WORKDAY GUIDE FOR

FACULTY

This reference guide provides an overview of common Workday self-service functions and how to seek assistance.

The Workday Enterprise Resource Planning (ERP) system is utilized by UCF to manage its financial and human resources business processes. Workday allows faculty and staff to self-initiate transactions such as reviewing and signing employment agreements, reviewing and/or printing payslips, requesting time off, requesting university travel spend authorizations, etc.

Getting Started

Support Is Always Available!

While the opportunity for self-service is an added benefit, we understand that the learning process can be time-consuming, and we are here to support you! Each college or division has a dedicated Finance Business Center (FBC) and a Human Resources Business Center (HRBC) committed to outstanding customer service. Before you start, please contact your college or division FBC and HRBC to find out how they can help. **Contact your business center**!

Workday Access & Basic Navigation

WORKDAY ACCESS

All UCF employees can access Workday in three different ways: my.ucf.edu, workday.ucf.edu and the Workday mobile application. For each access method, you are required to sign in with your UCF NID and password, as well as complete the Duo Multi-Factor Authentication (MFA).
- Cheatsheet: How to Access (Log in) to Workday

WORKDAY INTRODUCTION

The Workday Essentials online course provides basic information about how to use, navigate and understand the system, such as viewing and managing your personal profile, searching for information, understanding accessibility features, using Workday on mobile devices and more. Learn more at Enroll and Drop a Learning Course.

Video: Getting Started for Faculty - This video demonstrates how to perform basic tasks and actions in Workday, such as reviewing and signing faculty agreements, viewing tenure clock, etc.

NAVIGATING WORKDAY MY TASKS

Similar to an Outlook email inbox, the Workday My Tasks allows employees to take action on in-progress tasks (i.e., completing an expense report, approving time for direct reports, etc.).
- Video: Navigate Workday "My Tasks" Inbox
- Job Aid: View and Filter My Inbox (My Tasks)

STEP 1: CONTACT YOUR BUSINESS CENTER FOR SUPPORT & COLLEGE-SPECIFIC GUIDANCE

STEP 2: ENROLL & COMPLETE WORKDAY ESSENTIALS ONLINE COURSE

STEP 3: REVIEW KNOWLEDGE ARTICLES IN WORKDAY HELP, AS NEEDED

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Workday Access & Basic Navigation (cont.)

MANAGING WORKDAY NOTIFICATIONS

Workday sends notifications to employees' Outlook inbox and the Workday My Tasks/Inbox regarding in-progress tasks. Employees can modify the frequency of Outlook notifications and additional account preferences in Workday (i.e., preferred display language, push notifications and more).

- Job Aid: Notification Preferences
- Job Aid: Setup Account Preferences

USING THE WORKDAY SEARCH BAR

Search for people, tasks, reports and business data using the Workday search bar at the top of the navigation bar located on both the browser version and mobile app.

- Job Aid: Workday Search Overview
- Job Aid: How to Configure Workday Search Results

TOOLS AND NAVIGATION

The Workday homepage and navigation bar provides easy access to tools to complete a variety of tasks.

- Job Aid: Tools and Navigation

NAVIGATE THE WORKDAY PROFILE

The Workday Profile allows all UCF employees to navigate and manage basic information about job information, compensation, pay, education, absence and contact information.

- Video: Manage Your Employee Profile
- Job Aid: Modify Your Personal Information

Help

The **Workday Help** application allows employees to review knowledge articles by category and submit a Help case.

- **Job Aid: How to Navigate Workday Help**
- **Video: How to View Articles in Workday Help**
- **Video: How to Create a Workday Help Case**

Download Now

Use the App!

Most Workday tasks can be completed in the Workday Mobile App.

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Common Workday Self-Service Tasks

[Contact your respective college or division FBC or HRBC](#) for assistance and guidance on common tasks.

Financial Tasks

PI DASHBOARDS IN WORKDAY

Workday's Principal Investigator (PI) Dashboard provides the following information:

- **Helpful Links and Workday Reports**: Links to external websites and Workday reports useful for research personnel such as Huron Research Suite, Office of Research website, etc.
- **Grant Budget Position**: Two separate sections for external and internal grants/awards that display award/grant demographic and financial information.
- **90-Day Closeout Awards**: Two separate sections for external and internal grants/awards that display grants that either have ended or end within the next 90 days.
- [Job Aid: PI Dashboard](#)
- [Video: Add PI Dashboard to Apps Menu](#)

PURCHASES IN WORKDAY

University purchases of goods and services must be made with a UCF Expense Card. Alternatively, punchouts are also available. A "punchout" is a connection to a supplier website within Workday that allows users to shop a supplier's catalog of goods and services.

- [How to Make Purchases in Workday](#)
- [Job Aid: Creation/Approval of Punchout Requisition](#)
- [Job Aid: Amazon Punchout](#)
- [Job Aid Staples Punchout](#)
- [Job Aid: Graybar Punchout](#)

TRAVEL EXPENSE IN WORKDAY

Funding must be allotted for all planned university-related travel via an approved Workday Spend Authorization. This must be completed prior to travel, and is required to be reimbursed for travel-related expenses via a Workday Expense Report. *Please contact your respective college or division FBC for guidance prior to completing a spend authorization or expense report in Workday.*

IMPORTANT NOTE: All international travel MUST be approved by UCF Global first before entering spend authorizations in Workday.

- [Job Aid: Create a Spend Authorization](#)
- [Video: Create a Spend Authorization](#)
- [Job Aid: Create an Expense Report](#)
- [Video: Create an Expense Report](#)
- [Video: Create an Expense Report on Mobile](#)
- [Job Aid: Find/Edit/Cancel Spend Authorizations, Expense Reports and Credit Card Transactions](#)

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Common Workday Self-Service Tasks (cont.)

Human Resources Tasks

NAVIGATING ACADEMIC PROFILE

Review and sign a faculty agreement digitally in Workday.
- Job Aid: Review & Sign Faculty Agreements
- Video: Review & Sign Faculty Agreements

Access tenure clock and academic appointment profile in Workday.
- Job Aid: Navigate Academic Appt Profile
- Job Aid: View Academic Profile

ACCESSING PAYSLIPS

Review or print payslips (paychecks) and additional pay information via the **My Payslips** button located in your **Quick Tasks** section on the Workday homepage.
- Job Aid: View & Print Payslips
- Job Aid: Manage Payroll Options

MANAGING YOUR TIME OFF IN WORKDAY

All salaried, exempt employees must use the Workday Absence application to request time off.
- Job Aid: Manage your Time Off
- Job Aid: Request Leave of Absence
- Job Aid: Retroactively Edit Time Off

MANAGING YOUR TEAM'S TIME OFF OR TIME WORKED

Faculty who oversee UCF employees (i.e., graduate assistants, other faculty, OPS-student workers, etc.) are "managers," and are responsible for reviewing and approving time tracked (entered time) and requested time off as submitted by their direct reports in Workday.

***Note**: "Timekeepers" are designated HR individuals within colleges and HRBCs that are available to assist managers in reviewing and correcting time as needed.* Please contact your HRBC for the name of your college/division's timekeeper.

- Job Aid: Manage your Team's Time Worked (Hourly Employees)
- Job Aid: Manage your Team's Time Off (Salaried Employees)
- Job Aid: Mass Approve Time
- "What is a Timekeeper" FAQ Sheet