Employee Self-Service Guide

The following describes many of the self-service processes available in Workday.

If you have any questions or encounter any errors contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).

Table of Contents

Workday Mobile (p.1)

Change Workday Search Preferences (p.2)

Configure My Shortcuts (p.3)

Add/Update Contact Information (p.5)

Add/Update Emergency Contact Information (p.6)

Change Your Work Space (Office Location) (p.6)

Update Your Federal Tax Withholding Elections (p.7)

Update Your State Tax Withholding Elections (p.7)

Update Your W-2 Printing Elections (p.7)

View/Print Payslips (p.8)

Add Worker Documents (p.9)

Help Contact Information (p.10)

Workday Mobile

You will need the following information while setting up your Workday mobile application.

- **Company ID:** Montclair

  *The company ID is case sensitive.
- **Web Address:** https://wd1.myworkday.com

Installing the Workday Application

Get the Workday Mobile Application on your mobile device and set it up using the above information to access your account.

ANDROID

To install Workday on your Android device:

1) From your device, navigate to the **Google Play Store**.
2) Tap **Search** and enter Workday.
3) Tap **Install**.
4) Tap **Open** to launch the Workday application.
5) Tap the **Let’s get started** button.
6) Complete initial setup steps, including agreeing to license agreements and entering company settings.

IPAD AND IPHONE

To install Workday on your iPad or iPhone:

1) From your device, navigate to the **App Store**.
2) Enter “Workday” in the search field and select **Workday** from the search results.
3) Tap **Get** and **Install**.
4) Tap **Open**, once the app has downloaded.

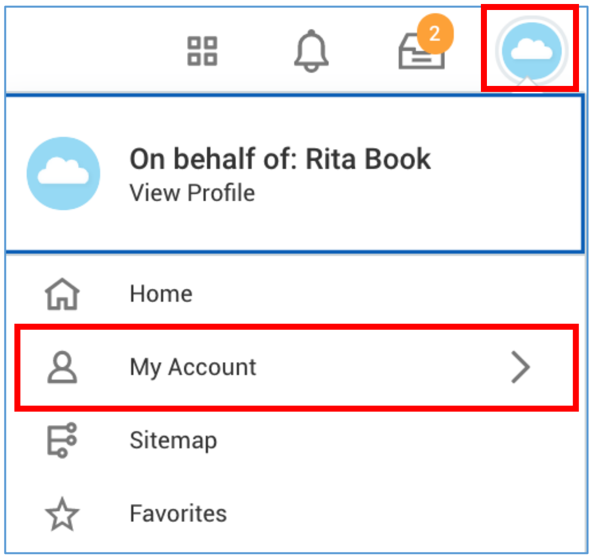
Note: There are two methods in entering your company’s credentials for the Workday native app. This document will cover the Settings method, but feel free to attempt the intuitive mobile setup instructions through the app and use these instructions as a second option. If successful, skip corresponding setup instructions in this document.

5) Tap **Settings** and enter the Company ID/Tenant name (provided above).
6) Enter your company’s Workday web address (provided above) and tap **Save**.
7) Enter your Netid and password and tap **Sign In**.
8) Tap **OK** to enable push notifications.

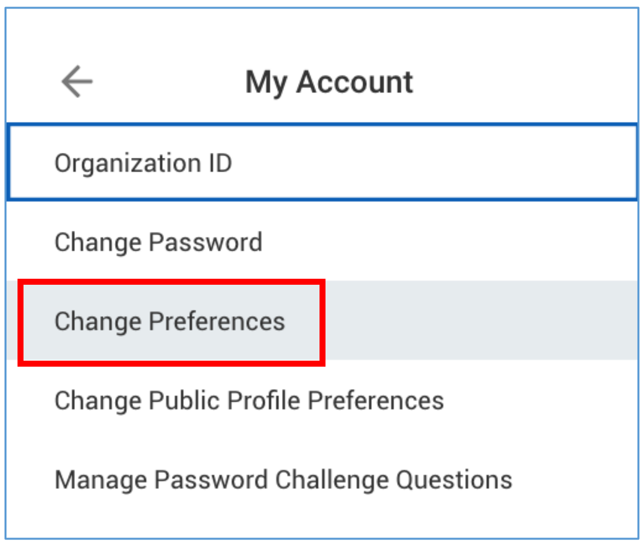
Change Workday Search Preferences

The default Workday search preference is the Comment category. We suggest you change the default search category to All of Workday for better result.

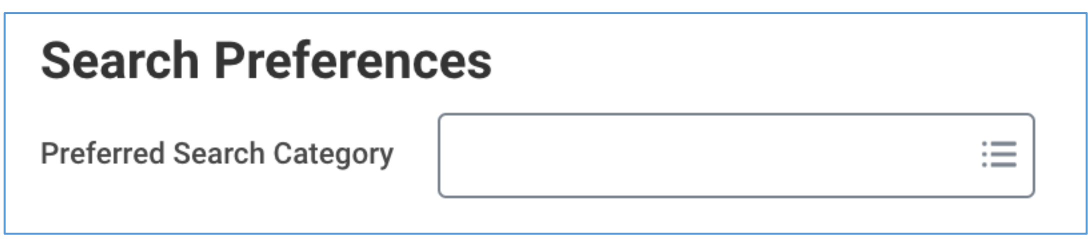
1) Click on the cloud icon in the top right corner of your Workday homepage.
2) On the menu that appears, click **My Account**.



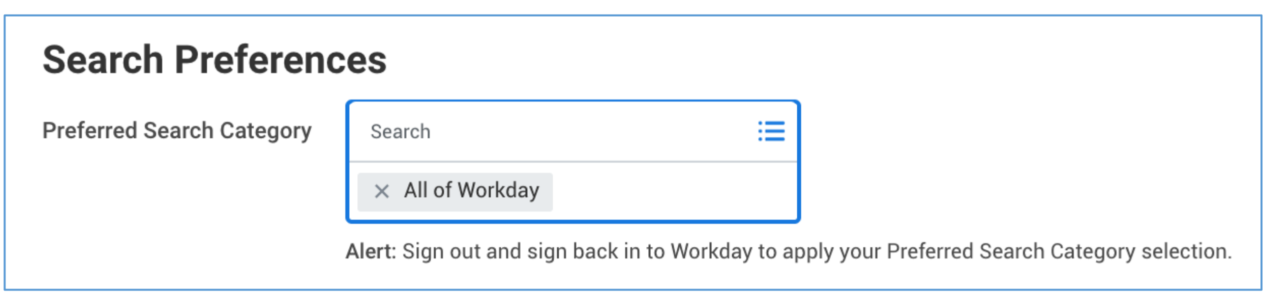
3) Click **Change Preferences**.



4) Scroll down to the section labelled Search Preferences.



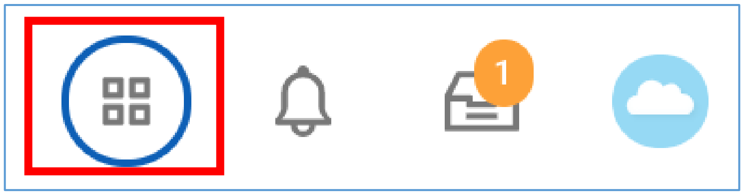
5) Select All of Workday in the Preferred Search Category prompt.



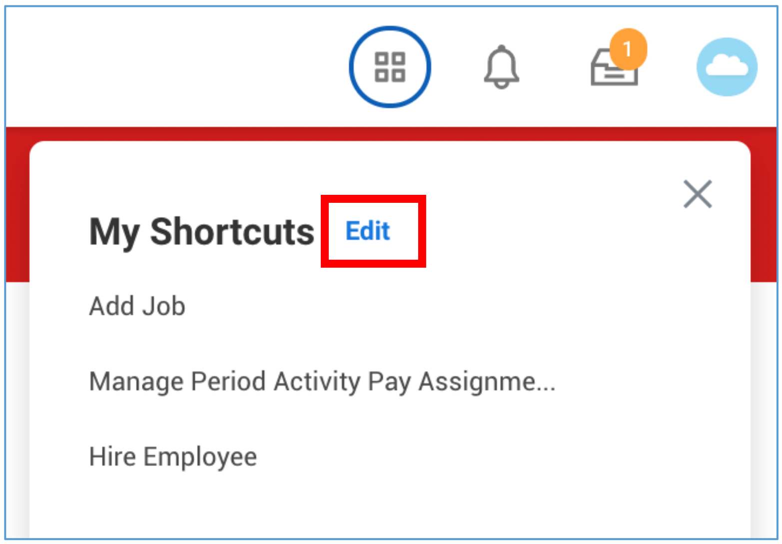
6) Click OK at the bottom of the screen. You have to sign out and sign back in for the changes to be applied.

Configure My Shortcuts

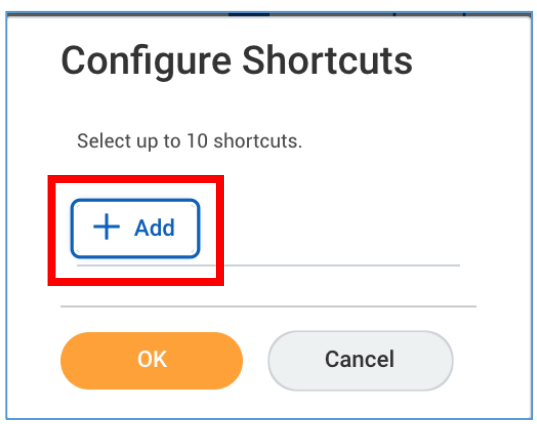
1) Click the **My Shortcuts** icon located in the top right of your homepage.



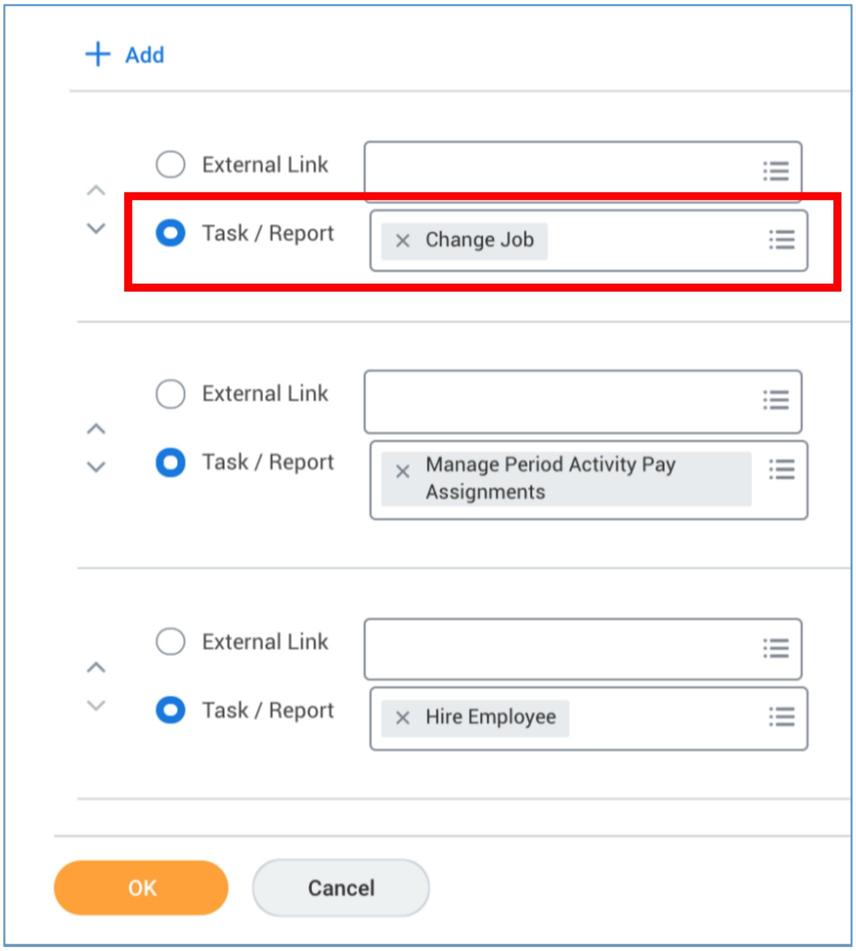
2) Click the **Edit** button to add your shortcuts.



3) Click the **Add** button.



4) Search for a task or report in the **Task/Report** prompt. Once you select your task or report you can click the **Add** button again to add more.



5) Click **OK** at the bottom when you are finished adding your shortcuts. The shortcuts icon can be clicked from any page you go to in Workday.

Add/Update Contact Information

Important Information

- All employees are required to have a home address, personal email address, and personal phone number listed under their HOME contact information.
- Your <u>Primary Work Email</u> needs to be your MSU email address. You can add additional work email addresses if necessary.
- Make sure that your HOME contact information is not listed under your WORK contact information.

1) From your homepage, click on the **Personal Information** worklet icon.
2) In the **Change** column on the left, click on the **Contact Information** button.
3) Click on the **Edit** button on the top left of the page.
4) To edit existing contact information, click the edit pencil icon to make changes.
5) To add new contact information, click the **Add** buttons located throughout the page.
6) When finished, click **Submit** at the bottom of the page.

Add/Update Emergency Contact Information

1) From your homepage, click on the **Personal Information** worklet icon.
2) In the **Change** column on the left, click on the **Emergency Contacts** button.
3) Click the **Edit** button if you are changing your existing emergency contact information or you need to add an alternate emergency contact.
4) Click the **Add** button if you are entering an emergency contact for the first time.

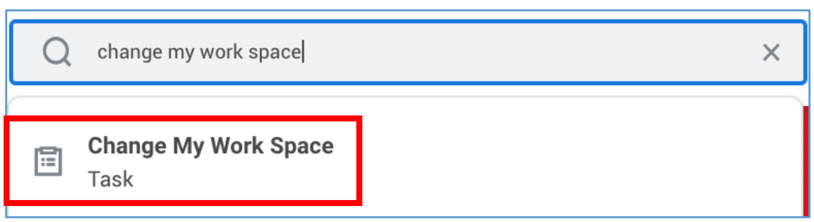
   The following information is required for all emergency contacts.

   - Legal Name
   - Relationship
   - Primary Address
   - Primary Phone

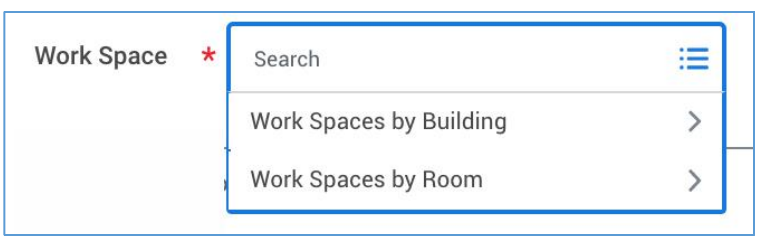
5) When finished, click **Submit** at the bottom of the page.

Change Your Work Space (Office Location)

1) From your homepage, type **Change My Work Space** in the Workday search bar and select the task that appears.



2) Enter the effective date of the Work Space change. You cannot use a future date.
3) In the Work Space menu, select or search for your Work Space. You can select the menu options to find your work space or you can narrow down your search by typing your room number and hitting enter.



   Note: All work spaces are fed to Workday from Archibus. If you cannot find your work space you can open a Workday ticket by emailing WCCSupport@montclair.edu.

4) Click **Submit** at the bottom of the page.

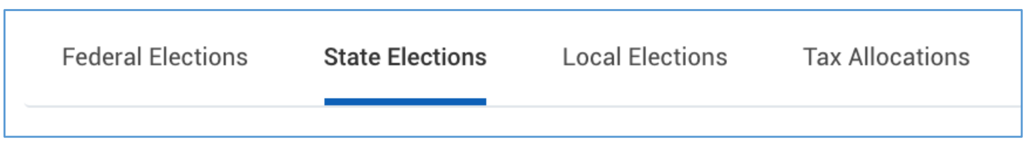
Update Your Federal Tax Withholding Elections

1) From your homepage, click on the **Pay** worklet icon.
2) In the **Actions** column on the left, click on the **Withholding Elections** button.
3) Click the **Update** button at the bottom of the page.
4) Enter the effective date of the election change. You cannot use a date in the past.
5) Click **OK** at the bottom of the page. You will see the blank electronic form on the next page.
6) Carefully follow the instructions throughout the form before selecting the **I Agree** checkbox and clicking **OK** at the bottom of the page

   Note: If you choose to use the Multiple Jobs Worksheet on page 3 of the blank W-4 form you will be instructed to click on the **View Blank Form** button. Please allow up to five minutes for the form to generate.

Update Your State Tax Withholding Elections

1) From your homepage, click on the **Pay** worklet icon.
2) In the **Actions** column on the left, click on the **Withholding Elections** button.
3) Click on **State Elections** and then click **Update** at the bottom of the page.



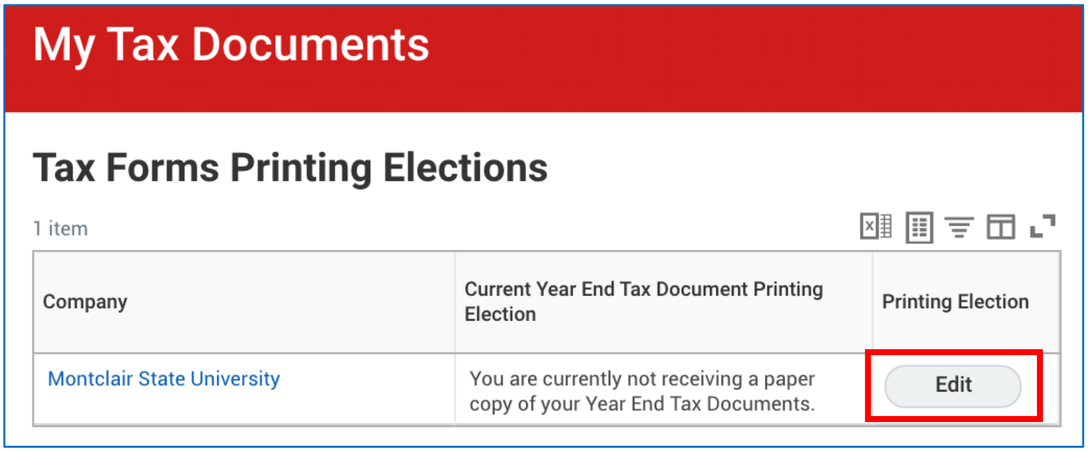
4) Enter the effective date of the election change. You cannot use a date in the past.
5) Select New Jersey or Pennsylvania as the State.

***Note**: Residents of other states need to select New Jersey as the State for the NJ-W4.

6) Click **OK** at the bottom of the page. You will see the blank electronic form on the next page.
7) Click on the **View Blank Form** button. Please allow up to five minutes for the blank form to generate.
8) Use the guidance on the generated blank W-4 form to fill out the electronic form in Workday.
9) Click the **I Agree** checkbox before clicking **OK** at the bottom of the page.

Update Your W-2 Printing Elections

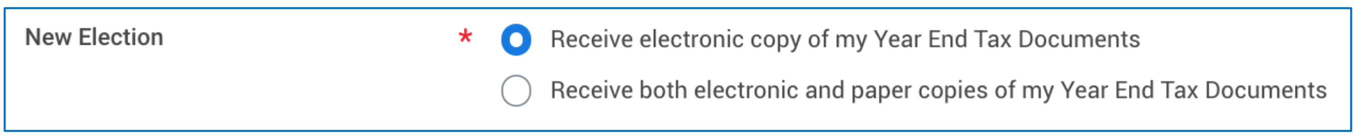
1) From your homepage, click on the **Pay** worklet icon.
2) In the **View** column on the right, click on the **My Tax Documents** button.
3) Review your current printing election and click the Edit button to change your election.



4) Select one of the two options displayed.
    a. Receive electronic copy of my Year End Tax Documents

       OR

    b. Receive both electronic and paper copies of my Year End Tax Documents

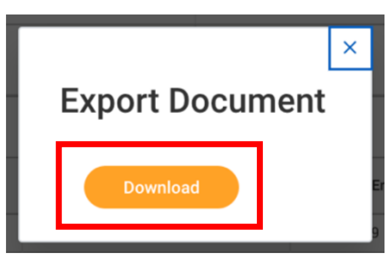


5) Click the **OK** button.
6) Click the **Done** button. The process is now complete. You will be returned to your **My Tax Documents** page where your new elections will be displayed.

View/Print Payslips

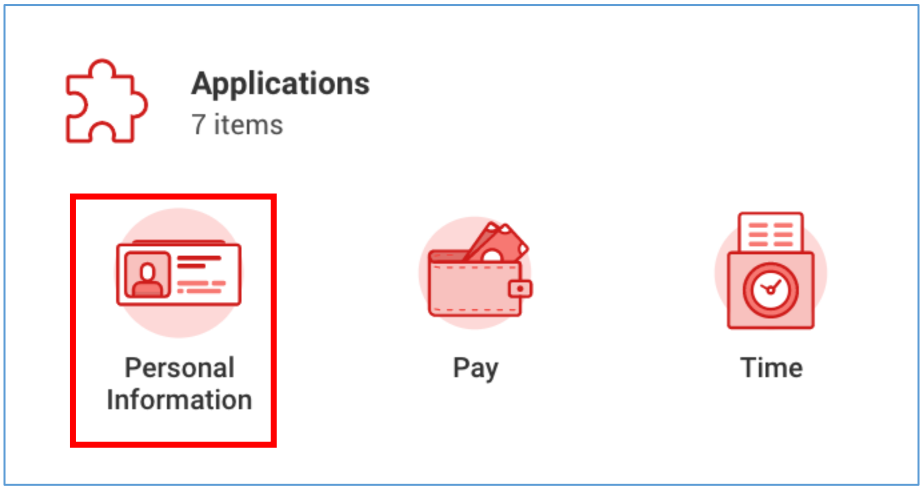
1) From your homepage, click on the **Pay** worklet icon.
2) In the **View** column on the right, click on the **Payslips** button.
3) Find the pay period you want to view and click the **View** button to the right.
4) Click the print icon located at the top right of the screen.

5) A window will pop up. Click **Download.** Your payslip will download as .pdf that you can print.

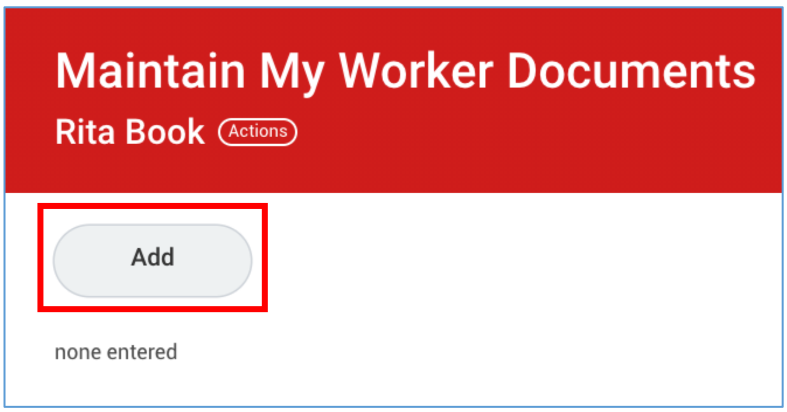


Add Worker Documents

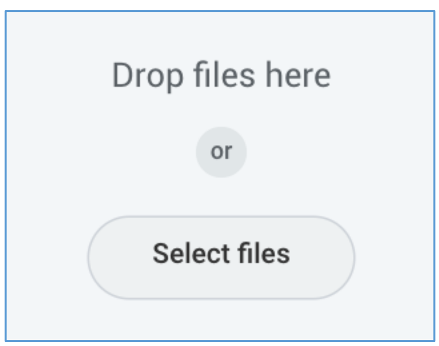
1) From your homepage, click on the **Personal Information** worklet



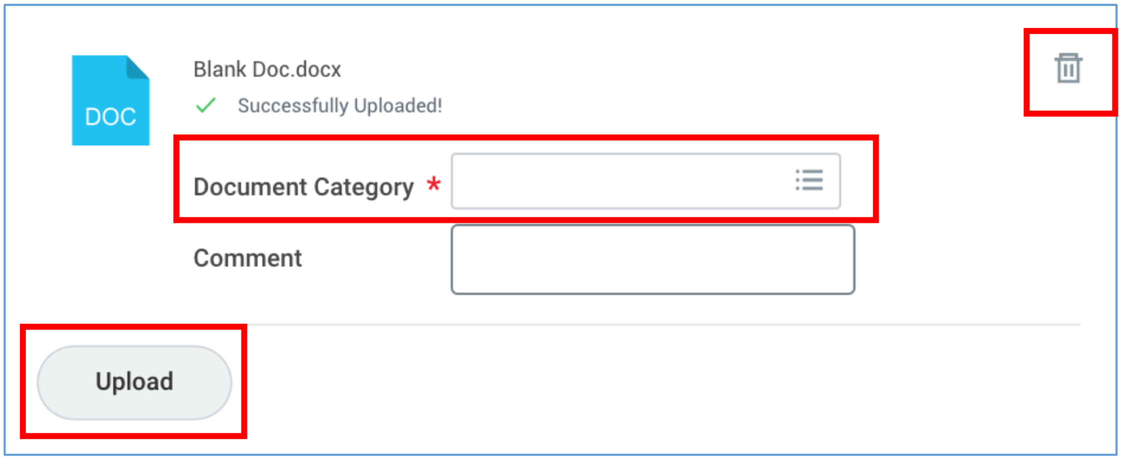
2) In the **View** column on the right, click on the **Worker Documents** button.
3) Click the Add button.



4) You can drag and drop your document into the grey area that appears or you can select the **Select files** button to search for the document on your device.



5) Select a Document Category.
6) (Optional) Write a comment for the document.
7) (Optional) Click the trash can icon to delete the document.
8) (Optional) Click the Upload button to add another document.



9) Click **OK** at the bottom of the screen.

Help Contact Information

If you have any questions or encounter any errors contact Workday Customer Care (973-655-5000 option 3 or WCCSupport@montclair.edu).