FAQs for HR and Payroll Teams: Living in Workday

How much historical data will we be bringing over from our existing system?
Workday will house six months of historical data. This means all inactive and active jobs starting July 1, 2014 and forward will be in Workday.

How do I filter my inbox?
You can add filters to your inbox by navigating to your inbox in full-view mode. Click on the dropdown arrow at the top left of the inbox to see the current filters available to you and to choose the Edit Filters option. You can create filters that will only show steps in all business processes or just individual business processes. See the Create Inbox Filter quick reference guide for more detailed instructions.

How can I set up and manage delegations?
To delegate your role to another Workday user, search for My delegations in the search bar. You can add a delegation assignment by click on the Manage Delegations button. For more information regarding delegating your role, see the Delegations quick reference guide. Your role should only be delegated to an individual who already holds the same or similar role.

How do I access reports?
The best way to navigate to a report in Workday is to search for the report name using the search bar. A list of delivered and custom reports can be found here.

How do employees who no longer work for the university get access to old payslips/W2s?
If the employee separated from the University after January 5, 2015, then access (in a limited capacity) is available until the January following the termination. This limited access will enable them to look at old payslips and update their address for their W2. If they need access to their payroll information after time, or their separation was before January 1, 2015, then they should contact payroll directly at payroll@uchicago.edu

Is there any way to limit what is returned in search results to only objects that are relevant to me and my division?
Yes, if you type a question mark (?) in the search bar and hit the return key, a list of search prefixes will display. You can use any of these prefixes (followed by a colon) to narrow down your search results. Some common prefixes include the following:

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org</td>
<td>Will only return organizations with your search criteria in the name</td>
</tr>
<tr>
<td>AU</td>
<td>Will only return academic units with your search criteria in the name</td>
</tr>
<tr>
<td>Worker</td>
<td>Will only return workers with your search criteria in the name</td>
</tr>
</tbody>
</table>
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How can I change the settings for which notifications I receive and how often I receive them?
You can change your notification preferences by navigating to the top right of the Workday home page and clicking on your photo or photo placeholder (this is the circle next to your name). Click on Change Preferences and scroll down to the Notification Delivery Preferences to change the frequency of emails you receive. Note that changes made here will only impact notifications being sent to you external email, notifications will still be sent to you Workday inbox. For more information, you can view the Updating Notification Preferences video tutorial or Quick Reference Guide.

Will employees be sent Workday emails to their uchicago email addresses?
The setting upon the initial hire will be for notifications to be sent to the home address they indicated when they first applied to the university. Once fully hired, notifications default to be sent to the employee’s work email address. Notification settings are configurable by the user, so the employee will be able to change this to meet his/her needs.

Will the Workday account disable itself if the employee is not in an active job?
Workday access will not be disabled for an employee until they are terminated. Once the employee has been through the termination process, the Workday account will remain active through the remainder of the calendar year the termination occurs and the following January.

If an employee does not have access to a scanner, how should the employee provide a form (i.e., State W-4 to Payroll, FMLA to Benefits)?
The employee can send the paper version of the forms to the HR Partner or Academic HR Partner who can then upload the forms to the employees’ Worker Profile on their behalf.

When in a business process, what is the recommendation on how to use the comments section?
The comments section should be used to communicate any specific instructions or reminders to the individuals who will be a part of future steps in the business process. The comments section will never be viewable to an employee who does not hold another security role in Workday. The comments will appear when viewing the business process history.

How do I view the history of a business process?
The worker history section of the worker’s profile allows you to view all business processes that have occurred for the employee. These processes are identified by their name and the date they were completed. To see more specific details about which steps were part of the business processes, when these steps were completed and by whom, click on the individual process. For more information, see the View Worker History quick reference guide.
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An employee was hired in Workday and will no longer be working for us. They haven’t started working yet, and so we don’t want to terminate the employee, what should I do?
The appropriate course of action is to *Rescind* the business process. HR Partners and Academic HR Partners are not able to rescind business processes and will need to contact the Workday Knowledge Center: workdaysupport@uchicago.edu

I have initiated a business process and would like to cancel the process and start from the beginning, do I need to contact the Workday Knowledge Center?
HR Partners and Academic HR Partners can cancel a business process on their own. See the Cancel Business Process QRG for more information.

In reports, workers are listed alphabetically by first name instead of last name. Can this be changed to be sorted by last name?
No, this is a delivered setting and is not currently configurable. The University of Chicago and other Workday clients have suggested to Workday that this be made available.

How should organizations with multiple HR Partners or Academic HR Partners determine division of labor within their areas?
This should be determined internally. Once an HR Partner or Academic HR Partner completes a step of a business process, the action item for that step will disappear from both users’ inboxes.

When in a business process I receive red error messages and orange error messages, what is the difference?
A red error message represents a validation error and you will not be able to move forward in the process until the item the message is referring to is addressed. The orange error messages are soft warnings and will display when Workday recognizes that you may have entered something incorrectly. These soft warnings should be reviewed and you should proceed once you have reviewed your entry and verified it is accurate.

What is a contingent worker?
A contingent worker is similar to an employee; however they cannot receive payment through Workday payroll. If applicable, contingent workers can have academic appointments, manage a supervisory organization, receive tasks or approve business processes and at a later time be converted to an employee.
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I am trying to search for something and it isn’t showing up in my search results, what can I do to expand the search?
When using the search bar in Workday, you can set your preference to search *All of Workday* to ensure you are retrieving the most results. To set your search preferences, click on the circle next to your name at the top right hand corner of the screen and select *Change Preferences*. About half way down the page, you will see the *Search Preferences* section. You can select *All of Workday* or another search category.

Do I have to continue to use the search bar every time I need to look for an employee or supervisory organization?
If you have a frequently visited supervisory organization, report, task, or employee, you can add these to you *Favorites* worklet for quick access. Open your *Favorites* worklet on your homepage, click on the settings wheel in the upper right hand corner of the screen and select *Manage Favorites*. You can add business objects (supervisory organizations and workers) to your favorites or you can add reports and tasks.