HOW TO USE THIS GUIDE
All faculty and staff will use Workday, and this guide has something for everyone, including baseline information on your transition. Additional details are available on the FGCU Workday Training webpage.

LAUNCH CHECKLIST
Good news! You will have a lot more information available to you in Workday! It is important to review all your information, as some Banner data may be outdated. The steps in the Launch Checklist direct you to the most important items for you to review and add.

EXPERIENCE THE SYSTEM
Access Workday via one of several convenient methods; reference the Launch Checklist (page 3) for important items to review and modify.

EXPLORE WORKDAY PROCESSES
Take a deeper dive into how business processes will function in Workday, including automatic routing to the individuals who need to review and approve. Your Inbox lets you know when you are “up next” in a process. Additionally, Delegation enables certain processes to be assigned to other individuals who may act on your behalf.

EXAMINE WHO’S WHO
Roles determine which processes an individual may initiate and approve, as well as the types of data they can view. Individuals in these roles are organized into supervisory organizations, which are groups of departments, divisions, and teams.

This Transition Guide is subject to change.
LAUNCH CHECKLIST

It is important to review your personal information, as data brought into Workday from Banner may be outdated. While we have verified financial data, it’s up to you to review and add personal information. The checklist below guides you through the most important items to review and add. Log into Workday and complete the items below. Workday training and support resources (page 14) are available if you have questions.

**Manual processes are now managed through Workday:** A Business Process is a set of tasks that people initiate, act upon, and complete in order to accomplish a desired business objective. Workday routes the task to the responsible employee and enforces securing and business rules throughout the flow. Business processes include Submitting and Approving Time Entry, Expense Reports, Time Off Requests, Hiring, and many more.

**PERSONAL INFORMATION**

**REVIEW:**
- Home Address and Phone Number ([Contact Information Job Aid](#))
- Profile Photo ([Your Workday Profile Picture Job Aid](#))
- Work Space ([Change My Work Space Job Aid](#))
- Preferred Name ([Changing Your Preferred Name in Workday Job Aid](#))

**ADD:**
- Emergency Contacts ([Getting Started in Workday Job Aid](#))
- Education (School, Degree, field of study) ([Personal Information Job Aid](#))

**PAY**

**REVIEW:**
- Banking Information ([Payment Elections Job Aid](#))
- Print new Payroll Calendar ([Office of Controller Webpage](#))
- Tax Elections ([Edit Tax Elections Job Aid](#))
- Payslip (beginning 7/17/20) ([View & Print Payslips Job Aid](#))

**ORGANIZATIONAL CHART**

**REVIEW:**
- Organizational Chart (verify supervisor) ([Getting Started in Workday Job Aid](#))
HR / COMPENSATION / BENEFITS

REVIEW:
- Benefits Elections
- Allowances
- Compensation *(Getting Started in Workday Job Aid)*
- Job Title *(Getting Started in Workday Job Aid)*

INBOX

REVIEW:
- Inbox Items and Alerts (Daily) *(Your Workday Inbox Job Aid)*
- Understand Delegation *(Delegation Overview Job Aid)*

TIME OFF

REVIEW:
- Time Off (formerly Leave) Balances *(Time Off Job Aid)*

ADD:
- Time Off Requests (for any dates after 6/27/20) *(Time Off Job Aid)*

GENERAL

- Download the Workday Mobile app *(Workday Mobile Job Aid)*, *(Changing Workday Mobile Tenant to Production Job Aid)*
ACCESSING WORKDAY

There are several ways to access Workday; select the method(s) you prefer:

FGCU WORKDAY WEBSITE

Open a web browser and navigate to Workday at fgcu.edu/workday. Select the Workday Login button. Use your FGCU username and password to login. Workday uses Single Sign-On (SSO) and Two-Factor Authentication (2FA).

DESKTOP ICON

Click the Workday icon on your desktop to log in.

MOBILE APP

1. Search for “Workday” in the Apple App Store or Google Play.
2. Download and install the app.
3. See the Workday Mobile App Job Aid for complete instructions.
What does Workday do for me?

**FACULTY**
- View Payslips, and manage payroll elections - online or mobile
- Submit and track expense reports
- View and maintain benefit information and participate in open enrollment
- Delegate select tasks to administrative assistants
- Generate budget reports with real-time data

**STAFF**
- View Payslips, and manage payroll elections - online or mobile
- Report time worked
- View leave balances and request time off
- View and maintain benefit information and participate in open enrollment
- Submit and track expense reports
- View and maintain personal information

**STUDENT WORKERS**
- Enter and submit time worked - online or mobile
- View and maintain personal information
- View payslips, and manage payroll elections

**SUPERVISORS**
- Approve hourly employee's time worked - online or mobile
- Review/Approve time off requests
- Maintain departmental calendar
- Approve expense report requests
- Initiate/Review salaries, promotions, job requisitions
- Manage hiring process
- Generate reports and dashboards

**COST CENTER MANAGERS**
- Generate reports with real-time data
- Prepare/Analyze budgets, planning using real-time data
- Create/Approve purchase requisitions, expense reports & other financial transactions
- Track encumbrances in real-time
- Create supplier and procurement requests
- Purchase, allocate, and track orders directly with vendors - such as Amazon

**FINANCIAL USERS**
- Generate financial reports with real-time data
- Analyze budgets, plan using real-time data
- Initiate purchase requisitions, expense reports, and other financial transactions
- Make accounting adjustments and journal entries
WORKDAY DEFINED

Highlighted below are a few common Workday functions & their definitions.

INBOX ITEMS

Your Workday Inbox provides items and tasks awaiting your action, detailing a streamlined and traceable workflow. Examples include Expense Reports, Time Off Requests, Time Entry Approvals, Delegations, Recruitment and Hiring, Procurement, and other notifications.

PERSONAL DATA

Workday contains all your employee information and delivers world class security to ensure your data is protected. Your Profile displays and provides access to personal and work contact information, emergency contacts, gender, date of birth and more.

EXPENSE REPORTS

Expense Reports will include travel and non-travel expenses. Capture, submit, and approve expenses from your computer or mobile device. Features include automatic routing for approval, allocation to Cost Center, upload of mobile photo receipts, real-time encumbrances, and status of reimbursements. Delegation enables faculty, supervisors or managers to delegate preparation of expense reports if desired.

PROCUREMENT

Workday’s Procurement features manage the entire purchasing process, including purchase requisitions, purchase orders, cost allocation, supplier invoices and payments, receipts and procurement card functionality. Workday seamlessly connects to Amazon, Dell, Fisher Scientific and Office Depot through an expedited “Punchout” purchasing process.

TIME OFF AND LEAVE

Workday allows you to view current and future Time Off balance and enter a Time Off request, which is routed to your manager for approval. Managers and supervisors can view all team members’ Time Off in one location.
**WORKDAY DEFINED continued**

**RECRUITING**

Workday Recruiting helps you find, share, engage, and select the best internal and external candidates. A single system will now manage job requisitions, referrals, recommendations, selections, and offers. New FGCU employees will begin their onboarding process through Workday as well.

**REPORTING**

Reporting is the fundamental way to collect, filter, and analyze large amounts of data in Workday. Human Resources and Finance reports feature real-time data and include budgets, dashboards, encumbrances, and team data for department chairs and supervisors.

**NOTIFICATIONS**

Notifications in Workday are represented by a bell icon. Notifications provide information about a report, action or process related to you; they are for your information only and will not prevent a process from proceeding.

**DELEGATION**

Delegation is the temporary assignment of another person to act on your behalf to carry out specific activities. Workday allows you to Delegate specific tasks from your Inbox (such as approvals), or the ability to initiate actions for business processes.
Workday is designed to be intuitive and uses icons you may recognize from other systems and websites.

**CONFIGURE**
Click to set preferences and perform other actions related to the page.

**REQUIRED FIELD**
Field must be completed to proceed.

**DROPDOWN MENU**
Click to reveal a dropdown list of items.

**FILTER RESULTS**
Select options to narrow down search results.

**RELATED ACTIONS / TWINKIE**
Click to reveal a menu of related actions for a given report or topic.

**ACTIONS**
Click to reveal a menu of possible actions for a given report or topic.

**EXPORT TO EXCEL**
Save a properly formatted Excel spreadsheet of the information displayed.

**PRINT**
Print a properly formatted version of the information displayed.
Service and effective dates:
The following dates are associated with Worker profiles:

• **Hire Date**: The most recent date of hire (same date that was historically in Banner).

• **Original Hire Date**: The original date of hire (same date that was historically in Banner).

   It matches the Hire Date for individuals who have never been rehired at FGCU.

• **Continuous Service Date**: The date upon which Service Awards and Paid Time Off calculations are based (same date that was historically in Banner).

• **Length of Service**: The time between today’s date and the Hire Date.

• **Time in Position** and **Time in Job Profile**: Aligns with the Hire Date or the Position Effective Date for job profile changes.

Workday Roles are groupings of people with specific responsibilities and permissions.

Complete the following steps to view the role assignments with whom you will interact.

1. **Under your profile picture, click View Profile.**

   ![View Profile](image)

2. **Click “Overview” in the sidebar.**

   ![Overview](image)

3. **Click “Support Roles” in the header.**

   ![Support Roles](image)
HUMAN CAPITAL MANAGEMENT (HCM) ROLES

Absence Partner: Performs absence management tasks for all supervisory organizations. Examples include adjusting accruals and Time Off and viewing employees on leave. Approval for Time Off and leave business processes.

Visibility: Can view Time Off balance as well as the leave types for an employee.

Administrative Support: Designed to support the HR Business Partner. Performs limited HR management functions for assigned supervisory organizations only. Examples include editing positions, adding/ending additional jobs, creating job requisitions, and compensation changes. Responsibility for initiating processes on behalf of assigned supervisory organizations. No approval authority.

Visibility: This department-level role has access to worker/position/compensation data for workers they support based on supervisory organization assignments.

Benefits Partner: Performs benefits management tasks for all supervisory organizations. Examples include granting or revoking benefit eligibility, initiating open enrollment, and viewing employees on leave. Approval for benefits, personal data, and staffing business processes.

Visibility: Benefits, personal data, and staffing business processes.

Compensation Partner: Perform compensation management tasks for all supervisory organizations. Examples include approving worker compensation plans, packages, and salary ranges. Approval authority for compensation and staffing business processes.

Visibility: This HR-specific role has view and modify access to worker/position/compensation data and history, as well as payroll results, across the institution.

HR Analyst: This is a view-only role with access to all HR setup and operational data for the institution. No approval authority for business processes.

Visibility: This HR-specific role has view-only access to worker/position/compensation data and history, as well as payroll results, across the institution.

HR Business Partner: Performs HR management functions for assigned supervisory organizations only. Examples include creating and approving new positions, job assignments, and compensation changes. Responsibility for initiating processes on behalf of assigned supervisory organizations and some approval authority.

Visibility: This department-level role has access to worker/position/compensation data for workers they support based on supervisory organization assignments.
ROLES Continued

HR Partner: Perform HR management functions for all supervisory organizations. Examples include creating and approving new positions, and job assignments. Approval authority for HCM business processes.

Visibility: This HR-specific role has extensive view access to worker/position/compensation data and history, as well as payroll results, across the institution.

Manager: Supervisory Organization leadership role, which can initiate HCM business processes and approve HCM, expense, procurement, and time and absence processes, including hiring employees or contingent workers, compensation changes, job changes, performance reviews, creating positions and headcount, staffing, recruiting, leaves, and Time Off.

  • Recruiting and Onboarding: Initiates the following: creating, closing, copying, and editing job requisitions and Evergreen Requisitions, the offer process, and job posting updates.

    Visibility: Candidate information, supporting documentation, and job requisition and Evergreen Requisition details.

  • Position and Employee Information: Initiates the following: creating positions and hiring workers, organizational assignment changes, adding and ending additional jobs for existing workers, transfers, data and business title changes, and terminations.

    Visibility: Contact information, job and position details, and additional jobs for workers.

  • Compensation: Requests compensation changes.

    Visibility: Compensation information for Workers.

  • Time Entry, Time Off, and Leave of Absence: Approves or cancels Time Off requests and correction; enters and corrects Workers’ Time Off on their behalf; places Workers on or returns them from leaves of absence; approves, cancels, or corrects requests to begin or return from leaves of absence.

    Visibility: Time Off requests and balances; Leave requests

  • Performance: Initiates and facilitates Performance Improvement Plans and Disciplinary Actions; facilitates Performance Reviews.

    Visibility: Performance Improvement Plans, Performance Reviews, and Disciplinary Actions.

  • Career Development: Initiates Development Plans; adds Workers’ accomplishments, awards, education, external job history, languages, and professional affiliations.

    Visibility: Workers’ accomplishments, awards, education, external job history, languages, professional affiliations, and career preferences.
ROLES Continued

**Recruiter:** Perform recruiting functions for all supervisory organizations. Examples include creating, qualifying, and evaluating applicants for jobs and positions. No approval authority.

*Visibility:* All prospects and candidates.

**Talent Partner:** Perform talent management functions for all supervisory organizations. Examples include processing employee reviews, creating talent and succession pools, and launching calibration. Approval authority for talent, performance, and succession business processes.

*Visibility:* Worker/position/career information and feedback for workers.

**PAYROLL ROLES**

**Payroll Partner:** Perform payroll review functions and time entry for assigned pay groups. Examples include setup data for positions, new hires, transfers, and terminations. Approval authority for payroll business processes and ability to manually advance time entry business processes.

*Visibility:* Salary detail.

**Timekeeper:** Performs time entry and submission functions for assigned supervisory organizations. Examples include correction of hourly employee time clock events, time entry of missed Check In and Check Out, and time submission for supervisor approval.

*Visibility:* Time Entry and balances

**FINANCE ROLES**

**Budget Check Exception Override Approver:** Approves an override of a budget exception allowing a transaction to proceed, even if it exceeds budget availability.

*Visibility:* All of Budget

**Cost Center Coordinator:** Secondary manager for assigned Cost Centers. Access to Cost Center budget data to check financial transactions for accuracy against support documentation.

*Visibility:* No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

**Cost Center Manager:** Primary manager for assigned Cost Centers. Access to Cost Center spend analytics. Approval authority for financial business processes.

*Visibility:* No salary visibility (by default). Spend analytics, and summary and transactional detail for assigned Cost Centers or Divisions.

**Expense Partner:** Perform expense management functions for all companies. Examples include creating payment elections for workers and viewing expense reports. Approval authority for expense business processes.

*Visibility:* Spend Authorizations, Expense Reports, Payment Elections.
Learning resources are available on the FGCU Workday website on the Training page. Here you will find:

**Videos:** Training videos were developed specifically for and with our FGCU Workday environment to give you the most accurate view of what you will see and experience in Workday.

**Job Aids:** Step-by-step guides have been created for the most common tasks and processes in Workday. They include detailed instructions and screenshots, walking you through Workday processes.

**Virtual Drop-In Labs:** If you have questions after viewing the on-demand videos and Job Aids, attend a Virtual Drop-In Lab, available for a limited time. Virtual Drop-In Labs will feature our Subject Matter Experts waiting to take your questions. View Calendar.

**Training Resources:** Additional resources are provided on the Training webpage, including an updated Payroll Calendar, Budget – Banner/Workday Crosswalk documents and a link to the Training Tenant (while available).
If you have questions as you use Workday, proceed through the following steps:

**VIEW ON-DEMAND TRAINING MATERIALS**

Videos and Job Aids are the first places to turn for questions since they guide you through steps in detail. Available at [FGCU Workday](https://fgcuworkday.fgcu.edu) on the Training page.

**CONSULT A WORKDAY CHANGE AMBASSADOR**

Consult a Workday Change Ambassador in your area who may be able to assist you. Change Ambassadors have advanced knowledge of Workday. To find a Change Ambassador in your area, click on your building on the [Change Ambassador campus map](https://fgcuworkday.fgcu.edu/map).

**CALL, EMAIL, OR VISIT THE HELP DESK**

We are always available and willing to assist. If your question isn’t answered through other resources, contact the University Help Desk by phone at 239-590-1188 or by email at helpdesk@fgcu.edu.

Please be patient as we reach stabilization with Workday. Use the Launch Checklist provided to review and confirm pertinent information; if corrections are necessary and you are unable to edit in Workday, please contact the Help Desk as indicated above.