GUIDE DISCLAIMER ........................................................................................................................... 1
WHAT IS WORKDAY? ......................................................................................................................... 1
Navigating Workday .......................................................................................................................................................................... 2
Accessing Workday ........................................................................................................................................................................... 2
Workday Home Page ........................................................................................................................................................................ 2
Worklets ............................................................................................................................................................................................ 2
Workday Inbox .................................................................................................................................................................................. 2
Using Notifications ............................................................................................................................................................................ 3
EMPLOYEE SELF SERVICE ACTIVITIES ........................................................................................... 3
Worker Profile ................................................................................................................................................................................... 3
APPROVALS ........................................................................................................................................ 5
Approve Time Off .............................................................................................................................................................................. 5
DELEGATIONS .................................................................................................................................... 6
Manage Delegations ......................................................................................................................................................................... 6
Delegate a Specific Task .................................................................................................................................................................... 8
APPENDIX 1: COMMON WORKLETS IN WORKDAY ....................................................................... 9

Guide Disclaimer
Due to continuous improvements to the Workday system, the guide may not reflect recent updates to the Workday environment.

What Is Workday?
Workday is a cloud-based system that The Texas A&M University System uses to manage the Human Resources, Benefits and Payroll functions for all employees. Workday is built on three basic fundamentals:

- **Organizations**: Organizations are used to group people, resources, workers and their institution or agency. They provide management, visibility and reporting structures for resource allocation.

- **Business Process**: A business process is a set of tasks used to accomplish a specific action. Workday will automatically route specific steps in a workflow to those responsible for them. Certain processes may require multiple approvals within Workday and may also have additional approvals outside of Workday.

- **Security Roles**: Security roles determine what you can see and do. Initiation of a business process is determined by the employee’s security role in the Workday system. The same business process may be initiated by multiple security roles.
  - Security roles are not job titles. The roles provide Workday users access to appropriate data within the assigned organization structure. The roles also determine functional responsibilities, routing of actions in a business process and access to reports
  - Workday users will be assigned a security role based on the access they will need in the system. Some users may be assigned to multiple security roles depending on their duties and responsibilities
Navigating Workday

Accessing Workday

All A&M System employees will access Workday through Single Sign On (SSO). [https://sso.tamus.edu](https://sso.tamus.edu)

Workday Home Page

The Workday Home page provides an icon-rich user experience. These icons, called worklets, enable you to quickly access tasks that you will perform on a daily basis as well as the links to pages that will provide additional resources for you.

Worklets

A worklet is an icon found on the Home page that makes it easier to access information needed on a routine basis.

Some examples of tasks that you can access through worklets include:

- View paystubs or benefits elections
- View reports
- Access your Inbox

Workday Inbox

Workday is a workflow-based application. All approvals, reviews, to-dos and other action items are accessed through your Workday Inbox. Action items remain in your Inbox until you (or someone with the same security role) reviews and takes the appropriate action.
Access your Inbox by clicking the **Inbox** worklet on your Home page

Using Notifications

Notifications are messages from Workday letting you know about tasks that have been completed or may require additional attention.

- **To view Notifications:**
  1. Click the **My Account** icon
  2. Then, select **Notifications** from the menu

**NOTE:** All Workday Notifications and To Do tasks will trigger an email notification to your email of record.

Employee Self Service Activities

Worker Profile

The Worker Profile provides you with basic information about yourself and other employees in the A&M System who are in Workday. Your security role determines how much information you can see.

The Worker Profile displays information such as the organizations employees belong to, who their managers are and contact information. Your worker profile provides information on your pay, benefits, team and leave.

**Access Your Worker Profile**

Click on the Cloud Icon on the Home Page and Click View Profile
Access information from the menu items listed.

Your Team in Workday

- Access the members of your team from the Org Chart Icon
- Use the arrows to move through the hierarchy of the organization.
- Clicking on an employee’s box brings up their information.

Email from within Workday by clicking on an employee’s email icon.
Approvals
Most business processes have several options when reviewed.

Approve
- Approve data entered by initiator
- Edits cannot be made, but the process can be "sent back" to anyone that completed previous steps

Review
- "Enhanced" approval
- Edits can be made to fields that were previously populated during approval

Send Back
- During a Review / Approval step, the approver may elect to send the process step back to anyone that completed previous steps

Deny
- Ends a process
- Once denied, process cannot be edited; it must be restarted from first step

Approve Time Off
Managers will approve time off that an employee has requested by accessing the request in the Inbox Worklet.
After reviewing the time off the manager may Approve, Send, Deny or Cancel.

NOTE: Click the View Balances button to view the Employee’s time-off balances.
Delegations
Manage Delegations

On the Workday Home page:
1. Type My Delegations in the Search bar and press Enter

2. Click the My Delegations link

3. On the Current Delegations tab, click Manage Delegations
4. Click the add icon + to add a new delegation
5. Under the **Begin Date** section, select the date that the delegation will begin

6. Under the **End Date** section, select the date that the delegation will end, if known (delegations cannot be more than 12 months long)

7. Under the **Delegate** section, complete the following fields:
   - Delegate
   - Alternate Delegate
Note:
- Clear the **Use Default Alternate** check box to add an Alternate Delegate
- The Alternate Delegate is used only when the Delegate is excluded from the task

8. Under the **Do Inbox Tasks On My Behalf** section, select one of the following options:
   - For all Business Processes
   - For Business Process
   - None of the above

Note:
- The **For Business Process** field enables you to select specific business processes to delegate
- Click **Business Processes allowed for Delegation** on the top left of the screen to view a list of business processes that you can delegate
- Select the **Retain Access to Delegated Tasks in Inbox** check box if you would like to retain access to your delegated tasks in your inbox
- The **Delegation Rule** field will not be used at this time

9. Enter any comments, as needed

10. Drag or upload supporting documentation if needed.

Engineering Best Practice
Workday will not be used to maintain supporting documentation.

11. Click **Submit**. This completes the **Manage Delegations** process.
Delegate a Specific Task

Delegation temporarily reassigns tasks to another user, enabling that user to perform individual actions on the delegator’s behalf. Users can delegate a task in their Inbox, such as Review, Approval and To Do steps, to another person, if that task allows delegation. Use for a quick one-time need when you are not available to complete a step in a business process or a task, or to delegate a task for up to 12 months.

Delegated tasks show as “On behalf of:” in the delegate’s Inbox. The delegate will use Switch Account to complete the delegated tasks.

From the Workday Home page:

1. Click the Inbox worklet
2. Click the action item you would like to delegate
3. Click the gear icon on the top right hand corner of the screen that displays
4. Click Delegate Task
5. Select Proposed Delegates
6. Enter any comments, as needed
7. Click Submit

This completes the Delegate Task process.
## Appendix 1: Common Worklets in Workday

<table>
<thead>
<tr>
<th>Name</th>
<th>Worklet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits</td>
<td><img src="heart.png" alt="Heart" /></td>
<td>A worklet linking you to common actions and views related to benefits, including change benefits, beneficiaries and dependents. You can use the worklet to view your benefit elections and current benefits cost</td>
</tr>
<tr>
<td>Favorites</td>
<td><img src="star.png" alt="Star" /></td>
<td>A worklet containing favorite reports and tasks for easy access</td>
</tr>
<tr>
<td>Inbox</td>
<td><img src="envelope.png" alt="Envelope" /></td>
<td>A worklet showing your action items, To Dos, and approvals; required for all users and cannot be removed from the Home page</td>
</tr>
<tr>
<td>My Team</td>
<td><img src="people.png" alt="People" /></td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their employment information (transfer, promotion or change of job). This worklet is being retired in 2018</td>
</tr>
<tr>
<td>My Team Management</td>
<td><img src="team.png" alt="Team" /></td>
<td>A worklet linking you to common actions and views related to your team, including viewing your direct reports and their recent activity. For example you can Transfer, Promote, or Change Job, Change Location, Add Job, Terminate and Place Worker on Leave here. Finally, you can view important information such as a team comparison, the Organization Directory, Headcount, Management Chain and Timeline</td>
</tr>
<tr>
<td>Pay</td>
<td><img src="wallet.png" alt="Wallet" /></td>
<td>A worklet linking you to common actions and views related to your pay, including accessing withholding elections and payment elections and viewing payslips, total compensation, bonus and one-time payment history, tax documents and allowance plans</td>
</tr>
<tr>
<td>Personal Information</td>
<td><img src="id-card.png" alt="ID Card" /></td>
<td>A worklet linking you to common actions and views related to your personal information, including changing your contact and personal information (such as your addresses, e-mail and phone number), emergency contacts, photo, legal name, preferred name and government IDs; required for all users and cannot be removed from the Home page</td>
</tr>
<tr>
<td>Safety</td>
<td><img src="warning.png" alt="Warning" /></td>
<td>A worklet enabling employees, managers and safety partners to report safety incidents</td>
</tr>
<tr>
<td>Time</td>
<td><img src="clock.png" alt="Clock" /></td>
<td>A worklet linking you to common actions and views related to your time, including entering your time and viewing your time-off balance</td>
</tr>
<tr>
<td>Time Off</td>
<td><img src="luggage.png" alt="Luggage" /></td>
<td>A worklet linking you to common actions and views related to time off, including viewing your time-off correction, leave of absence, time off and time-off balance</td>
</tr>
</tbody>
</table>