Student Employee Self-Service

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Table of Contents

Navigating Workday ...................................................................................................................................... 3

Home Page ................................................................................................................................................ 3

Introduction to Worklets .......................................................................................................................... 3

Search ........................................................................................................................................................ 3

Related Actions Icon .................................................................................................................................. 4

Profile Menu ............................................................................................................................................... 4

Profile Page .............................................................................................................................................. 4

Worklets ........................................................................................................................................................ 5

Personal .................................................................................................................................................... 5

Pay ............................................................................................................................................................. 5

Job ............................................................................................................................................................. 6
Navigating Workday

Home Page
The main Workday page is the Home page. This page has some required worklets, but you can also configure the pages to meet your needs, by adding optional worklets. Workday opens to the Home landing page.

Introduction to Worklets
Worklets provide access to groups of related tasks, reports, and links. Worklets are organized by functional category and represent different kinds of tasks or work that you can easily perform using self-service functionality. Icons represent each worklet on the Home page. There is a My Team worklet which is only available for those who manage others.

Search
Use the Search window to locate any tasks, reports, and views to which you have access. For example, if you are not sure where to find information in a particular worklet, simply type the task name or report you are looking for, hit enter, and view the results in the search box.

From the search box, you can access information about your own worker record and about other workers, too: the information you can view depends on what level of security access your role(s) give you. For example, your access might limit what you can see about other workers to contact information, phone, and email.
You may also see the organizations to which other workers belong: their management chain, their current job, and the people that support the organization, such as their HR Partner, Benefits Partner, and more.

**Related-Actions Icon**

When the Related-Actions icon 🗓️ appears next to an object (a person, an organization, a cost center, or any other object), click on this icon to perform actions on (or complete tasks related to) that object.

**Note:** The actions you can perform depend on the security access that your role(s) offer you.

**Profile Menu**

The tabs, which you will find on the right side of the Workday screens, have special functionality.

- **Inbox:** Use the Inbox link to access tasks and to review requests. Once you are in the Inbox you can click on My Delegations to view or add delegates to your Inbox or specific tasks.

- **Notifications:** Use this link to access notifications and/or alerts related to tasks or processes that you have completed, or may have pending in the system.

- **W:Drive:** This link is a storage site for larger reports run in Workday. A report can be generated and the output sent to the W:Drive while you continue to work in the system. Access to the W: Drive is limited to those items generated from your own account.

- **My Account:** This link provides you with the ability to change some preferences in Workday (Search, Notification set-up, etc.).

**Worker/Employee Profile Page**

The employee profile (which you can access by clicking on your name in the upper right hand corner of most Workday pages) contains information about your job, your pay, your contact information, and other information.

Many of the worklets on your view-worker page are similar to those on the **Home page:** Workday often has more than one way to get to the same information.
Worklets

You will find several worklets on different pages: a few examples are personal, pay, and job.

Personal:

This worklet contains general personal information about you. If you need to make any changes to the information, please contact your HR representative, who will make changes to your information in PeopleSoft, the system that stores all student data.

The Personal Information worklet is available from the Home landing page and the Employee Profile / View Worker page, which you reach by clicking on your name near the search box in the top right of the screen. Personal information contains links that allow you to view (and modify some) personal information: view your name, marital status, emergency-contact Information, address, and more. Many of the tasks and links that can be accessed in the Personal Information worklet can also be accessed from the Related Action menu associated with your name.

The Home link in the view menu opens the Employee Profile/View Worker page, the same page that you reach by clicking on your name in the upper right of the Workday page: this page is a hub of information about the worker.

Pay:

This worklet lets you view your Payslips, total compensation, bonus and other payment history, tax documents, and reimbursable-allowance-plan activity. Also, you can view and update your withholding elections. (Note: if you need information about the W-4 form, please visit the US government's website: http://www.irs.gov/Individuals/IRS-Withholding-Calculator.)

The Pay worklet is available from the Home page and the Employee Profile / View Worker page. Some of the functions are available from the related actions arrow next to your name under Personal Data.

View/change your federal and state withholding elections: until Cornell has used Workday for a few months, only view access will be available

Select Withholding Elections in the Actions menu to see your federal and state withholding elections.

Available soon: Federal withholding can be changed by clicking the Complete Federal Withholding Elections button, selecting the effective date of the withholding change, and completing a new online W-4 form. (Note: if you need information about the W-4 form, please visit the US government’s website: http://www.irs.gov/Individuals/IRS-Withholding-Calculator.)

State withholding cannot be changed in Workday.
View or modify direct deposit accounts and elections: Currently only view access is available.

Select **Payment Elections** in the **Actions** menu.

**Available soon:** Add, Change or **Delete Account** will change the accounts available for direct deposit. **Change Elections** will allow the employee to change the percentage of compensation deposited to each account.

**Payslips:**

This link enables you to view and print a copy of your payslip or to change your payslip printing election. You may view payslips for any period in the past provided the historical data has been loaded.

**Job:**

The Job tab is available on the Employee Profile/View Worker page. This view offers a comprehensive list of information about the jobs you have held at the university, including supervisory organizations, managers and history.

**Job Details**

This tab provides relevant information about your current job: e.g., the Job Profile, Location, Hire Date and Organization. The information is not modifiable, but several of the fields (such as, Organization, Position and Job Profile) have a related actions icon and a hyperlink, allowing you to view more information.
**Manager History**

This tab lists all of your previous managers and their contact information.

**Management Chain**

You may view your place in the management chain by selecting the Management Chain tab. Your manager is listed along with his or her manager.

**Organizations**

To find out what organizations you belong to, select the Organizations tab. Workday allows for many different levels of reporting, including cost center, region, and project. For example, select this tab to see what cost center you belong to before submitting an expense report.

Select the Related Actions icon next to an organization in Workday to open a preview pane with available actions for that organization: these actions will vary depending on your security role. Click the **Org Chart** button to open the organization chart.

As you open, close, and navigate through your organizations, Workday animates the transitions of the chart and synchronizes the left-side panel displaying an organization outline, or tree. You can use the chart or the tree to move between organization levels, as well as expand and collapse organizations. Use the zoom control bar to control the size of the chart. Double-clicking an organization zooms and pans the chart to focus on that organization. Double-click in whitespace to fully zoom out, giving you a bird's eye view of the entire organization’s structure.