Quick Reference Guide

GETTING STARTED IN WORKDAY
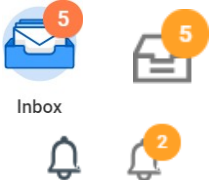## ALL EMPLOYEES

OVERVIEW

This guide provides information on how to use Workday. Download and review the **Basic Workday Overview** job aid, intended for all employees, for further information on system features and capabilities.

TOPICS COVERED

- Worklets
- What to do with your first day of access
- Employee responsibilities in Workday
- Information at a glance

WORKLETS

All employees will have a standard set of Worklets on their Homepage. Worklets are essentially quick access buttons to common tasks. Worklet accessibility is based upon the security role(s) associated with your job. You may add additional Worklets available to your security role by clicking on the gear icon in the upper right corner of the Homepage: ⚙

Icon	Function	Description
Inbox	Inbox: Notification:	View and respond to messages and take action on tasks. *Note: Your responsibility to respond to or complete an activity depends upon each inbox notification.*
Absence	Absence	Request absence, correct an absence and view your available balance as of that day. You can also access ePayroll.
Career	Career	Find new Oregon state government jobs, view your active applications submitted in Workday, update your skills and experience, see mentorships and start a career development plan.
Personal Information & Documents	Personal Information & Documents	Update your contact, ethnicity, disability, military status, photo and emergency contact information.
Safety	Safety	Initiate the process of submitting a safety incident report and access other safety-related information.
Favorites	Favorites	Use this to set up a favorite view of tasks or reports. Type "manage favorites" in the search bar to learn how, or click on the gear in the top right.

WHAT TO DO ON YOUR FIRST DAY OF ACCESS

Review your Personal Information to ensure it is accurate. Click on the "Personal Information & Documents" Worklet on your Workday Homepage. View the information displayed and select "View User Profile" to view additional information. Confirm your information in Workday is correct:

- Team – Is your Manager correct? If not, let your manager know.
- Contact – Review your home and work information; edit if needed.
- Emergency Contact – Enter your emergency contact details.
- Compensation – Review your salary and any allowances you receive.
- Time Off* – Review your time off balances. This information is loaded into Workday from the Oregon State Payroll Application (OSPA) on a monthly basis.
- Explore Workday – Lastly, feel free to view all that is available to you in Workday as an employee with Oregon state government!

EMPLOYEE RESPONSIBILITIES IN WORKDAY

On and after your first day in Workday, you will be responsible for the following Workday tasks:

- Updating personal data changes
    - o Personal information (e.g., legal or preferred name and home address)
    - o Contact information (e.g., home address, phone number, personal e-mail or alternate business contact information)
    - o Emergency contact information
    - o Licenses
- Maintaining your professional profile (i.e., your "Career" tab)
    - o Education
    - o Professional affiliations
    - o Certifications
    - o Work history
    - o Career and job interests
    - o Languages spoken
- Setting and updating individual career goals
- Completing a self-review for the annual performance review process
- Requesting time off*

INFORMATION AT A GLANCE

Workday provides one place for you to easily review and manage your worker profile. You will be able to see the following tabs and subtabs within your profile:

- Summary – Job details, education and job history.
- Overview – Service dates, support roles, timeline, worker history and manager history.
- Personal -- Legal or preferred name, licenses and identifications.
- Compensation – Compensation and pay history.
- Contact – Emergency contact information, organizations and support roles.
- Performance – Performance reviews, goals and development plans.
- Career – Training records, work experience, job interests and internal job applications/statuses.
- Time Off* – Time off balance and previous time off requests.

Does not apply to employees whose agencies are not using Workday to request leave time.