



Personnel Activity – *December 16, 2020*  
Complete system launch - *January 2021*



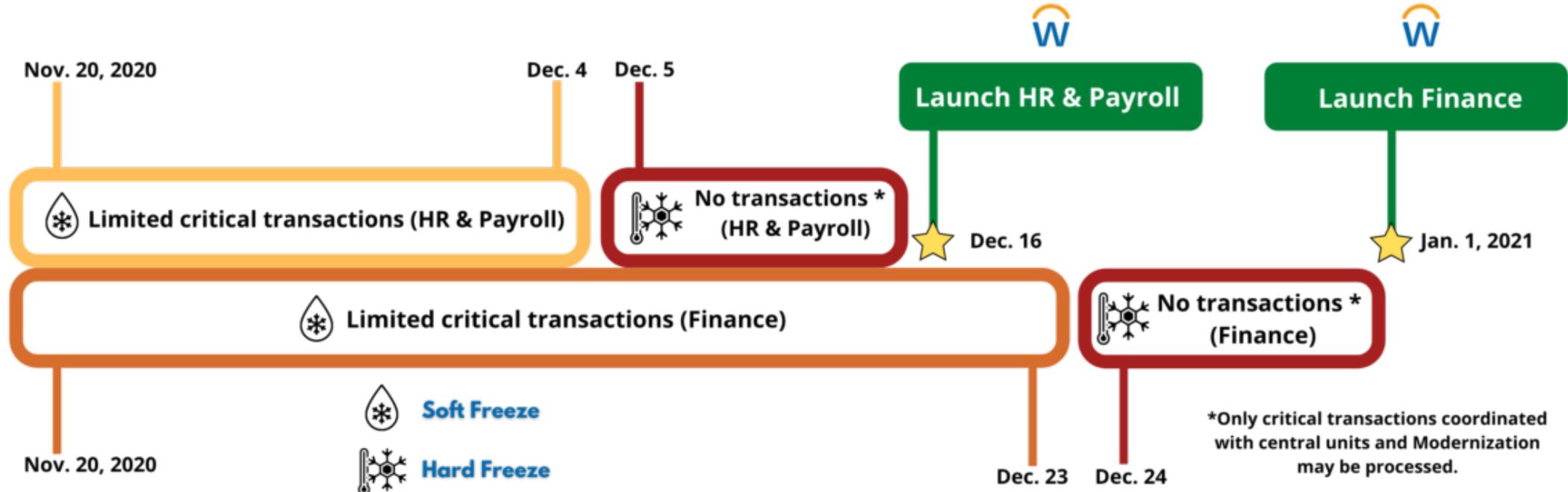
Workday orientation  
session topics:

- Cutover Dates
- Training – How, what,  
where, when
- Resources for help

# Cutover

- A collection of activities necessary to transition from the current systems to Workday
- Includes “freeze periods” during which transactions will not be performed to allow transition between systems

## Workday Cutover Timeline



Dates you should know

# November

- **November 13** – Soft freeze on K-orders, F-orders and payment requests to Purchasing
- **November 16** – Anticipated time off for Dec 1<sup>st</sup> - 15<sup>th</sup> DUE to Darla
- **November 20** - Leave reports for OT ineligible DUE for November
- **November 20** – **SOFT** freeze on personnel or funding changes (unless deemed critical)
- **November 30** – Last day to post on WSUjobs for new recruitments

Dates you should know:

# December

- **December 1** – Cease use of pcards and CTA card (for critical purchases – see Megan)
- **December 4** – HARD freeze on NEW contracts
- **December 7** – Comp time payout requests DUE to Darla
- ★ **December 11** – **Recommended date to complete *essential* training**
- **December 14** – Last day to submit TEVs to Travel Services
- **December 15** – HARD freeze ANY pcard/CTA purchases
- ★ **December 16** – **Begin using Workday for payroll and time entry and leave requests**
- **December 21** – HARD freeze of ANY purchases using K or F orders

**January 1, 2021** - Workday launches for all transactions and activity

# Workday Training

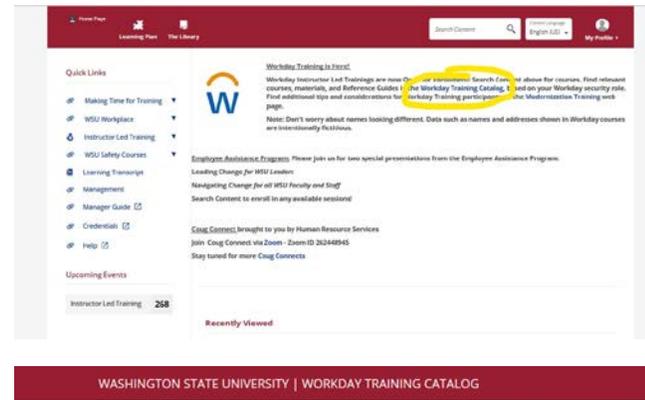
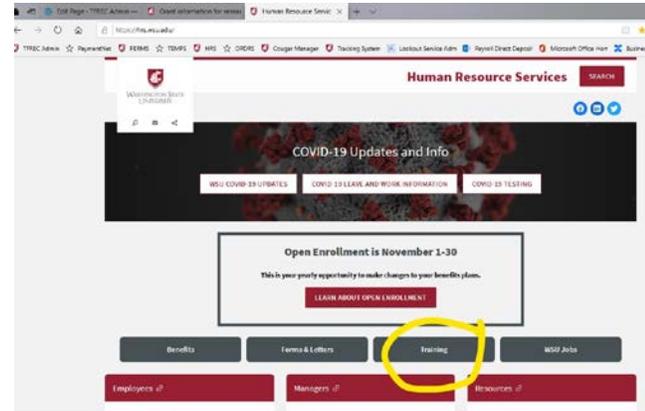
- EVERYONE will use Workday, therefore, EVERYONE needs training.
- The bulk of the training will take place between October and December 2020.
- You are encouraged to focus on sessions that are relevant to your duties and/or security roles. Reference guides and other materials are designed to help employees after launch.

# TFREC Admin Website

## ➤ Modernization Initiative Page

### Workday Training Guide

- ✓ View file with instructions and screenshots on how to access training.



Search:  Filter

You are viewing all content with a Training Focus of All Employees and a Functional Work Area of Employee as Self.

#### Getting Started with Workday Guide: Complete Federal Withholding Elections

Description: How to complete federal withholding elections.

Roles: Employee as Self

Training Type: Reference Guide

Link to Training Resource: [Getting Started with Workday Guide: Complete Federal Withholding Elections](#)

#### Getting Started with Workday Guide: Complete State & Local Withholding Elections

Description: How to complete state and local withholding elections.

Roles: Employee as Self

Training Type: Reference Guide

Link to Training Resource: [Getting Started with Workday Guide: Complete State & Local Withholding Elections](#)

#### Getting Started With Workday Guide: Modify Your Personal Information

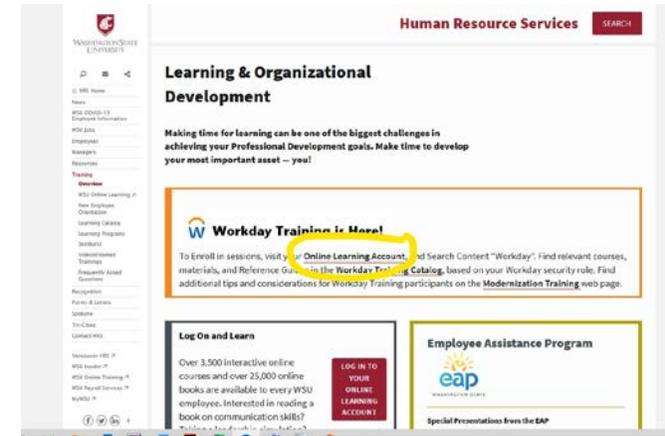
Description: How to view and update personal information in Workday.

Roles: Employee as Self

Training Type: Reference Guide

Link to Training Resource: [Getting Started With Workday Guide: Modify Your Personal Information](#)

Getting Started With Workday Guide: Tools and Modernization



Welcome to the Workday for WSU training Catalog. On this page, you will find a complete list of Workday training courses and materials. Each listing includes the direct link to the item for quick access. Selecting a link will take you to a new page with the location of each training material.

To find the course offerings related to a specific Workday security role, select the "Training by Role" button under the Training Focus menu, then select your security role from the menu underneath.

If default, all WSU employees will be assigned the role of Employee as Self and those who are in a management role will be assigned Manager as Self. If you have questions about your assigned Role or HR security roles, contact your Area Resource Officer.

To search by functional area, use the Training Focus menu to search by broader functional categories, then select the detailed Functional Work Area from the menu underneath to view all related training items regardless of role.

For questions, please visit [hr@wsu.edu](mailto:hr@wsu.edu).



# Training Types

- **Virtual Instructor Led (VILT)** - Remote classroom training led by an instructor.
- **Recorded Virtual Instruction Led** – Recordings of certain VILTs; some available now, some available soon. Keep checking the site for updates.
- **Reference Guide** - Step by step guides to completing processes with screenshots, available round the clock.
- **Micro-learning** - Self-led in-depth courses/videos viewed in Skillport that may be repeated as needed.
- **Workday Expert Q&A** – Zoom led by Workday experts after launch to answer questions about a specific subject.

# Training Session Page

If you have selected an instructor led or micro learning training type, you will be directed to a page like this with either a button to launch or a list of sessions for which you can enroll.



## Getting Started With Workday: Manager Self-Service

Custom - Course

Status: 

**LAUNCH** 



**About**

[Related Items](#)

## Overview

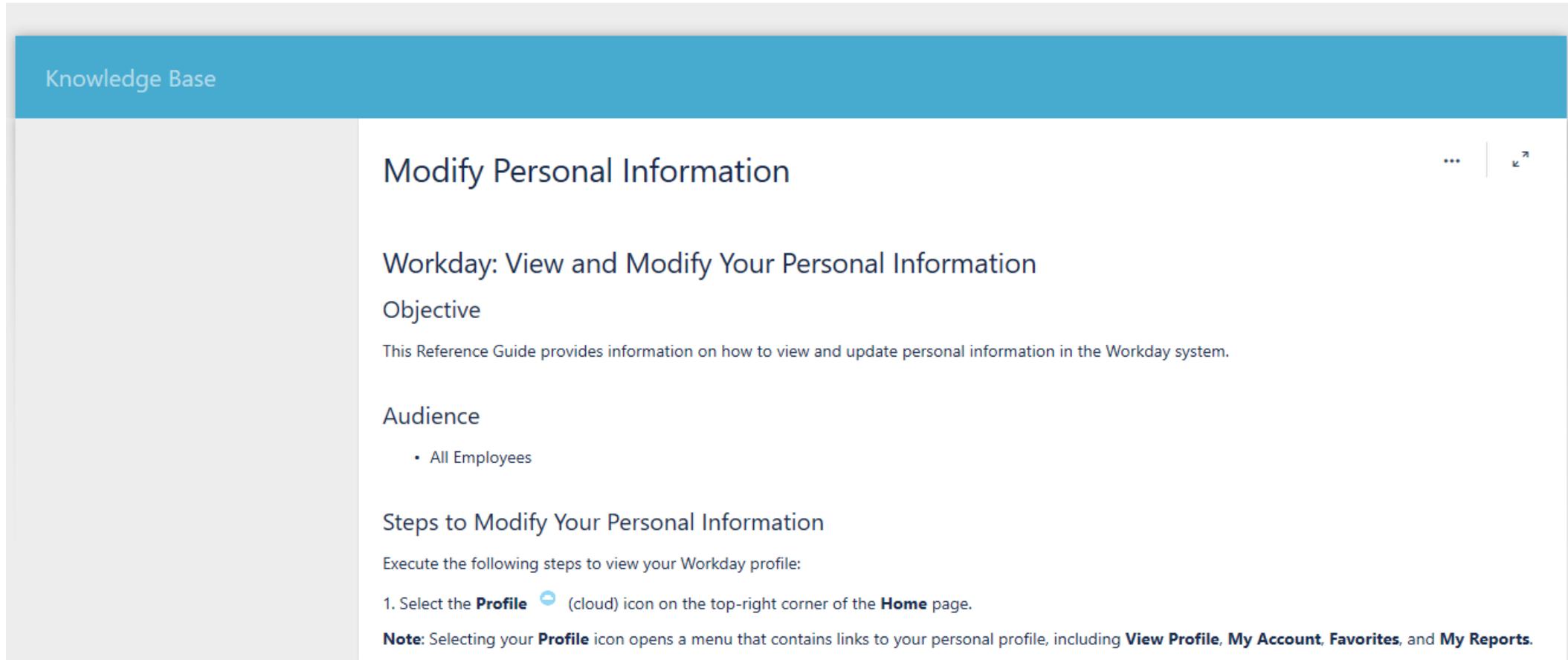
This course will provide an overview of Workday Navigation for Managers.

## Library ID

ID: `_scorm12_wsu_wkdy_mss101`

# Reference Guide Page

If you select a reference guide training type, you will be directed to the Knowledge Base site to view the step by step instructions for the training topic.



The screenshot shows a Knowledge Base page with a blue header bar containing the text "Knowledge Base". The main content area has a light gray sidebar on the left. The page title is "Modify Personal Information" in a large, dark blue font, with a three-dot menu icon and a share icon to its right. Below the title is the subtitle "Workday: View and Modify Your Personal Information". The "Objective" section states: "This Reference Guide provides information on how to view and update personal information in the Workday system." The "Audience" section lists "All Employees". The "Steps to Modify Your Personal Information" section begins with "Execute the following steps to view your Workday profile:" followed by a numbered list starting with "1. Select the **Profile** (cloud) icon on the top-right corner of the **Home** page." A **Note** at the bottom states: "Selecting your **Profile** icon opens a menu that contains links to your personal profile, including **View Profile**, **My Account**, **Favorites**, and **My Reports**."

Knowledge Base

## Modify Personal Information

### Workday: View and Modify Your Personal Information

#### Objective

This Reference Guide provides information on how to view and update personal information in the Workday system.

#### Audience

- All Employees

#### Steps to Modify Your Personal Information

Execute the following steps to view your Workday profile:

1. Select the **Profile** (cloud) icon on the top-right corner of the **Home** page.

**Note:** Selecting your **Profile** icon opens a menu that contains links to your personal profile, including **View Profile**, **My Account**, **Favorites**, and **My Reports**.

# Training Essentials for **ALL** WSU Employees

## **1. Getting Started With Workday: Employee Self-Service**

Description: Online micro-learning course provides information on common tasks employees can complete.

## **2. Getting Started With Workday Guide: Tools and Navigation**

Description: How to get started with Workday and learn about the features that will help you navigate the system.

## **3. Workday Time and Absence: Enter and Correct Time (Employee)**

Description: This video provides the steps to enter and correct Time.

## **4. Workday Time and Absence: Request and Correct Time Off (Employee)**

Description: This video provides the steps for employees to request and correct time off in Workday.

## **5. Manage Your Payroll Options: Complete Payment Elections**

Description: How to set up Payment Elections and Direct Deposit in Workday.

## **6. Complete State and Local Withholding Elections**

Description: How to complete state and local withholding elections.

## **7. Getting Started With Workday Guide: Modify Your Personal Information**

Description: How to view and update personal information in Workday.

*\*Website with direct links to training resources: <https://modernization.wsu.edu/essential-training/>*

# Training Essentials as a Supervisor or Manager

## **1. Getting Started With Workday: Manager Self-Service**

Description: This online micro-learning course provides information on common tasks managers can complete in Workday.

## **2. Workday Time and Absence – Recording**

Description: This instructor-led course provides information on how to manage time and absence in Workday. It is recommended that you take the Workday HR Overview and Key Concepts course prior to taking this course to maximize your learning experience.

## **3. Workday Time and Absence Guide: General Time & Absence**

Description: This Reference Guide provides an overview of Time & Absence processes in Workday.

## **4. Workday Time and Absence Guide: Manage Time and Absence on Behalf (Manager)**

Description: This Reference Guide provides information on how to perform the following processes in Workday: Enter and correct time on behalf of an employee, enter leave of absence on behalf of an employee, enter and correct time off on behalf of an employee.

## **5. Workday Time and Absence: Correct Time Off (Manager)**

Description: This video provides the steps for managers to correct employee time off requests in Workday.

## **6. Workday Time and Absence: Enter Time Off (Manager)**

Description: This video provides the steps for managers to process employee requests for time off in Workday.

\*Website with direct links to training resources: <https://modernization.wsu.edu/workday-training-essentials-for-managers/>

# Training Essentials for Supervisors and Managers (continued)

## **7. Workday Recruiting: Overview – Recording**

Description: This course provides information on the recruitment process and how to create job requisitions (recruitments) and review applicants for jobs and positions in Workday. It is recommended that you take the Workday HR Overview and Key Concepts course to maximize your learning experience.

## **8. Workday Staffing: Employee Lifecycle – Recording**

Description: This course provides information on how to manage job assignments and change jobs in Workday. It is recommended that you take the Workday HR Overview and Key Concepts course to maximize your learning experience.

*\*Website with direct links to training resources: <https://modernization.wsu.edu/workday-training-essentials-for-managers/>*

# Trainings recommendations by employee type

- Faculty/PIs – Grants and manager self-service trainings (filter by “grants” or “manager as self” in Workday Training Catalog).
- Graduate students – Employee self service training
- Postdocs/Research Techs – Employee self service, supervisor/manager (if applicable).
- Admin – View the trainings as indicated by your security roles, as well as all Employee as self offerings.

# Other Important Trainings (as needed)

## ***Workday Travel and Expenses: Create and View Expense Report (fka TEV)***

Description: How to create, edit and approve an expense report in Workday.

## ***Workday Travel and Expenses: Create Spend Authorization (fka TA)***

Description: How to create a spend authorization in Workday. Use this reference guide to receive permission for future expenses.

## ***Workday Reporting Guide: Using Workday Reports***

Description: Learn how to run reports in Workday and about reports available by security role.

## ***Getting Started with Workday Guide: View your Payslip (fka earnings statement)***

Description: This Reference Guide provides information on how to view a payslip in Workday.

## ***Getting Started with Workday Guide: Workday for Mobile Devices***

Description: How to access Workday via Mobile Device.

# Tips and Tricks

## Find the Workday training resources:

- Filter by Training Focus (i.e. reporting, payroll, etc.).
- Filter by Functional Work Area (i.e. procurement, time, leave & absence, etc.)
- Use the search feature on the online training website, Skillport (top right of page) by typing “workday”.
- From the Workday Training Catalog link, scroll to the search bar located under the “functional work area” section and type a key word from the training title. **CLICK filter to initiate the search rather than hitting enter.**

## Which trainings do I take?

- Consult lists posted on TFREC Admin site on the Modernization page (*UPDATED*).
- Each training will list “roles” below the description, which will tell you who the training is for (employee as self, Manager as self, HR Partner, etc).
- Filter training by role under the “Training Focus” header
- Consult with your supervisor or admin manager.
- If you missed an instructor led training, some sessions have been recorded and some will have additional sessions added after launch (January 1, 2021).

# Future Workday Orientation Session

## **November 13**

- ✓ Who – Supervisors/Manager
- ✓ What – Time and absence – view, correct and approvals

## **November 20** (following faculty meeting)

- ✓ Who – PIs/grant managers
- ✓ What – grant management (what's changing/what's not)

## **December 4**

- ✓ Who – Everyone (including timeslip)
- ✓ What – Employee self service – time (hours worked) and absence reporting

## **December 11**

- ✓ Who – Anyone
- ✓ What – Q&A about Workday (all subjects)

# Need Help?

- Contact Darla Ewald ([dewald@wsu.edu](mailto:dewald@wsu.edu))
- Available now!
  - [modhelp.wsu.edu](http://modhelp.wsu.edu) (type in address bar of browser)
- Workday FAQs
  - <https://confluence.esg.wsu.edu/display/KB/FAQs>
- Available after December 16:
  - Workday Service Desk (link will be distributed soon)