Getting Started in Workday for Employees

Objective: To provide NKU employees with a starting point for understanding basic navigation and completing key tasks, including updating emergency contacts and verifying or updating personal information.

Audience: All employees

This first part of this user guide provides a brief overview of navigation, followed by step-by-step instructions for items listed below in the Table of Contents.

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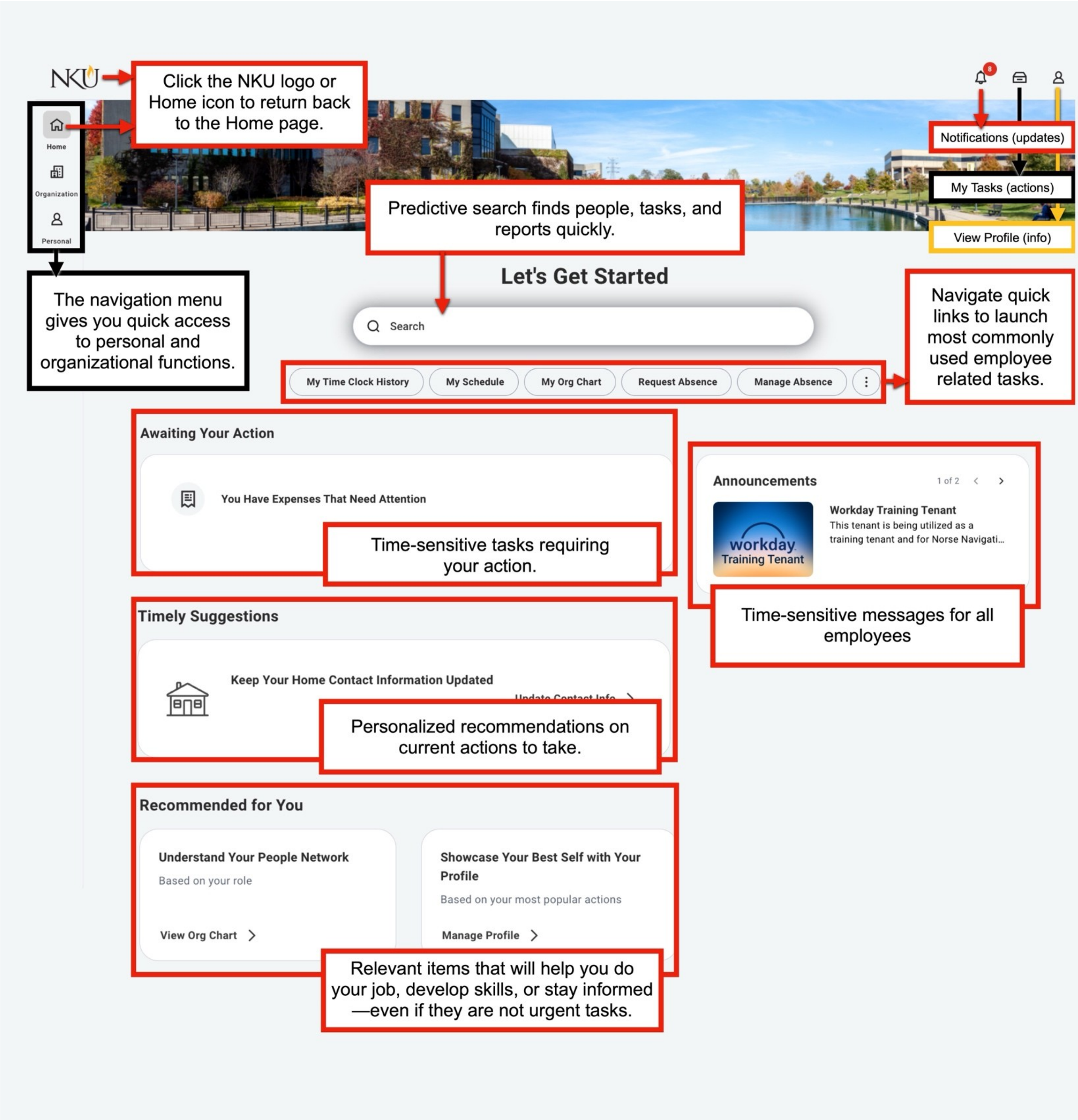
Click the required process below to go directly to that portion of the User Guide:

Explore Home Page Navigation



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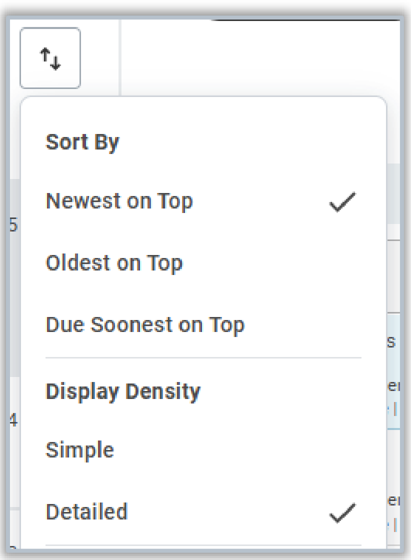
Use My Tasks

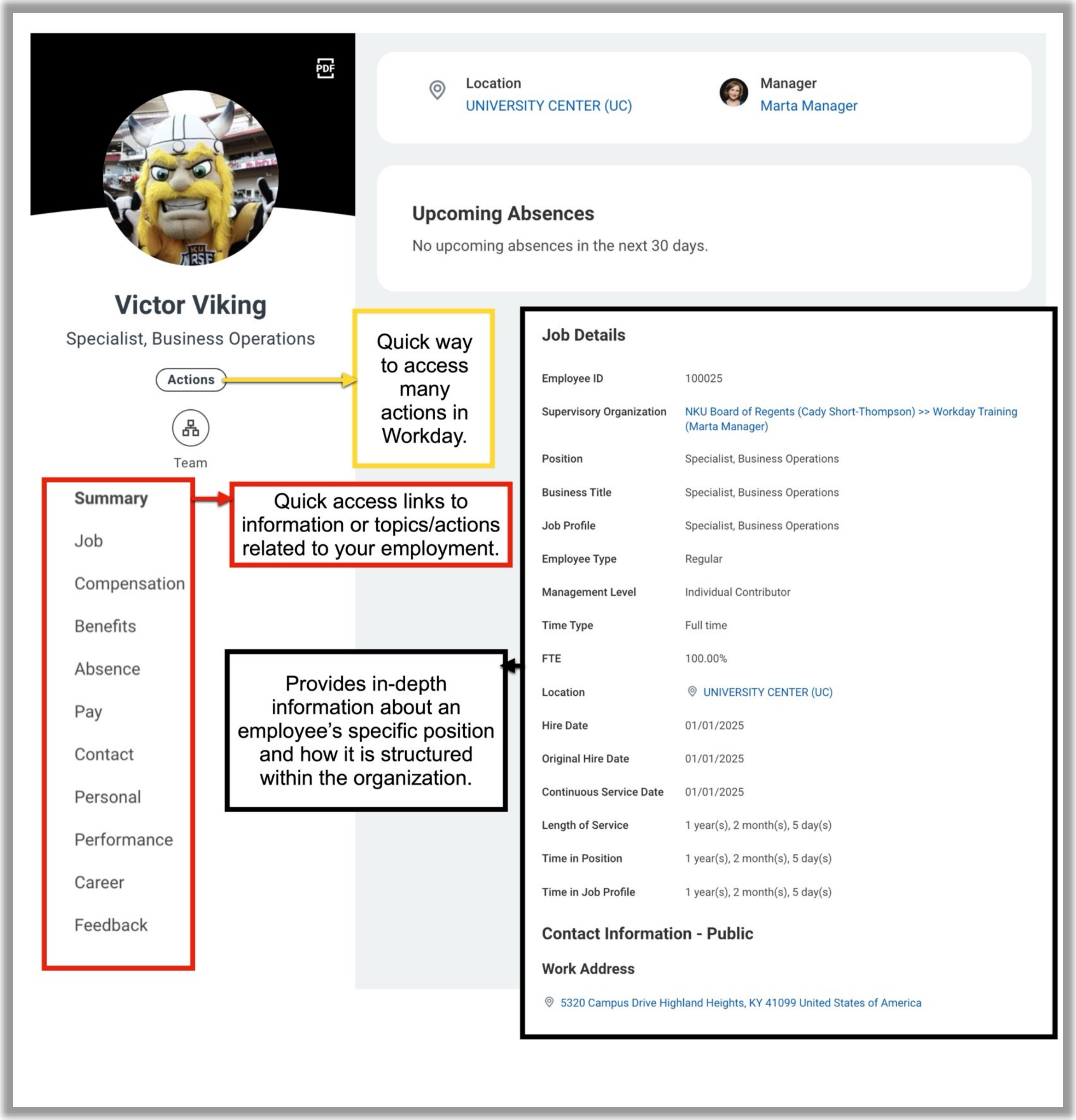
1. Near your Profile photo, select the **My Tasks** icon.
2. Choose the **All Items** tab to view your business process tasks, approvals, and to-dos.
3. Choose the **Saved Searches** tab to display all the saved searches you have created via Advanced Search.
4. Choose the **Filters** tab to view a category of items such as Overdue, Absence/Time, and Expense Report Approvals.
5. Choose the **Archive** tab to access the status of your previous business processes.
6. If applicable, the Bulk Approve and Manage Delegations actions will also be available in your My Tasks section.

Additional My Tasks Features:

1. The My Tasks navigation panel is collapsible, allowing for more screen space to complete your tasks.
2. The sorting option allows you to sort your My Tasks items by Newest on Top, Oldest on Top, and Due Soonest on Top.
3. From the display option, select your display density by either choosing **Simple** or **Detailed**. Detailed provides more information to identify which tasks need your attention.
4. Mark an item as a favorite by selecting the star icon, and it will display in your Favorites filter.
5. Use the search functionality on the All Items and Archive tabs to find a specific task.



View Employee Profile



Note: Employee view of tabs may vary slightly from screenshot display.

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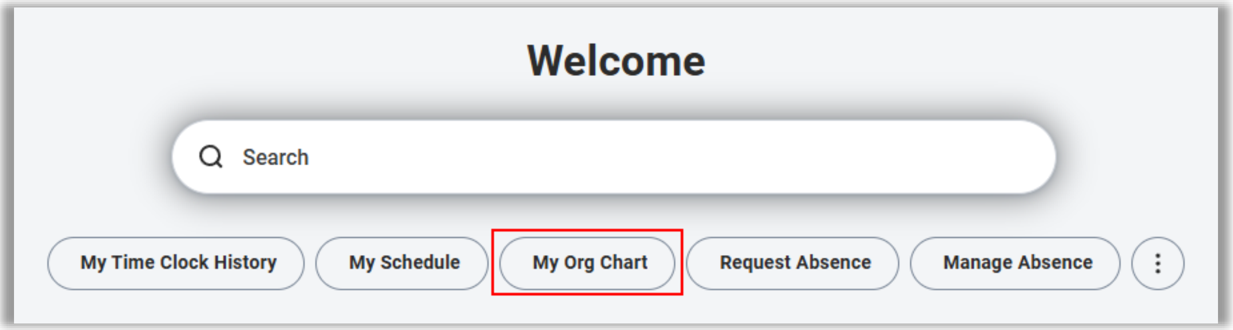
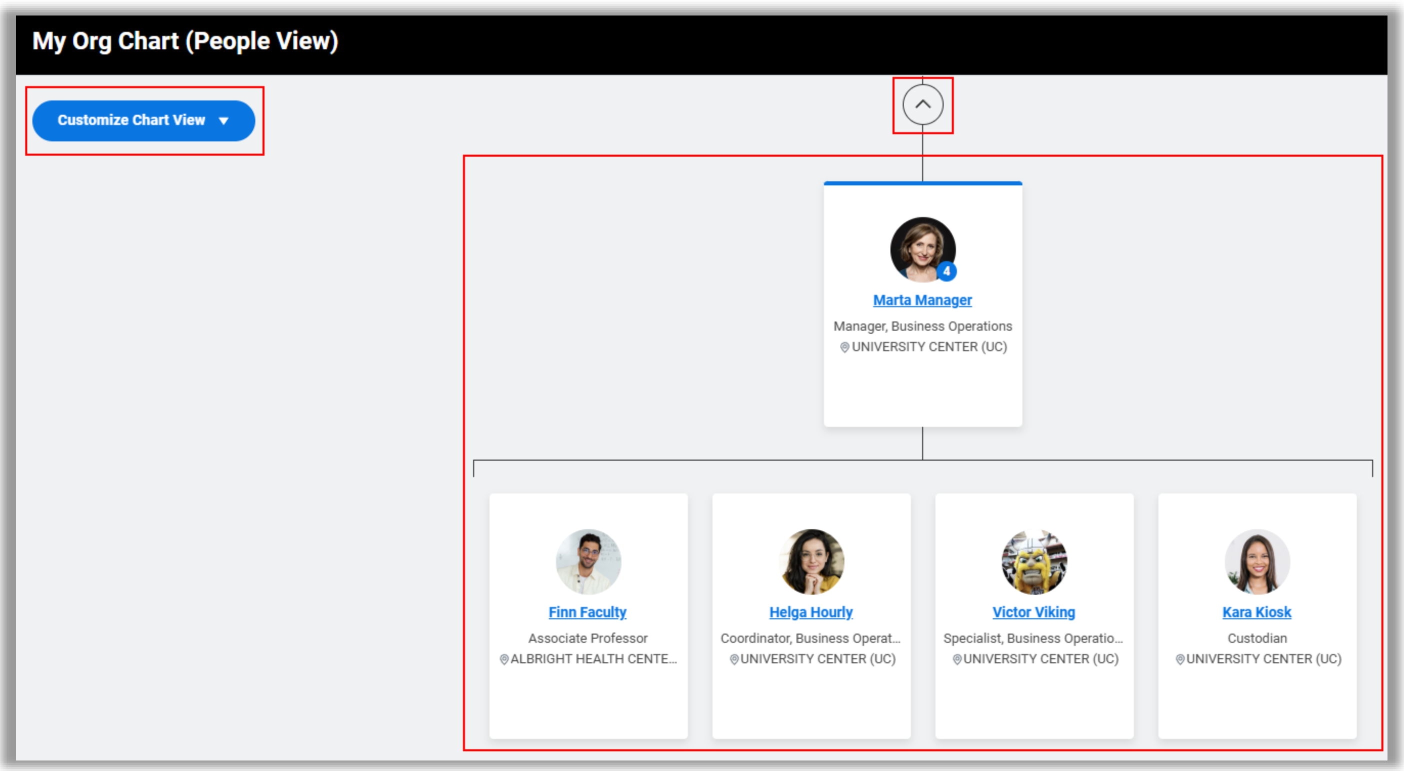
Navigate My Org Chart

From the Workday homepage, click **My Org Chart** quick link.



Note: Applications display beneath the Search bar based on users' activity over time. If the required app does not display, click ⋮ to view additional apps. My Org Chart can also be accessed from the Employee Profile.

My Org Chart displays team reporting structure, including other team members and direct manager. Use arrows to navigate up or down the org chart. Optionally, employees can customize the My Org Chart view to including or not include contingent workers and open positions.



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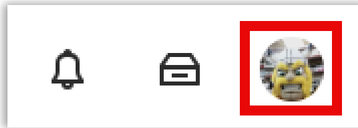
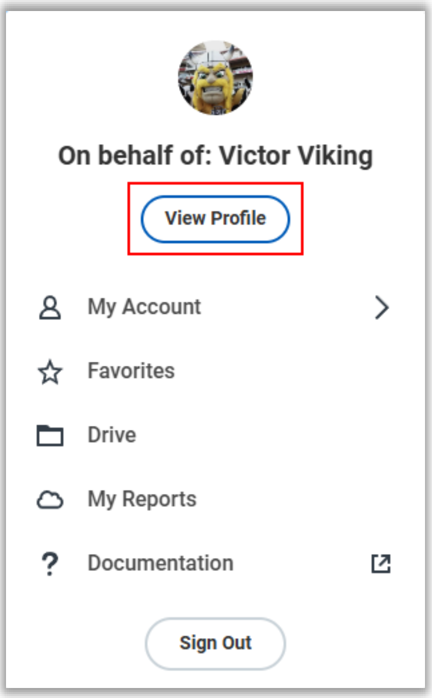
Add or Change Your Contact Information

From the Workday Home page:

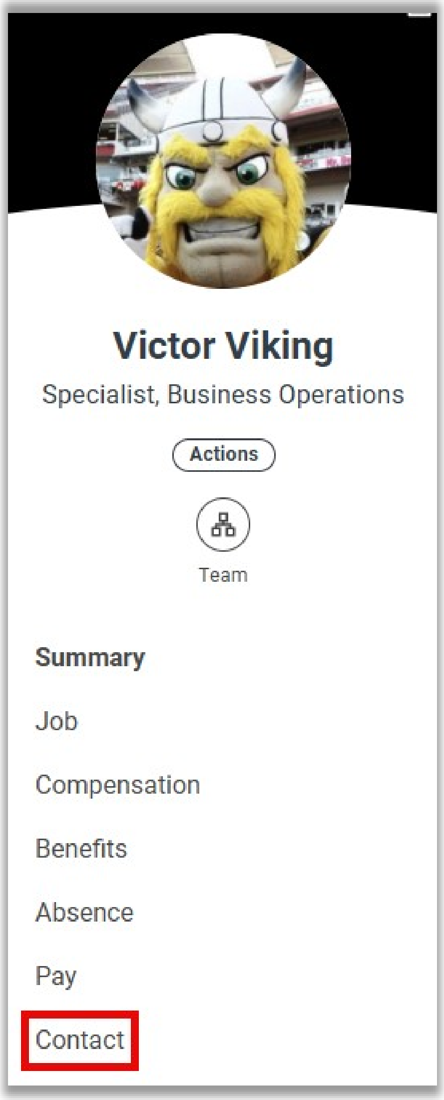
1. Click **Profile** icon in the top-right corner.



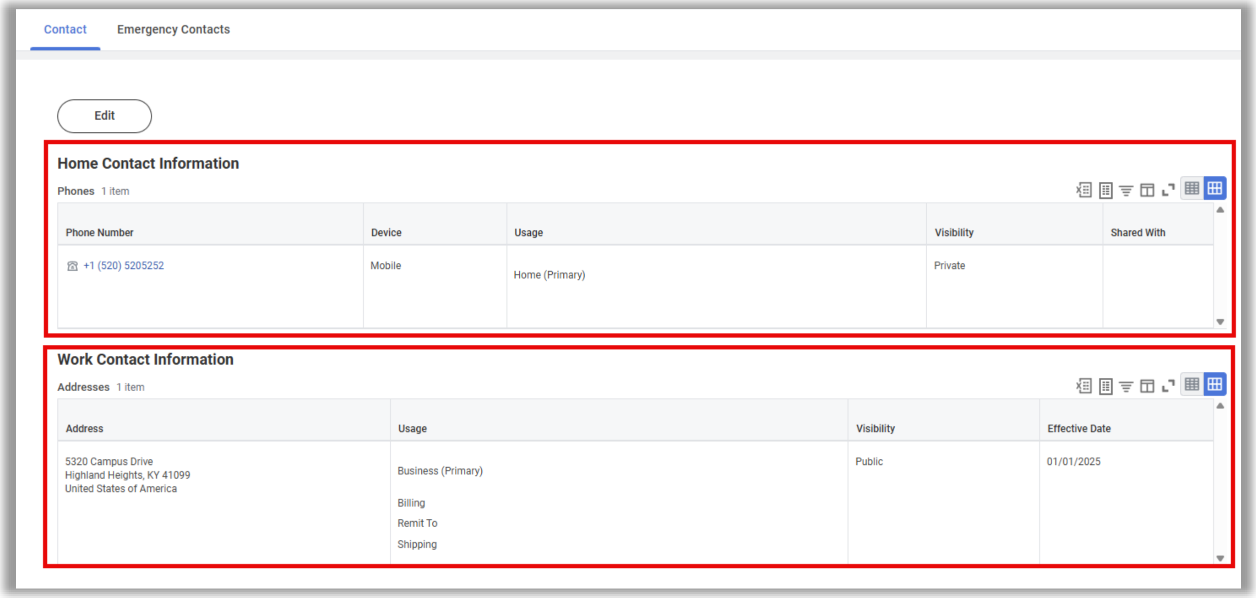
2. Click **View Profile**.



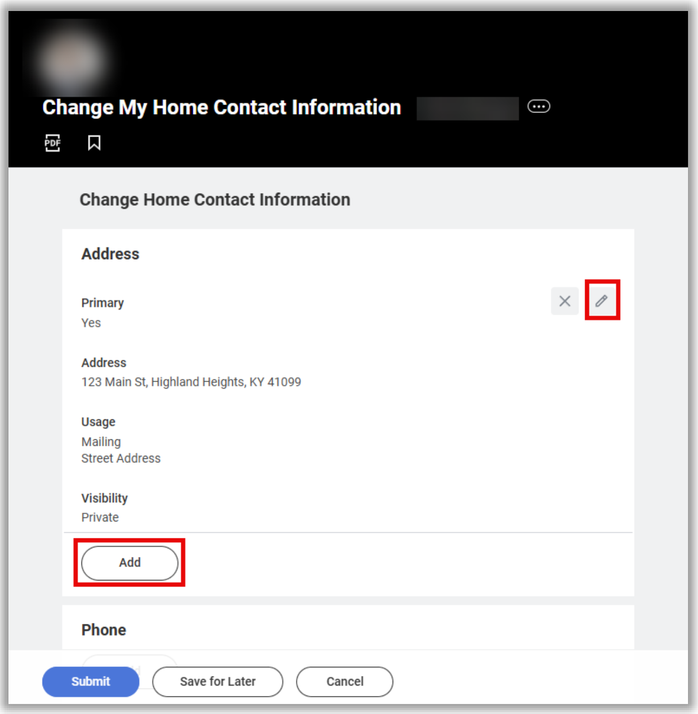
3. Click **Contact** from the profile options.



4. Click **Contact**. Home and Work contact information displays.



5. Click **Edit** to update Home Contact Information. The Change My Home Contact Information window displays.



6. Click to modify existing information, to delete existing address information or **Add** to enter a new address.

7. Click **Submit** to save the change. Payroll representatives will be notified of the home contact change and will review the change for any tax implications.

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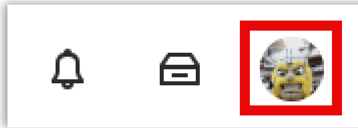
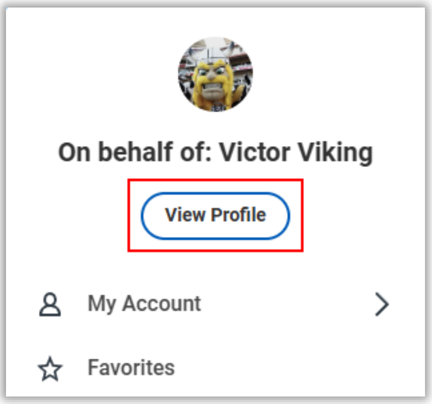
Add or Change Your Emergency Contacts

From the Workday Home page:

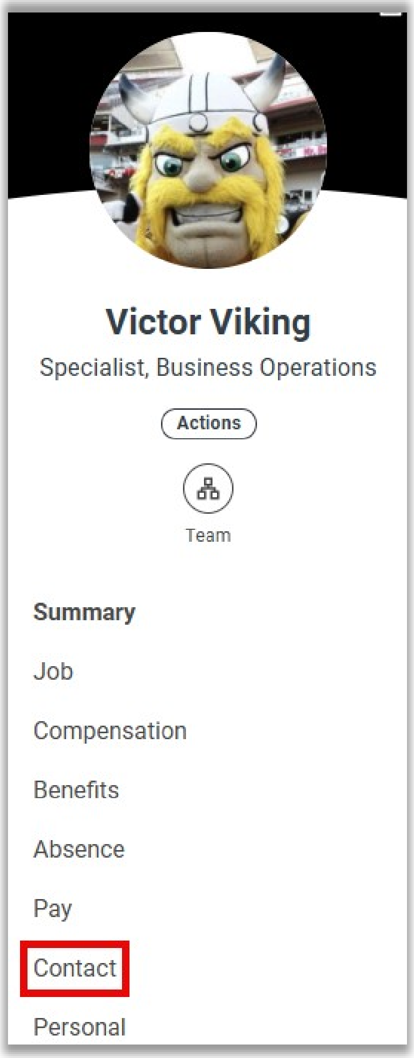
1. Click **Profile** icon in the top-right corner.



2. Click **View Profile**.

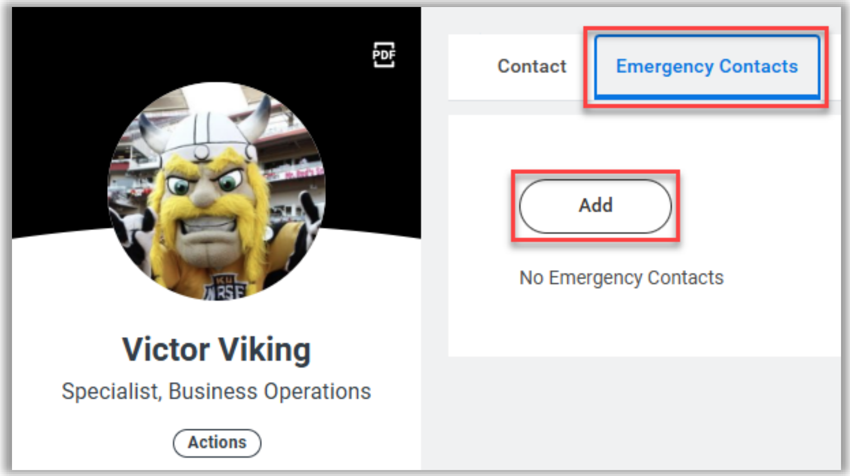


3. Click **Contact** from the profile options.



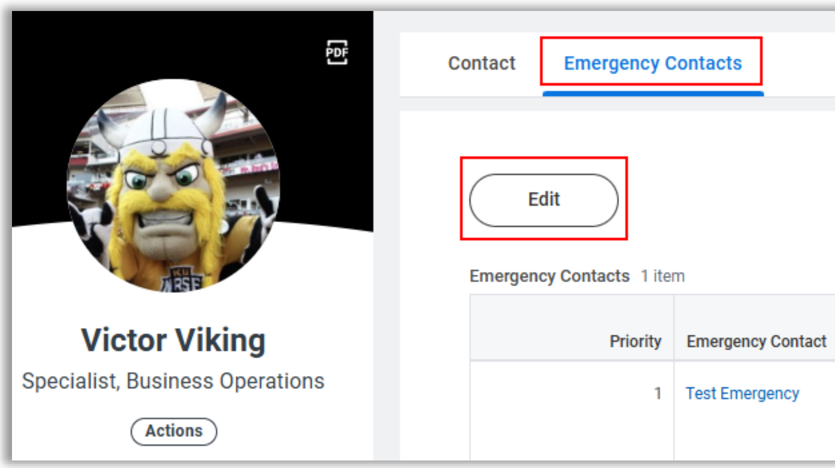
4. Click **Emergency Contacts** and complete one of the following actions:

   a. Click **Add** to enter *new* emergency contact information. Complete all required fields.



   OR

   b. Click **Edit** to update *existing* emergency contact information. Complete all required fields.



5. Click **Submit** to save the changes.

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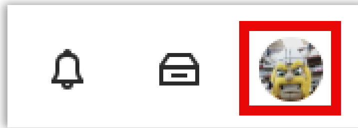
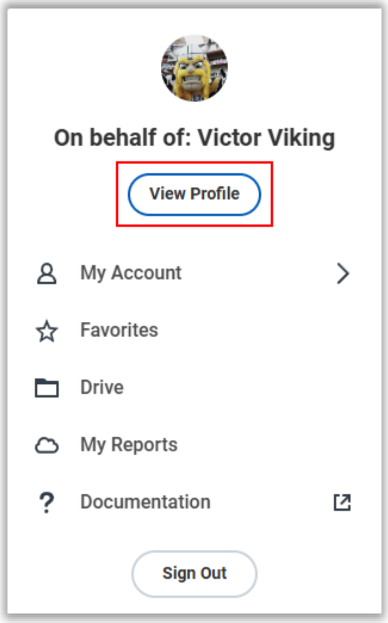
Verify or Update Personal Information

From the Workday Home page:

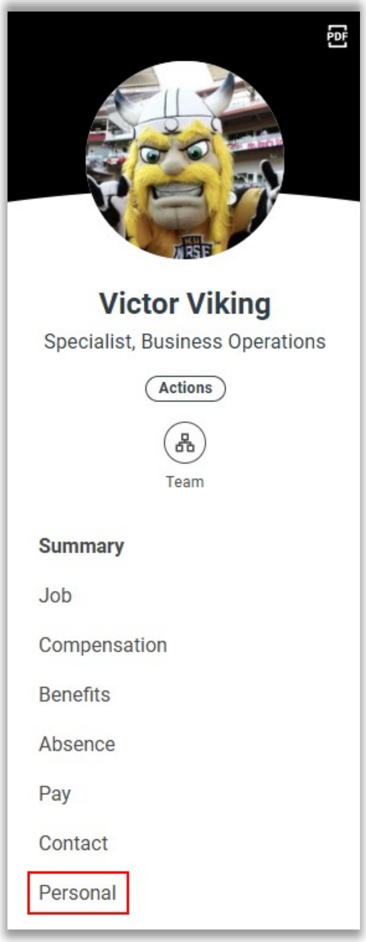
1. Click **Profile** icon in the top-right corner.



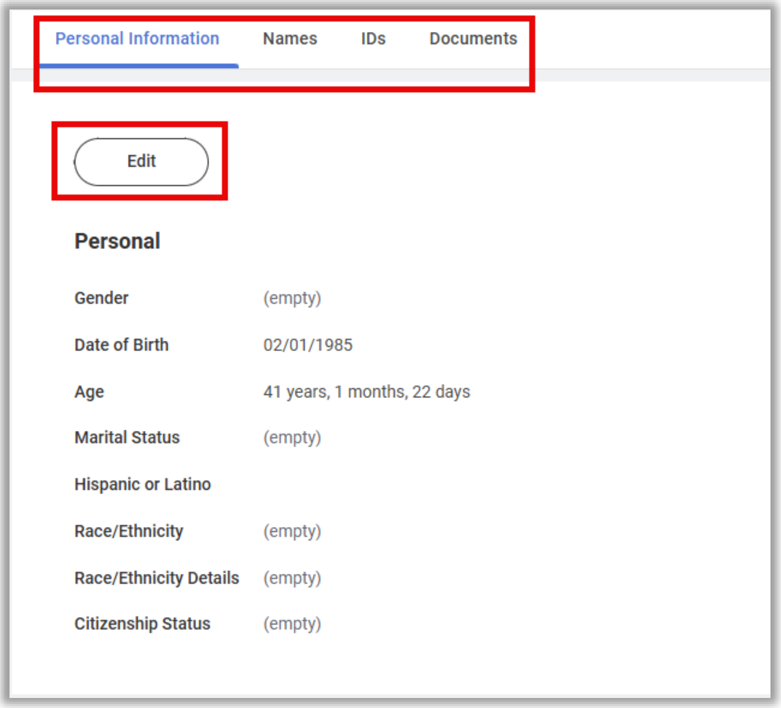
2. Click **View Profile**.



3. Click **Personal** from the profile options.



4. From the Personal page, navigate to the tab(s) requiring updates:



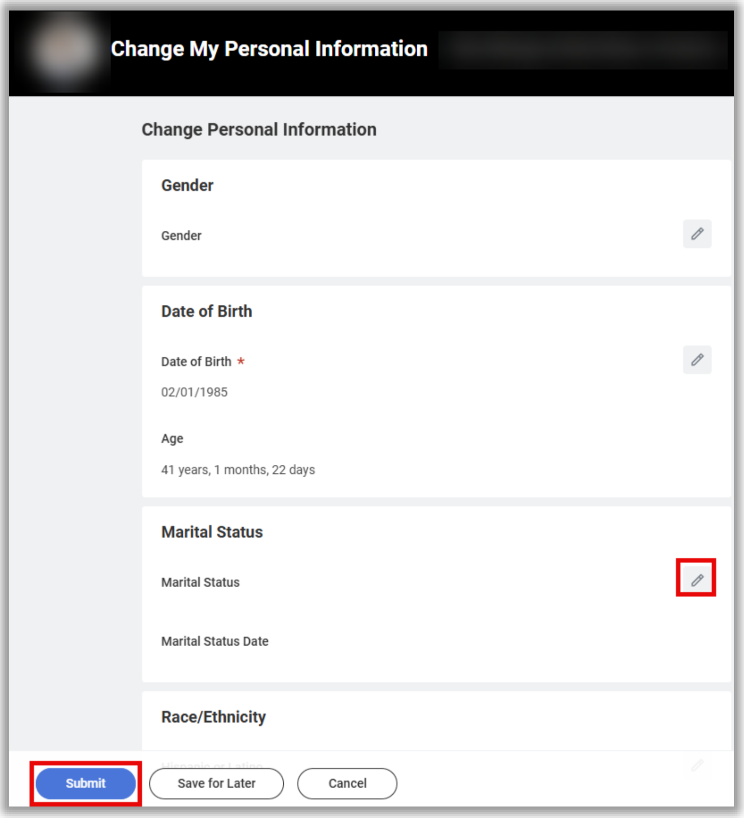
   a. **Personal Information**: Includes Gender, Date of Birth, Marital Status, Race/Ethnicity, and Citizenship Status

   b. **Names**: Includes Legal Name and Preferred Name

   c. **IDs**: Includes Government IDs, Licenses, Passports and Visas, KPPA Member IDs

   d. **Documents**: Includes any relevant documents linked to the employee profile

5. Click **Edit**. The Change My Personal Information page displays.



6. Click  to modify existing information and enter required data.
7. Click **Submit** to save the changes.

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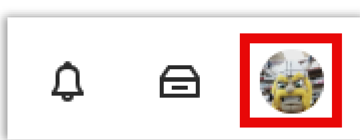
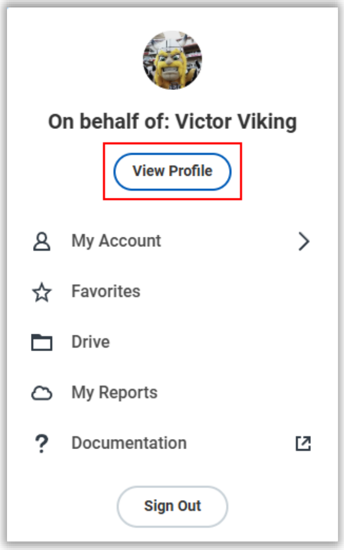
Access and Edit Career Profile

From the Workday Home page:

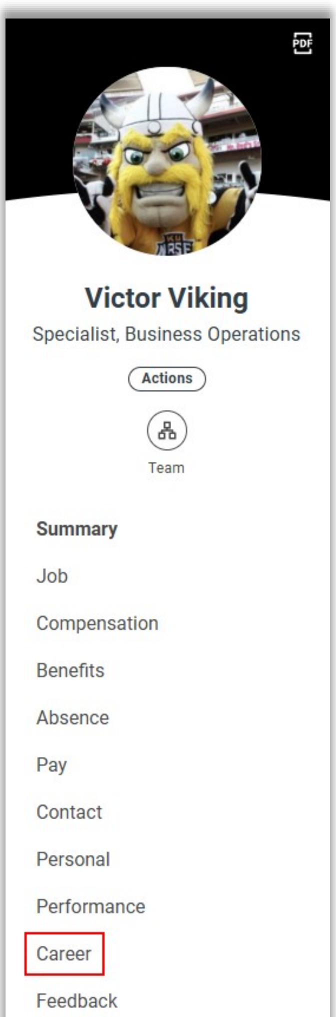
1. Click **Profile** icon in the top-right corner.



2. Click **View Profile**.

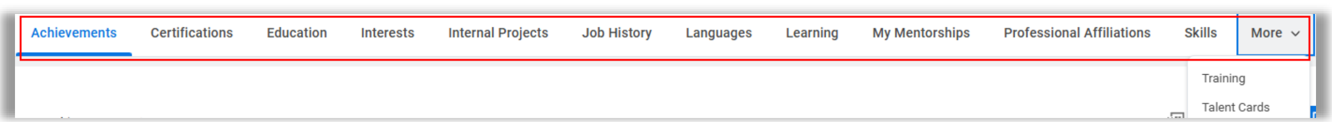


3. Click **Career** from the profile options.

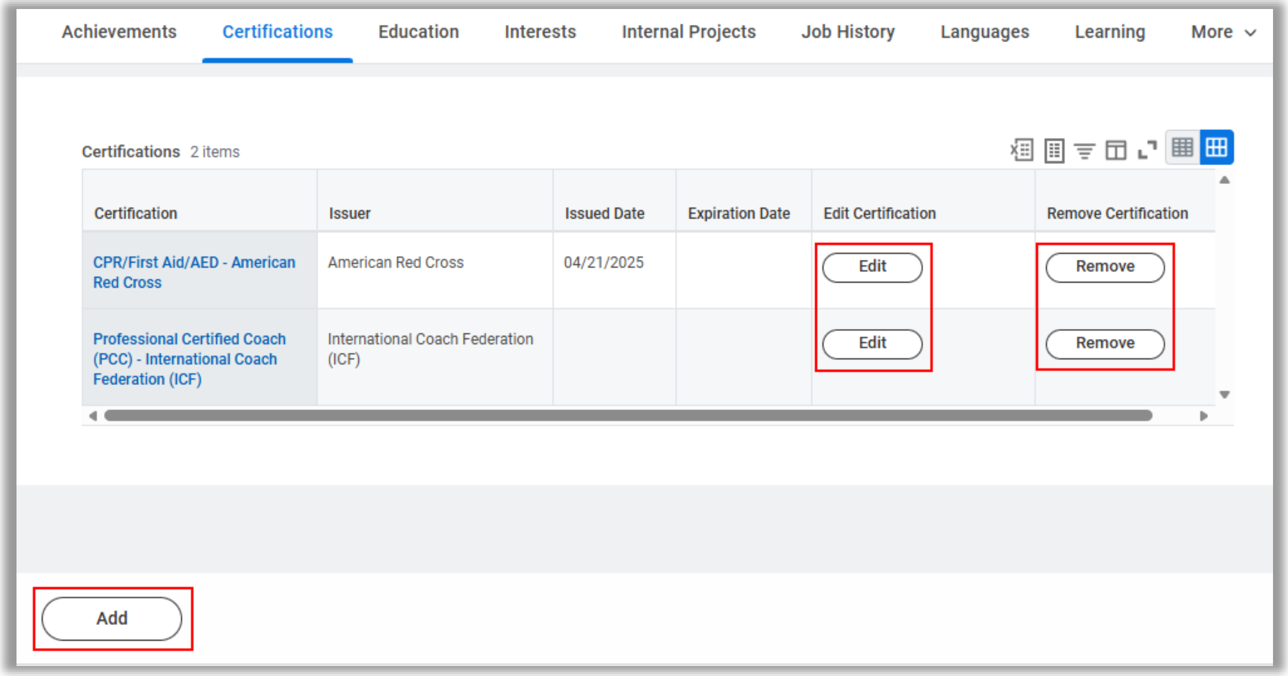


4. Select one or more of the following tabs to add or modify Career information:

    a. Achievements
    b. Certifications
    c. Education
    d. Interests
    e. Internal Projects
    f. Job History
    g. Languages
    h. Learning
    i. My Mentorships
    j. Professional Affiliations
    k. Skills
    l. Training
    m. Talent Cards



5. Click **Add**, **Edit**, or **Remove** talent information on the selected tab. Fill out all required fields.



6. Click **Submit** to save the changes.

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Need Help?

If additional support is needed, contact workdaysupport@nku.edu.