

## GETTING STARTED IN WORKDAY@OK – SHARED SERVICES

### THIS GUIDE IS FOR: AGENCY HR STAFF/OMES CENTRAL HR STAFF/SHARED SERVICES

This guide lays out the foundations for Human Resources professionals to get started with Workday@OK and manage human capital for agencies participating in Shared Services.

### BASIC NAVIGATION

Workday@OK is accessible via personal computer or mobile device. Security measures require that users log in via single sign-on credentials before gaining access to their homepage.

- Once logged in to Workday@OK, you will see the **Search** bar at the top of the page which will be useful to quickly look for and navigate to any part of the Workday@OK platform.
- To the top right of the screen, note the icons to check your **notifications**, your **inbox** and your **user profile**.
- Keep in mind that after a period of unuse, the system will prompt you to stay signed in or be logged out.

### REPORTING

Among the many apps useful to HR practitioners in Workday@OK are **Reports**. It is to your advantage to explore this function for data collection and export.



Using the main menu icon at the top left corner, select **Reports**. This will allow you to view reports that are available or that you have queried.

Upon selecting either option, a table populating the reports will appear. You can select the column names or select the filter icon at the top right of the table to apply search filters to the results.

Upon entering a report, you can use the same sort and filter options. You can also export a report by selecting the icons at the top right of the page to export to Excel spreadsheet or PDF format.

### ORGANIZATIONAL CHARTS

Org charts for any user can be viewed from their profile page. Simply use the **Search** bar to directly search for and select an employee's name to dive in.

- Once you are taken to their profile page, select the **Team** icon under their profile picture to enter the org chart view.
- An upward arrow icon for scrolling up the org chart will appear above the chart.
- To scroll down an org chart, select any user who has a yellow bar along the top of their box. This yellow bar indicates they have a supervisory organization under them, whereas a blue bar indicates they do not.



## SUPERVISORY ORGANIZATIONS

Organizational structures of who reports to whom are called **Supervisory Organizations** in Workday@OK. A supervisory organization can be an agency, division, program or unit.

Positions are associated with supervisory organizations and workers are hired into positions associated with a supervisory organization. The two staffing model types in Workday@OK from which a supervisory organization can select to use are **Position** and **Job Management**.

**Position Management** enables control for one position at a time.

- You specify the number of positions to fill, and positions must be approved and opened for a worker to be hired into them.
- It also allows you to see open positions in the org chart for that supervisory organization.
- Use this when you need the ability to define tight controls over job requirements, hiring location and approvals

**Job Management** provides less control in favor of more flexibility.

- You do not need to create a new position each time you want to fill in a job. This method does not require a defined quantity of jobs to fill, and one set of hiring restrictions is defined that will apply to all jobs under the supervisory organization.
- Naturally this method places more reliance on staffing workflows and approvals to control the number of incoming workers.
- Use this when you need to fill a large number of positions that do not require differences in job requirements.

## JOB CATALOG

Before creating job openings or filling positions, you must use the **Job Catalog** to create generic definitions of positions.

Use the **Search** bar to look for **Job Catalog**. This will pull up a table of positions and jobs sorted into columns corresponding to the below tiered criteria.

- A **Job Family Group** is a collection of job families.
- A **Job Family** is a collection of job profiles.
- A **Job Profile** describes basic job characteristics and conditions of employment such as required skills, training or prior work experience.
  - Positions and jobs are sorted into job profiles.