EMPLOYEE JOB AID

GETTING STARTED IN WORKDAY

This job aid covers the basics to get started using Workday and the features that will help you use the system. Workday’s proven processes simplify the way we manage our personal and professional information. Using standard processes, you can view and edit your information. You initiate changes directly in the system and, when necessary, Workday sends the request for appropriate approval – all online, all in one place.

NOTE: Workday is optimized for Internet Explorer 11, Firefox, and Chrome.

Topics include:
- Description of Key Icons and How to Use Them
- Workday Worklets
- Using your Workday Inbox
- Your Profile Page
- Workday Search Bar
- Managing the Favorites Worklet
- Employee Responsibilities in Workday

KEY ICONS

Workday makes it easier for you to track activities, search for answers and fill in responses. Below are some of the key icons you will see and how to use them.

<table>
<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="home.png" alt="Home Icon" /></td>
<td>Home</td>
<td>This is your home page on Workday, which you will see upon logging in. To return to this page, click the Workday icon or home icon to take you back to the home page.</td>
</tr>
<tr>
<td><img src="search.png" alt="Search Icon" /></td>
<td>Search</td>
<td>Quickly Search for people and tasks; when you start to type a word, choices will begin to auto populate. You can search for an employee by name or employee number. See the section “Workday Search Bar” for more details.</td>
</tr>
<tr>
<td><img src="actions.png" alt="Actions Icon" /></td>
<td>Actions</td>
<td>Click this icon to view a list of actions you can take</td>
</tr>
<tr>
<td><img src="asterisk.png" alt="Red Asterisk Icon" /></td>
<td>Red Asterisk</td>
<td>Indicates a required field that you must complete or you will receive an error message. In addition to the steps required with a red asterisk, Booz Allen may require other fields to be filled out. These will be noted in the job aid. You are encouraged to follow</td>
</tr>
</tbody>
</table>
the step-by-step job aids or Guided Editor to understand what the fields are for and what information you should provide

<table>
<thead>
<tr>
<th>Prompt</th>
<th>Icon that resembles a checklist; click to expand a box that will contain a dropdown list of options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gear</td>
<td>Click this icon to customize your Workday landing pages, and to add or remove Worklets and see the Worklet descriptions</td>
</tr>
<tr>
<td>My Account</td>
<td>This icon in the upper right corner of the page will display your photo next to your name and employee ID. Left-clicking on it will allow you to get to your Inbox, Notifications, Account, etc. Right-clicking on it will allow you to open a new tab, copy a URL or text, print or export to Excel. To view your profile, click on your name and select View Profile.</td>
</tr>
</tbody>
</table>

WORKDAY WORKLETS

Each icon below represents a worklet, which is a starting place for you to view information and initiate tasks. Depending on your role, responsibilities and location, your Home Page will include worklets specific to your needs. Some of these are shown below. You may also add additional worklets by clicking on the gear in the upper right corner of the Home Page.

<table>
<thead>
<tr>
<th>WORKLET</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Job Aids and Videos | Connects you with job aids and videos to help you complete key processes in Workday. When you click on this worklet, you will have the option to link to: | - Employee and Manager Job Aids and Videos (Available Outside the Network).  
  - Employee, Manager and HR Community Job Aids (hosted on the Workday Zone Page within the firewall). |
<p>| Inbox | View and respond to messages and tasks. You can add this Worklet to your Home Page by clicking on the Gear on the upper right corner of the Home page. (See more information below.) |</p>
<table>
<thead>
<tr>
<th>Worklet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information</td>
<td>View and make changes to your name, address, emergency contacts and other personal information. You can also click “About Me” to get to your profile page with all your work and personal information in one place.</td>
</tr>
<tr>
<td>Benefits</td>
<td>View your benefits and make changes to your benefit elections due to a life event change</td>
</tr>
<tr>
<td>Pay</td>
<td>View your expense payment elections and your pay history</td>
</tr>
<tr>
<td>Time Off</td>
<td>View your Time Off balance and initiate a request for a Leave of absence or a return form a leave of absence</td>
</tr>
<tr>
<td>Favorites</td>
<td>Use this to set up a favorite view of tasks, reports or custom reports. Type “Manage favorites” in the search bar to learn how, or click on the gear. (refer to Managing the Favorites Worklet section for more information)</td>
</tr>
<tr>
<td>Directory</td>
<td>View a directory of workers, locations and organizations, or search for an employee by name</td>
</tr>
<tr>
<td>Performance</td>
<td>Add or edit goals, request or give feedback and complete self-review</td>
</tr>
<tr>
<td>My Team</td>
<td>View your team, org charts. Managers (with at least one direct report) can view direct reports and take actions (e.g., Job Change, Location Change)</td>
</tr>
<tr>
<td>Career</td>
<td>Find new jobs, view your active applications, refer a candidate, and see matrices</td>
</tr>
<tr>
<td>Appreciation</td>
<td>Connects you to the Living Our Values Every Day site. Once in the worklet, click “Appreciation” to nominate your colleagues and “appreciate” their efforts. (Note: Contractors are not able to view this worklet)</td>
</tr>
</tbody>
</table>
**Discounts**

This icon will provide access to the largest employee discount marketplace. On BenefitHub, you will find discounts on restaurants, tickets, electronics, travel, hotels, and more.

---

**USING YOUR WORKDAY INBOX**

Navigate to your Inbox either by clicking on the Inbox worklet on your home page, or by clicking on your Picture or cloud icon in the top right corner of your screen and scrolling down to the Inbox link. Open your Inbox to view all your pending actions and notifications.

Whenever you want to see an action you’ve completed, you can view them up to 30 days afterwards in the archive folder in your inbox. To view older items, you can click the down arrow and select View More Processes to run a report.

When completing actions in your inbox, make sure to click the green button for your inbox to mark it as complete, and move to your archive.

**NOTE:**

- There are filters within your inbox to easily sort notifications. Click into the Actions tab, and look through the options under Viewing and Sort By.
• Notifications in Workday cannot be deleted. To curate the notifications, you see in your inbox, choose from the filters below.
  o You can also add a custom filter to sort for common tasks and processes by selecting Edit Filters.
• If you cannot find something in your Inbox, ensure that you are selecting All in the Viewing tab. Completed tasks and read notifications will be auto-archived.

- Notifications from Workday to Outlook can be controlled by adjusting Preferences in your account.
  o Click on your picture or cloud icon. Select My Account then Change Preferences.
  o Under Background Notification Preferences, select your preference Daily Digest Email or Immediate Email.
  o Repeat the process for each tab: Business Processes, HCM, Recruiting, and System.
The Workday Inbox will fill with actions and notifications from actions in the system. Actions in Workday are items that need action for a process to move forward. Notifications will let you know about various changes, updates, or processes that have happened in the system.

YOUR PROFILE PAGE

Workday provides one place to see all your work and personal information easily.

From your home page, click on the Personal Information worklet and then click on About Me. You can also click on your name and picture on the home page and click on View Profile just under your name.

You will see the following tabs and sub tabs, which you can click on to view your personal and work information:

- **Summary**: View Summary Education, Job History, Feedback, and Job Details
- **Job**: View Professional Profile, Job details, Organizations, Management Chain and RC Code
- **Compensation**: View Compensation and Pay History
- **Benefits**: View and make changes to your benefits, beneficiaries or dependents
- **Pay**: You can view your payment elections and change your elections or accounts
o **Performance** – View or add Firmwide Behaviors and performance expectations, Individual Goals, view Performance reviews, view or request Feedback and view Awards

o **Career** – You can view and add Job Interests, and view employee applications and status, Career interests, Education, Work experiences, Certifications, Job History, Relocation preferences, Clearances and more

o **Personal** – View and edit contact and Emergency Contact information, Name history, Personal Information, and IDs (Government IDs, Passports, and Visas).

o **Overview** – View Service dates, Support Roles, Worker History, Manager History and any attached documents.

On this page you can also click on **Team** at the top of the page and see your organization. You can scroll up to see the reporting line or click on any **employee** to see their public profile, which includes their job information and feedback they have chosen to make public.

**WORKDAY SEARCH BAR**

Workday search has tremendous power, and to use it most effectively, you can change the phrasing, category, and overall preferences to fit your specific role and need. Below outlines some tips and tricks.

**OVERALL TIPS:**

- Choosing the category “All of Workday” after searching will return a lot of values and might not be useful for your needs.
- You can change the default Search Preferences.
  - First, from the homepage, click on your picture. Choose **My Account**.
  - From there, click **Change Preferences**.
MANAGING THE FAVORITES WORKLET

Workday allows the user to favorite custom reports based on preference or daily usage. This job aid shows how the employee can take advantage of this option for convenient access to his or her most viewed reports. Follow this process to bookmark an important or frequently viewed report, such as Current Benefit Elections, Data Validations, or My Referrals, among others.

1. Click the **Favorites** worklet from your Workday **home page**.
2. In the right-hand corner, click on the **Gear** icon, then **Manage Favorites**.
3. From the **Favorite Custom Reports** drop-down menu, select the report you want to “favorite” and click **OK**.
4. Notice that the report is now included under the **Favorite Custom Reports** column.

![Image of Workday interface with Favorite Custom Reports highlighted]

5. The next time you click on your **Favorites** worklet you’ll see a direct link to the report, shown below.

![Image of Workday interface with direct link to report]

**EMPLOYEE RESPONSIBILITIES IN WORKDAY**

- **UPDATE PERSONAL DATA CHANGES**
  - Personal Information (e.g., legal or preferred name and home address)
  - Contact Information (e.g., home address, phone number, client phone number, personal e-mail, or alternate business contact)
  - Emergency Contact

- **MAINTAIN PROFESSIONAL PROFILE**
  - Education
  - Certifications
  - Languages spoken
  - Disabilities
  - Work history
  - Relocation preferences

- **SET AND UPDATE INDIVIDUAL GOALS**
- **GIVE AND GET FEEDBACK**
- **COMPLETE A SELF-REVIEW FOR THE ANNUAL SUMMARY PROCESS**
- **REQUESTS FOR LEAVE OF ABSENCES**
- **COMPLETE OPEN ENROLLMENT FOR BENEFITS OR CHANGE BENEFITS IN THE EVENT OF A LIFE EVENT CHANGE**