

Facilitator Guide

Course Title	Workday In-Person Training Series – Week 1
Delivery Method	In-person
Duration	2 hours
Course Description	UW–Madison is offering a three-part in-person training series to help employees learn how to use Workday on a computer and smart phone
Course Objectives	<ul style="list-style-type: none"> • Log into Workday on a phone or computer • Navigate the home screen • Update personal information
Course Agenda	<ul style="list-style-type: none"> • Introduction • Overview of Workday • Logging into Workday • Tour of the Homepage • How to Update Personal Information • Resources and Next Steps
Primary Audience	Employees who do not use a computer in their work.
Recommended Pre-Requisites	N/A
Supplemental Material	Participant Guide – Week 1

#	Slide Title	Facilitator Notes
Introduction		
Timing for the Section:		
1		
2		
3		
4	Workday In-Person Training Series	<p>Welcome to the Workday In-Person Training Series. My name is [name] and I'll be facilitating today's training. I work at [your unit] as a [your job title].</p> <p>With us here today to help are [introduce helpers]. [Allow helpers to introduce themselves – their names, where they work, etc].</p>

		<p>If you haven't yet signed in, we will bring the sign-in sheet to you, so you can raise your hand.</p>
5	What to Expect	<p>So, let's talk about what you can expect to do during our time together.</p> <p>We will...</p> <ul style="list-style-type: none"> • review how to complete tasks in Workday • give you time to practice completing tasks • You'll see the computers in front of you, and we will walk through using those here in a little bit. <p>Some things we will not be able to do today...</p> <ul style="list-style-type: none"> • answer personal employee questions <ul style="list-style-type: none"> ○ If you do have questions about your job or any personal details, we cannot answer those today. We would encourage you to talk to your supervisor or your local HR staff to help you with those personal questions. • address department-specific policies or procedures <ul style="list-style-type: none"> ○ We know that different departments and units have different policies and procedures, so if you have a question about how something will work in your own department, you should talk to your supervisor.
6	Training Series Overview	<p>So let's talk about some things we will review over the next few weeks. We will review how to</p> <ul style="list-style-type: none"> • Log into Workday

		<ul style="list-style-type: none"> • View paystips and leave balances • Update tax forms (W-2, W-4) and address • How to apply for internal positions • How to get help
7	Learning Objectives	<p>Today specifically, here are our learning objectives. So by the end of today's session, you will know how to:</p> <ul style="list-style-type: none"> • Log into Workday on a phone or computer • View and print a payslip • Review your time off balance • Request time off
8	Working Agreements	<p>As we present information today and allow you time to practice, we have some working agreements that we ask that you follow, so let's look at those.</p> <p>Stay engaged – Listen during the presentation and use the work time to practice and explore.</p> <ul style="list-style-type: none"> - This will help you understand what to do during the practice time, so make sure you are listening and following along. <p>Ask questions – Raise your hand if you have a question or need help during the work time.</p> <p>Don't get too far ahead – Stay with the rest of the group so you don't get lost.</p> <ul style="list-style-type: none"> - Try not to get off task because it may be difficult for you to get caught back up.

		<p>We are working in a group space –You are welcome to ask your peers for assistance if you are comfortable, or you can raise your hand if you want a helper to come around and assist you.</p> <p>If you think you can agree to these, give us a thumbs up.</p>
9	<p>Engagement Activity - Partner Discussion</p> <p>Timing: 10 minutes</p> <ul style="list-style-type: none"> • 2 minutes for instructions • 5 minutes for participants to discuss • 3 minutes for whole group discussion 	<p>Before we start our overview of the new system, I’m curious to hear what you all have heard about Workday. So, please turn to someone near you, introduce yourself (your name and where you work), and discuss these two questions:</p> <ol style="list-style-type: none"> 1. What have you heard about Workday? 2. What do you think you can use Workday for? <p>*Note to Facilitator: Give the participants about 5 minutes to chat. When they are done, ask for a few volunteers to share what they have heard, or what their prior knowledge of Workday is.</p> <p>*Tip: Keep in mind what the group says so you can connect to their ideas in the next section.</p>
<p>Overview of Workday</p> <p>Timing for Section:</p>		
10	Overview of Workday	First, we will review what Workday is and what you will use it for.

		<p>*Tip: Try connecting some of the information in this section to what the participants shared from the partner discussion. This will help keep them engaged.</p>
11	What is Workday?	<p>So What is Workday?</p> <ul style="list-style-type: none"> • Workday is the new system all Universities of Wisconsin employees use to do employment-related tasks • Workday is a website and has an optional mobile app
12	What can I do in Workday?	<p>There is a lot that an employee can do in Workday! Some of those things are listed here:</p> <ul style="list-style-type: none"> • Submit time off • Update contact information, direct deposit, federal and state tax elections • View and print pay slips • View benefits information <p>Being able to do all of this can empower you as an employee to have direct access to important information about your employment.</p> <p>For example, a payslip may be required if you apply for a loan or for proof of income for renting an apartment. Also, Benefits information tells you what you chose for health insurance options. You can access that information yourself, whenever you'd like.</p>

		In this training you will learn how to access this information at any time (including on a mobile device).
13	Workday	<p>There are many advantages of Workday. For an employee, a few key ones are</p> <ul style="list-style-type: none"> • Having access to the system using the mobile app • There is a search bar to help you find what you need • You can make changes to your personal information. <p>I think a huge benefit of Workday is that you can get to all of your employment information from one space. You can even use your phone to get access to it, which is nice.</p> <p>Throughout today and the next two weeks, we will highlight the key features that you may use regularly, and give you time to explore and practice playing in the system.</p> <p>So let's get started!</p>
<p>Logging into Workday Timing for Section:</p>		
14	Logging into Workday	<p>First, we are going to look at the ways that you can log into Workday.</p> <p>You have two options: from your smart phone with the Workday mobile app or online using a computer or web browser.</p>

		<p>We are going to review all of the steps to download the mobile app, and then we will look at how you can log into Workday on a computer. After that, we will give you all time to get logged into Workday, and we will walk around and help as needed.</p>
15	What You Will Need	<p>For today, here are the things you will need.</p> <ul style="list-style-type: none"> • To get logged into Workday, you will need a computer or smartphone. • You will also need your personal NetID and password. • You will then have to authenticate using Duo, so you'll either need your smartphone, or your duo device to authenticate.
16	<p>Installing the Workday Mobile App</p> <p>Engagement: Allow users to find the Workday app and install it while you go over the rest of the instructions</p>	<p>If you'd like to download the mobile app, here are the instructions to do so. This is optional, and there is no expectation you do this, but if you use your phone everyday, it might be easier than logging into a computer.</p> <p>If you have your phone with you and want to download the app, go ahead and pull it out now. We can let the app download while we look at the rest of the instructions.</p> <ol style="list-style-type: none"> 1. On your device, go to the Apple App Store or Google Play Store 2. Search for and select Workday in the search field. <ul style="list-style-type: none"> - Look for the W logo to know that you have the right app. 3. Select Install or Get and accept application permissions, if necessary

17	Installing the Workday Mobile App	<p>4. Open the Workday Mobile app</p> <p>5. Tap Log in</p> <p>6. Enter the organization ID in the Your Organization ID field, or scan the QR code UW-Madison's Organization ID is: XXXXXXXXX (to come)</p>
18	Installing the Workday Mobile App	<p>7. Next, you will tap Single Sign On</p>
19	Installing the Workday Mobile App	<p>That will take you to this screen, where you need to:</p> <p>8. select UW-Madison from the dropdown menu</p> <p>9. Tap Go</p>
20	Installing the Workday Mobile App	<p>Here is where you will need to enter your NetID and password.</p> <p>10. Type in your NetID and Password</p> <p>11. Tap Log In</p>
21	Installing the Workday Mobile App	<p>12. You will then need to authenticate, so either enter the verification code on your phone, or tap "other options" and enter your Duo mobile passcode.</p> <p>After this step, you should be logged into Workday on your phone.</p>
22	Getting to MyUW	<p>You can also use a computer to access Workday. You can use any web browser, but for today and the other sessions, we will be using Chrome. You'll see that your computer is already set up to use Chrome.</p>
23	Visit MyUW	<p>Your computer is set up to bring you right to MyUW, but we are going to review the all of the steps in case you want to access it on your own outside of today's session.</p>

		<ol style="list-style-type: none"> 1. First, you'll open your internet browser, 2. Then, type in my.wisc.edu into the address bar. 3. And then hit enter
24	Logging in	Next you will have to enter your NetID and password.
25	Duo Authentication	Then you'll have to authenticate. So enter the verification code on your smartphone, or tap "other options" and enter your Duo mobile passcode.
26	MyUW	<p>Once you get logged into MYUW, the Workday app will be automatically added to your MyUW website. The location of the Workday tile may be at the top, or somewhere else.</p> <ol style="list-style-type: none"> 8. Find the Workday app, 9. Click "Launch full app" and that will get you logged into Workday.
27	<p>Work Time-Log into Workday</p> <p>Timing: 10-15 minutes</p> <p>Tip: Walk around the room, assisting anyone who asks for help or seems to be having issues.</p>	<p>Now we are going to take some time to get you all logged into Workday. On the screen, you will see the tasks you need to complete.</p> <ul style="list-style-type: none"> • The first is optional, but if you use your phone more often than a computer, you may choose to download the Workday mobile app. • The second task is to get logged into Workday, either on your phone or the computer in front of you. <ul style="list-style-type: none"> • If you think you need help, just raise your hand and someone will be around to help. • If you finish early, ask anyone around you if they need help.

		We will be taking a break after this, so once you finish the tasks, you can take your break, but try not to distract those around you who are still working.
28	<p>Break Time</p> <p>Timing: 5 minutes</p> <p>*Tip: Write on a whiteboard the time everyone should be back in the room for the next section.</p>	<p>*Note: Give no more than 10 minutes. If the activity took the group the full time, give them 10 minutes. If it didn't take the whole time and people were sitting around, give a 5-minute break.</p>
<p>Tour of the Home Page Timing for Section:</p>		
29	Tour of the Home Page	<p>Now that you are logged into Workday, we will give you a brief tour of the home page.</p> <p>We will look at some important spots for you to view to help you use the new system. Then, we will give you some time to explore and complete some actions to practice. During this time, we'd appreciate your attention so you can learn about the basics of the system.</p>
30	Home Page – Mobile App	If you are using your smartphone, this is what you should see on the homepage. It is a bit more condensed than the homepage on the computer screen, but you have the same access to view and do things on your smartphone.

31	Home Page - Computer	<p>The home page is what you will see every time you log into Workday. Here is what you should see when on the computer.</p> <p>There are a lot of buttons that will take you to different places in Workday, so we will review some of the most important ones. The smartphone buttons should do the same things, but they may look different.</p>
32	Menu and home	<p>The first two areas we will look at are in the top left corner of the computer screen.</p> <p>The first button we want to point out is the Wisconsin logo. This button will bring you back to this homepage from anywhere in Workday. So if you're exploring, and want to return home, you can click that button.</p> <p>The next button is the "Menu" button. This will open the Global Navigation Menu for quick access to the different apps in Workday, like the Jobs Hub, or the Benefits and Pay Hub.</p>
33	Menu and home – Mobile App	<p>In the mobile app, those buttons are a bit different</p> <p>The home button at the bottom will always be there, and you can tap it to return the homepage at anytime.</p> <p>The menu button however is not a button, but is listed at the bottom of the screen.</p>

34	Global navigation – Mobile app	To see all the Apps available to you from the Global Navigation Menu, tap the Apps button. We will review some important apps a bit later.
35	Search bar	The next feature we want to highlight is the search bar. If you want to perform a task or look something up, use the search bar just like you would with Google or a different search engine.
36	Search bar – Mobile app	The search feature is also available on the mobile app, but it is on the bottom bar and is called “Find” with the magnifying glass.
37	Search bar example	For example, if you want to find your payslip, you can type “pay” and the search feature will give you options. One of those is “My Payslips,” which will bring you directly to your payslips. We will look at this a bit more in the next section.
38	Notifications	The next button we want to highlight is the notifications button, which is the bell icon. This works like any other notification button. If you have a notification, a red circle with a number will pop up, and you can click the bell icon to read the notification. Notifications may include information or reminders.
39	Notifications – Mobile app	In the mobile app, you’ll see the bell icon in the upper right corner and can see your notification by tapping on it.
40	My tasks	<p>Next up is the “My tasks” button. In the upper right corner next to the notification bell, you’ll see a button that looks like a drawer. Click that to see your tasks.</p> <p>Tasks might include courses that you need to take for your job or messages from your local HR professional.</p>

41	My tasks – Mobile app	In the mobile app, the “My tasks” button is located at the bottom bar.
42	Profile	Next up is the Profile button. This is in the top right corner, next to the notification bell and Tasks button. This may also be called the Worker Profile. This space includes information about your own account
43	Profile – Mobile app	In the mobile app, the profile icon is on the bottom bar, farthest to the right.
44	Awaiting your action	Now let’s look at some larger features of the homepage. The first is the “Awaiting your Action” space. This space shows off the top three current tasks assigned to you. These could be courses assigned to you or other tasks you need to complete for your job.
45	Timely suggestions	The other area you will see on the homepage is the “Timely suggestions” space. This space will give you updates on active items, including required actions, or recommended tasks, like updating your emergency contacts, or reviewing upcoming time off requests.
46	Timely suggestions – Mobile app	In the mobile app, you’ll see the same timely suggestions in a smaller space.
47	Quick tasks	Another space to note is the “Quick tasks.” Quick tasks may vary from person to person, and they give you easy access to the top three tasks you perform regularly. So if I’m reviewing my Payslip frequently, the “My Payslips” button will show up in the Quick tasks space.

48	Your top apps	<p>The final space we want to highlight is “Your Top Apps.” Apps is short for applications. On the computer, this space shows off your top 4 apps or functions you use the most in Workday. ,You can customize which apps show up here.</p> <p>In the mobile app, it will show which of the apps you regularly use and automatically change based on what you use.</p>
49	Questions?	
Update Personal Information Timing for Section:		
50	How to Update Personal Information	<p>Next up we are going to look at how to update your personal information in Workday. This includes your name, home address, phone number, and your personal email address. Again, the personal information that you previously had entered in the old system should have transferred over, so no action is needed from you. But in case you want to update your information, we will review how to do so, then give you time to review and make any changes if you’d like.</p> <p>It is important to note that if you do have a legal name change due to a marriage or divorce you should contact your local HR as this is a qualifying life event. Workday will become the “source of truth” for your name. This means that if you update your name in Workday that is how it will appear in other technology systems used at the university (such as Microsoft Teams or Zoom for example).</p>
51	Update personal information	<p>Let’s look at the steps to update your personal information.</p> <ol style="list-style-type: none"> 1. From the Workday Home Page, click Person icon in the top right corner. This is the Worker Profile.
52	Update personal information	<p>From there, a pop up will appear, and you need to</p> <ol style="list-style-type: none"> 2. Click View Profile

53	Update personal information	To see your personal information, 3. Click Contact from the red bar on the left side of the screen. It will probably be near the bottom of your options.
54	Update personal information	If you don't see the Contact option, click More and it will show up for you to click.
55	Update personal information	The page that will open up will show your home contact information, personal phone number, and your personal email address, along with your work contact information. 4. To edit your information, select the Edit button at the top of the page. 5. Then click Change My Home Contact Information
56	Update personal information	From the Change My Home Contact Information screen, you have some options. 6. To add a new address, phone number or personal email address, click the Add button. You would use this feature if you had two personal phone numbers (like a landline and a cell phone). If you'd like to edit an existing address, phone number, or personal email, click the pencil icon to edit the information that is there.
57	Update personal information	7. To save the information on the address, phone number, or personal email address, click the Checkmark. 8. To Submit all of your changes to your personal information, click the Submit button. You can also choose to Save for Later or Cancel. None of your updates will take effect until you hit the Submit button.
58	Update personal information	To confirm that you have submitted successfully, a popup will appear that says you have submitted.
59	Update personal information (Mobile app)	If you'd like to update your personal information in the mobile app, you also have the opportunity to do so. Most of the steps are the same, but what you click on might be different. 1. First, tap the Profile icon in the bottom right corner of the screen. 2. Then, tap the pencil icon next to your name.

		Please remember that if you have a name change due to a marriage or divorce, you should contact your local HR as it may impact your benefits.
60	Update personal information (Mobile app)	To update your personal information from the app, 3. tap Change My Home Contact Information. 4. You will then see your address, phone number, and personal email. To update any of those, tap the pencil icon.
61	Update personal information (Mobile app)	5. Finally, tap Submit once you have made your changes.
62	<p>Engagement Activity - Practice: Review personal information</p> <p>Timing: 10-15 minutes</p> <ul style="list-style-type: none"> • 3 minutes for instructions • 10-12 minutes for learners to practice and explore 	<p>Now let's take some time to practice getting to those places that we just looked at. The tasks we have on the screen are just to help you review and explore Workday. You do not need to make any updates or changes to your information, but we want to give you an opportunity to get into Workday and review.</p> <ol style="list-style-type: none"> 1. Go to your Profile and click Contact to make sure your Home Contact Information is correct: <ol style="list-style-type: none"> 1. Address, Phone Number, Email Address <p>Emergency Contacts</p>
<p>Resources and Next Steps</p> <p>Timing for Section:</p>		
63	Resources and Next Steps	Before we end our session, I wanted to highlight a couple of resources to help you continue your learning, and some next steps.
64	Log off	Before you leave, please log off your computer. Click on the time at the bottom right corner of your screen.
65	Log off	Click on the power icon. Select restart. The screen will turn white and then turn off. You are now logged out of the computer and the device is ready for the next person to use it.
66	Materials and Resources	A great place for you to go for help is the HR Guides for Employees. Whether you're looking for guidance, training, or answers to common questions, this directory can help you navigate HR functions in Workday.

67	Next Steps	<p>Here are some next steps for you:</p> <ul style="list-style-type: none">• Make sure you signed in at the front of the room• Confirm the date, time, and location of your next session<ul style="list-style-type: none">○ Contact your supervisor for help• Practice logging into Workday
68	Thank You!	<p>Thanks for being here today! If you have any questions or need support, contact your supervisor.</p>