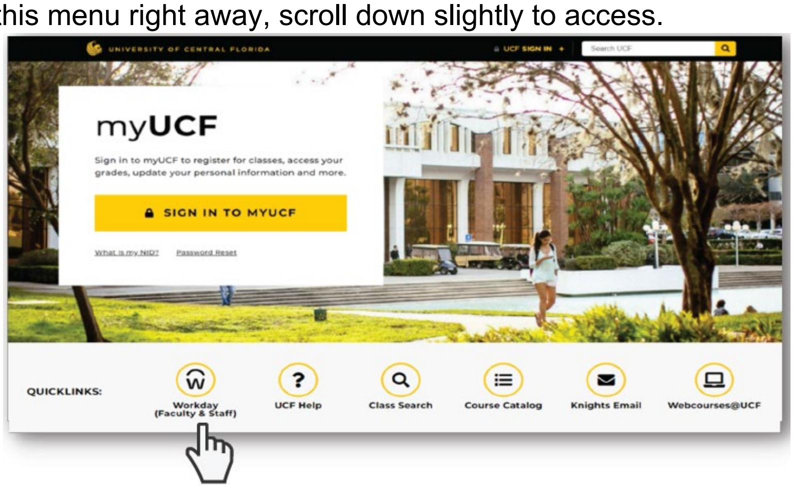
The purpose of this guide is to serve as an onboarding resource for our new Workday users. Details provided within this user guide will help guide you through basic Workday functionality and provide troubleshooting resources.

This roadmap is a small collection of our full knowledge base of Workday demo videos, job aids and courses. Begin by exploring Workday using the Day 1 Checklist and build your knowledge and competencies over the coming weeks. As with anything new, time and practice are the keys to success.

How to Access (Log In) Workday Starting on July 1, 2022!

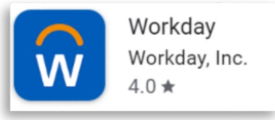
All UCF employees and affiliates [direct support organizations (DSOs)] will have access to Workday using their UCF NID through multi-factor authentication (MFA). To access Workday, users can login 3 different ways:

1. Go to https://my.ucf.edu and access Workday from the **“Quick Links”** menu. If you do not see this menu right away, scroll down slightly to access.



2 Go to https://workday.ucf.edu (effective July 1, 2022) and login with your UCF [NID](#).

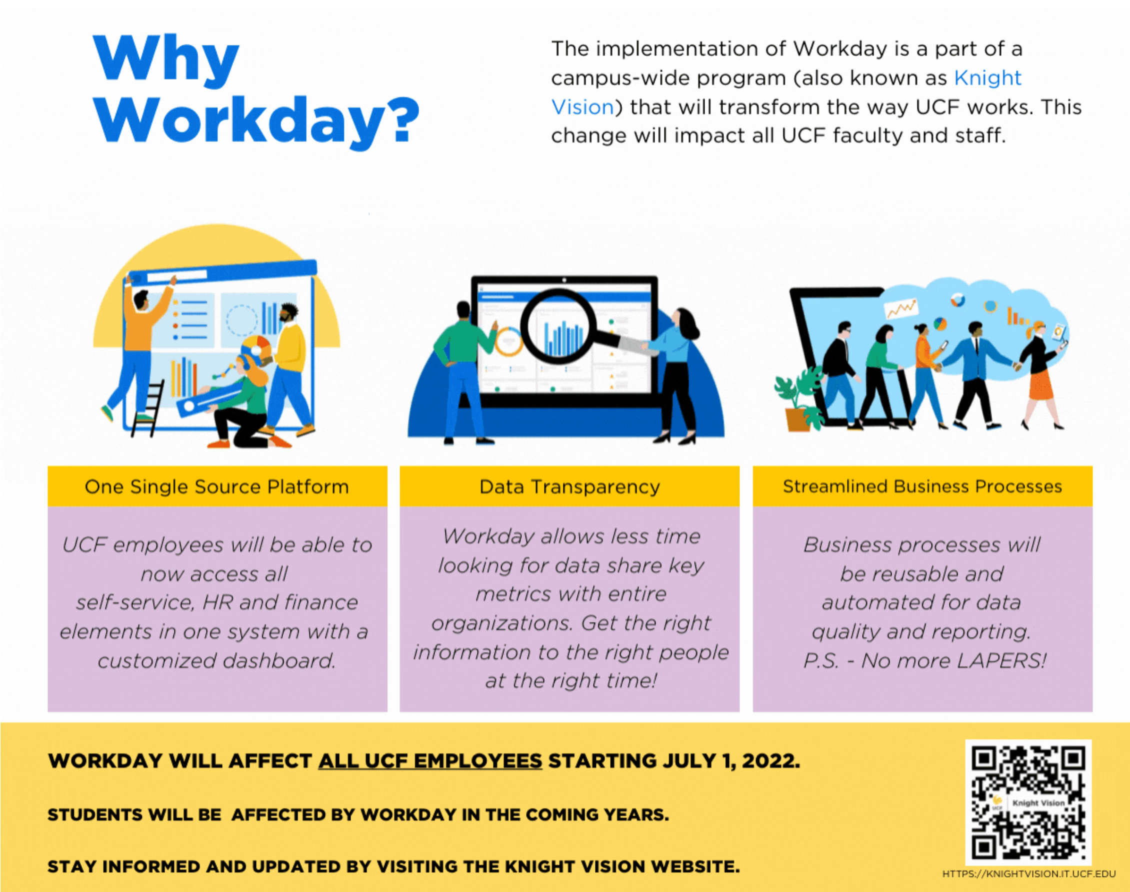
3 Access the **Workday mobile app** on your device and login with your UCF NID.



GET IT ON Google Play

Download on the App Store

WHAT IS WORKDAY?



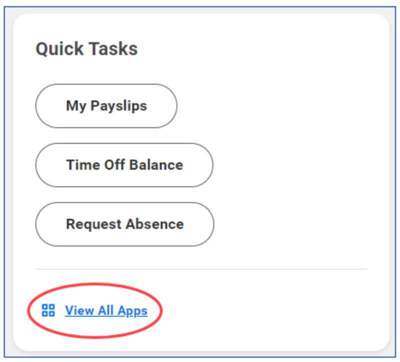
Access all Workday Essentials job aids and video demos here: [Workday Essentials](#)

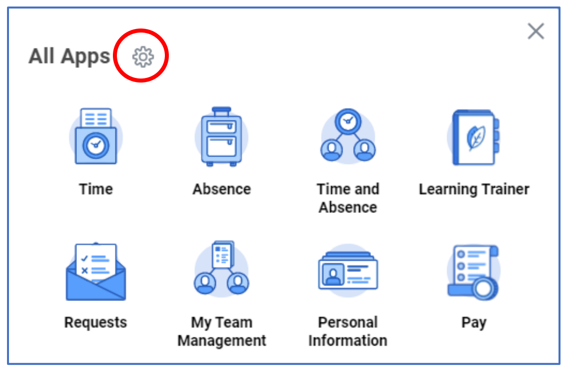
Access all Workday for Managers job aids and demos here: [Workday – All Managers](#)

WORKDAY APPLETS

WHAT ARE WORKDAY APPLETS?

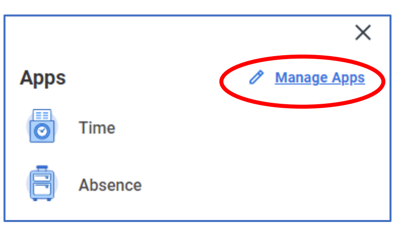
Workday Applets (Apps) are icons that live on the home page of the desktop and mobile versions of Workday. Each one acts as an entry point to a category of actions or information. Your home page will display a pre-set group of Apps and provide you with the option to customize how they display. Which Apps are available to you depends on your security role in Workday. Individuals may be given access to different Apps or to different information within an Apps category. From the Apps you are provided you may add, remove and rearrange them by selecting the **View All Apps** link under **Quick Tasks** on the home page, clicking the **gear** tool and selecting the desired options.

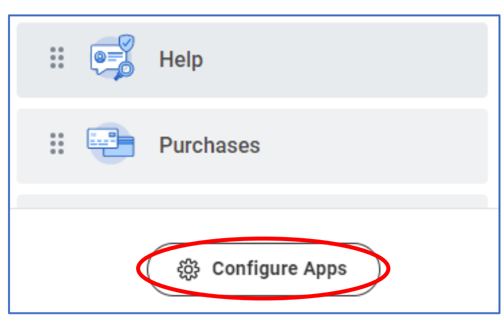




You can open the list of Apps by clicking the **Apps** icon, which displays as three lines, in the upper left corner of the home page and many other Workday pages. Clicking the UCF icon beside it will return you to the home page.

When you select the Apps list, you can choose one of the Apps to go to it, or you can select **Manage Apps** to reorder or change the list. When you select **Configure Apps**, you can delete or search for and add Apps to your saved list.





COMMON APPS IN WORKDAY

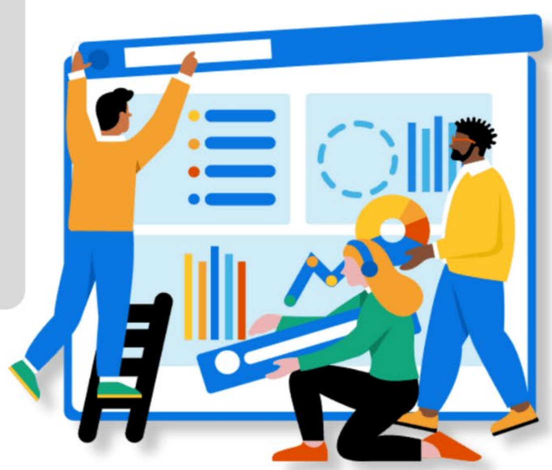
THE FOLLOWING APPS ARE DEFAULT FOR ALL UCF EMPLOYEES:

- *Time*
- *Absence*
- *My Requests*
- *Personal Information*
- *Pay*
- *Benefits (UCFAA)*
- *UCF Benefits*
- *Expenses*
- *Learning*
- *Help*

THE FOLLOWING APPS ARE DEFAULT FOR ALL UCF MANAGERS:

- *Time & Absence*
- *My Team Management*

Specialty roles will have additional default Apps. All employees can add more apps.



DAILY CHECKLIST

DAY ONE – JULY 1

On your first "Workday day," it is important to confirm your access by logging into the new system, installing Workday Mobile and getting a general overview of the look and feel of Workday. Your journey begins by signing into Workday, reviewing personal information, updating system preferences and exploring your access.

How to Begin

The checklists below guide you through some of the most important tasks you will need to do as a manager and employee and provide guidance and resources to assist you.

Note: We recommend that UCF managers and supervisors follow both columns.

Access Workday

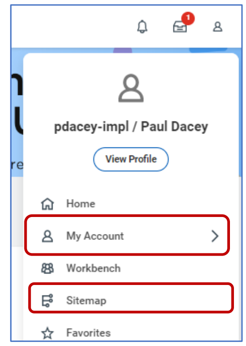
The UCF Employee should…	The UCF Manager/Supervisor should…
☐ All employees will access Workday using their UCF NID. The access point to Workday can be located at my.ucf.edu. 1. Visit my.ucf.edu. 2. Select Workday icon. 3. Log in with your UCF NID credentials. Relatable training resources: • Installing Workday Mobile • What is Geofencing? • Use Tools and Navigation	☐ Be sure your staff is able to log into Workday from MyUCF (or the mobile app) and does not require additional technical support for their multifactor authentication (MFA). ❖ Please have your direct reports contact their IT support if they need assistance with their NID access. Relatable training resources: • Manager's Go-Live Checklist • What is Geofencing? • Installing Workday Mobile

Note: Workday works best on Google Chrome, Microsoft Edge, Mozilla Firefox and Safari.

Setup Workday Mobile App

1. Download the Workday Mobile application for iPhone or Android.
2. Open the Workday application.
3. Enter your Organization ID or scan the QR Code using your mobile device's camera.

4. Locate the Organization ID and QR Code in Workday.
5. From the **Workday home page:**
   - ☐ Click your **profile picture** or icon along the top right.
   - ☐ Select **My Account** from the drop-down menu.
   - ☐ Select **Organization ID**.
   - ☐ The Organization ID and QR Code will display.



Access Time Tracking (For Direct Reports)

The UCF Employee should…	**The UCF Manager/Supervisor should…**
☐ All *non-exempt employees* utilize Workday to report every "in" and "out" time each day, including meal periods, to ensure a complete and accurate record of all hours worked as required by federal law. ☐ In the new system, non-exempt employees must record their actual work time/hours as they will no longer be paid automatically based upon their "standard hours." This means that if non-exempt employees do not report their work time/hours in Workday, they will not receive payment for those hours on the next scheduled payday. Related training resources: • What will time tracking look like? • How to clock in & clock out?	☐ Encourage and ensure all non-exempt employees begin checking "in" and "out" for work and meal breaks. ☐ Familiarize yourself with the time-tracking process and features in the Apps available to your role. ☐ Provide links to Workday Training Catalog job aids, videos or other resources or printed copies to your employees as appropriate. ☐ **July 8 at 5 p.m. – End of Pay Period** – Approve workers' time in Workday. Related training resources: • Manage Your Team's Time Worked • How to Approve Time Off – Managers • Mass Approve Time

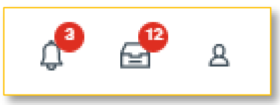
Access Workday Applications

The UCF Employee should…	The UCF Manager/Supervisor should…
☐ You can add Workday apps that are not visible from your navigation menu. Follow these steps to configure your apps: 1. From the Quick Tasks pane, click **View All Apps**. 2. Click the **gear** icon. 3. Click the **Add Row** icon under Optional Applets to add a new worklet. 4. Click the **prompt** icon to select from the list of existing worklets. 5. Click the **Remove Row** icon to remove a worklet from the home page. 6. Click the **Move Row Up** arrow or **Move Row Down** arrow to reorder the worklets. To move a worklet to the first or last position, use the **Move Row to Top** or **Move Row to Bottom** arrows. 7. Click **OK** and **Done**. Related training resources: • Use Tools and Navigation	☐ Encourage employees to review their Apps and available functionality. (See Apps section of this manual for more information.) ☐ Open My Team Management to view various information about your direct reports and the “Compare Team Report.”  Related training resources: • How to Approve Time Off – Managers

Access Your Workday Inbox

The UCF Employee should…

☐ Access your inbox. The Inbox includes notification of tasks, approvals, due dates and other items sent to you as part of your organization's business processes. You can access your Inbox using your desktop or mobile device.



From your Desktop:

1. To the left of your Profile photo or icon along the upper right corner of Workday, click the Inbox icon.
2. Click the Actions tab to view your business process tasks, approvals and to dos.
3. Click the Archive tab to access the status of your previous business processes.

From your Mobile:

1. From the navigation bar, tap the Inbox icon.
2. Tap the Actions or Archive tab to access corresponding information.
3. Items may be sorted with the Sort icon.
4. Select an item to view more details and action options.

Related training resources:

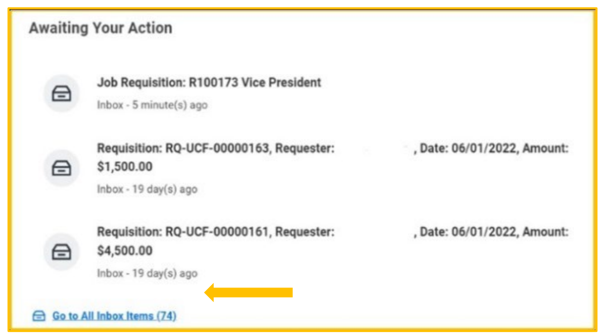
- Use Your Inbox

The UCF Manager/Supervisor should…

☐ Remember to check your Workday Inbox daily for Actions to complete.

☐ Encourage your employees to go to their Inbox and familiarize themselves with its features.

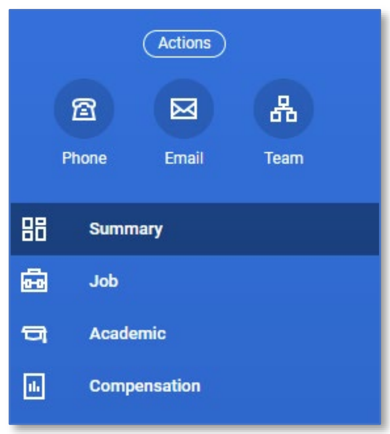
Use home page to view Awaiting Actions and access your Inbox if preferred:



Related training resources:

Getting Started for Managers

Access Personal Information

The UCF Employee should…	The UCF Manager/Supervisor should…
☐ Navigate to your **Profile icon > View Profile** to access your personal information. 1. Review the **Personal** tab to view and edit details such legal and preferred names, personal information, IDs and Documents. 2. Review the **Contact** tab to view and update your home and work contact information and emergency contacts. 3. Review the **Job** tab to view your job details, employment data, service dates, management chain, support roles (under the More drop-down menu) and much more. 4. Review the **Career** tab to view and update education, skills and certifications. 5. Review the Pay tab to review and edit tax elections and payment elections (direct deposit information) and to view payslips (**AFTER JULY 7**). 6. Explore more tabs. Related training resources: • Modify Personal Information	☐ Encourage staff to review their personal information in Workday and to become familiar with where they can locate information. ☐ Remember you can access Actions, from your personal profile under your profile image, for additional tasks.  Related training resources: • Getting Started for Managers

Access Preferences

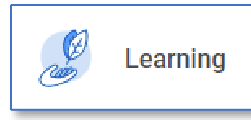
The UCF Employee should…	The UCF Manager/Supervisor should…
☐ Navigate to your **Profile icon > My Account > Change Preferences** to access your account preferences to change preferred language, email notifications, etc. Related training resources: • Set Up Account Preferences	☐ Encourage staff to go into Workday to edit preferences as needed.

Access Training via Workday Learning

The UCF Employee should…	The UCF Manager/Supervisor should…
☐ Access the Learning application, which contains all Workday courses and features three tabs. • The **Learning Home** tab lists courses in which you are enrolled. Courses required for your job display here automatically. You can also search through topics of interest. • The **My Learning** tab also displays your course enrollments. In addition, it allows you to view a transcript of your learning history, provides a place to drop enrollments, informs you of any Learning requirements you have and offers recommendations. • The **Discover** tab allows you to browse through or search the Learning Catalog and provides training recommendations.	☐ Encourage staff to access the Learning application to check for any mandatory trainings and register for upcoming training sessions or courses. ☐ Managers may review their team's learning enrollments and transcripts in Workday.

The UCF Employee should…	The UCF Manager/Supervisor should…
Related training resources: • Enroll and Drop a Course	

Access Workday Learning



- ☐ 1. From the Workday home page access the **Learning** App.
- ☐ 2. Select **Discover**.
- ☐ 3. Select **Browse Learning**.
- ☐ 4. Search **Workday** in the Browse Learning Content search bar.
- ☐ 5. Select **Workday Essentials**.

TRAINING & SUPPORT

WORKDAY TRAINING AFTER JULY 1

Workday training materials and live sessions will continue to be made available to the UCF community.

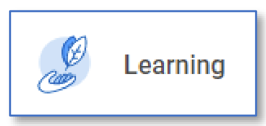
Training and support efforts will be provided to all UCF employees by the Knights Experience Team (kNEXT). Training information will be posted in the Workday Training Calendar and on the new kNEXT website, *https://knext.ucf.edu* (available on July 1).

Need to Register for Training after July 1? Registration for all online and live training sessions will be provided in Workday from the Learning application. You may register for any training sessions or online webcourses starting on **Tuesday, July 5**.

Enroll and Drop a Course Job Aid

Where can I locate Workday training resources? All Workday job aids and video demos will be placed in our **Workday Help Knowledge Base** as *Help Articles*. This is a system feature that will allow for you to search for and access Workday-related resources while logged into Workday. Use the Workday search bar or click the **Help** application to view any Help articles from our knowledge base.

Where are my courses now? Workday courses – similar to former Webcourses and training sessions in PeopleSoft – will now reside in Workday. The Workday learning management system is called **Learning** and can be accessed through the Workday Learning application.

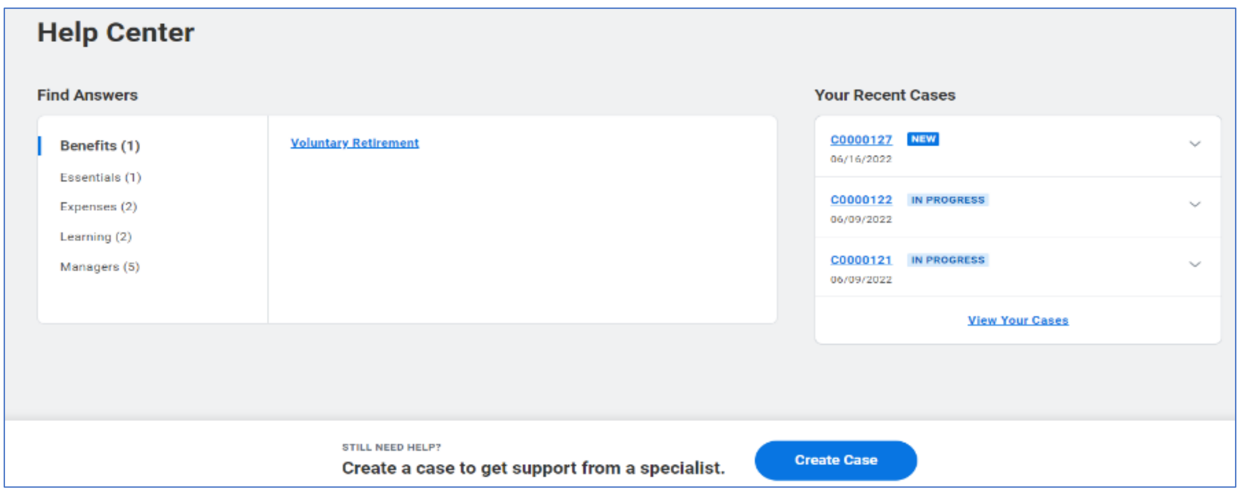


WORKDAY HELP: HOW CAN WE ASSIST YOU?

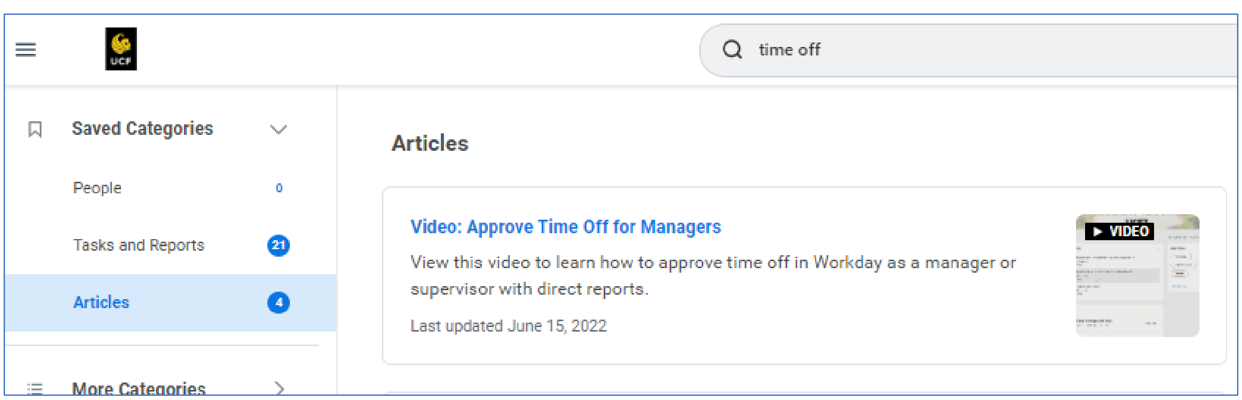
HOW DOES IT WORK?

Workday Help offers self-driven assistance within the Workday application. When a user has a question, they can go to the Workday Help application or use the search box to access Knowledge Base articles that contain step-by-step instructional job aids, video demos, guides and helpful workflows.

You may access the **Help** application anytime to view Knowledge Base articles or to create a case (similar to a service ticket) within Workday. Anytime you access Workday Help, suggested articles related to the topic you need assistance with will automatically appear.



You may also use the search bar in Workday to find articles. Search for a related term, such as Time Off, and select articles from the results.



You can search for information on the kNEXT website, kNEXT.ucf.edu, as well as the Workday Help Knowledge Base using the "Help" application. If you do not find the information you need, you can create a case.

CUSTOMER CARE FOR WORKDAY

Cases in Workday are routed to specialists who provide personalized assistance.

1. After an employee creates a case, it routes to a customer care coordinator at kNEXT, the primary Workday Help case management team. Customer care coordinators with kNEXT provide support for general questions related to leaves of absence; time, time off and pay; Workday Learning; human resources; and finance.
2. Cases requiring additional assistance are routed to specialized service teams in human resources and finance.
3. Workday technical teams also assist with Workday Help cases. Information technology (IT) and consultant teams handle questions related to changes to Workday and system issues. These include the following teams:
    - kNEXT: Continuous Improvement for change requests including Workday change requests, Knowledge Center article updates and Workday training needs
    - Workday Enterprise Systems for security roles
    - Workday Enterprise Reporting for reporting cases

If you aren't sure where to go for help with HR, Finance or Workday, please direct your questions to one of the following:

• ***Visit the Knights Experience Team (kNEXT) Website:*** *https://knext.ucf.edu – This website provides an overview of kNEXT, information on some common HR and Finance questions, and additional helpful resources.*

• ***Submit a Case via Workday Help*** *– Workday Help provides self-driven assistance within the Workday application. Workday Help and Workday Learning provide step-by-step instructional job aids and answers to FAQs.*

• ***Call (407) 823-NEXT (6398)*** *– Best for when you want to speak directly with a Customer Care Coordinator.*

WHAT'S CHANGING

OVERVIEW

The implementation of Workday and the Service Enhancement Transformation (SET) initiative has changed how we work as an organization. In this section, we will highlight key changes that require action following July 1, 2022.

Workday Is Live!

KEY CHANGES REQUIRING ACTION

Time Tracking (Clock In/Clock Out)

- *All* *non-exempt employees* will utilize Workday to report every "in" and "out" time each day to ensure a complete and accurate record of all hours worked, as required by federal law. Some non-exempt employees will be required to clock out for mealtime only if they currently perform this action.
- In the new system, non-exempt employees must record their actual work time/hours as they will no longer be automatically paid based upon their "standard hours." This means that **if a non-exempt employee does not report their work time/hours in Workday, they will not receive payment for those hours on the next scheduled payday**.
- Timekeepers, previously known as the Payroll Processors, will be assigned to each Business Center to assist with managing/editing submitted time. This may be an HR Coordinator or HR Specialist assigned to a department or unit. It is important for managers to know who their assigned timekeepers are so that they have additional support tracking time. *Please note: A timekeeper can correct or input time within the new Workday system, but only a manager can approve that worker's time.*

Key Dates and Actions for Go-Live

- **July 1, 2022:** All non-exempt employees begin checking in and out for work (and meal breaks if applicable) using Workday or designated time clocks.
- **July 8, 2022**: Ensure all non-exempt employees have submitted their hours by 12 p.m.
- **July 8, 2022**: All managers and supervisors must approve timesheets in Workday by 5 p.m.
  - ✓ Video: How to Approve Time Off – Managers
  - ✓ Job Aid: Manage Your Team's Time Worked

About SET and Business Centers/kNEXT

The Service Enhancement Transformation (SET) Project is part of the Knight Vision Program. It aims to improve and simplify human resources, payroll, finance, procurement and unit-based post-award services and processes throughout our university. The goal, as stated by President Cartwright, is to improve the administrative structure that drives our operating excellence and efficacy. In doing so, we will provide better services for all users through the actions listed below.

Key Facts About SET Business Centers/kNEXT

- Multiple Finance Business Centers and HR Business Centers will exist to support specific colleges and divisions.
- The Knights Experience Team (kNEXT) – formerly known as the Administrative Service Center (ASC) – will provide support to employees campus-wide with HR, finance and Workday self-service questions and issues. View this "What is kNEXT?" video for more details.
- The Talent Acquisition Unit, an office in Human Resources within the Division of Administration and Finance, will provide support in the hiring of staff and temporary positions. Faculty recruiting is fundamentally different and will remain with colleges supported by the HRBC. The Talent Acquisition Unit follows best practices in successful competition for talent in the Orlando market.

What's Changing with Finance?

Workday will impact various financial procedures at UCF, streamlining business processes and functions. These functions include:

- Accounting/Foundation Data Model (FDM),
- Procurement,
- Customer accounts,

- Expenses,
- Budgeting,
- and more.

All spend authorizations and expense reports will now be completed and approved in Workday. This means no more paper reimbursements; credit card packets and the status of the approval process can be checked at any time.

View the PeopleSoft to Workday crosswalk to become more familiar with Workday terminology.

What's Changing with HCM?

Workday will provide many benefits to HR processes at UCF. This system will provide a mobile-friendly, configurable platform for employees at the university. The Workday implementation will streamline business processes such as:

- Ease of access to view their teams' information, run team reports, and initiate actions.
- Change of current processes and reduction of paper.
- A dashboard interface will provide customizable visibility and access to important reports and actions.

Learn more about what is changing and key benefits in our Current versus Future Processes for HR.

What's Changing with Grants

Currently, researchers and faculty must submit a paper form to acquire up-to-date grant information. Administrators and staff, if available, may assist by accessing PeopleSoft and reports.

Please note that all actions that take place within the Huron Research Suite system will remain the same. See more information at https://wahoo.research.ucf.edu/.

- Colleges follow separate processes, and this often involves a multi-step process to provide data.
- Grants has to email a checklist or email a confirmation to members outside of the systems.

Workday leverages a unified system which will host all grants information. Researchers, faculty and appropriate administrative and staff members will now have visibility into data.

- Data will be accurate, immediately available and accessible through reports and dashboards.
- Reports and dashboards have drill down capabilities providing multiple layers of real-time data.

Learn more about how Grants processes are changing in our Current versus Future Grant Processes.

What's Changing in Reporting & Analytics?

Workday reporting is very robust and provides many standard reports. UCF has created custom reports, and you are able to generate and schedule reports, too. Data on reports can be viewed, filtered and drilled down into. Be sure to view the following reporting resources:

- Video: View a Report in Workday
- Job Aid: Generate Reports

Reporting in Workday includes five major changes when compared to the previous system:

1. **Data updates in real-time, meaning reports always feature the most current data available.** Transaction approvals and edits made in Workday will update right away, which means no more waiting overnight to run reports.
2. **Actionable reports allow users to view specific details by use of filtering, sorting and drill-down, all in the same report.** Reports will be interactive, and many can be accessed on mobile devices. Reports can be scheduled for auto-delivery to an individual's inbox, or to multiple inboxes.
3. **HR and Finance data can be displayed together in a single report.** Users will no longer need to manage multiple external systems and export data to create and manage reports.
4. **Dashboards consolidate key reports and information in one place**, giving users improved navigation and visibility for more accurate, streamlined planning and decision making.
5. **Security groups/roles determine which dashboards users can access**, which reports they are able to run, the kinds of data that they are able to see in those reports (e.g., PII) and their ability to drill down into further details or initiate business processes.
6. **Find reports relevant to your job by doing a search or using the Reports app**. You can save reports in a centralized location within the app. Examples of Workday reports include the following:

> **NOTE**: Workday provides multiple ways to access information. Reports can be accessed directly by searching by title on the home page and common reports may also be linked within an app, e.g., you can search My Expense Reports or select View, Expense Reports within the Expenses app.

What happened to your old reports? Access the Workday Report Crosswalk to find the new Workday reports that correspond to many of the legacy reports. This crosswalk is updated weekly on Fridays and reflects the continuing progress of Workday report writing.

WORKDAY GLOSSARY

COMMON TERMS

Below is a collection of common terms found in Workday:

- Approve: An approval action in a business process that allows designated participants to progress an event to the next step.
- Business Process Instance: A business process that the initiator has started. **For example, the Hire Employee for Organization X business process definition becomes a business process instance when the initiator uses it to hire a particular applicant.*
- Cancel (business process): Canceling a business process stops the workflow in progress and reverses changes made to data. You cannot cancel a completed business process; you must rescind it. This is a securable action in a business process security policy.
- Dashboard: A specialized landing page containing links to actions, reports and tasks. May also contain charts and graphs.
- Deny (business process): When you deny a business process, the business process is terminated, and all Workday data is restored to its state before the business process started. To restart the business process, you need to submit the process again, and redo all previously completed steps.
- Functional Area: A collection of domain or business process security policies that are related to the same set of product features. **For example, Benefits or Compensation.*
- Job Profile: The generic features and characteristics of a job or position, such as management level, pay rate type, compensation, skills and other qualifications.
- Roles: A grouping of people with specific responsibilities and permissions.
- Task: A step, either standalone or in a business process, that you must complete. **For example, task alert notifications are triggered by incomplete steps in a business process.*
- Tenant: A tenant is a unique instance of Workday that contains a set of data in a logically separated database. Our project team uses a series of tenants to configure Workday for delivering UCF business processes, security and data.
- To Dos: Reminders to do something outside of Workday. They can be part of business processes and must be marked complete before the workflow will advance to the next step.
- View (business process): A securable item used to allow members to view status of a business process and report on it.
- Worker: An employee or a contingent worker.
- Workflow: The steps, or “flow,” of tasks to complete a business process.

GLOSSARY TERMS BY FUNCTIONAL AREA

Additional common terms can vary by functional area. Use the following links to learn Workday terms in the following areas:

- Finance/Procurement (31 terms)
- Grants (14 terms)
- Payroll (10 terms)
- Reporting (5 terms)
- Security (4 terms)
- Time Tracking (4 terms)

ADDITIONAL HELPFUL RESOURCES

- Knight Vision Website
- PeopleSoft to Workday Finance Crosswalk
- Workday Glossary
- Workday Training Catalog (Website)
- Workday Training Catalog (PDF)
- Workday Training Calendar (UCF Events page)

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Knight Vision