Workday: Frequently Asked Questions (FAQ)

Human Resources

This document is intended for Scholastic employees, at all levels, to be able to quickly answer questions they may have as they begin to use the Workday system.
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General Questions

1. **What is Workday?**

   Workday is Scholastic’s Human Resource and Payroll system (replaced PeopleSoft). Workday is available to all employees to review their employee information, search the directory for other Scholastic employees, navigate the organization, and update personal information, including withholdings and direct deposit information.

2. **What does Workday help me do?**

   Workday is the Human Resources and Payroll system used by Scholastic. Workday will help manage HR processes such as hiring, promotion, paid or seasonal leaves of absence, and various other processes. Workday will also help manage compensation, benefits, and many other Human Resources related actions. Workday is Scholastic’s Payroll system used for processing employee paychecks. Employees can use Workday to manage direct deposit and tax withholding elections; and to find payslips from July 2012 forward (employees may find paycheck history prior to July 2012 via the HR Portal).

3. **Where do I begin in Workday?**

   You will begin on the Home page in Workday. From this page you can navigate to any other part of the system, and you can access information quickly using the worklets provided. To view an illustration of the Home page, see the section below on Navigating Workday. If you ever need to return to the Home page you can click the Home icon or the Workday Logo.
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*My Workday Account*

4. **How do I login to Workday?**
   Before you can access your data and use the Workday system, you must first sign into your personal account. Per Scholastic Policy, all employees will sign on via [Access@Scholastic](https://access.scholastic.com) using Single Sign-on. Simply choose the “Workday” link at access.scholastic.com.

5. **How do I change my password?**
   Workday is one of several HR systems that uses single-sign on, which allows immediate access from your Access@Scholastic page – there is no need to remember a separate username and password to login to Workday.

6. **How do I change my Workday account preferences?**
   In the top right corner of the Workday screen, find and click the Profile link (click on your name in the upper right corner of the screen). Here you will be able to edit preferences such as: Preferred Start Page, Preferred Display Language, and other Display preferences.
7. **As an employee, how do I navigate the Home page to find the information I need?**

The Home Page is Workday’s one stop shop for employee self-service and information. The Home page is organized as a series of icons (also called worklets). The Home page is pre-set with the most useful employee self-service tasks. Click on the icon to reveal the tasks:

- **Personal Information** – to view or change contact information or other personal information, select this worklet
- **Directory** – provides an easy way to navigate the Scholastic organization to find work contact information
- **Pay** – to view paycheck history and to change withholdings or direct deposit information, select this worklet
- **Performance** – to view or change your performance goals, and to view your performance reviews, select this worklet
8. As a manager, how do I navigate the Home page to find what I need?

The Home Page is available to all managers within Workday. The page is organized with employee self-service topics as well as manager topics. Manager topics provide information about the employees that report to the manager’s organization. The worklets include:

- **My Team** – information for direct reports, org chart and directory information are available from this worklet
  - When a manager selects the name of a member of their team, they can view additional information about that employee
  - Most information can be viewed, downloaded or printed (look for the printer icon in the upper right corner of each screen)

- **Team Performance** – to view and manage employee performance goals, view annual performance reviews, and get feedback about an employee’s performance
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9. How do I view and manage my Inbox in Workday?

Your Inbox is always visible in the top right corner of the blue Workday Header ( ). If you have actions waiting in your Workday Inbox, a number will appear to show how many tasks are waiting for your action. Click on your name (profile) and select Inbox from the drop down Menu. Your Inbox will open with a list of tasks on the left, and the details for the selected task in the window to the right. You can work on each task directly from your Inbox. Action buttons will appear for each task to allow you to Approve or Submit a task; you may also follow-up for more information or Deny a task, as appropriate.

From the drop down Menu, you may also select Notifications – to view messages to you that do not require action. Check your Workday Inbox often.

10. How do I navigate the My Workday 2.0 page?

There is a My Workday 2.0 page for those who participate in business processes within Workday, including HR Coordinators, HR Managers, Payroll Partners, Compensation Partners, Division Heads, and others. To get to the My Workday 2.0 page, go to the drop down Menu ( ) by clicking on your name at the top of the screen and selecting ( ) My Workday 2.0. The page is organized by worklet – some worklets will appear on your page, and others can be added for more information by using the Configure icon ( ). For those who work in Workday often, you may configure the My Workday 2.0 to become your landing page when you enter Workday (in place of the Home page). Select My Account from the drop down Menu and scroll down to change Account Preferences.
11. **How do I use the W: Drive?**

The **W: Drive** is a storage drive within Workday that holds the reports you have requested. To get to the **W: Drive**, go to the drop down **Menu** by clicking on your name at the top of the screen and selecting **W: Drive**. From the W: Drive you can also view the **Process Monitor** for any integration or batch transactions you have initiated.

12. **What Workday Documentation is available?**

There are several **Scholastic Job Aids** for how to navigate and use Workday to accomplish tasks. The Job Aids are available from the HR Portal, from a link on Access@Scholastic, and from within Workday. Job Aids are available for how to use Workday self-service, how to process transactions (for HR Professionals), how to complete the Annual Performance Review process, and how to complete the Annual Merit Process. For quick reference, you may add the Job Aids icon to your Home page using the Configure this Page **function**.

In addition to Scholastic Job Aids, there is general Workday information available – from the drop down **Menu**, select **Documentation** to link to a general Workday documentation webpage.

Scholastic Job Aids have been tailored with the information you will need to complete your Workday tasks. If you have any questions or need to receive a Job Aid, please contact Human Resources or HRIS.

13. **What do I use the Available Actions icon for?**

The **Available Actions** icon appears next to an employee’s name, organization name or other object whenever there are possible actions that can be taken. Available Actions is most often used to find more information about an employee. Click on the icon next to a person’s name to view their work contact information, location, and other public information. If you are their manager, you may also view their emergency contact information and performance information.
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14. How do I search for something in Workday?

The Search function allows you to find information within Workday. The Search box is always visible in the blue Workday header on the left side. As you type your request into the Search Box, Workday will return possible selections based on Common searches. You may also select a specific category for your search (to narrow your selection), such as People, Processes, or Organizations.

Using Workday – For All Employees

15. How do I change my home address, mailing address, and personal contact information?

From the Personal Information icon on the Home Page, you may change or view your employee profile information. Listed under the column heading Change you will find information or actions that can be taken. The Personal Information icon allows you to (through self-service) change your home address, add or change your mailing address (if different than your home address), add or change your personal phone numbers and personal email address. Click on the Contact Information link to submit a change. Be sure to click Submit when your changes are completed. From this link you are able to view your work contact information; changes to your work information must be submitted through Human Resources.

16. How do I change my Marital Status in Workday?

From the Personal Information icon on the Home Page, you may change or view your employee profile information. Listed under the column heading Change you will find information or actions that can be taken. The Personal Information icon allows you to (through self-service) change your Marital Status. Click on the Marital Status link to submit a change. Be sure to click Submit when your changes are completed.
17. **How do I change my Emergency Contact information?**

From the Personal Information icon on the Home Page, you may change or view your employee profile information. Listed under the column heading Change you will find information or actions that can be taken. The **Personal Information** icon allows you to (through self-service) add or change your Emergency Contacts. Click on the **Emergency Contacts** link to submit a change. Be sure to click Submit when your changes are completed.

18. **How do I manage my Direct Deposit or Payroll Withholding information?**

The Pay icon provides valuable payroll-related information. You can manage your tax withholding elections, your direct deposit information and your payslips. All information can be viewed, downloaded or printed, as needed.

**Payment Elections** – complete or edit your Direct Deposit information
- To add new direct deposit information, click Add Elections
- You may select Payment Type of Direct Deposit or Check
- Instructions are provided for how to complete the direct deposit information
- More than one account may be added

**Withholding Elections** – complete or edit your Federal, State and Local income tax elections (Form W-4)
- Home Address and Social Security Number are shown at the top of the page (privacy is maintained for all personal information)
- Complete your Federal Withholding Elections by clicking on the button at the bottom of the page
- Separate Tabs for State Elections and Local Elections (submit your State and Local withholding forms to Payroll; and external link to required forms is available on the Pay icon)
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19. How do I view my Payslips?
From the Pay icon you may view, download or print your payslip details. Click on the Payslips link to view a spreadsheet listing of all payslips which can be downloaded or printed. Click on a specific payroll date to view the details of a single payslip which can be downloaded or printed.

To change whether to receive payslips by mail or electronically, click on the button labeled “Change Payslip Printing Elections.”

20. How do I change my Legal or Preferred Name in Workday?
From the Personal Information icon, you can submit a legal name change. Listed under the column heading Change, select Legal Name. After submitting a Legal Name change, you will receive a To Do in your Workday Inbox to provide your new Social Security Identification as evidence of your new legal name. Complete the To Do, by visiting your Human Resources representative, and click Submit on the action when completed.

You can also add or change your preferred name, which will be changed immediately. Listed under the column heading Change, select Preferred Name. A preferred name change does not change the legal name on your employee profile.

When changes are made to your Employee profile, click Submit to save the changes. Click Save for Later to hold changes until a later time. Click Cancel to erase changes.

21. How do I view my Performance Goals and Annual Performance Reviews in Workday?
The Annual Performance Review process is managed within Workday. For Scholastic Book Fairs, the Mid-Year Performance Review process is also managed within Workday. To view or manage your performance goals and to view your performance reviews, go to the Performance icon on the Home page:

- Performance Goals – you can manage your goals throughout the year, using the worklet link Goals, and your goals will be pulled into your Annual Performance Review for further editing.
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- **Performance Reviews** – are available to view, download and print from the Reviews link. Your performance reviews are also listed under the heading My Reviews. Click on the name of the review to view, download or print a completed review. The reviews listed here are those since the 2012-2013 Annual Performance Review period.
  - Tip: for performance reviews completed prior to 2012-13, select Worker History and View Worker Document File from “Available Actions.”

22. **How do I view and manage my Benefits?**

Please continue to manage your benefits elections via the HR Portal, and the links to Scholastic Benefit Service Providers for health and welfare benefits, 401K, and stock plans.

23. **How do I find the name of my HR Support person?**

Each person can click on their own name and they will see their profile within Workday. Go to the tab labeled Support Roles to view the people in Benefits, Compensation, Human Resources and Payroll who are assigned for your support.

24. **How do I find directory and org chart information in Workday?**

The Directory icon provides links to each of your

- Co-workers (all others who report to the same manager) by name which includes each co-worker’s work address, work email and work phone number

Within the Directory icon there are several links to view the Scholastic organization, including:

- Org Chart – structural view of the Scholastic organization, with or without open positions shown
- Organization Directory – spreadsheet view that can be downloaded
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- Management Chain – your manager, their manager, and the complete reporting chain to the President of Scholastic

Using Workday – For Managers

25. How do I view my Direct Reports in Workday?

As a manager, you have access to more icons on the Home page within Workday. When you click on the My Team icon you will see a list of information available for you to view. Each item is a link to that information. You will also see the names of the employees on your team. Click on a person’s name or use the Available Actions icon to see information from an employee’s profile. A manager is permitted to see public information, such as work phone number and address, and the following information specific to your role:

- Emergency Contacts – one or more names and phone numbers to contact in the event of an emergency (employees manage this information through self-service)

- Performance Goals and Performance Reviews – performance goals and completed annual performance reviews

26. What reports are available to me?

Many of the links within the Home page icons available to managers are internal Workday reports that are immediately accessible. You may also search for reports by name using the Search box – it is best to refine your search by selecting the Reports search category. There are many standard reports available in Workday, and there are custom reports that may be created for you by HRIS or by Human Resources. Please contact Human Resources if there is any information you need that you have not found in Workday.

27. How do I download information and reports in Workday?

Whenever you request a listing of information in Workday, a report is prepared and shown within the Workday system. Information shown in Workday is also available to download and to print. From any page in Workday, look for the Excel icon (_excel_图标) and the Print icon (_print_图标) in the upper right corner to request the information to be downloaded and/or printed.
28. **How will I know when a Workday task or action is waiting for me?**

When a process requires you to complete a task, the action required will be placed in your inbox. From within your Workday Inbox, you can open the task and complete the step as indicated. If you share a process role with someone else, the same task will appear for both people, and either person can complete the task. It is important to communicate among those you share a Workday role with to ensure there is no confusion, for example HR Coordinators by Division.

Workday is the place to manage tasks related to your role as a Manager. When a task is awaiting your action it will be placed in your Workday Inbox. You may be asked to visit Workday to handle one or more tasks, for example:

- Approve Performance Goal changes made by employees on your team
- Complete Annual Performance Reviews for members of your team
- Complete steps as part of the Annual Merit Review process
- Approve changes to your organization
- Your employee profile, your payroll elections, and your performance goals/reviews.

If a task is waiting for your action, the number of actions will appear next to your name in the upper right corner of the screen ( ). To perform a task, click on the drop down Menu and open your Inbox. Select each task, in turn, to view the request. The actions offered will vary by task, typically they are:

- Approve
- Deny
- Submit
- Send Back (specify the name of the person)
- Close (Save for Later)
29. I will be on vacation, leave, etc. How do I delegate/route Inbox tasks to someone else?
If you plan to be on vacation or leave, and you are the only person handling Workday tasks for your group, please notify HRIS to reassign your tasks to the person covering for you.

30. How do I use Favorites?
Tasks and reports can be tagged as Favorites using the star icon. Once tagged, you can filter your Inbox to show Favorites – so you can handle these actions first. Once added to your Favorites, the Tasks/Reports, Custom Reports or Favorite Business Objects you requested will be available on the Favorites page (from the Menu icon).