Workday Training

for All Employees

Training Class 2

July 8 & 9, 2025

Goal

Introduce all employees to Workday, to remind you of key points and support you in common tasks as you get started in July.

Training Options

Employee

Employee Training #1
June 10, 11, OR 12

(ATTEND ONLY 1)

Employee Training #2
July 8 OR 9

(ATTEND ONLY 1)

Hourly Employee

Hourly Employee Training

TBD

Manager

Manager Training #1
June 17 OR 18

(ATTEND ONLY 1)

Manager Training #2
July 1 OR 2

(ATTEND ONLY 1)

Office Hours

Monday, July 7

1:00-2:30pm

Tuesday, July 8

1:00-2:30pm

Wednesday, July 9

1:00-2:30pm

Thursday, July 10

1:00-2:30pm

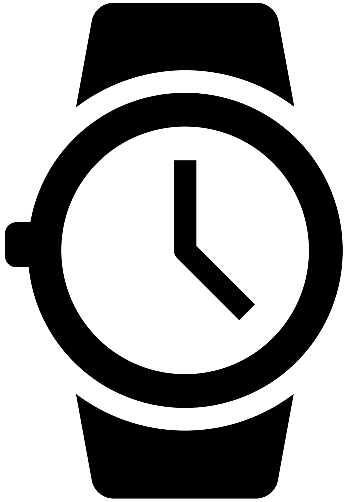
Additional Dates

TBD

Agenda

- INTRODUCTION TO WORKDAY
- YOUR LEARNING SUPPORT TOOLS
- FINANCE - EXPENSE REPORTS
- PAYROLL, PTO & TIME TRACKING
- HR, BENEFITS, & RECRUITING
- HR - TALENT
- REFERENCE MATERIALS & SUPPORT

90 Minutes



YOUR LEARNING SUPPORT TOOLS

www.kencrest.org/workday

KenCrest
Your Dreams. Our Mission.

About Us | What We Do | Get Involved | Connect With Us | Donate Now | Careers

Home

Workday Essentials

HR & Workday

Payroll & Workday

Finance & Workday

Managers & Workday

This page is a work in progress and will be evolving as we continue our Workday integration. Bookmark this page and check back often for the most up-to-date info.

Workday combines human resources, payroll, and finance applications for KenCrest employees into one secure cloud-based portal. Workday is a fully integrated and user-friendly system that provides team members the ability to easily access and update their own information as well as enabling our Human Resources and Finance teams to more effectively manage the operations of KenCrest.

Log in to Workday

Login

If you do not have a kencrest.org email address, when logging into Workday for the first time you will need to reset your password. Follow the login link above, then click the button for "I do not have a KenCrest email address." Select the "forgot password" option, then use your previous Dayforce username and personal email to receive a password reset link.

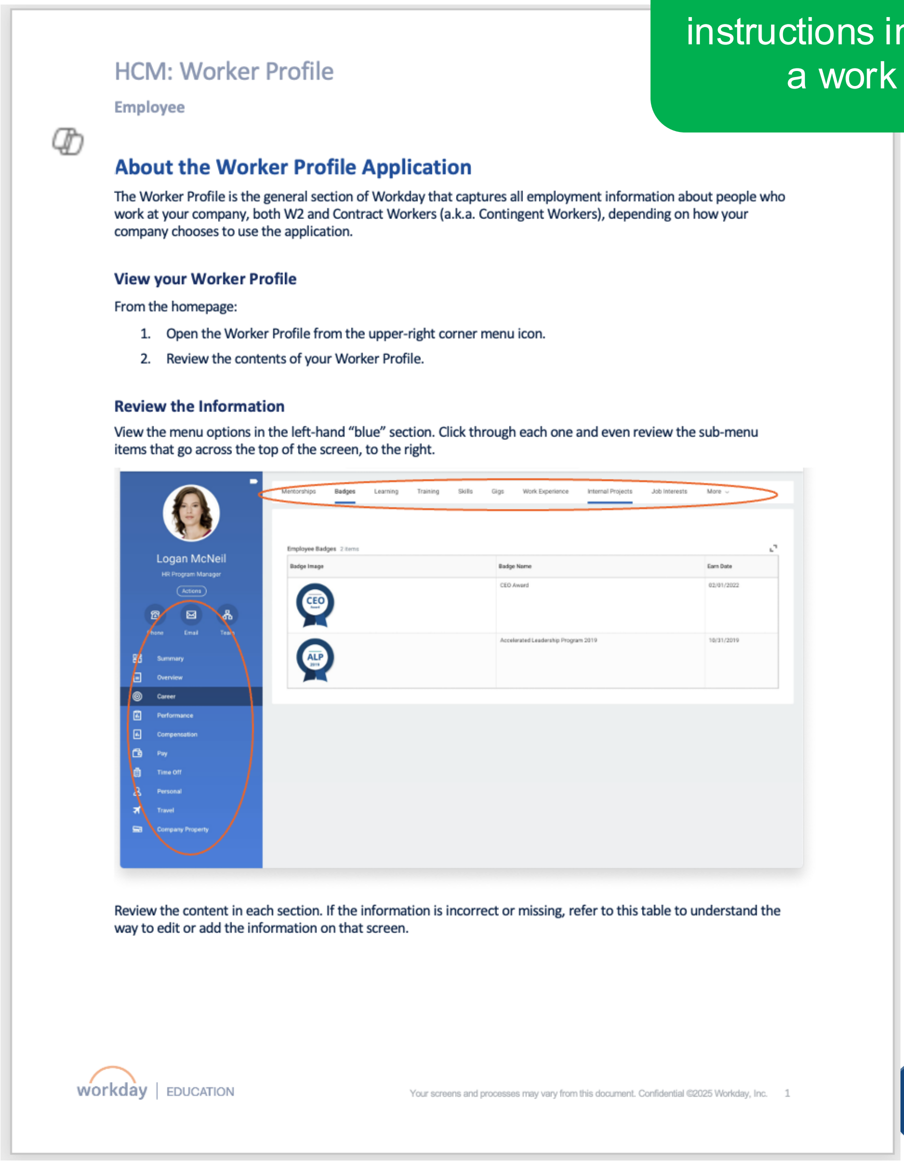
Training Resources

- Make sure to watch the "Getting Started" video before your training session
- Workday Training for All Employees #1 - Recorded Session
  - Slides used during the training
- Workday Training for Managers #1 - Recorded Session
  - Slides used during the training
- Workday Training for Managers #2 - Recorded Session
- All managers should complete both trainings
- Workday Training for All Employees #2 - Live Session
  - Tuesday, July 8 (9:30AM-11:00AM)
  - Wednesday, July 9 (9:30AM-11:00AM)
- Office hours for virtual live support

Job Aids

- 58 Total Job Aids
  - Initially built by Workday
  - Customized for KenCrest
  - Likely to change over time
  - More to come

Definition: Simple, clear instructions in how to do a work task.


HCM: Worker Profile

Employee

About the Worker Profile Application

The Worker Profile is the general section of Workday that captures all employment information about people who work at your company, both W2 and Contract Workers (a.k.a. Contingent Workers), depending on how your company chooses to use the application.

View your Worker Profile

From the homepage:

1. Open the Worker Profile from the upper-right corner menu icon.
2. Review the contents of your Worker Profile.

Review the Information

View the menu options in the left-hand "blue" section. Click through each one and even review the sub-menu items that go across the top of the screen, to the right.

Review the content in each section. If the information is incorrect or missing, refer to this table to understand the way to edit or add the information on that screen.

workday | EDUCATION

Your screens and processes may vary from this document. Confidential ©2025 Workday, Inc. 1

PRO TIP: Bookmark the Landing page, or your favorite Job Aid, and refer to it there. Printing it out might result in missed information.

www.kencrest.org/workday

Communication Channels

- Weekly Communications Email
- Town Hall
- Employee Portal
- Relias
- Dayforce Landing Page (and email)
- EAC Meetings (and email)
- Govenda (for board members)
- Change Champions
- **All pointing towards www.kencrest.org/workday**

Who is my Change Champion?

Program	Identified Champion(s)
Delaware State – Adults	Grace Hodge
Connecticut	Michelle Pych
Pennsylvania Birth to Five	Christina Waldron
Delaware Birth to Five	Michele Bailey
Clinical Services	Autumn Miller & Nicole Briggs
Early Learning Centers in Philadelphia	Christina Stiles & Wil Padilla
Children's Transitional Homes	Ivan Johnson
Community Medical Homes	Dakota Trent
Supported Independent Living	Martayia Nelson-Rainey
Quality Outcomes Specialists	Ariana Forbes
PA Homes – Eastern Montgomery County	Maame Afia-Baah, Ryan Abner, Sydney Clark, & Edward Robinson

Program	Identified Champion
PA Homes – Western Montgomery County	Jean Dantica, Kimberly Royster, Nadia Aitammi, & Sisa Ncube
Lifesharing	Angela Weir
Community -Based Services	Katie White
Employment Services	Demir Moore
Quality Outcomes Specialists	Sharnese Jones
PA Homes – Chester County	James Carter, Courtney Hemingway, Delphine Johnson & Sylinda Butler
PA Homes – Philadelphia and Upper Bucks County	Tia Gibbs, Erika Curry, Michelle Golas, & Sumaro Dorleh
Scheduling Department, IT, ET & Nursing Coordination	Amanda Vani
Facility Management, Billing and Revenue Cycle Department , Philanthropy & Executive Office	Hannah Simons
Incident Management, Corporate Finance & Human Resources	Diana Crothers

Team lead: Sheetal Manglani, Melissa Bailey-Raison, Karen Latimer, Beth Tavenner

Coming up July

KenCrest
Bringing ability to life

workday

Let the games begin!

Join us for a fast-paced, fun-filled round of **Workday Jeopardy** — where your knowledge could win you bragging rights and prizes!

- 🧠 **Test your skills**
- 🤝 **Team up with colleagues**
- 🏆 **Compete for glory**

Sign up by July 21st to secure your spot!

Dates:
July 24 12 – 1 PM
July 27 12 – 1 PM
Aug 7 3 – 4 PM

Location: Virtual Teams Meeting

Audience welcome to sign up as well!

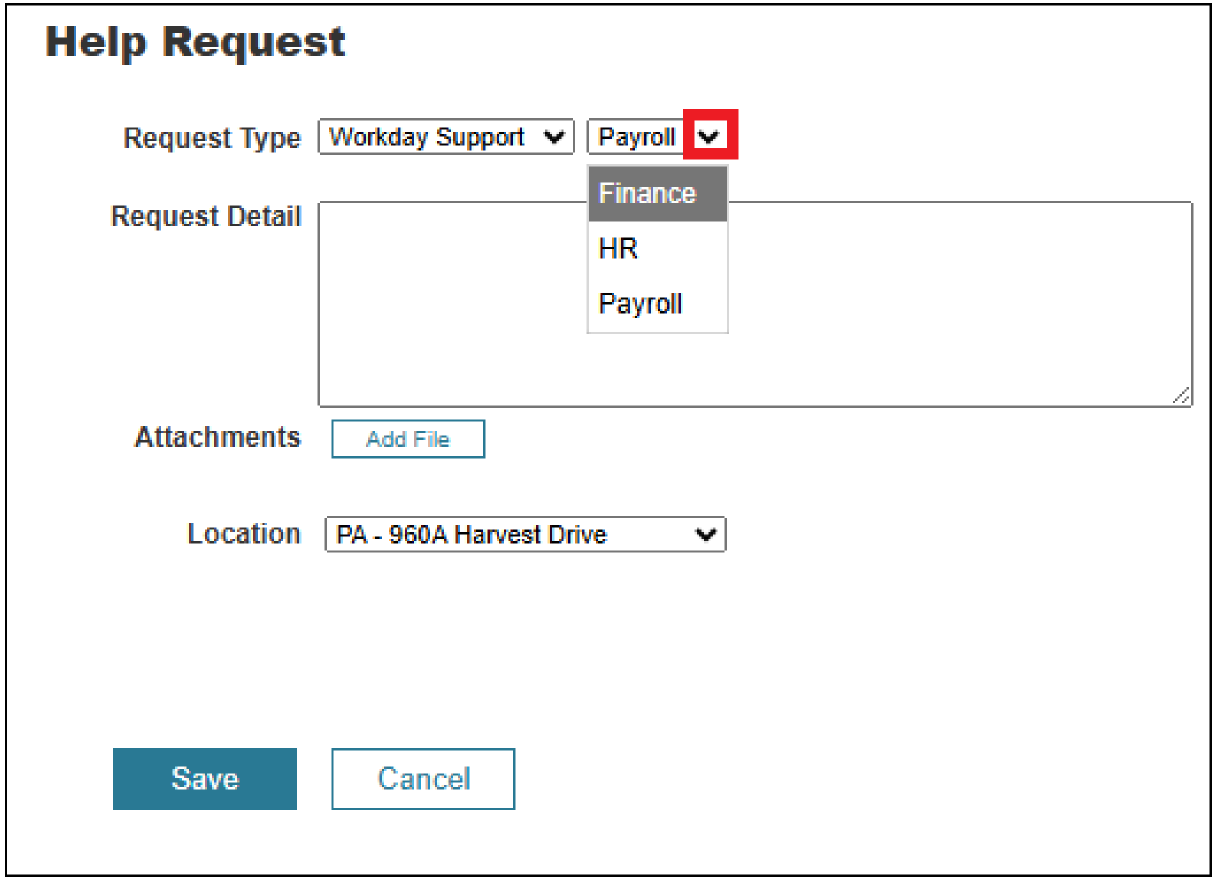
Sign up using the QR Code or use the link https://insights.kencrest.org/s/r3a65w

$100 gift cards for all winners

We will match you up with 2 other participants across the agency to form teams of 3.

Games Coordinators
Erika Curry, Sisa Ncube, Angela Weir, Katie White, Tia Gibbs, Karen Latimer, Melissa Bailey-Raison, Beth Tavenner, Sheetal Manglani

Where to get help – helpdesk.kencrest.org



Request Type: **Workday Support**

Sub Type: **Finance** OR **HR** OR **Payroll**

Sub Types to be added:

“Need help signing in”
“Other”

- OR email WorkdaySupport@kencrest.org

ACCESS & NAVIGATION

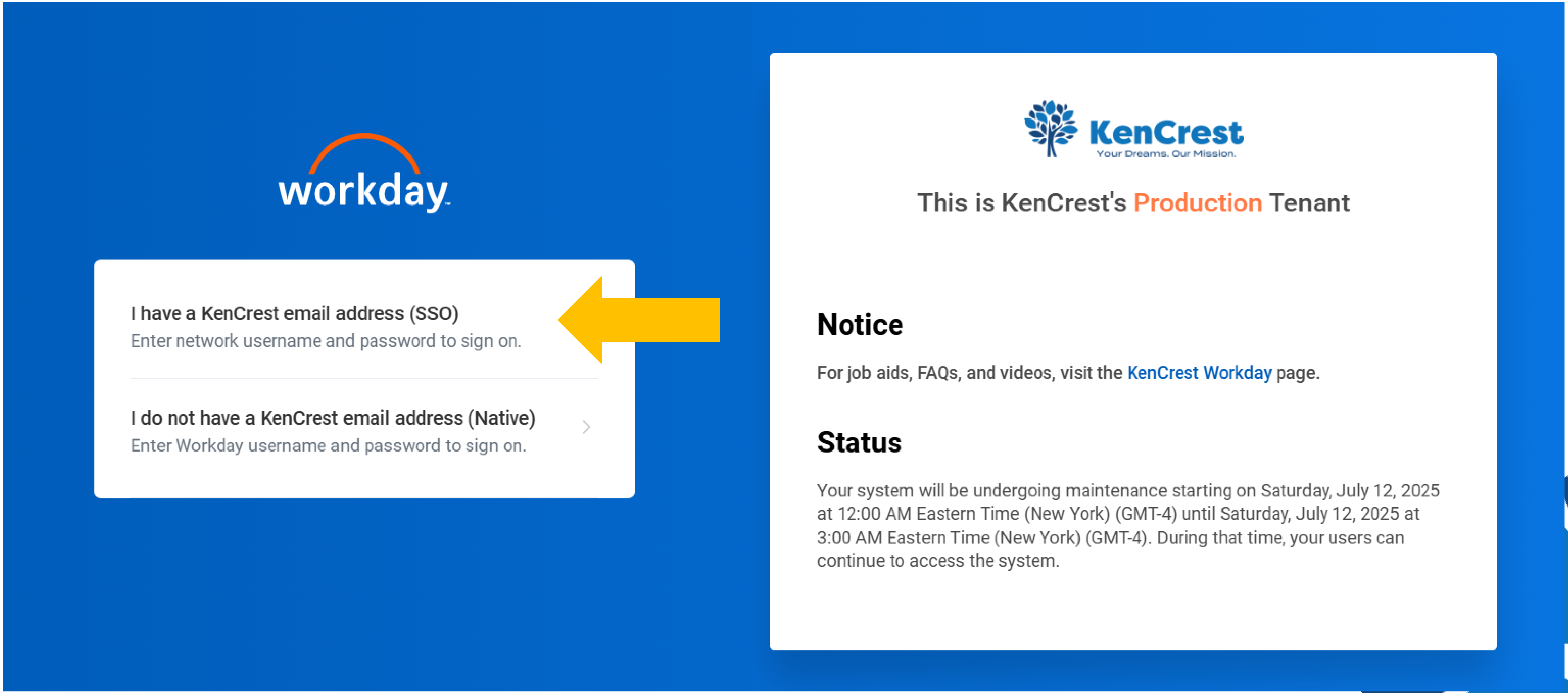
Systems going away

Dayforce
CentreSuite
PeopleSoft
Inspyrus

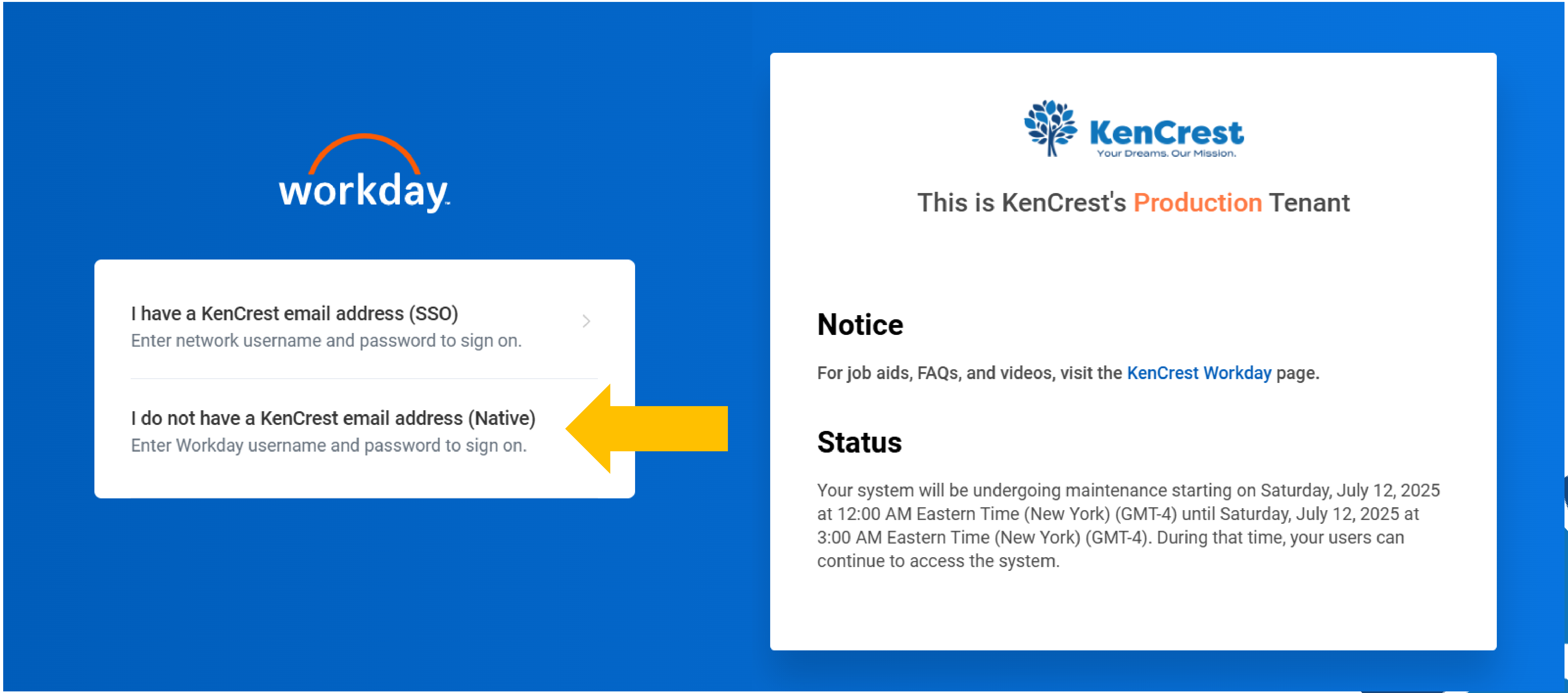
July 1

Kronos → over the next year

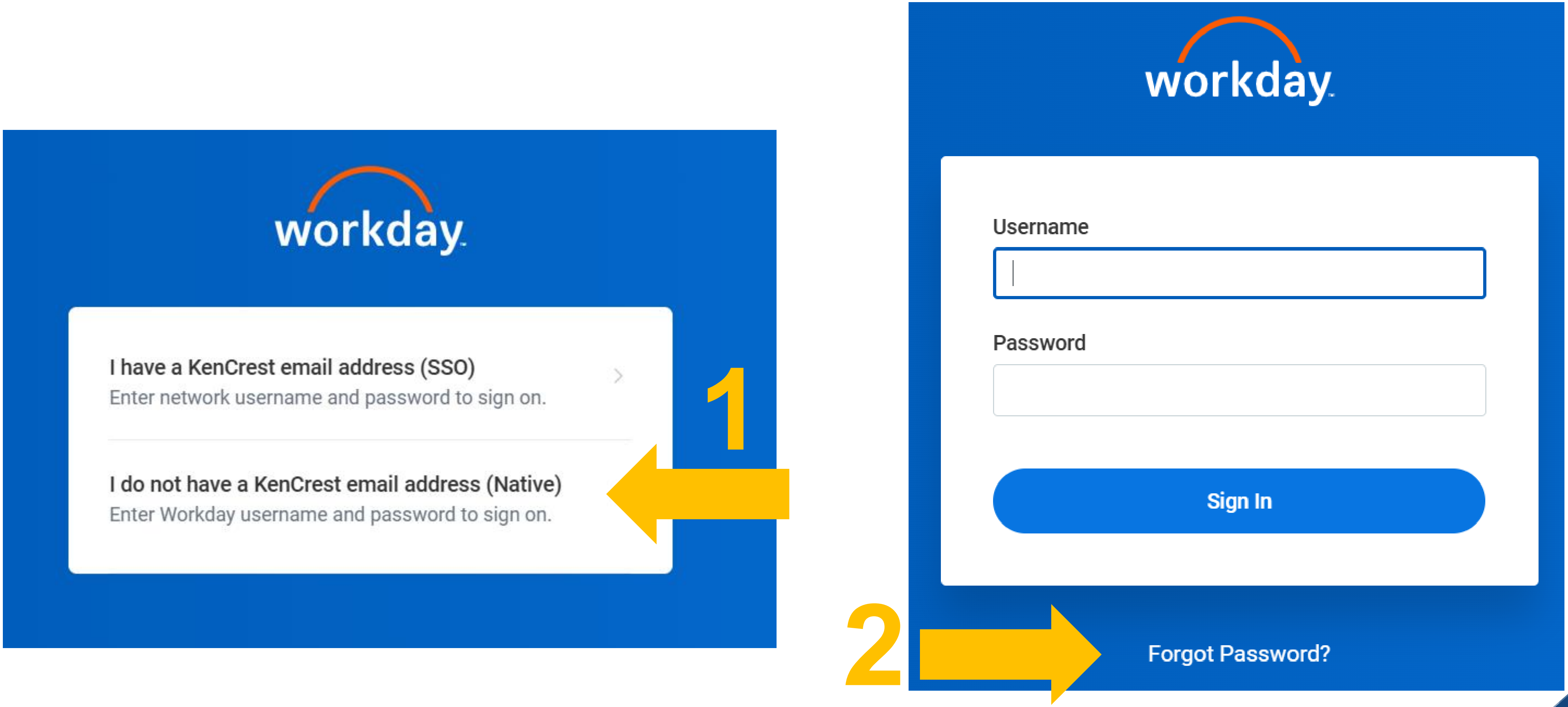
I have a KenCrest email address (SSO)



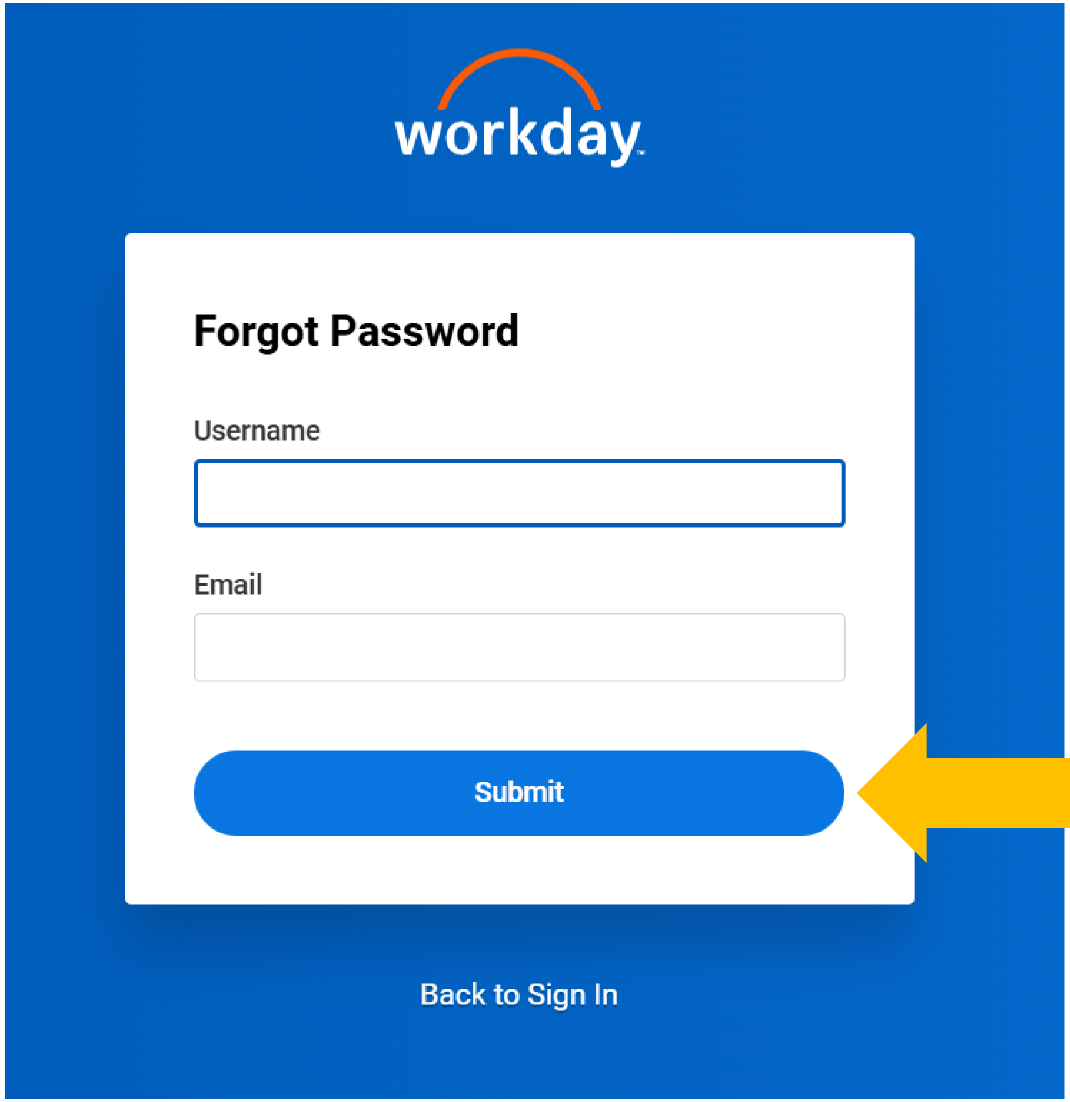
I do not have a KenCrest email address (Native)



I do not have a KenCrest email address (Native) First Login – Use Forgot Password



I do not have a KenCrest email address
First Login – Use Forgot Password



3 Username – Enter your previous Dayforce username

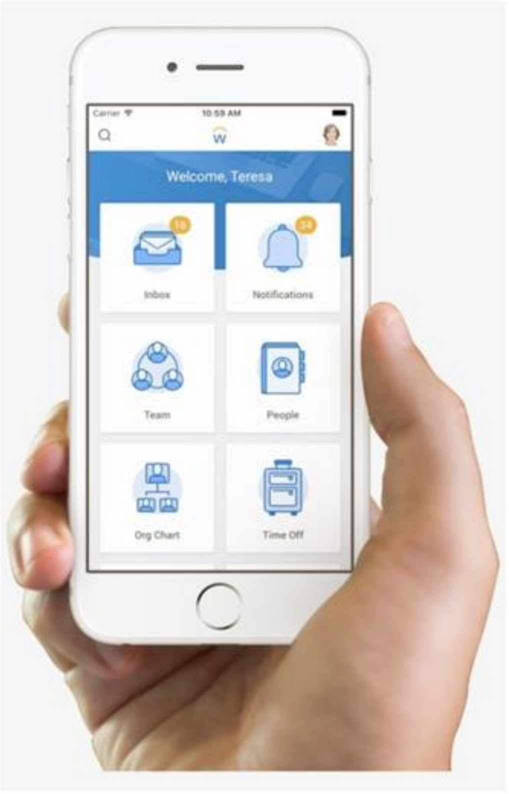
4 Email – Enter your personal email

5 Click Submit – You will receive a password reset link.

Mobile Access

NOTE:

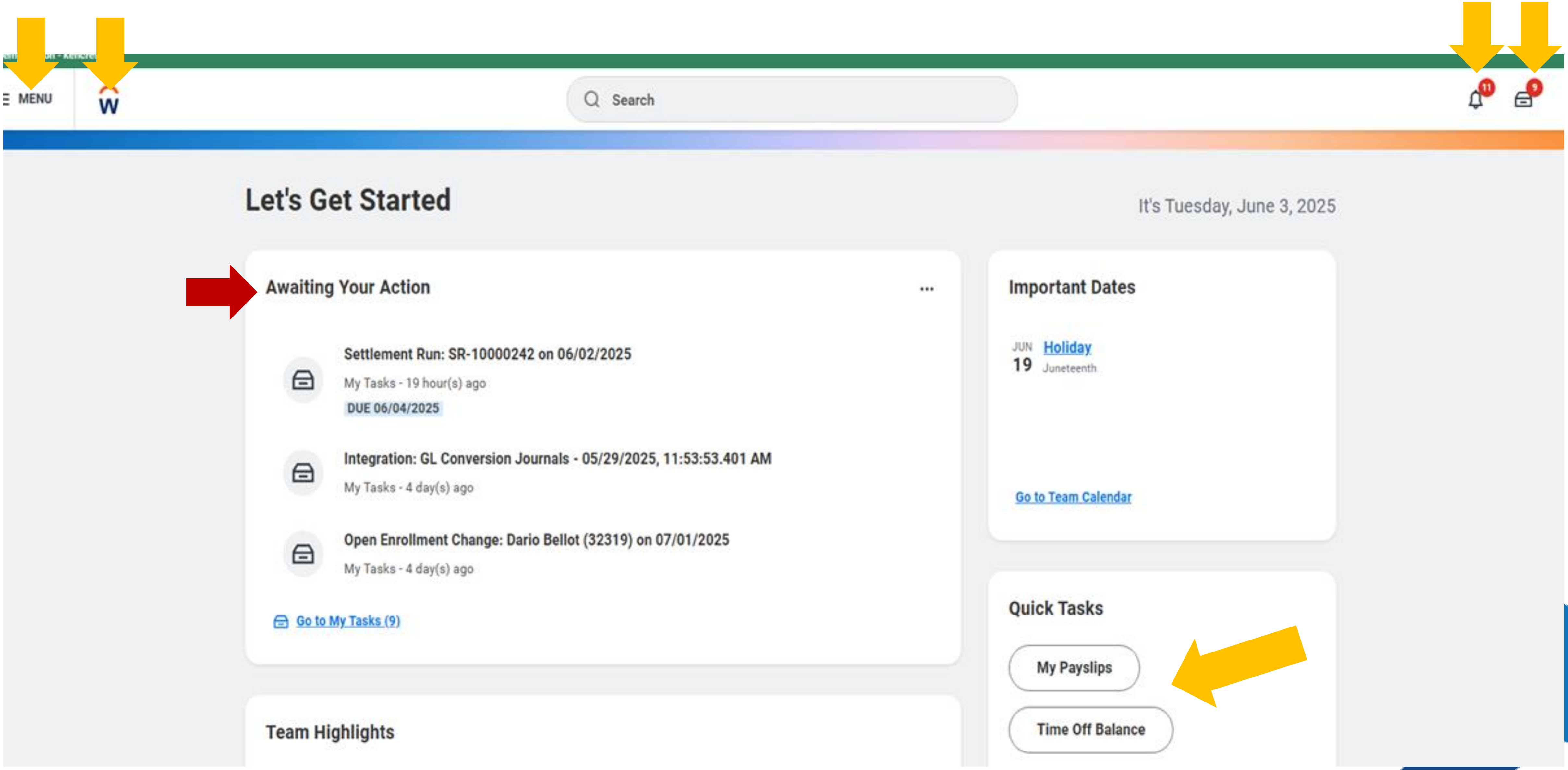
1. Existing Mobile Phone policies apply.
2. Use it to review time balances and request time off. But only specific positions will have the ability to use the mobile app to punch in and out (more to come in July).



Step 1: Go to your App Store

Step 2: Download the Workday App

Step 3: Login with the same Instructions from above

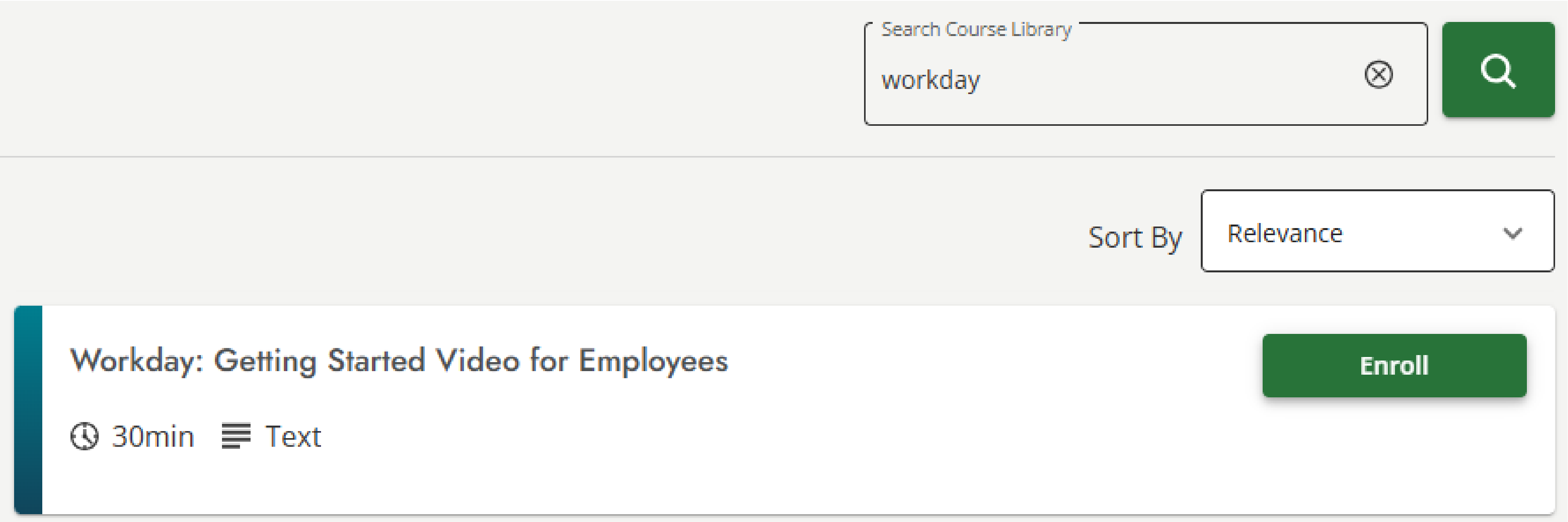

MENU
W
Search
11
9
Let's Get Started
It's Tuesday, June 3, 2025
Awaiting Your Action
Settlement Run: SR-10000242 on 06/02/2025
My Tasks - 19 hour(s) ago
DUE 06/04/2025
Integration: GL Conversion Journals - 05/29/2025, 11:53:53.401 AM
My Tasks - 4 day(s) ago
Open Enrollment Change: Dario Bellot (32319) on 07/01/2025
My Tasks - 4 day(s) ago
Go to My Tasks (9)
Team Highlights
Important Dates
JUN
19
Holiday
Juneteenth
Go to Team Calendar
Quick Tasks
My Payslips
Time Off Balance

Navigation Video

1) Login to Relias (**training.kencrest.org**). On left click “Course Library”
2) Upper right corner type “Workday” into search box and press ENTER.
3) Find “Workday: Getting Started Video for Employees” and Click “Enroll”

OR

https://kencrest.training.reliaslearning.com/Learning/Catalog.aspx?CourseCode=1761716



QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.

FINANCE – EXPENSE REPORTING

Agenda

- Review Credit Card Expense Information
- Review Expense Navigation
- Splitting/Itemizing Transaction
- Attaching Receipts
- Linked Quick Expense
- Out-Of-Pocket Expenses

Credit Card Expenses Review

- <u>Credit Card Expense Reports will run on the same cycle:</u>
  - House - every 2 weeks (First expense report 7/11/25)
  - Admin - 25th of every month (7/25/25)

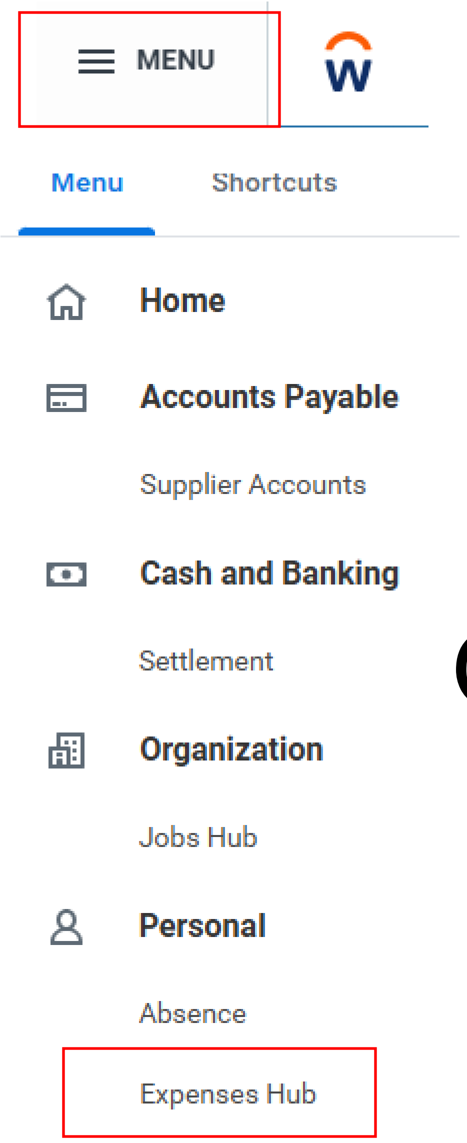
- Expense reports will be created by Workday only after the close of the statement period. Cardholder will NOT create credit card expense reports.

- Expense team does NOT have the ability to make any changes to your expense report.

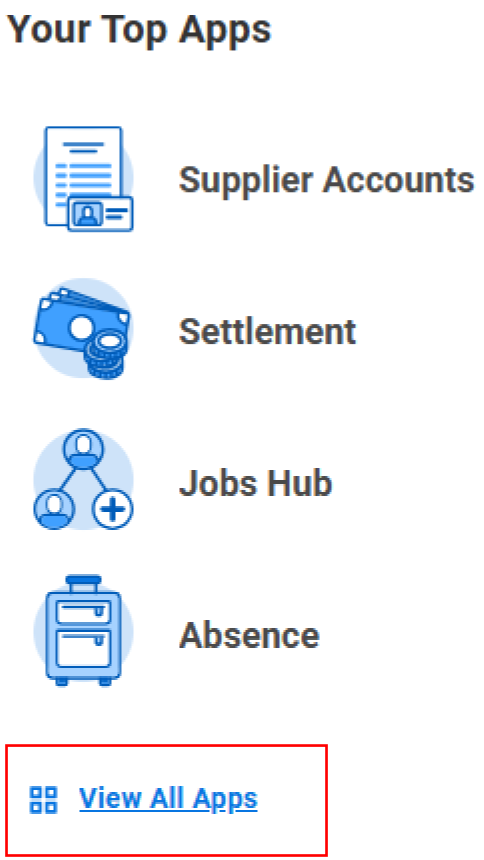
- Current practices will remain the same for:
  - Lost Card
  - Temporary Increase
  - New Card
  - Suspicious Activity

Navigation Review Desktop/App

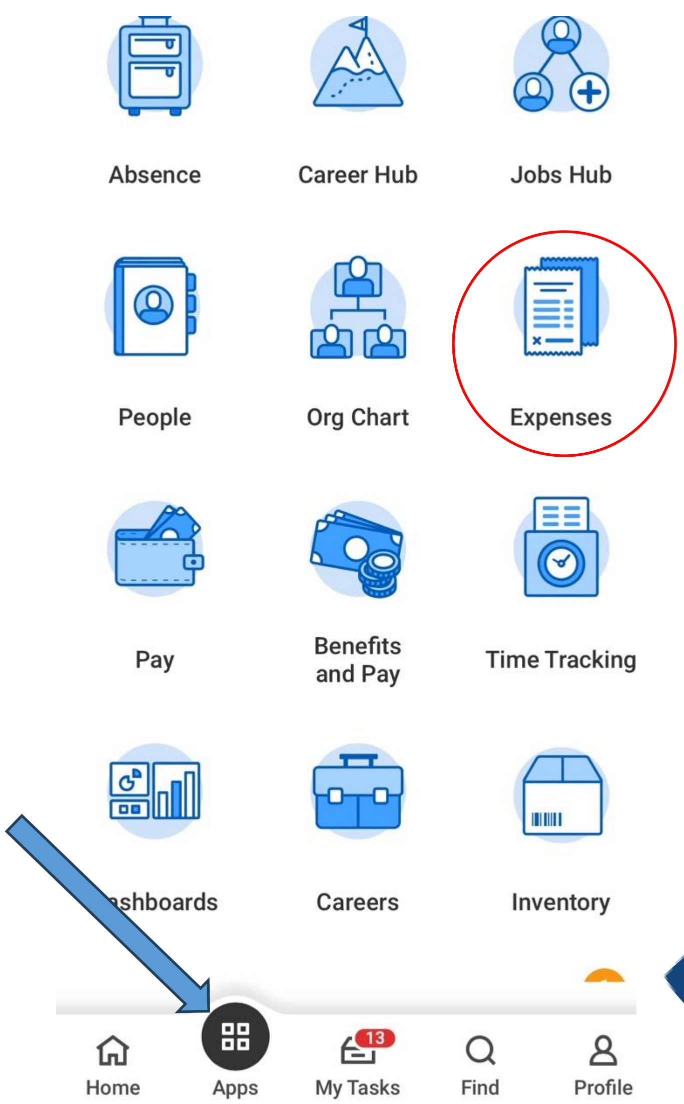
Desktop



OR



App



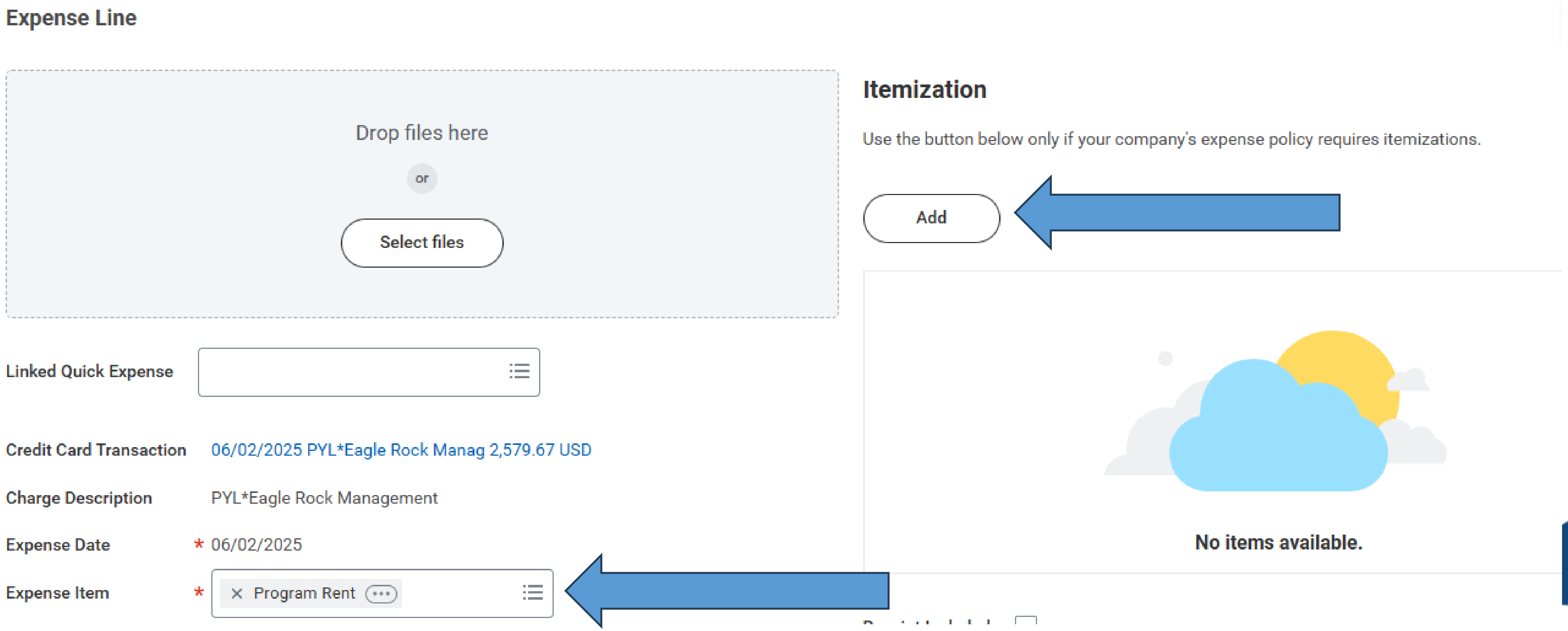
Credit Card Expenses Review

Expense Item *	Gas	(GL Account)
Total Amount *	222.18	(Billing Amount)
Currency *	USD	
Memo *	Gas for KenCrest Vehicle	(Description)
Company	KCS KenCrest Services	
Cost Center	54136 508 Ramsey Rd., Oreland, PA 19075	(Department)
Additional Worktags		(Client Code)

Billing Amount	Merchant Name	Description	Business Unit	GL Account	Department	Client Code
$31.95	WAWA 8149	GAS	KSADS	870200	4767	

Splitting Transactions

- Workday gives you the ability to split a transaction between different cost centers, expense items or individual recipients. This feature will work for every expense item except ***Mileage Reimbursement.***



Itemization/Splitting Transaction

Remaining 0.00/2,579.67 USD

Expense Date * 06/02/2025

Expense Item * Electric

Total Amount * 100.00

Memo * electric

Company KCS KenCrest Services

Cost Center 99104 Accounting

Additional Worktags

Remaining 0.00/2,579.67 USD

Expense Date * 06/02/2025

Expense Item * Program Rent

Total Amount * 2,479.67

Memo * rent

Company KCS KenCrest Services

Cost Center 99104 Accounting

Done

Itemization/Splitting Transaction

Expense Line

Drop files here

or

Select files

Linked Quick Expense	
Credit Card Transaction	06/02/2025 PYL*Eagle Rock Manag 2,579.67 USD
Charge Description	PYL*Eagle Rock Management
Expense Date	* 06/02/2025
Expense Item	* Program Rent
Total Amount	2,579.67
Currency	* USD
Memo	* Please enter a purchase description.
Cost Center	(empty)
Additional Worktags	(empty)

Itemization

Remaining Amount to Itemize 0.00/2,579.67 USD

Edit

2 items

Electric Mon, Jun 2, 2025	100.00 USD
Program Rent Mon, Jun 2, 2025	2,479.67 USD

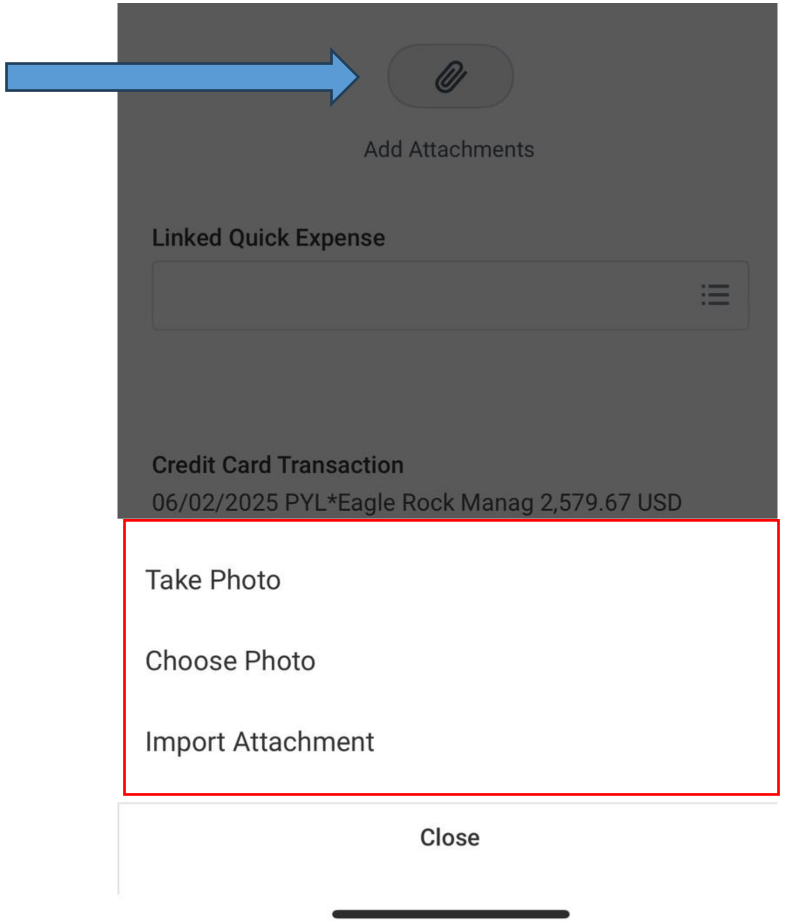
Attaching Receipts

❖Workday has 2 options when attaching receipts:

1. Take a picture with your phone

2. Scan receipts to folder on your desktop

Attaching Receipt (App/Phone)

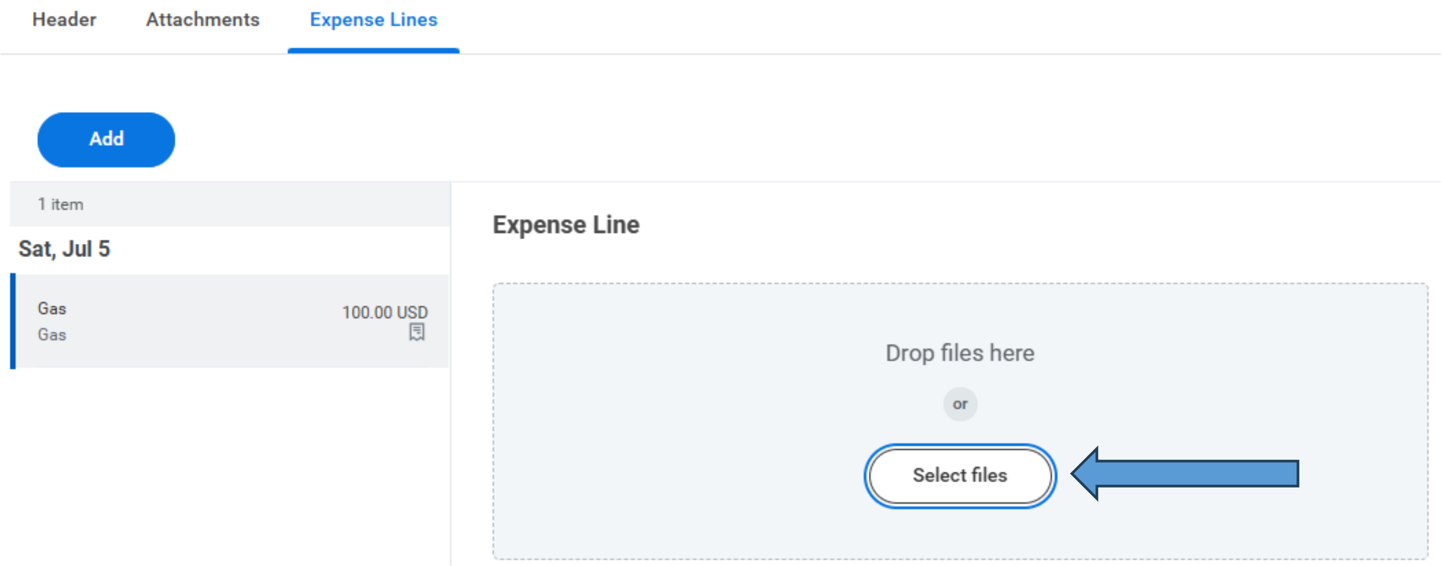


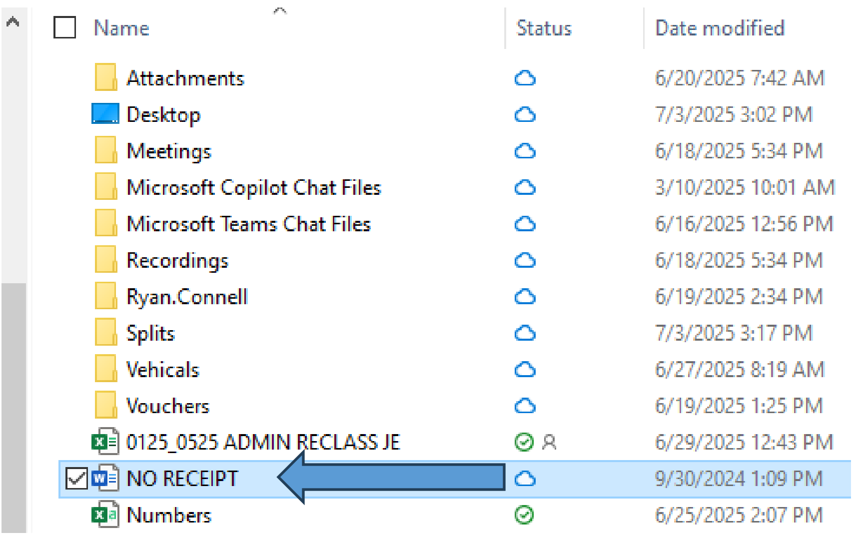
- ❖ After selecting the "Add Attachments" within the expense line, 3 options will appear:
  - ➢ Take Photo
  - ➢ Choose Photo
  - ➢ Import Attachment

- ❖ You can take, choose or import a photo of the receipt. More than one photo can be attached per transaction.

  - ➢ Workday does not have a receipt gallery.
  - ➢ Save photos to phones photo gallery to attach once report has been created.

Attaching Receipt (Desktop)





- ❖ After selecting the "Select Files" Workday will pull up the file folder on your computer.
- ❖ Find where you saved the receipts that you scanned and select "open".
- ❖ You will have the ability to select more than one scan per transaction.

Linked Quick Expense

- The Linked Quick Expense feature is an easy way to keep your transactions organized and ready to attach when the expense report is created by Workday.

- Using the Linked Quick Expense will give you the ability to create a prepopulated expense "shell" with the following information:
  - Date
  - Expense Item
  - Merchant
  - Amount
  - Receipt

- Once the expense report is created by Workday, you can attach the Quick Expense to the credit card transaction.

You will only be able to use this feature within the app

Linked Quick Expense Job Aid

Workday Out-Of-Pocket Expenses

- ❖ All FY25 (7/1/24 to 6/30/25) mileage or any other reimbursement from KenCrest will be completed by the old process. Sending in the paper expense report to AP to process for payment.
  - ➢ Please do not mix FY25 and FY26 expenses

- ❖ Any expenses that occur for FY26 (7/1/25 to 6/30/26) will need to be completed in Workday.

- ❖ For all Out-Of-Pocket expenses you **WILL** be creating an expense report.

Out-Of-Pocket Expenses

Mileage Reimbursement Live Demo

QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.

PAYROLL, PTO & TIME TRACKING

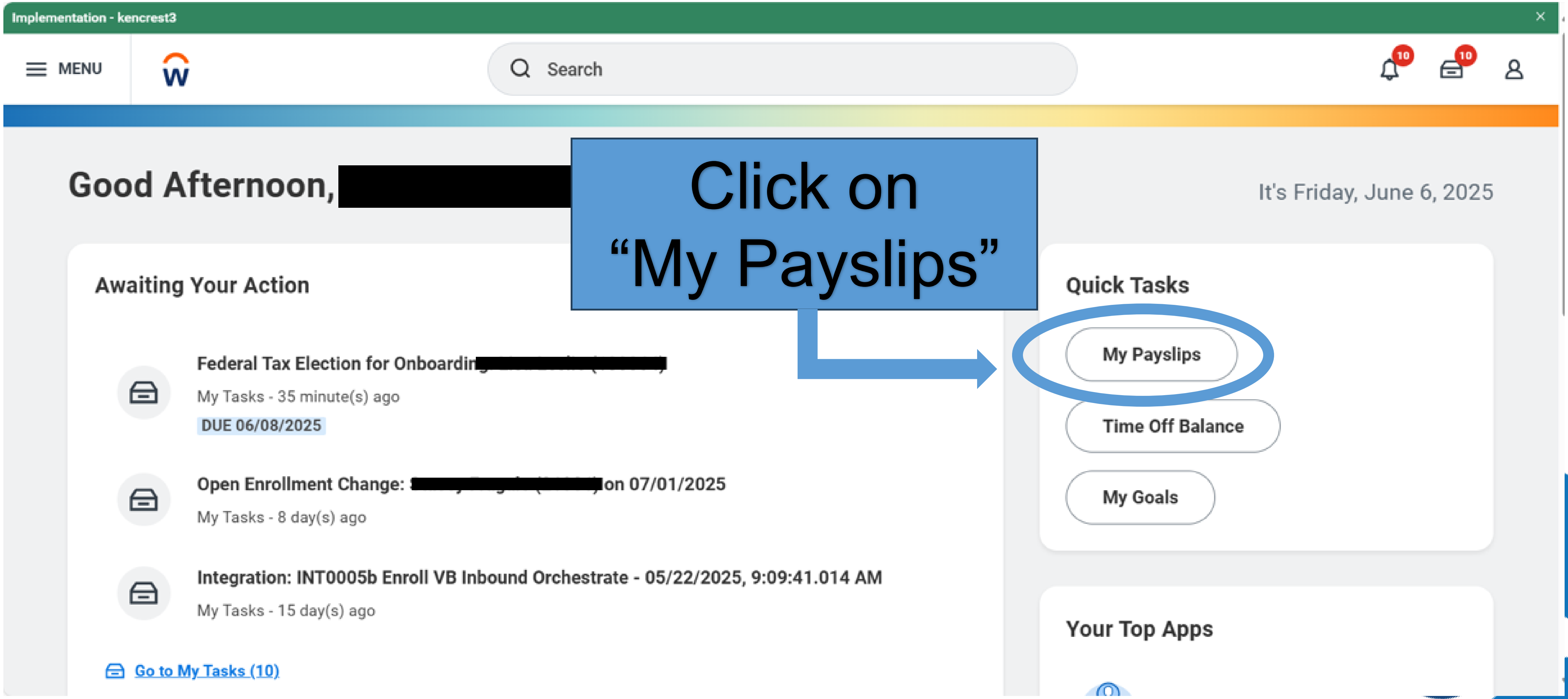
Workday and Payroll

Agenda:

- View Pay Slips
- Setup Direct Deposits
- Requesting PTO
- Time Tracking

Viewing pay slips using Workday

View pay slips using “Quick Tasks”



View pay slips using “Quick Tasks” - Continued

Municipal Statistics | Favorites | Job Data (2) | Job Data | Leave Plans (2) | Leave Plans | Manage Hires | Person Applicant Inf... | Query Manager | Other favorite

Implementation - kencrest3

MENU

Search

Payslips for Worker [redacted]

Payslip Printing Details 1 item

Company	Payslip Printing Details
KCS KenCrest Services	

Print Multiple Payslips

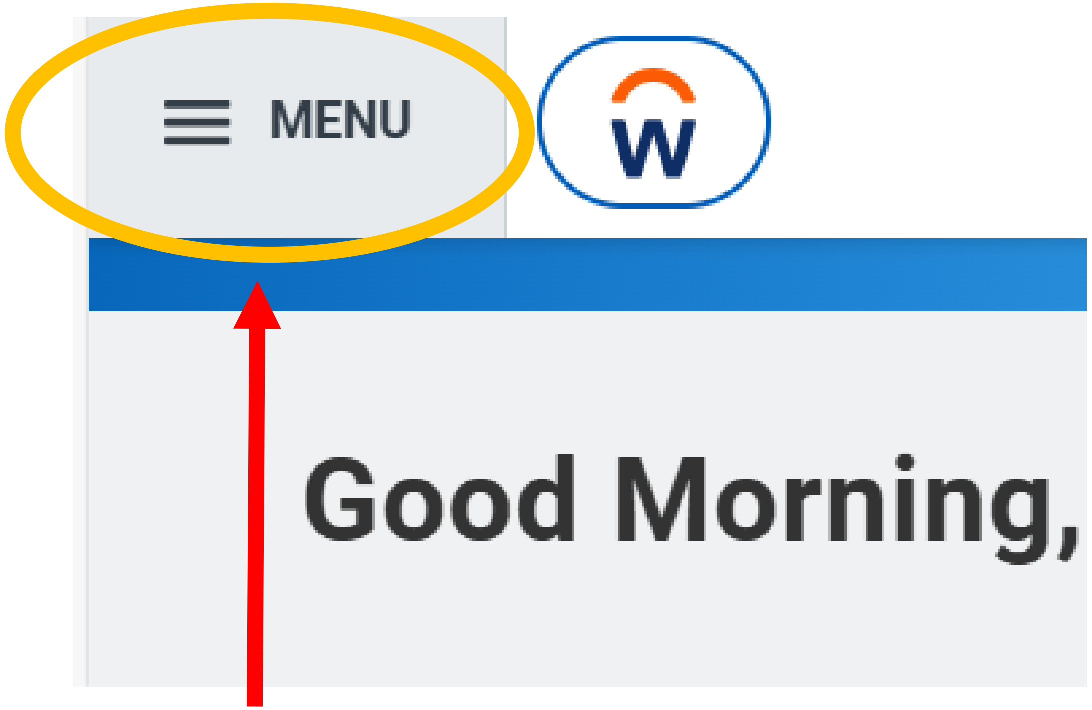
Able to view and print your pay slips

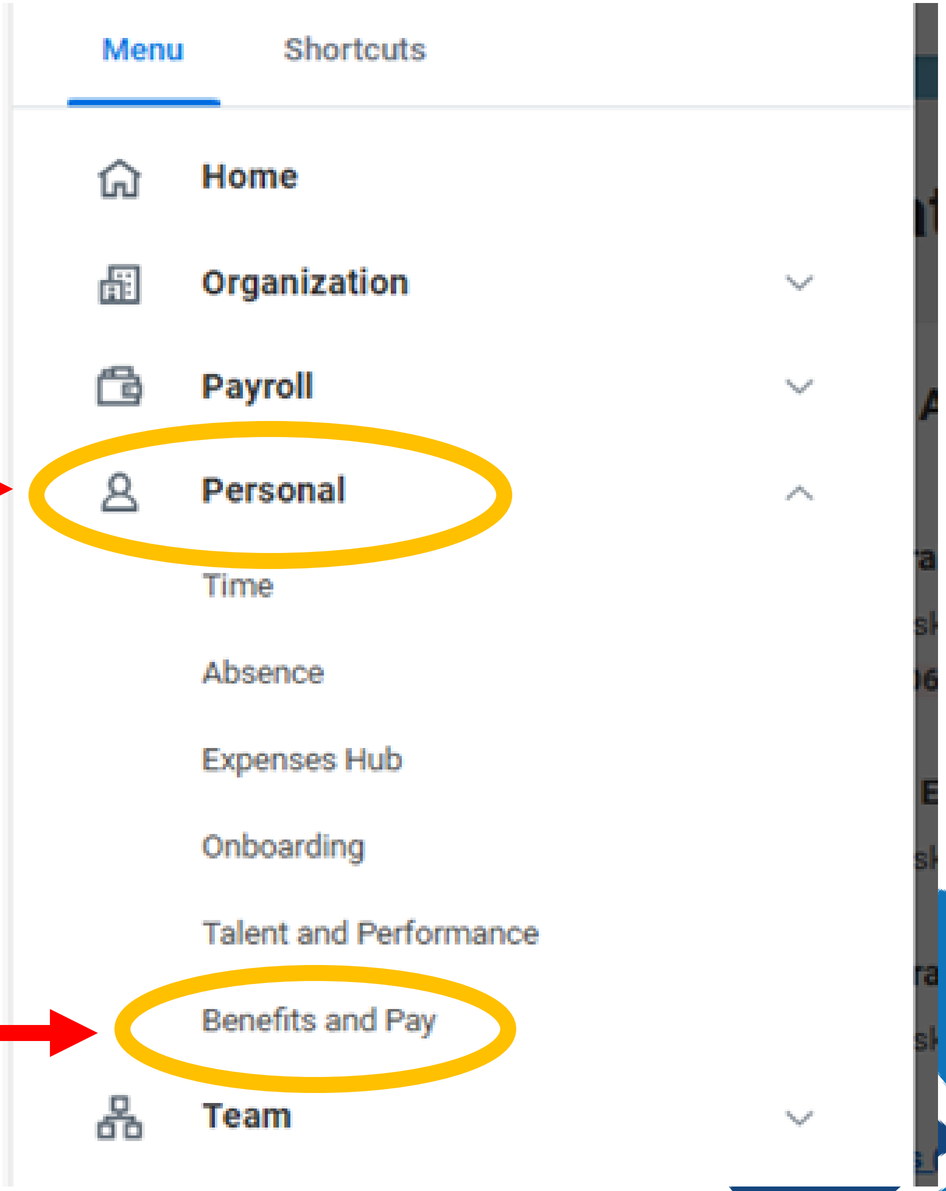
Payslips 2 items

Payment Date	Period Start Date	Period End Date	Company	Gross Amount	Net Amount	View	Print
04/25/2025	03/31/2025	04/13/2025	KenCrest Services	0.00	0.00	View	Print
04/11/2025	03/17/2025	03/30/2025	KenCrest Services	0.00	0.00	View	Print

Direct deposit in Workday

Direct Deposit Setup:

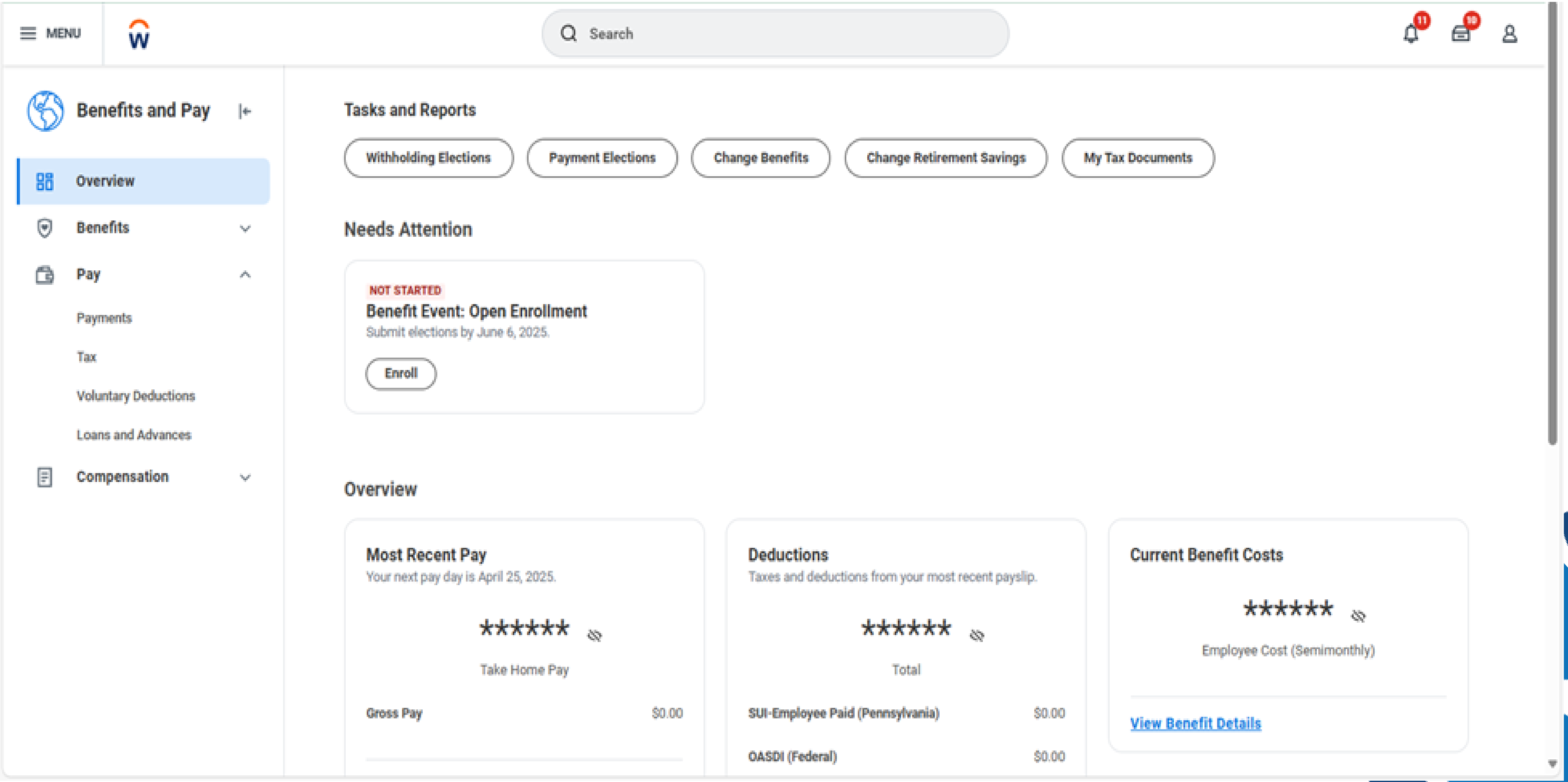


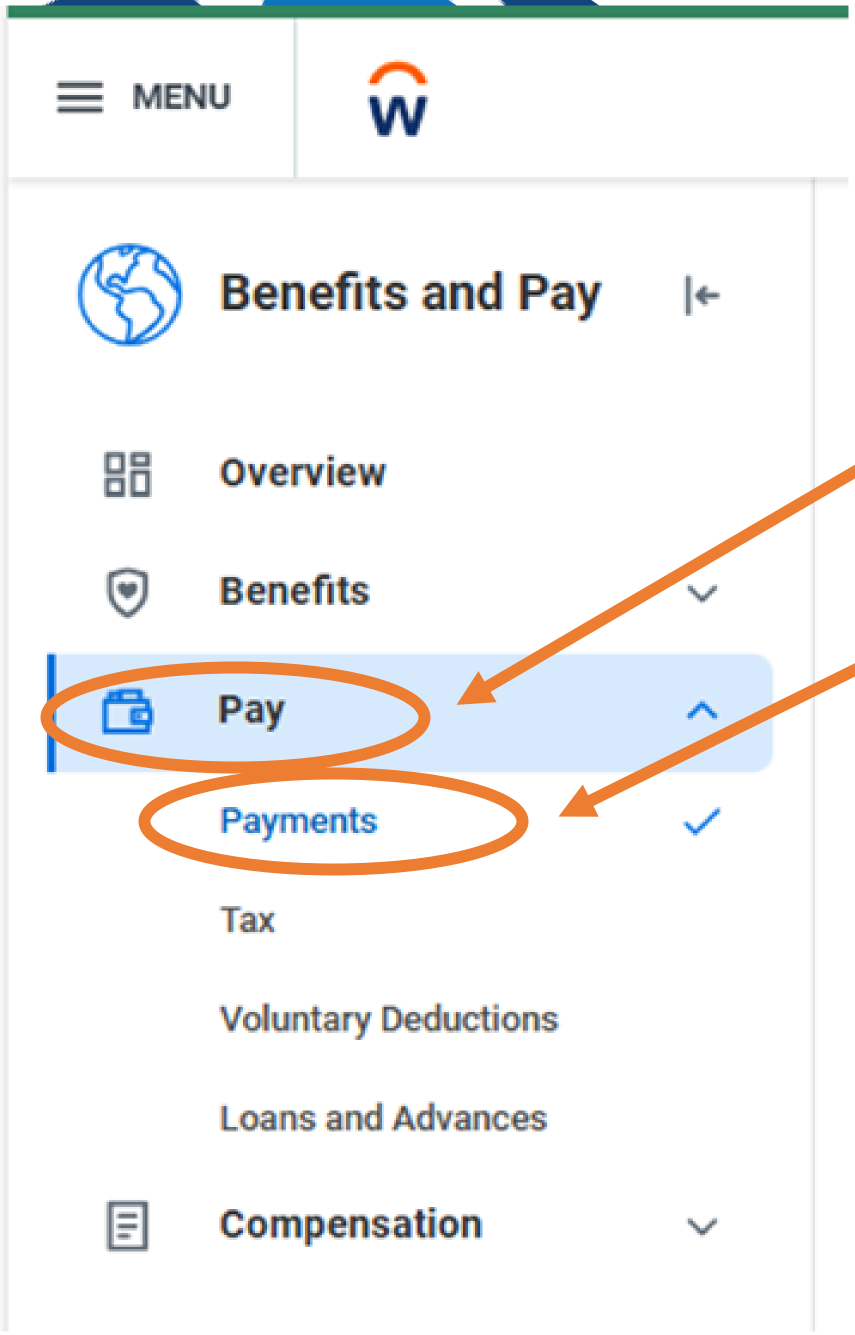


1. Click on "Menu"
2. Click on "Personal"
3. Select "Benefits and Pay"

Note: Direct Deposits already setup in Dayforce will NOT need to be redone in Workday.

"Benefits and Pay" Screen:





1. Click on "Pay" dropdown.
2. Then select "Payments".

Note: This will bring you to the "Payroll Hub – Worker Payments Information"

Scroll down to "Payment Elections"

Payment Elections

Person [redacted]

Default Country United States of America

Default Currency USD

Status Successfully Completed

Last Updated 02/19/2025 05:04 PM

Can edit or remove accounts

Accounts 2 items

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
WELLS FARGO BANK, NA [redacted]	United States of America	WELLS FARGO BANK, NA	Checking	[redacted]	Edit Remove View
AMERICAN HERITAGE FEDERAL CREDIT [redacted]	United States of America	AMERICAN HERITAGE FEDERAL CREDIT UNION	Checking	[redacted]	Edit Remove View

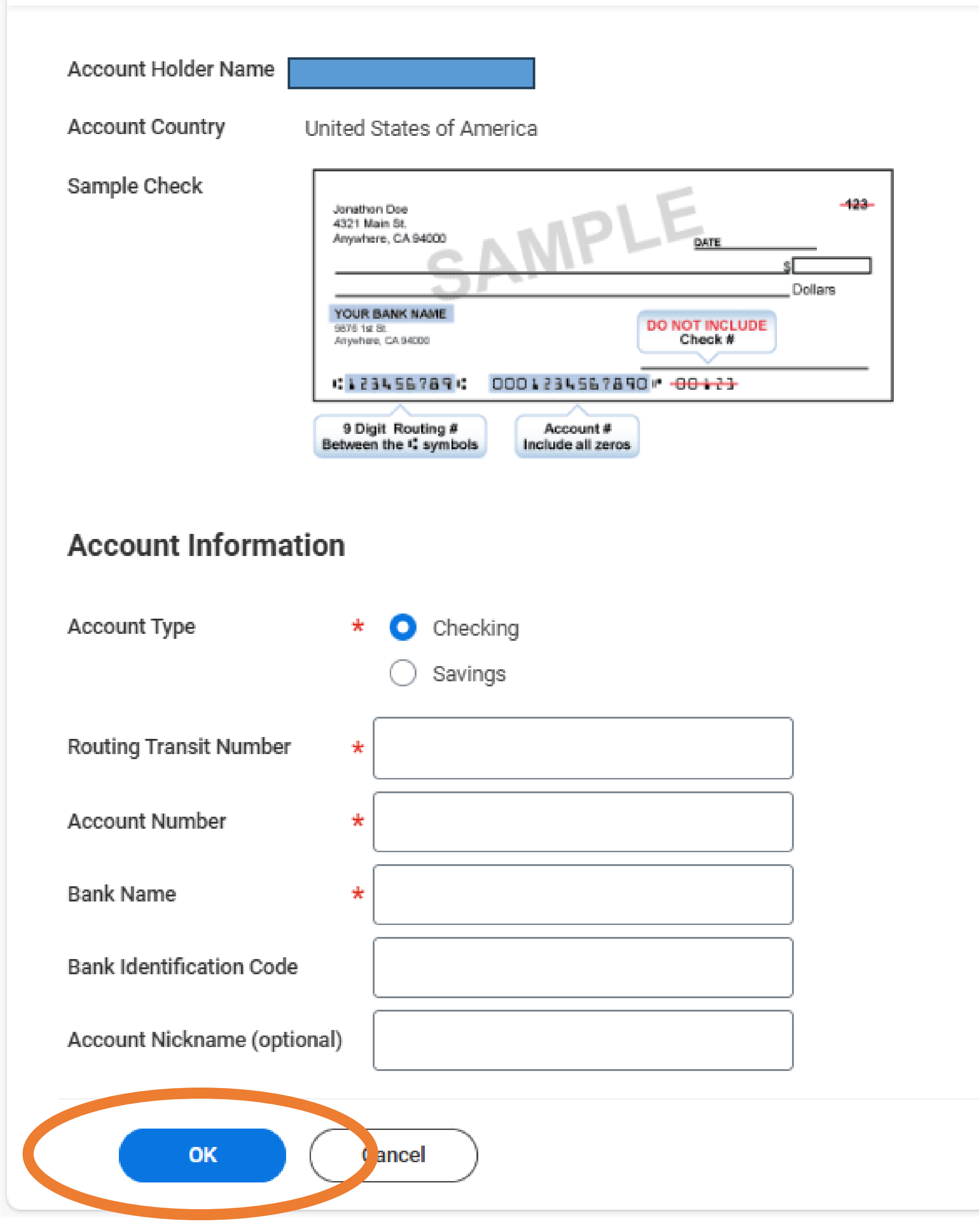
Add

Can add new accounts

Payment Elections 2 items

Pay Type	Payment Type	Account	Account Number	Distribution	Action
	Payment Elections				
USA Payroll Payment	Direct Deposit	WELLS FARGO BANK, NA [redacted]	[redacted]	Amount	Edit

Add a new account:


Account Holder Name
Account Country United States of America
Sample Check

Account Information

Account Type * Checking / Savings
Routing Transit Number *
Account Number *
Bank Name *
Bank Identification Code
Account Nickname (optional)
OK
Cancel

Fill in the following information:

1. Select Account Type
2. Routing Number
3. Account Number
4. Bank Name
5. The click "OK"

You should now be able see the account that you added below.

Results | Input | Tax Elections | Withholding Orders | Payment Elections | Pay Group | Payslips | Costing Allocations | Voluntary Deductions

Default Country United States of America

Default Currency USD

Status Successfully Completed

Last Updated 06/09/2025 10:12 AM

Accounts 1 item

Account Nickname	Country	Bank Name	Account Type	Account Number	Action
AMERICAN HERITAGE FCU ******7565	United States of America	AMERICAN HERITAGE FCU	Checking	******7565	Edit Remove View

Add

Payment Elections 2 items

	Payment Elections				
Pay Type	Payment Type	Account	Account Number	Distribution	Action
Expense Payments	Direct Deposit	AMERICAN HERITAGE FCU ******7565	******7565	Balance Yes	Edit
USA Payroll Payment	Direct Deposit	AMERICAN HERITAGE FCU ******7565	******7565	Balance Yes	Edit

Click "Edit" to indicate the desired amount to be deposited into the new account

From here you can specify the amount or percentage, then click Ok

Payment Election

Designate how to receive payments. For direct deposit, you must first add a valid account on the previous page. Workday evaluates multiple payment elections in the order you specify. To submit a valid payment election, the last election specified must have a distribution type of balance to capture the remaining amount, or the percentages must add up to 100 percent.

Pay Type USA Payroll Payment

Person [redacted]

Default Country United States of America

Default Currency USD

Number of Elections Allowed 10

Payment Elections 1 item

Order	*Country	*Currency	*Payment Type	Account	*Balance / Amount / Percent
	United States of America	USD	Direct Deposit	AMERICAN HERITAGE FCU ******7565	Balance (selected) Amount 0.00 Percent 0

OK Cancel

PTO requests using Workday

PTO Requests

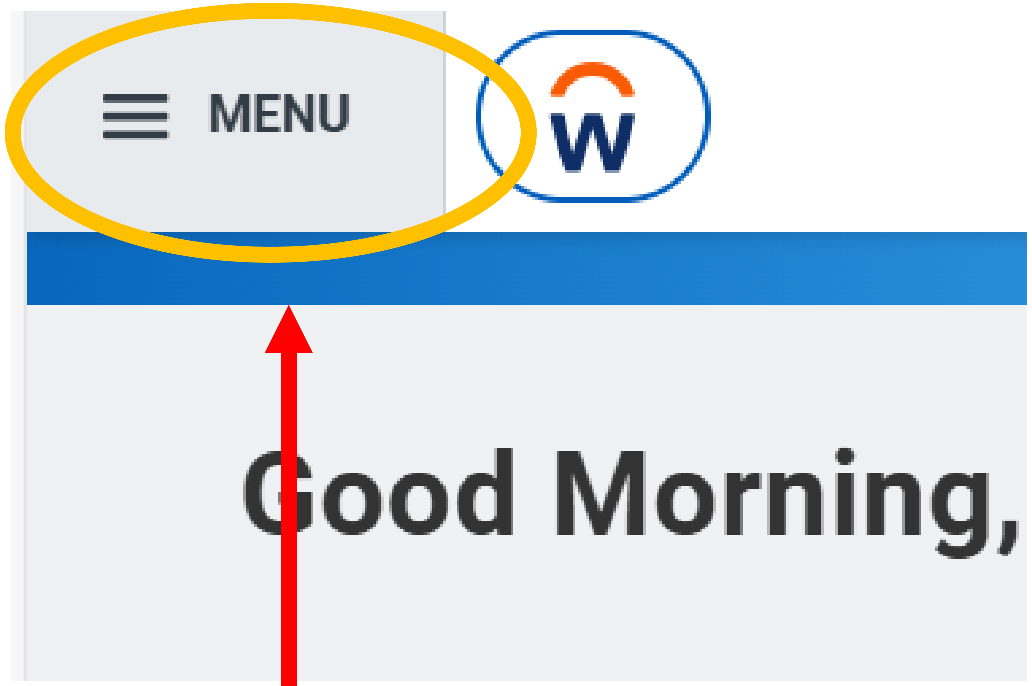
What you need to know about requesting PTO in Workday

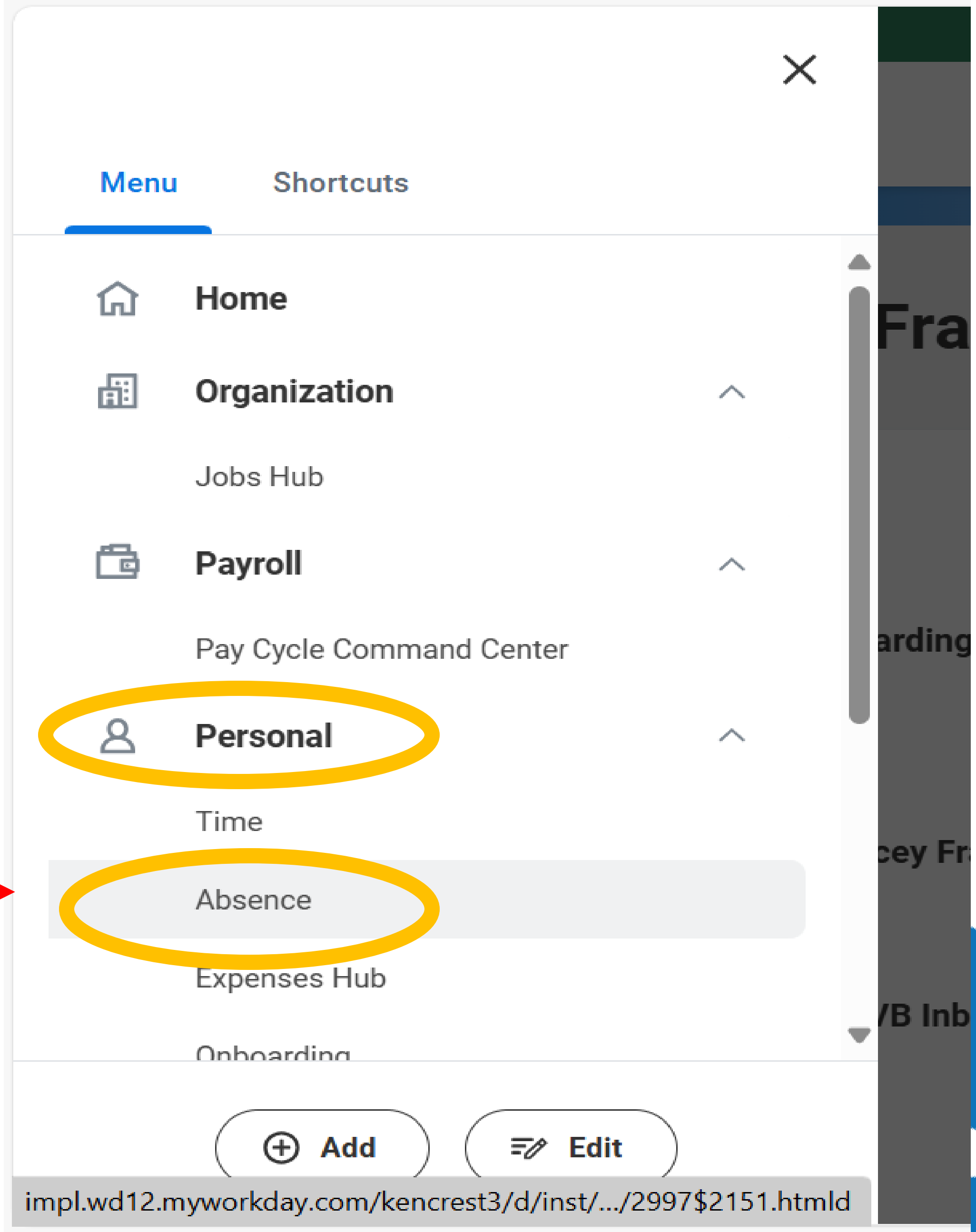
STAFF WILL BE ABLE TO REQUEST PTO USING WORKDAY

MANAGERS WILL APPROVE PTO REQUESTS IN WORKDAY

PTO BALANCES WILL BE MIGRATED TO WORKDAY

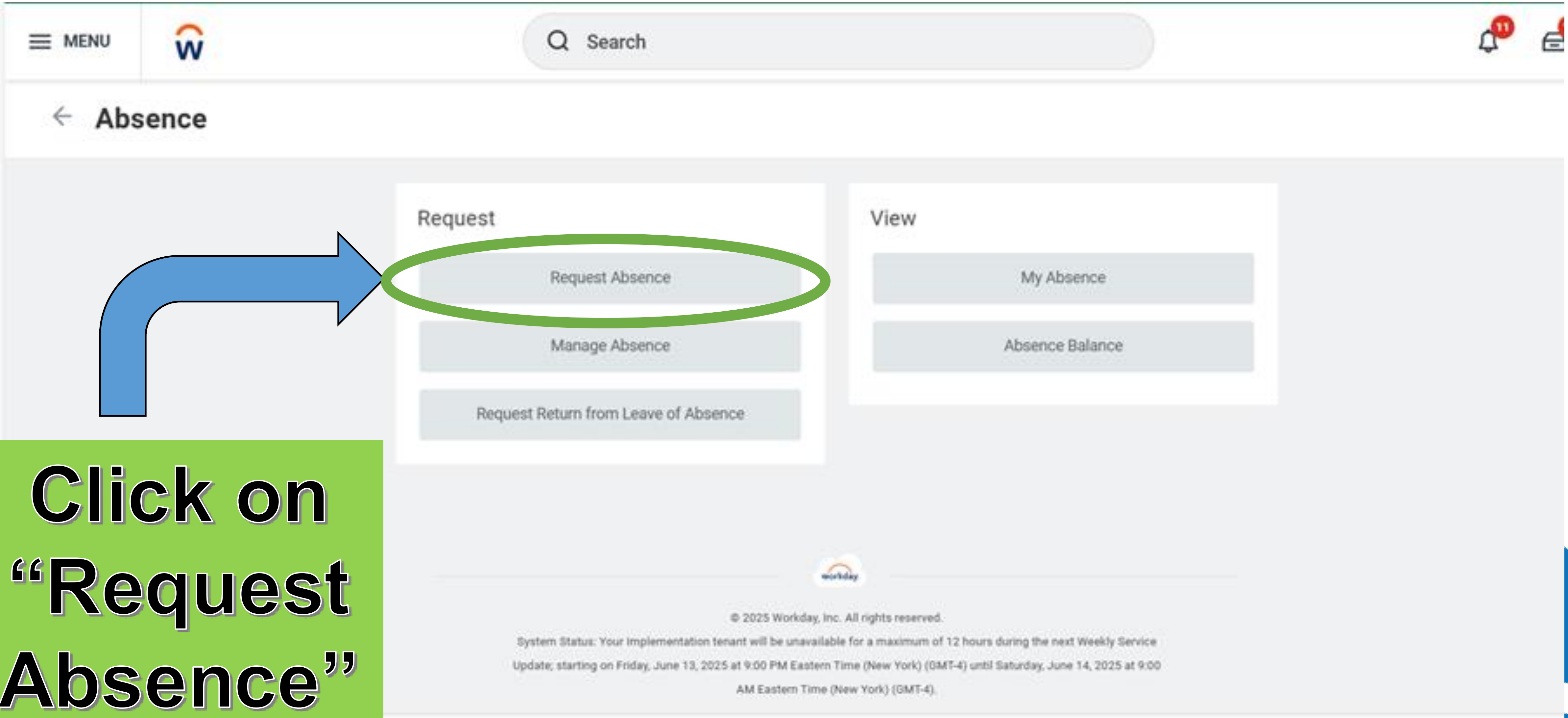
Request PTO using the Menu





1. Click on "Menu"
2. Click on "Personal"
3. Select "Absence"

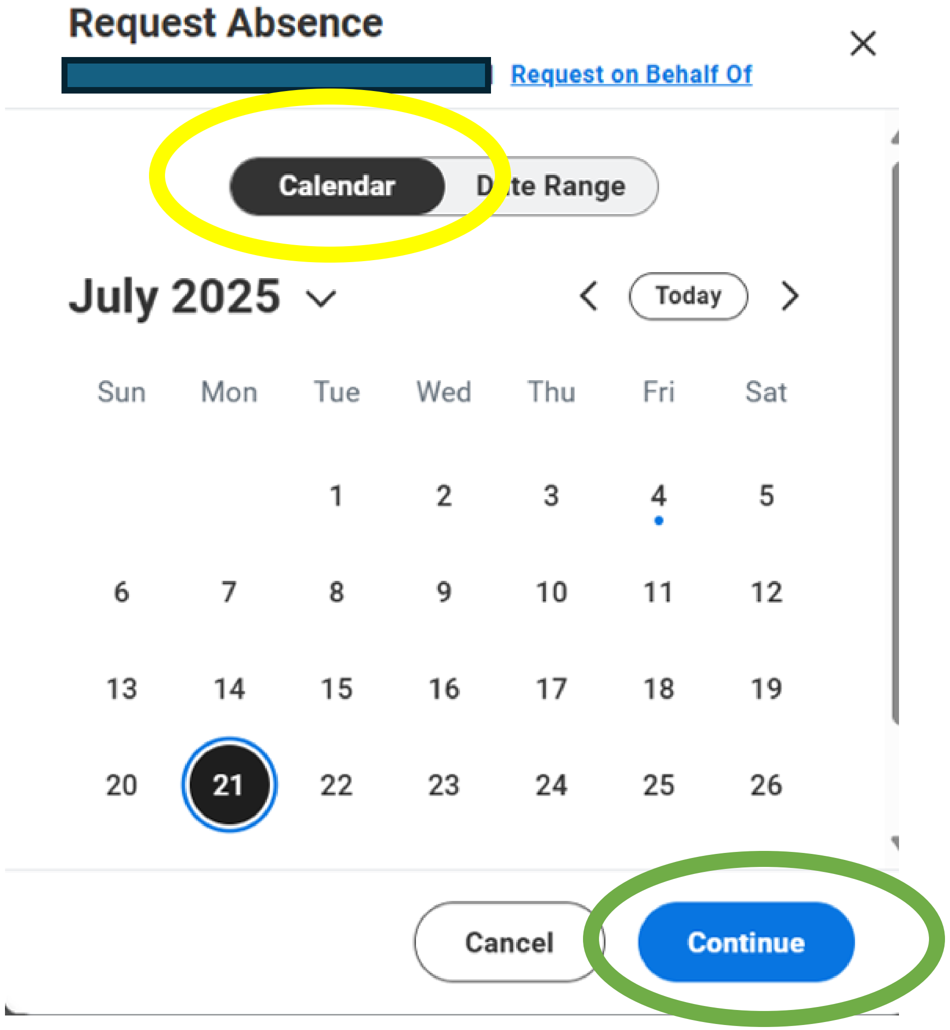
Request PTO using the Menu - Continued



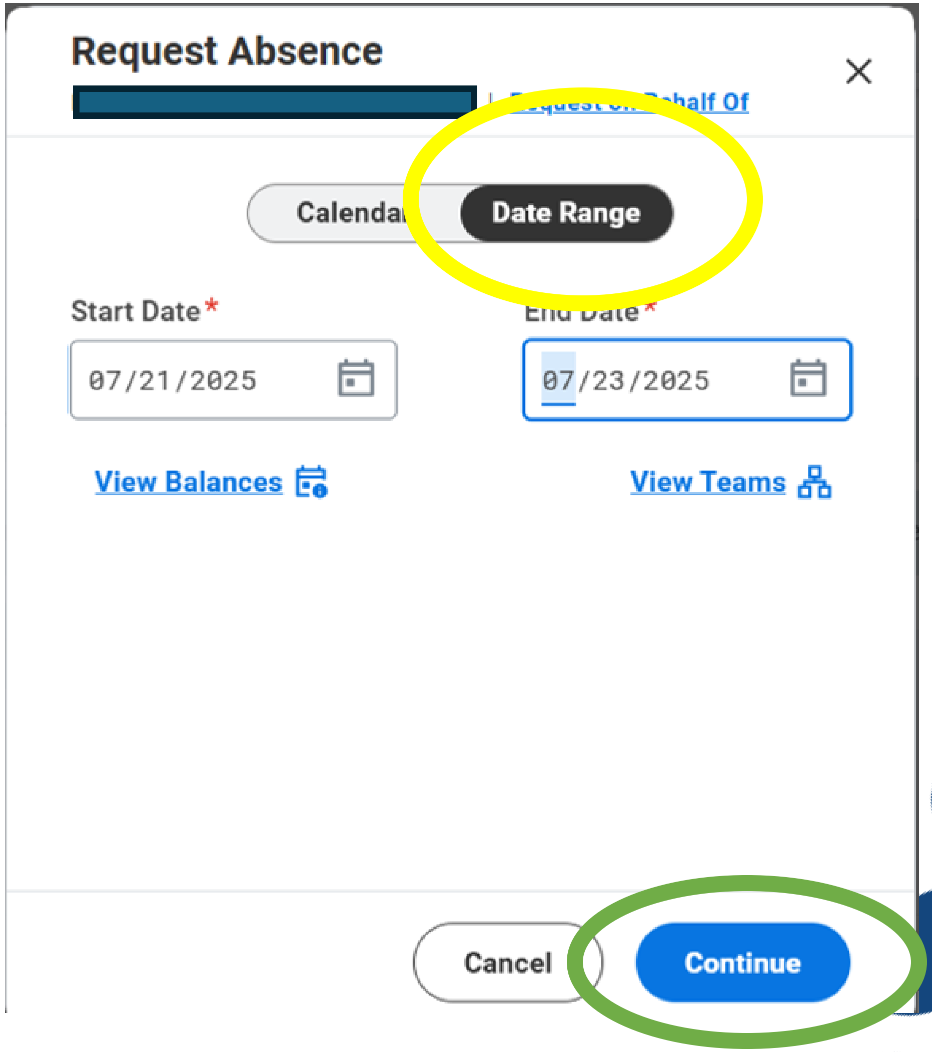
Click on "Request Absence"

How to submit PTO requests – 2 options

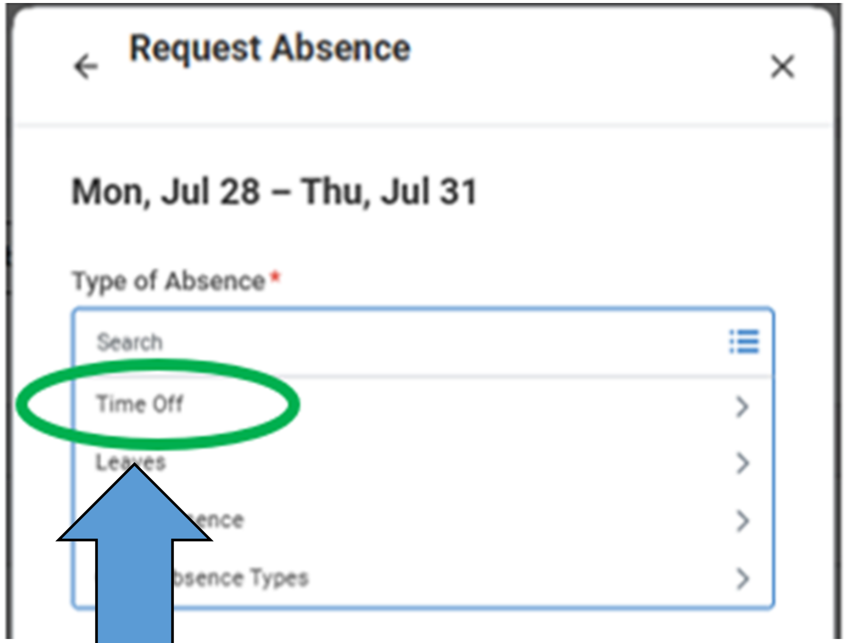
Calendar – 1 day



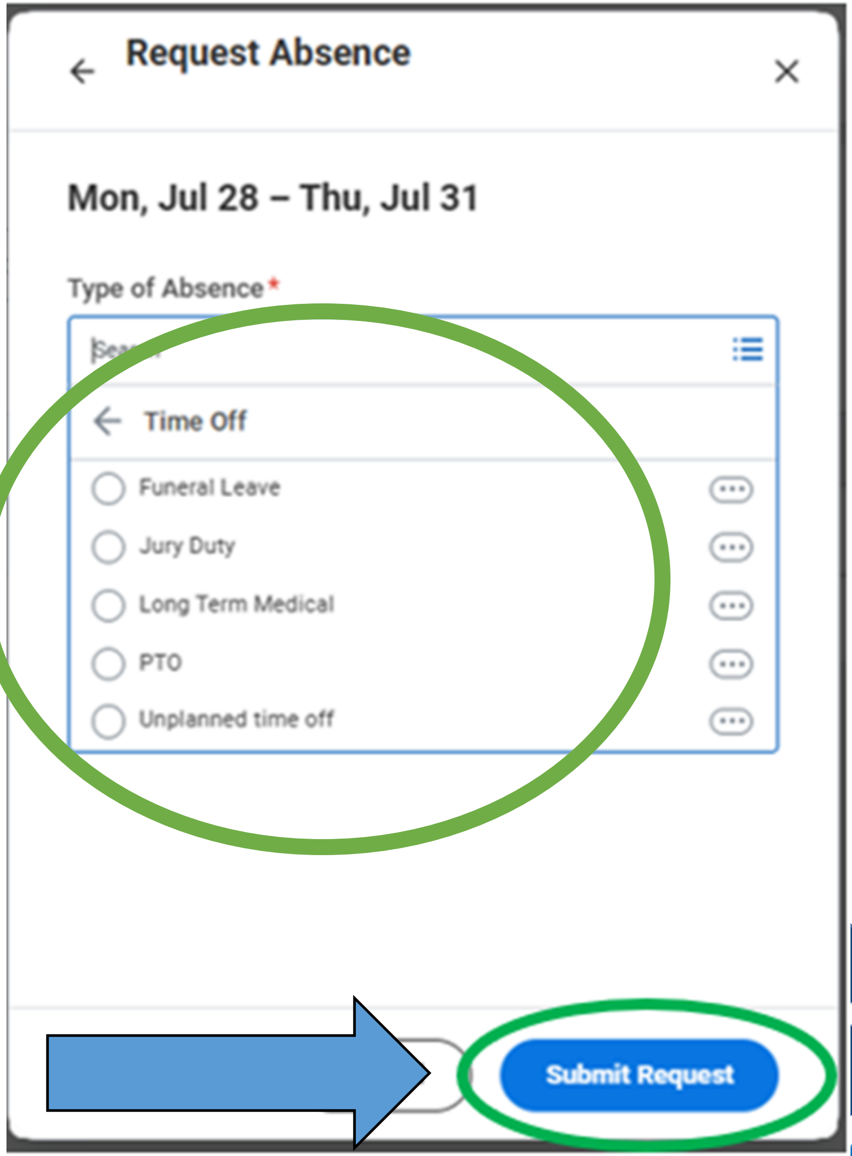
Date Range – 2 or more days



How to submit PTO requests - continued

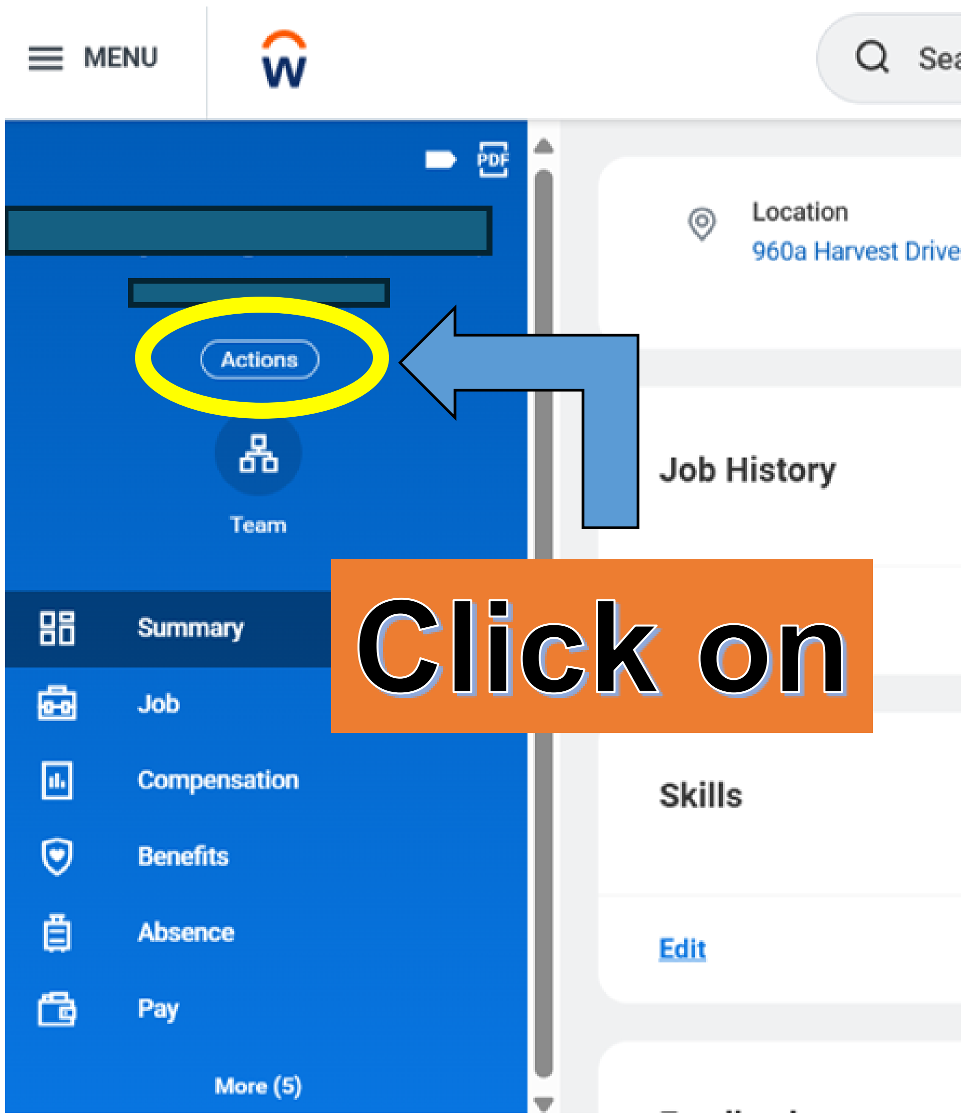


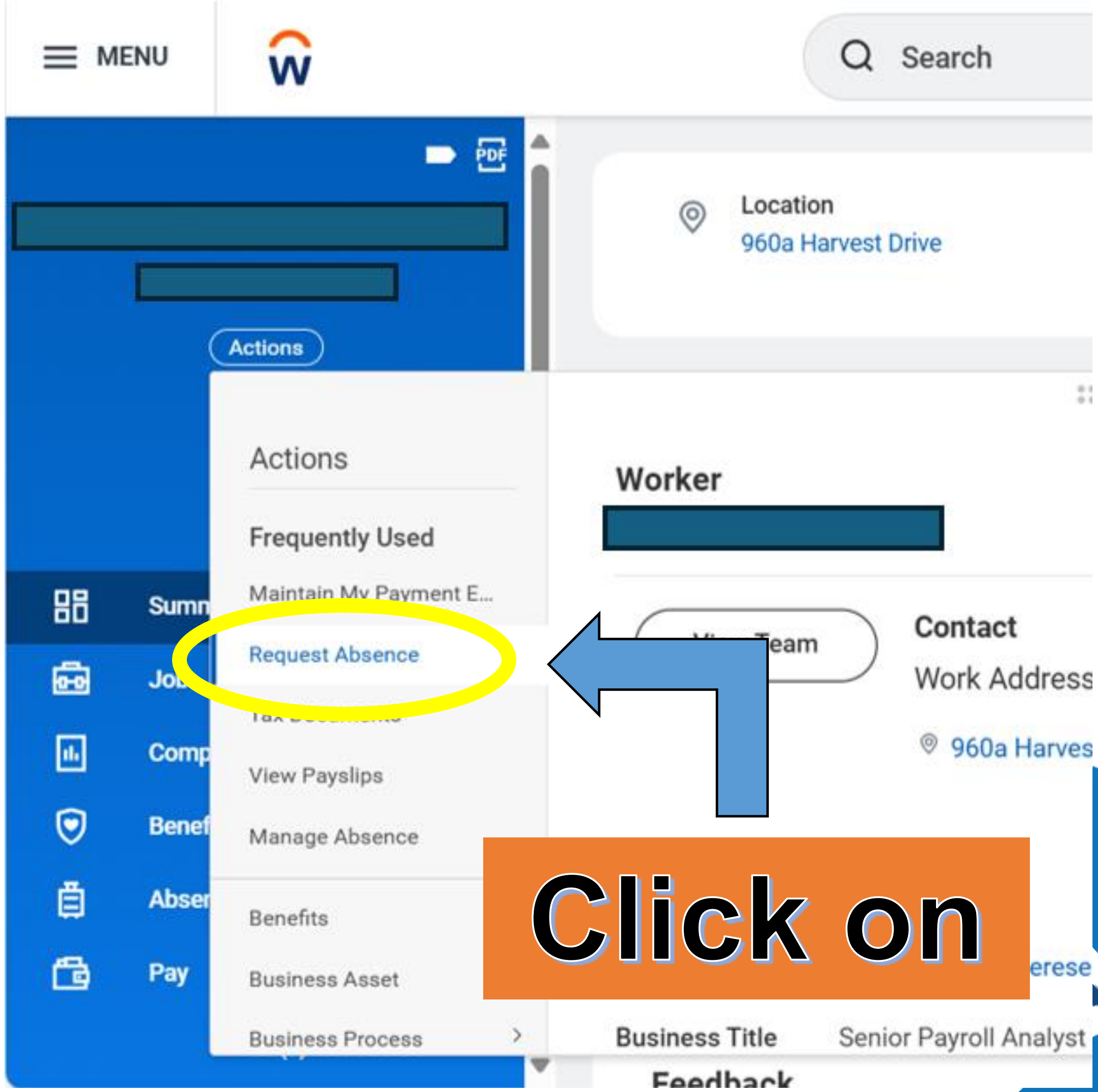
Select “Time Off



Pick type of “Time Off” and click “Submit Request”

How to request PTO using action





Time Tracking in Workday

Time Tracking in Workday

Time Tracking Delayed

Kencrest is in the process of identifying new time capture solution**.**

Kronos will still be active until further notice. Please continue to utilize **Kronos Timestamp,** timeclocks and mobile app for time tracking.

Managers will continue to edit and approve hours worked for all Hourly Workers in Kronos.

Managers are no longer required to approve Salary Exempt staff

QUESTIONS?

Please type your questions in the chat.

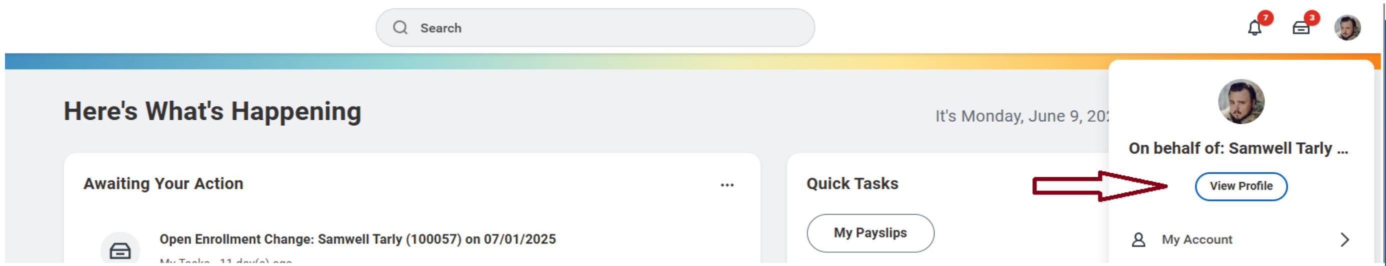
We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.

Thank You

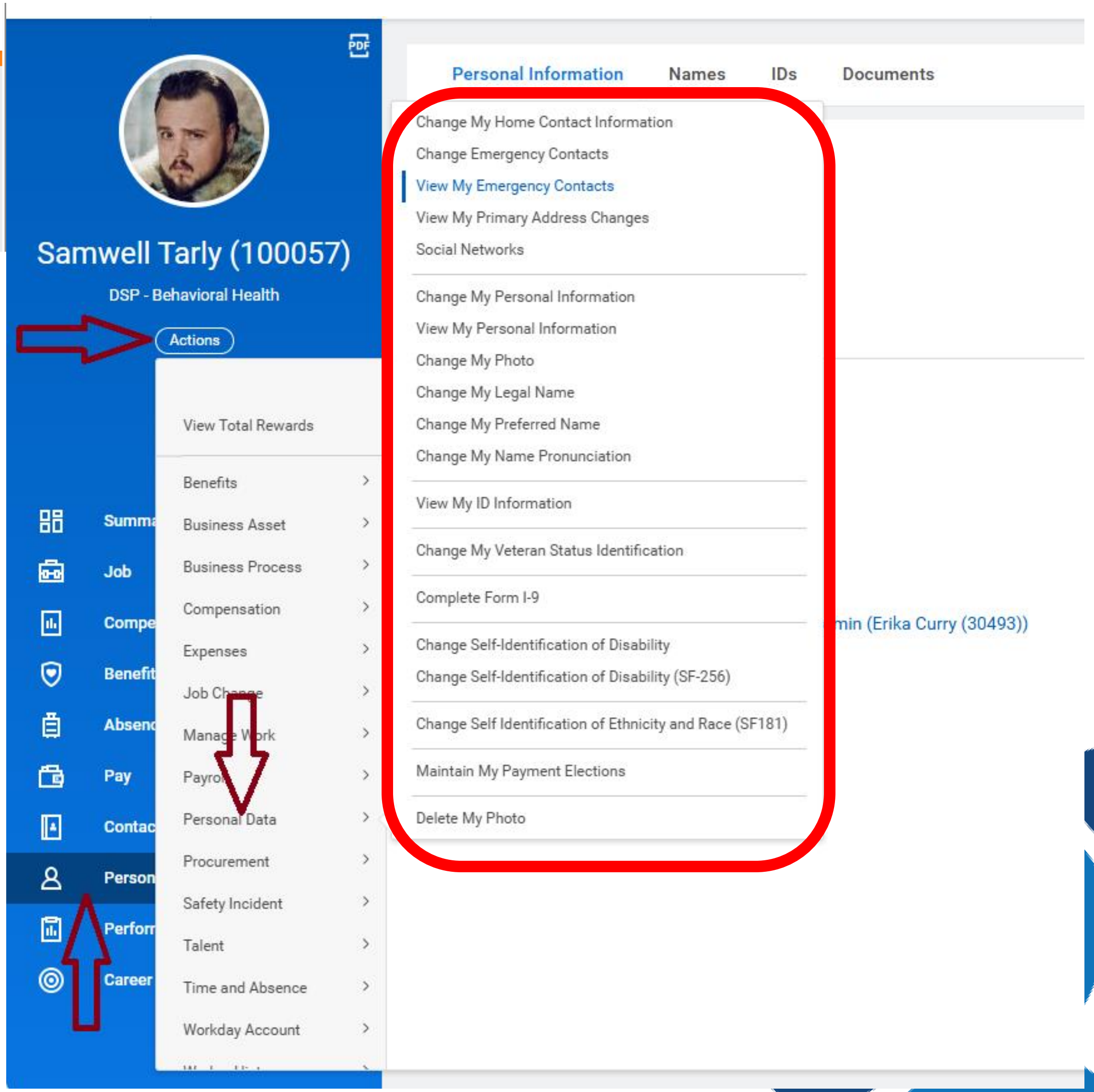
Do you have any questions?

HR – WORKER PROFILE and BENEFITS

HR – Worker Profile



- Employee Profile – A central place in Workday where you can view and update your personal and contact information;
- Make sure to review and if needed update direct deposit, personal information and contact information (on July 1st 2025).
- Demo: Update contact information



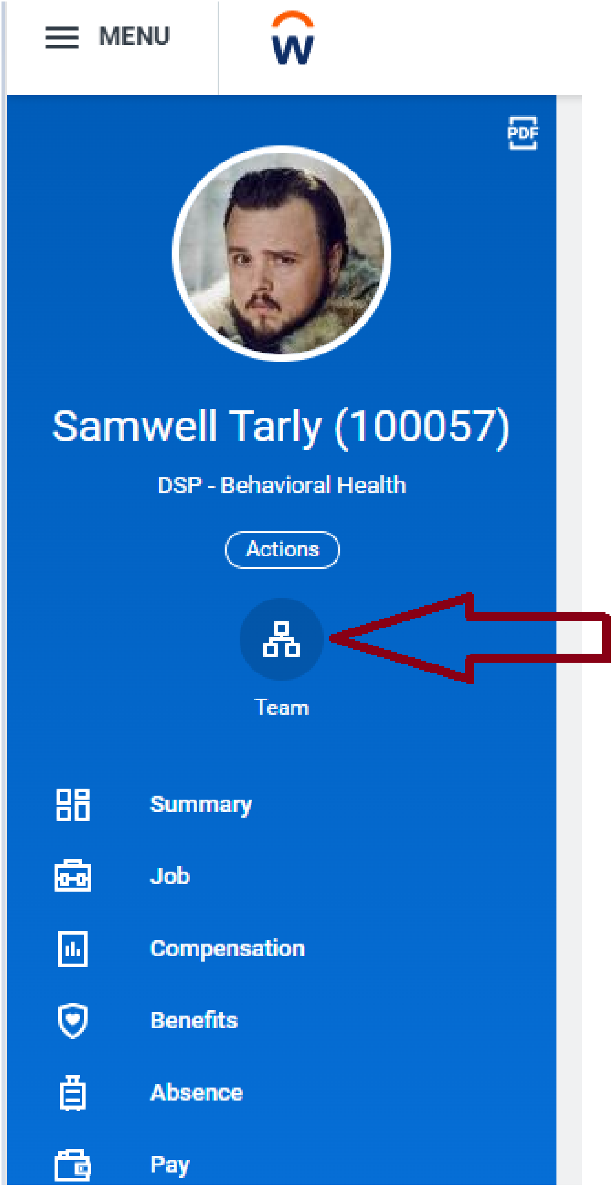
HR – Worker Profile

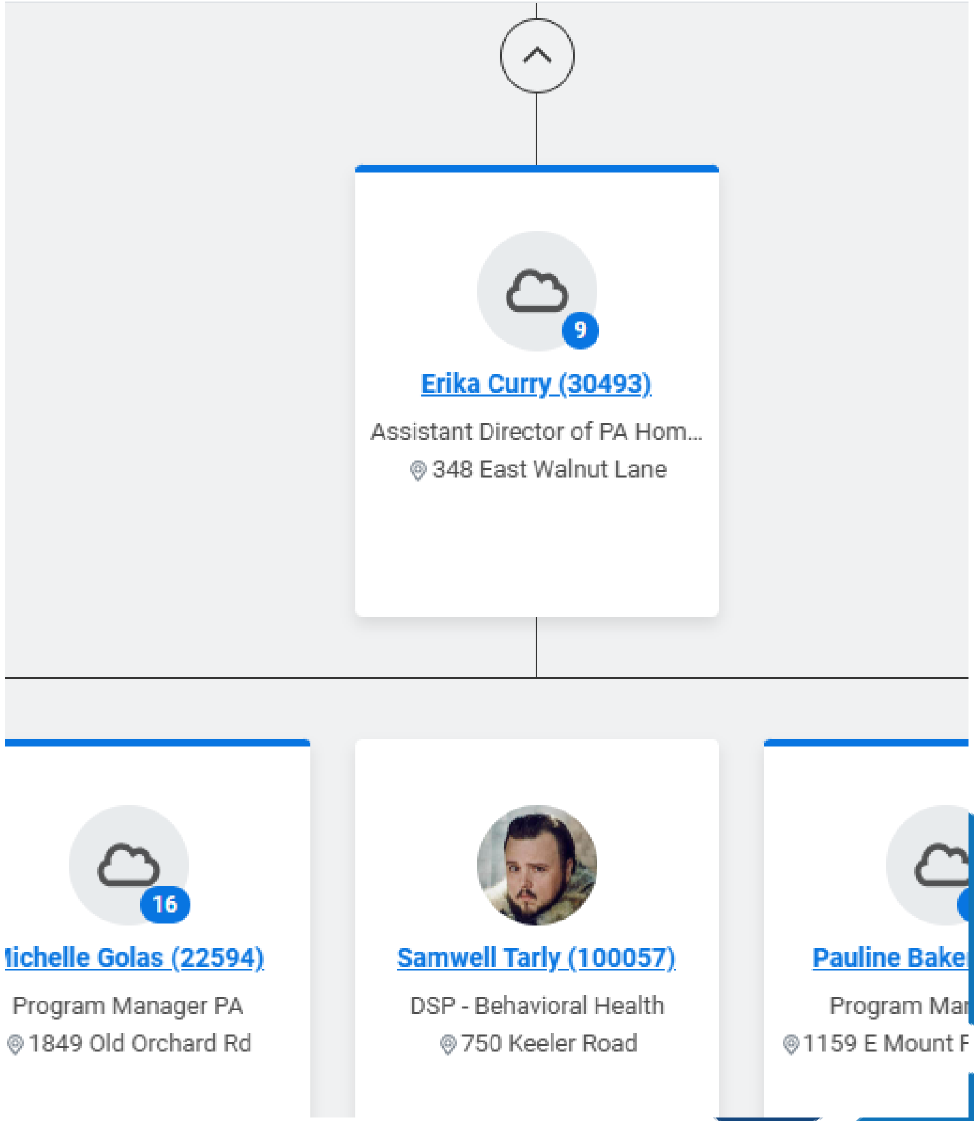
Where to go to Edit?

	Confirm Job Details are Accurate	How to Make Correction
Summary	Job Details column on the right	Contact Workday Support for assistance
Job	Service Dates	Contact Workday Support for assistance
Compensation	Review all values	Ask your Manager and/or contact Workday Support for assistance
Benefits	Benefits, My Retirement Savings, My Dependents, My Beneficiaries	Edit it yourself
Absence	Review Long Term Medical (LTM) Account and Paid Time Off balances	Contact Workday Support for assistance
Pay	Tax Elections, Payment Elections (aka Bank Account), Pay slips, Voluntary Deductions	Edit it yourself. Be sure to confirm your Payment Elections (aka Bank Account).
Contact	Contact and Emergency Contacts	Edit it yourself If your Work Location is incorrect, contact Workday Support for assistance
Personal	Personal Information, Names, IDs, Documents	Edit it yourself OK if the Documents is empty
Performance	Individual Goals, Development Items, Check-ins, Performance Reviews, Development Plans	Review and Edit as needed; More to come; Connect with your Manager
Career	Review all categories as needed	Add any elements you see applicable Add your Certifications here, as it pertains to your position
Feedback	Review for learning; Feel free to use as needed	Edit it yourself
Company Property	Credit Cards - confirm this information is accurate	Edit it yourself

HR – Org Chart

- A visual map in the Workday that shows reporting relationships – who you report to, your team and other roles in your company
- Demo

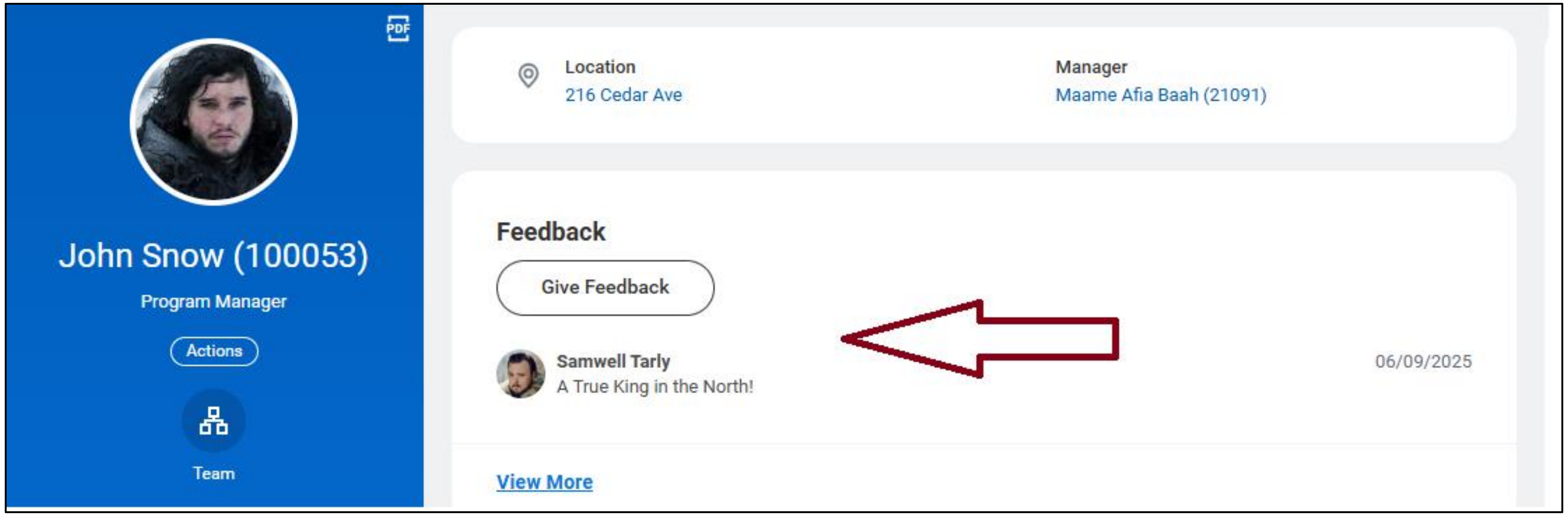




HR – Feedback

Feedback:

- A feature that allows you to give or receive comments about colleague's performance or contributions.
- Demo: Feedback



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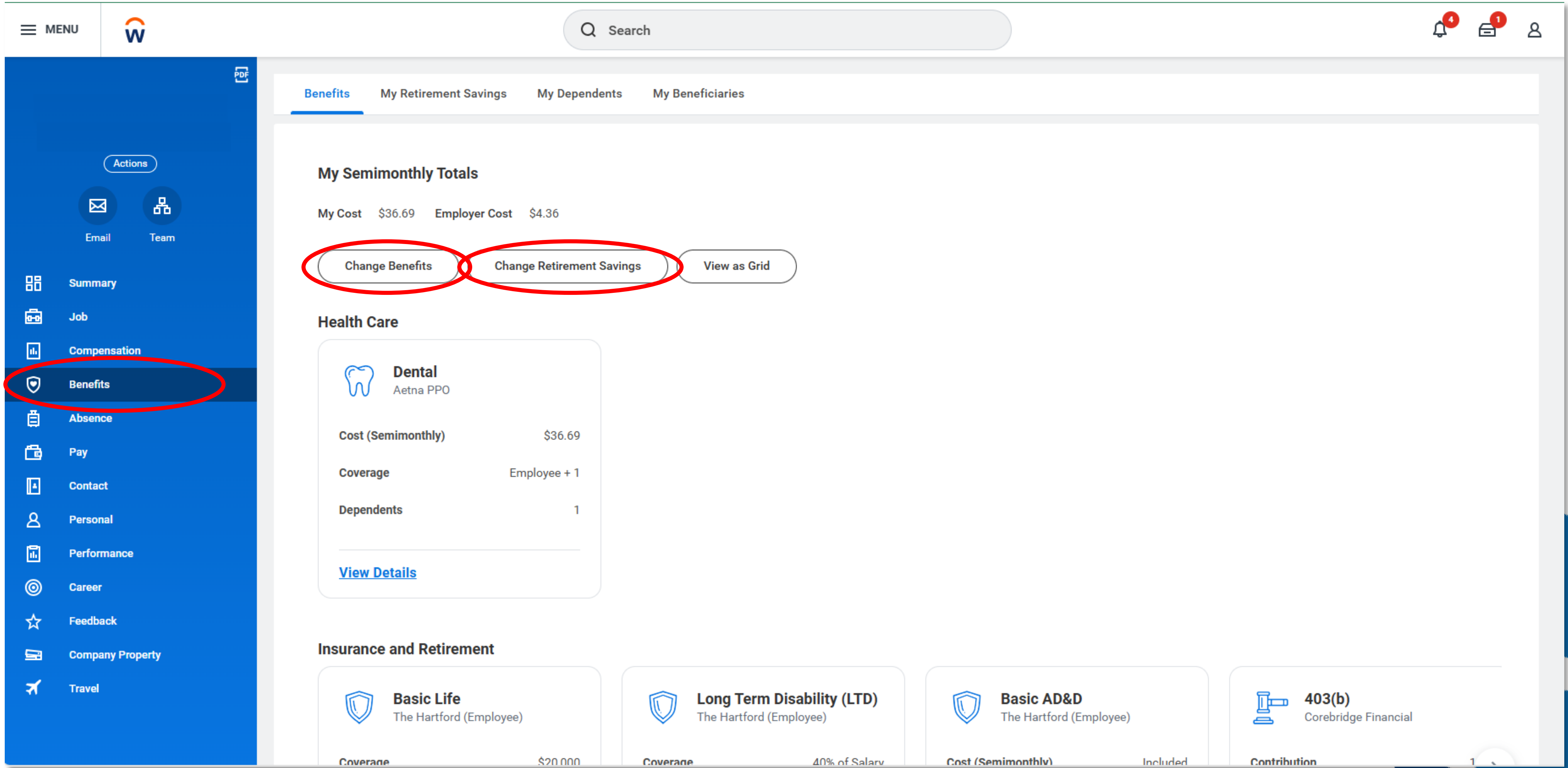
HR – Benefits

How to Make a Life Event Change



Live Demo

QUESTIONS?

Please type your questions in the chat.

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HR – RECRUITING

Recruiting - Overview

dayforce

FROM

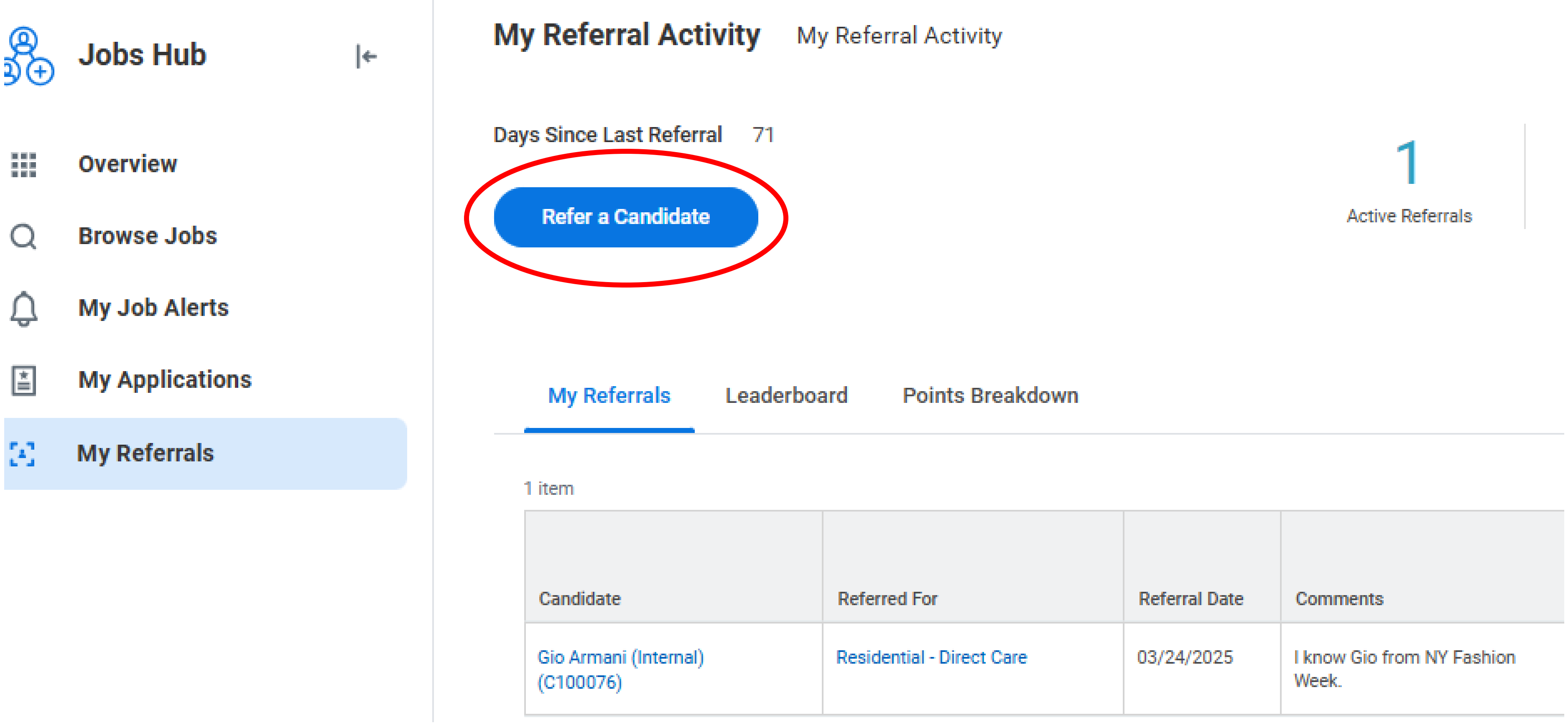
- Basic Internal Job Search
- Referral Process - Manual

workday

TO

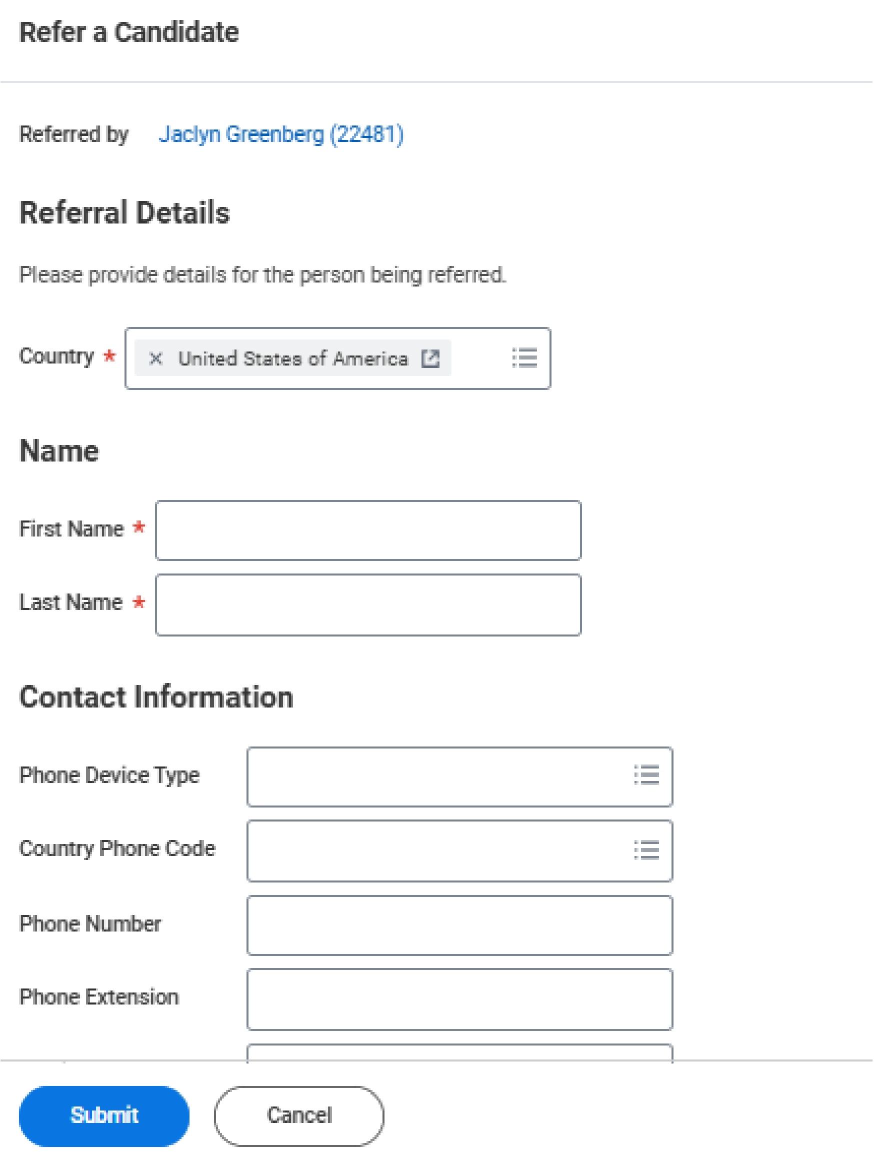
- Advanced Internal Job Search
- Referral Process via System

How Do I Refer Someone to KenCrest?



www.kencrest.org/workday

What Info Do I Need to Give?


Refer a Candidate

Referred by Jaclyn Greenberg (22481)

Referral Details

Please provide details for the person being referred.

Country * United States of America

Name

First Name *

Last Name *

Contact Information

Phone Device Type

Country Phone Code

Phone Number

Phone Extension

Submit Cancel

The more information the better but anything with a Red Asterisk (*) is mandatory

These include:

- ➢ *Referral* First Name
- ➢ *Referral* Last Name
- ➢ ***Referral* Email Address**
  - *This is how they will receive the referral to accept and apply via a link to the job you choose*
- ➢ Job you are referring them for
  - *This will be a drop down*
- ➢ How you know the referral
- ➢ Comment to explain relationship or just general information for recruitment

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How Do I Refer Someone to KenCrest Part 2!

MENU

Search Results

1 item

endorse

Advanced Search

Save

Endorse: Gio Armani for PA - Region 1 - Eastern MC - Homes - Direct Support Professional - 220 Anderson Lane DSP3

03/2

Due: 03/26/2025

Created: 03/24/2025 | Due: 03/26/2025

Endorse Candidate Gio Armani

A candidate just submitted their application and indicated that they know you. If you wish to endorse them, they will be identified as a referral candidate, and your name will be associated with the candidate record.

If you do not wish to endorse them or if you do not know them, simply select **No** and your name will be removed from their candidate record. The candidate will not be notified of your decision.

Candidate Name Gio Armani

Job PA - Region 1 - Eastern MC - Homes - Direct Support Professional - 220 Anderson Lane DSP3

Endorse? * Yes

No

Relationship

Comment *

Submit Cancel

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QUESTIONS?

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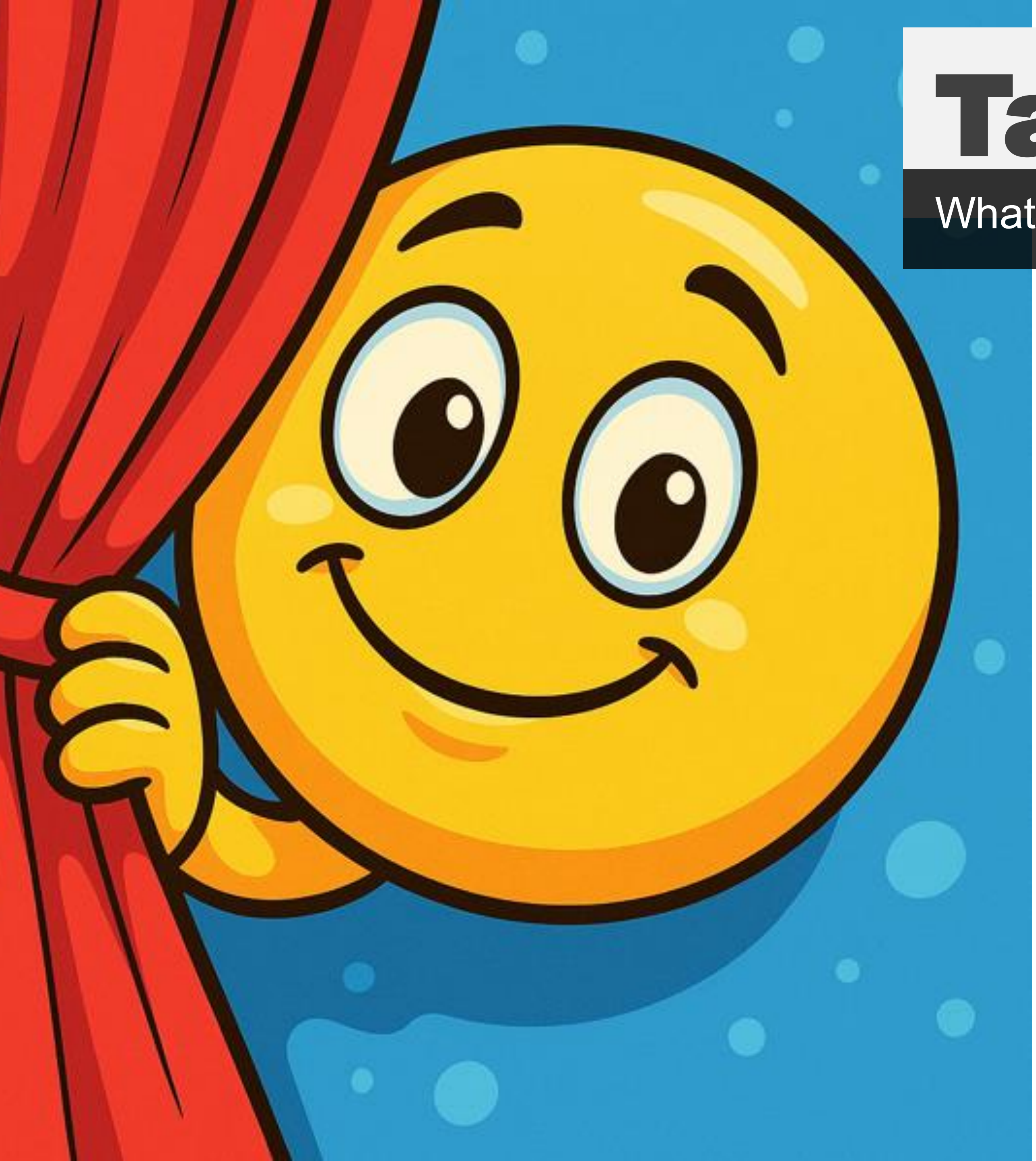
We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.



Talent Sneak Peek

What's Coming

- Check-Ins
- Feedback – Giving & Receiving
- Reviews- Development Plans
- Reviews-Performance Reviews
- Certifications
- Mentorships
- Career Hub

QUESTIONS?

Please type your questions in the chat.

We will do our best to answer them here in the call and/or will add them to the FAQs if we are limited on time.

WHAT's NEXT?

NEXT STEPS

1. Login to Workday and Validate your Information

2. Attend Office Hours (as needed)

3. Enter a Ticket or Email Workdaysupport@kencrest.org if you need additional support

4. Attend a LIVE On-site event!

Feedback

Join by QR code

Scan with your camera app

Your opinion is important to us!

- Please take 3-4 minutes to complete this survey.
- Your feedback will help us design and customize courses in the future.
- This survey is anonymous.

OR use this link in your browser:

https://insights.kencrest.org/s/zernjr

THANK YOU!!!

WORKDAY SEARCH

Bonus Topic if there is extra time

Job Aid - Using Workday Search

Home

Workday Essentials

HR & Workday

Payroll & Workday

Finance & Workday

Managers & Workday

- Find Your Place in the Organization
- Modify Personal Information
- Set Passwords & Account Pre
- Using Workday Search
- Workday Accessibility
- Workday: Getting Started (Vide)
- Workday Navigation & Tools

www.kencrest.org/workday

Job Aid - Using Workday Search

Getting Started: Workday Search

Employee

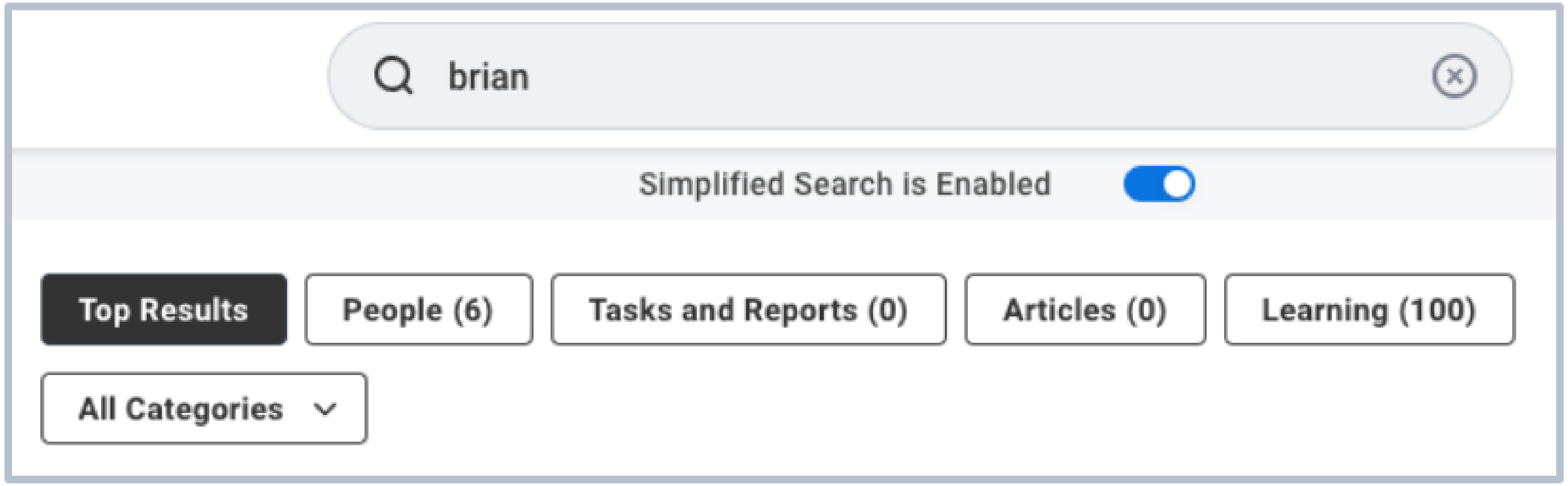
This job aid outlines the various ways that you can search in Workday. It also provides some tips and tricks to get the most out of Workday Search.

Global Search

Workday makes it easy to search for people, tasks, reports, and business data using the Search box.

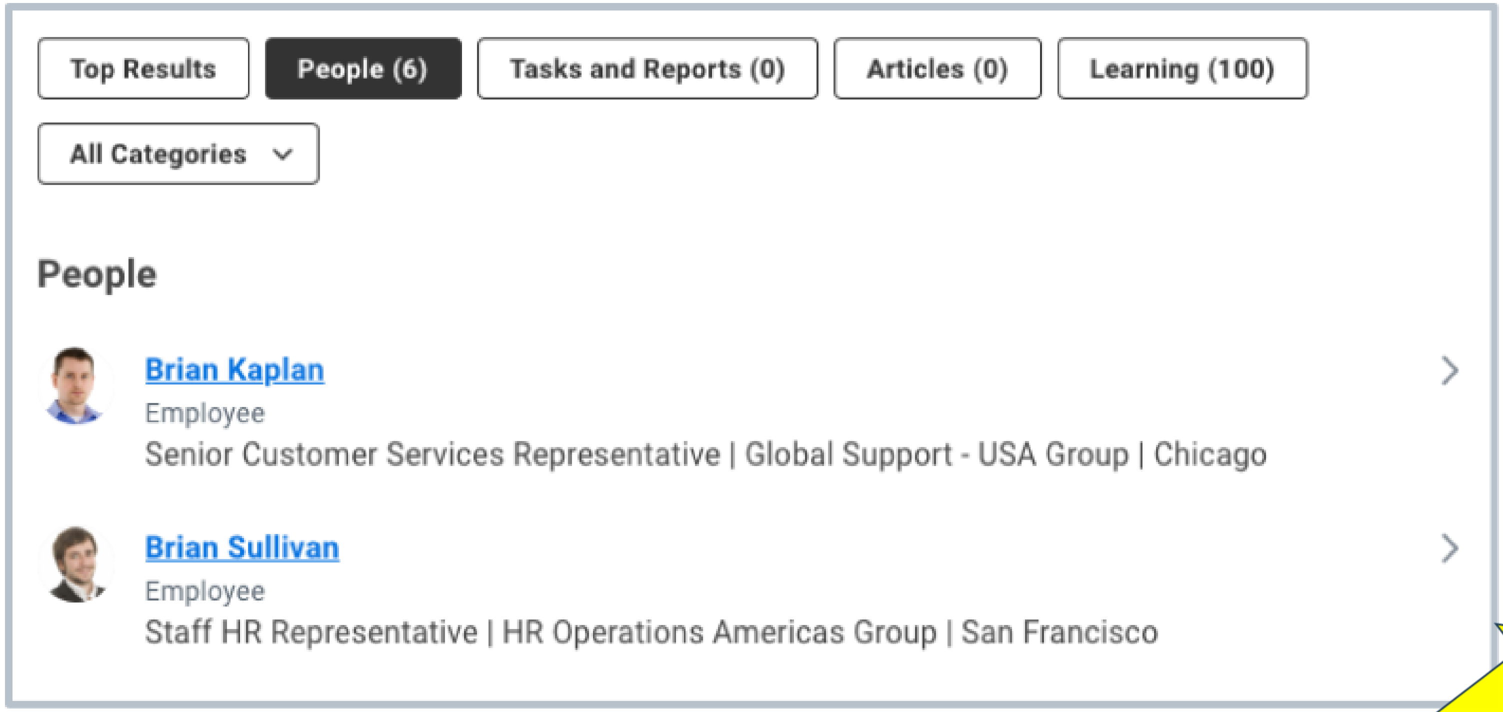
Job Aid - Using Workday Search

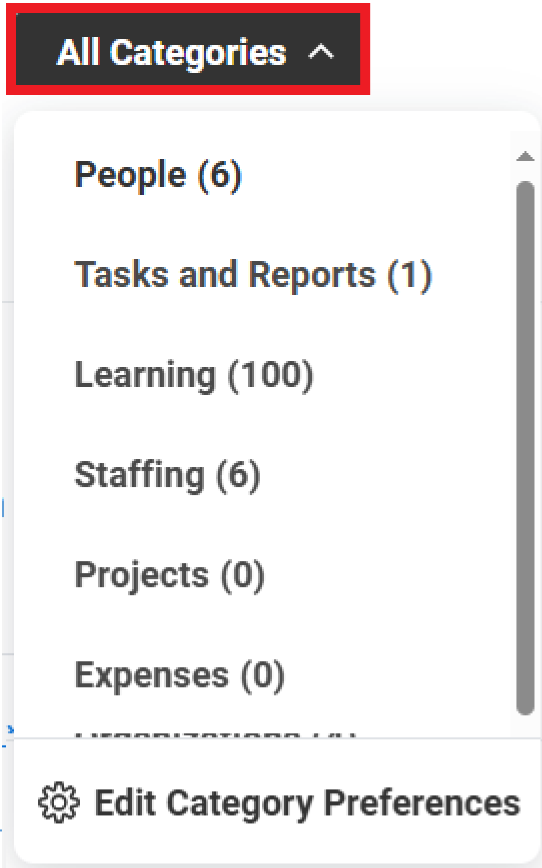
For example, to find a worker, enter their name into the Search box, and then press Enter on your keyboard.



Job Aid - Using Workday Search

Search results options display across the top of the page as a group of filter buttons. Top Results is the default data returned, personalized for you. Navigate to People to filter the results to only display workers in your organization.





Use All Categories to filter your search for more specific results.

Job Aid - Using Workday Search

Exact Match

Keep in mind that searches find exact matches. If you misspell the search text, likely no results will return. Workday Search also favors complete word matches over partial word matches, so that search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex,” the results may not display the name “Alexander.”

Partial Search

Though complete word matches are favorable, you can also use a partial search to find your results. For example, if you want to find the Maintain Candidate List Assignment task, you can use the search string “main can lis”. Though this method is still effective, it may not be a best practice for all search types where Workday returns multiple results.

Job Aid - Using Workday Search

Prefixes

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To return a list of all search prefixes available to you, enter a question mark (?) in the Search box and then press Enter.

Job Aid - Using Workday Search

?

Better Ways To Search

You can search with questions, keywords, or prefixes.

How to Use Prefix Words

It can be helpful to use a prefix word to refine your search results. For example, to find only organizations, begin your search text with 'org: '. To find specific workers, use 'worker: '.

To search for an employee or contingent worker	worker: john smith
To search for a specific person or organization using a global identifier	id: 111223333
To search for a business process	bp: 3000
To search for a job requisition using the job posting title or job requisition ID	jr: R00247
To search for a candidate using the candidate's name, ID, or email address	cand: john smith cand: j.smith@gms.com3

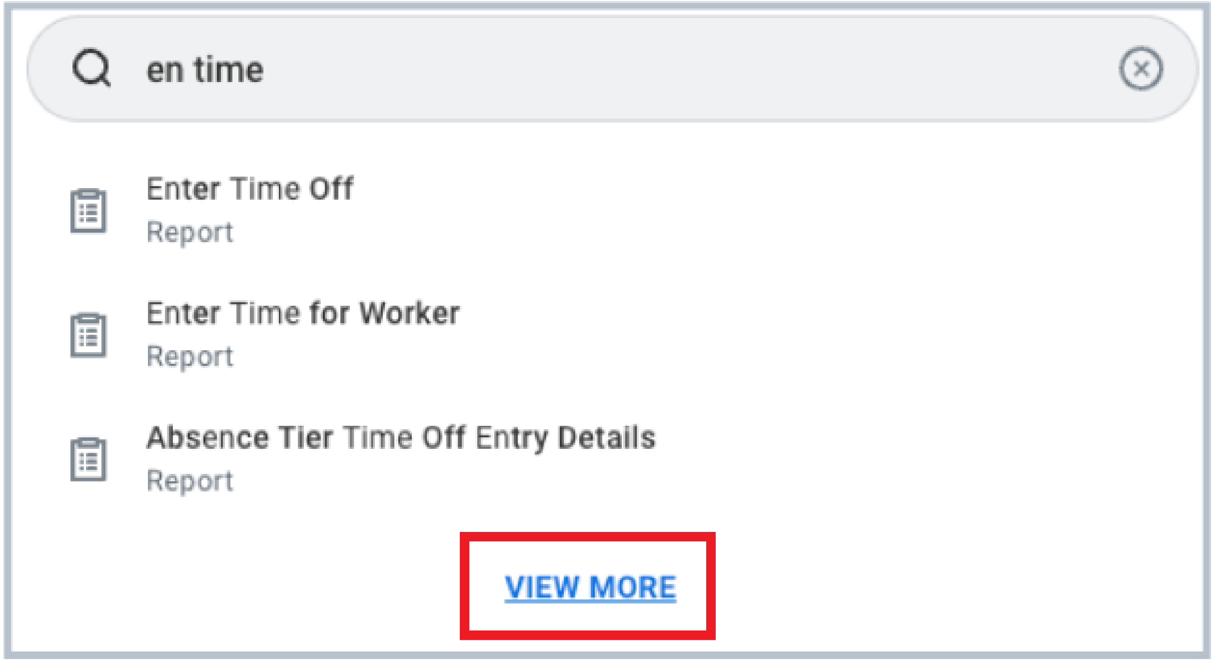
www.kencrest.org/workday

Hint: You will only see results for items that you have permission to view!

Job Aid - Using Workday Search

Auto-Suggest

Global Search Auto-Suggest displays suggested results as the first type-ahead result. It also displays loading animations when type-ahead is fetching results. To view all results, select the View More button on the search results page, as shown in the image below.



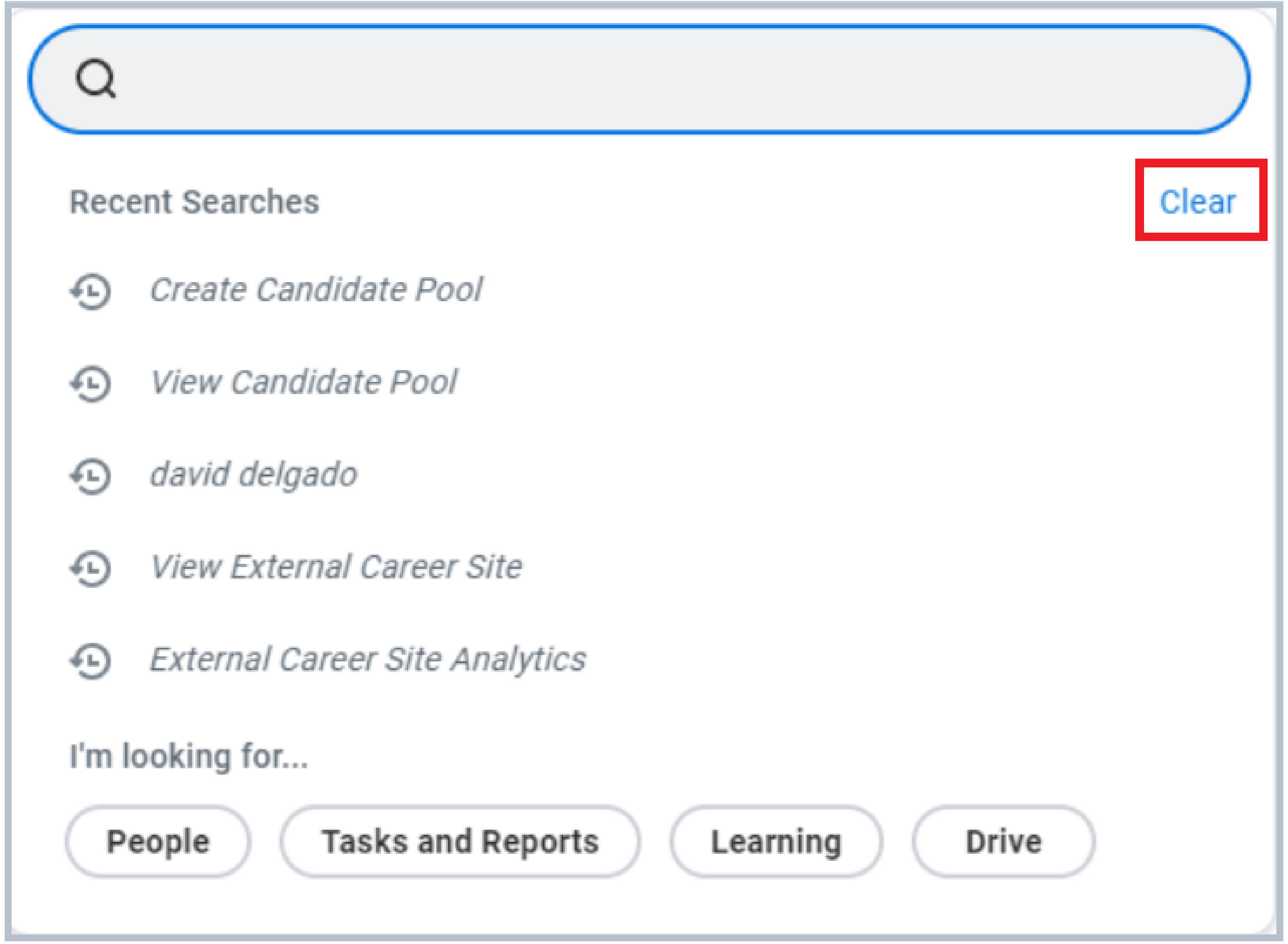
Job Aid - Using Workday Search

Recent Searches

Workday saves your recent search results and queries for convenience, as shown in the image below. The five most recent searches display, helping you access these items faster. You can clear the results by selecting Clear in the Search box pull-down.

Job Aid - Using Workday Search

How to clear results



www.kencrest.org/workday