Created by
Sizemore, Inc.

Associate Self Service Training Guide

6/21/2024

sizemoreinc.com

Table of Content

What is Workday?

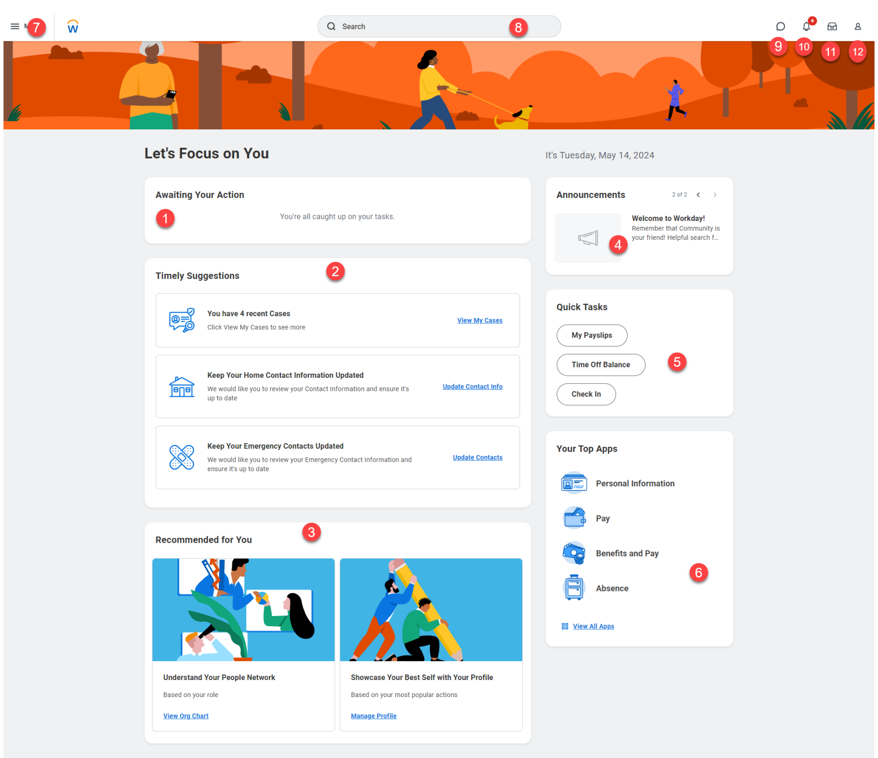
Workday is a leading provider of enterprise cloud applications delivering state-of-the-art solutions designed for human capital management (HCM), financial management, and payroll systems.

Workday Navigation

Navigate the Home Page

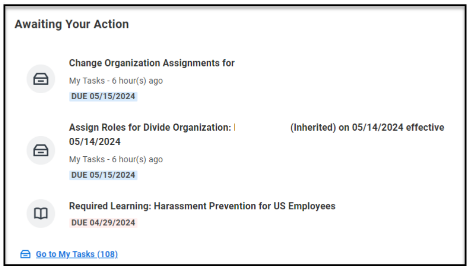
The Workday homepage serves as the central hub for Associates to access various features and tools within the Workday system, tailored to streamline their daily tasks and enhance overall productivity.

Note: Click the Home logo to return to the home page.

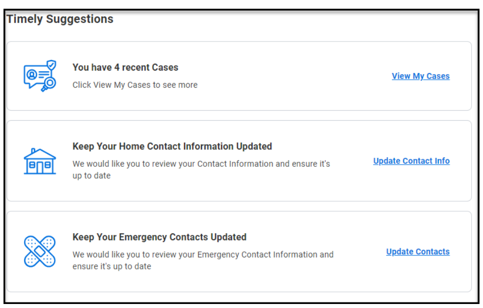


Home Page

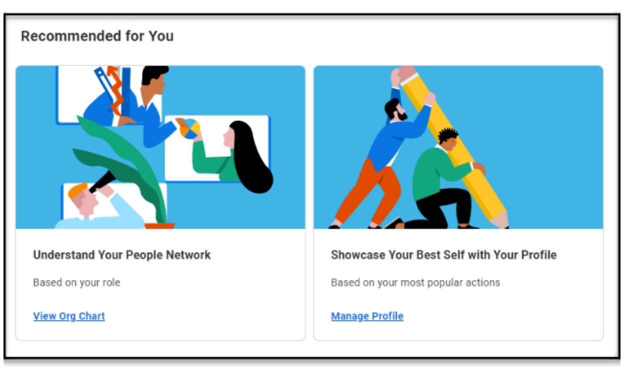
1. **Awaiting Your Actions**- Displays the top three items on your inbox. To access your inbox, you can click on the link "**Go to all Inbox Items**" beneath the list or the inbox icon on the top right of your screen.



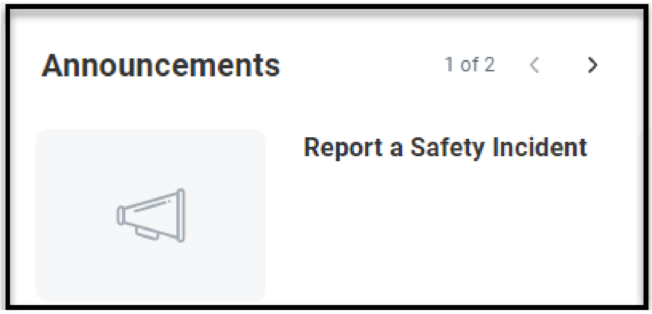
2. **Time Suggestions –** This section offers personalized reminders and alerts for upcoming deadlines, meetings, or tasks. It is designed to help Associates manage their responsibilities more effectively.



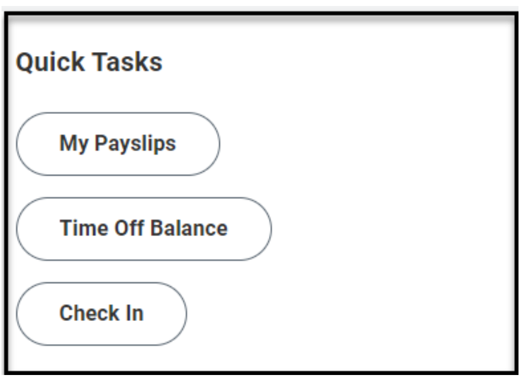
3. **Recommend for You -** This feature leverages machine learning and the Associates' interaction history with the system to provide tailored recommendations and insights.



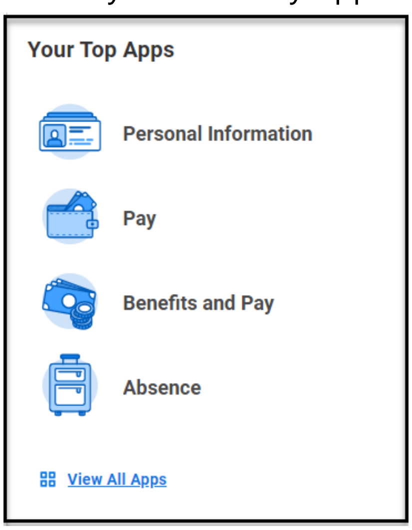
4. **Announcement-** This section displays a shortcut to "**Report a Safety Incident.**" Additionally, this section is used to display important notifications.



5. **Quick Tasks –** This section includes frequently used shortcuts that an Associate can use; enhancing productivity by reducing the number of clicks needed to navigate.



6. **Your Top Apps –** This section displays the top 4 apps on your home page. Associates can quickly find all your Workday Apps by clicking the "**View All Apps**" link.



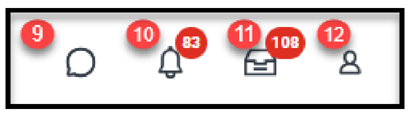
7. **Global Navigation Menu -** 

This feature allows Associates to access all of Workday's applications and functionalities from a single, centralized location. This menu includes 

shortcuts to frequently used tasks and reports.

8. **Search Bar -** 

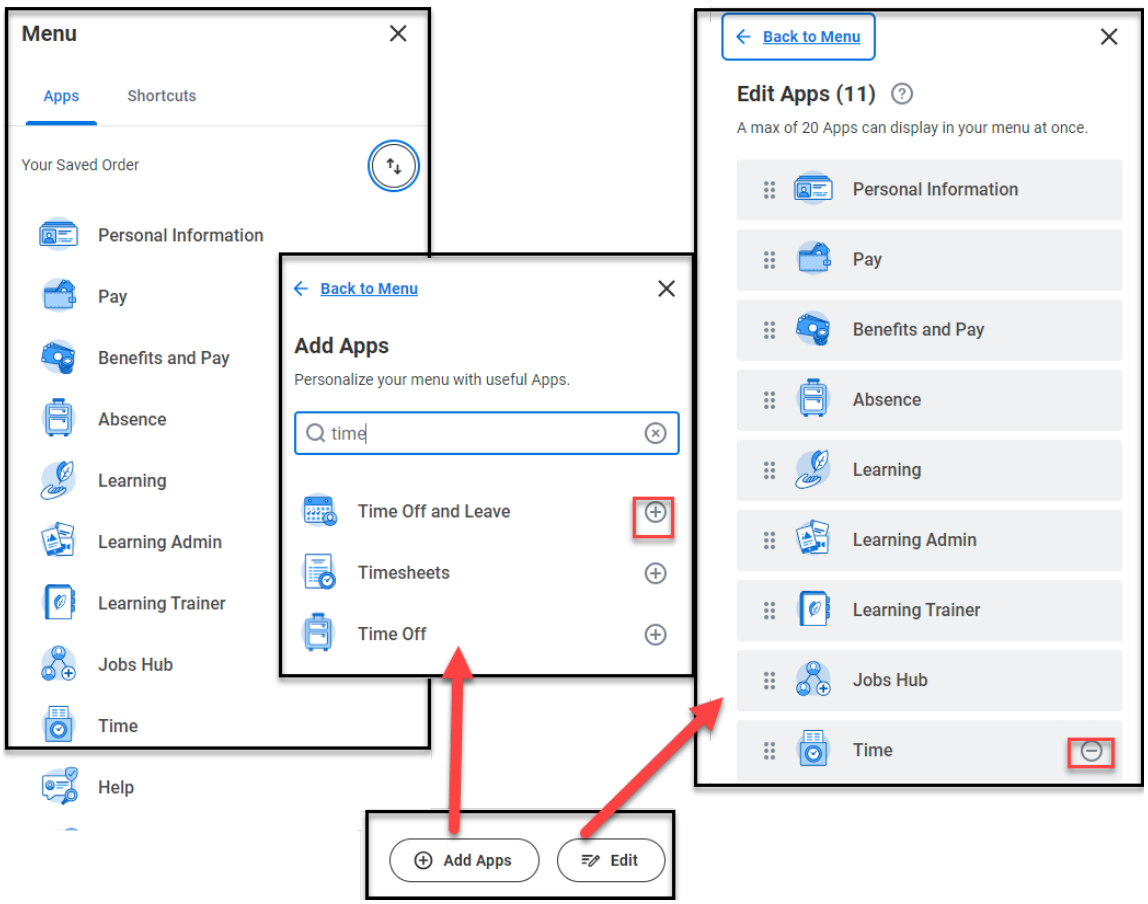
Located at the top, this prominent feature allows Associates to quickly search for people, tasks, documents, and reports across the entire Workday system.



9. **Workday Assistant -** This virtual assistant allows Associates to interact with Workday using simple language to perform a variety of tasks and retrieve information.
10. **Notification -** This area alerts Associates to important information or actions they may need to take, such as approval requests or system updates.
11. **Inbox -** Similar to an email inbox, this section collects tasks and notifications that require Associate action or response, ensuring that important items do not go unnoticed.
12. **Worker Profile –** A centralized repository for all relevant information about an Associate, accessible to both the Associate and, depending on permission, their managers and HR personnel.

My Applications (Apps)

"**My Applications**" (often referred to as "**apps**" or "**worklets**") are personalized tools or widgets that provide quick access to specific functionalities within Workday. There is a **20** shortcuts limit on display.



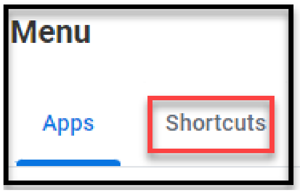
To Add, Rearrange and Delete your Apps:

- **To Add** press "**Add Apps**" and type the name of the App or keyboard on the search bar. To save changes and results, click the plus sign to add.
- **To Rearrange** press "**Edit"** then drag the app to the new location. Press **Save Changes** to save the new order of the Apps.
- **To Delete** press "**Edit"** then click the minus icon beside the app. Click **Save Changes** when finished.

Shortcuts

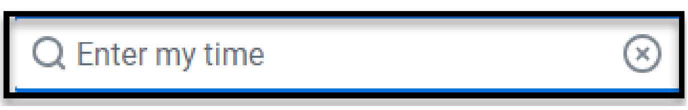
Shortcuts are a quicker way to find tasks and reports. There is a **10** shortcuts limit on display.

1. Under **Workday Global Navigation Menu** press the **Shortcuts** tab



2. Press **the Add Shortcuts** button to add specific shortcuts on the Shortcuts tab.

3. From Find Shortcuts search, type as an example – ***Enter My Time***



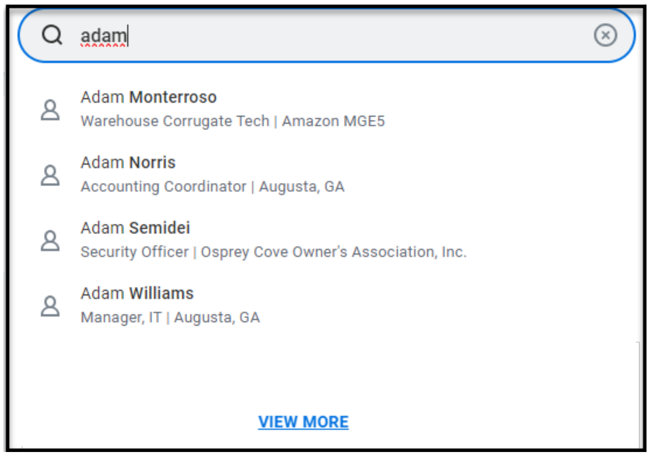
4. Press the **+** button to add the shortcut to the Menu.

5. Press 

to return to the shortcut list (to run to the shortcut simply click the link.

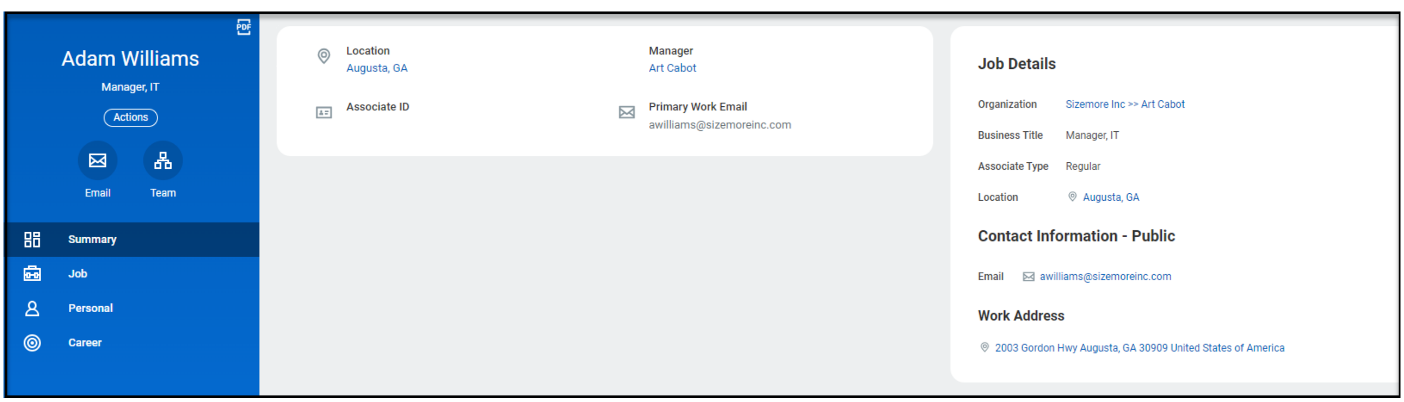
People Search

Associates can access the People Search feature from the main search bar at the top of the Workday homepage. The search bar allows Associates to type in the name of the Associate they are looking for.



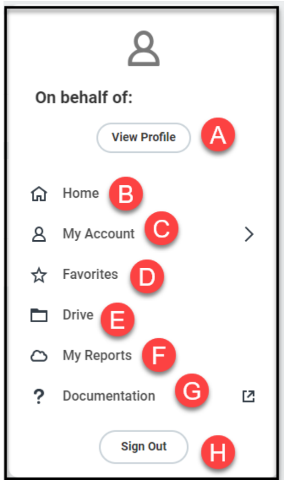
Results Display

Note: Information is based on security setting. When selecting a person from the search results, Associates are directed to that Associate's worker profile. This profile typically includes contact information, reporting structure (like their manager), job responsibilities.

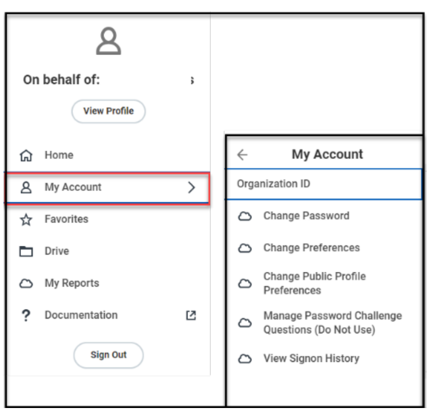


Workday Profile Menu

The **Workday Profile Menu** provides Associates with easy access to their personal and professional information where they can view and update. The **Workday Profile Menu** contains links to the **Home**, **My Account, Favorites, Drive, My Reports, Documentation, Sign Out** and **View Profile.**



A. **View Profile**: Offers a detailed overview of the Associate's employment history, roles, responsibilities, and other professional data stored within Workday.
B. **Home:** Return Associate to the main dashboard.
C. **My Account:** This section allows you to manage and view details specific to your user account. This can include your contact information, security settings (like password changes and multi-factor authentication setups), preferences (such as language and notification preferences),

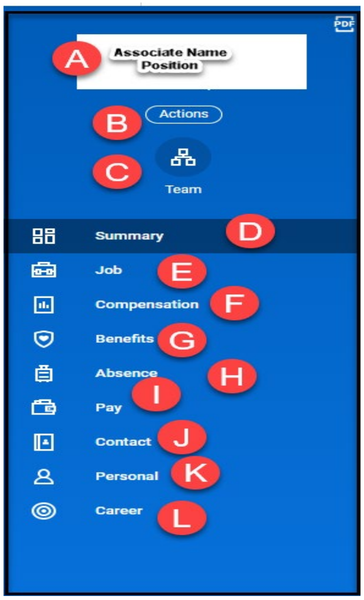


D. **Favorite:** This section provides access to save your favorite reports and tasks**.**
E. **Drive:** A cloud-based storage that allows Associates to store, manage, and share fields directly within Workday.

F. **My Reports:** This section provides access to reports that are relevant to you. Depending on your role, these might include personal performance metrics, team reports, or other data analytics you frequently work with. This area allows for quick retrieval of saved or commonly accessed reports, making data-driven decision-making more efficient.
G. **Documentation: Note: This section is security driven**. This section provides access to workday Documentation located in Workday Community.

Workday Profile

"**My Profile**" is a comprehensive section where an Associate can view and manage a wide range of personal and professional details related to their employment. This profile acts as a central hub for accessing and updating Associate information within the Workday system.



A. Identify the Associate name and position.

B. **Actions:** Refer to variety tasks or function that can be performed directly from an Associate's profile page.

C. **Team:** Displays information about the teams that the Associate is a part of within Sizemore.

- **Team Member:** A list of Associates who are part of the same team.
- **Managerial Structure: Details** about reporting hierarchy showing who the Associate's direct manager is and who reports to whom within the team.

D. **Summary:** The Summary section serves as a dashboard that provides essential information in a user-friendly format, allowing Associates and their managers to quickly access data.

E. **Job:** This section provides detailed and structured information about the Associates' current position and role with Sizemore.

- **Job Details:** This section contains current information about the Associate's job, including the job title, department, location, and job classification. It details the Associate's role within the organization, their responsibilities, and other job-related specifics like full-time or part-time status.
- **Worker History:** Worker History captures all significant employment events for an Associate within the organization. This includes changes in position, promotions, transfers, salary adjustments, and other key employment milestones. It provides a chronological record of the Associate's career progression within the company.
- **Employment Data:** This section includes comprehensive data about the Associate's employment terms and conditions. It covers the type of contract (permanent, temporary, contractor), employment status and base salary.
- **Service Dates: This** section includes the Associate's position, hire date and original service date. Service dates are critical for determining benefits, retirement eligibility, and other employment rights that accrue over time. Key dates include:
- **Hire Date**: The date when the Associate first joined the organization.
- **Continuous Service Date**: This date represents the total amount of time an Associate has continuously worked for Sizemore.
- **Seniority Date**: Used for calculating tenure-related benefits and may influence things like vacation entitlement.
- **Manager History:** This section records all changes in an Associate's reporting lines, showing past and present managers. It is useful for reviewing the Associate's management support over time and can impact performance evaluations and career development discussions.
- **Management Chain:** The Management Chain shows the complete line of reporting up from the Associate to the highest level in the organization. This view helps understand the organizational hierarchy.
- **Organizations:** This section highlights the organizational structure and Associate's placement with various parts of Sizemore.
- **Support Roles: Support** roles refer to specific functions or roles an Associate may hold in addition to their primary job. The support roles under an Associate's profile identify the approver for assignable tasks.

F. **Compensation**:

- **Salary and Bonuses**: Current compensation details including base salary, any bonus structures, and other incentives.
- **Pay History**: Historical data on salary adjustments, promotions, or any changes in compensation.

G. Benefits:

- **Enrollments**: Overview of current benefits such as health insurance, life insurance, retirement plans, etc.
- **Benefits History**: Historical view of benefits selections and changes during past enrollment periods.

H. Absence: This section provides details about an Associate's time off, including PTO balances, historical absence records, and pending leave requests.

I. Pay: The Pay section includes information on an Associate's salary or wages, pay slips, tax documents (such as W-2 or 1099 forms), and payment history. It may also offer tools for managing direct deposit settings and other pay-related preferences.

- **Tax Election:** Elections made by the Associate regarding how much federal and state income tax is withheld from their paycheck.
- **Payment Election:** Allows Associates to manage their direct deposit details, including the ability to add or change bank account information and designate how they want their salary to be distributed across their accounts.
- **Payslips:** Detail record of an Associate's earnings for each pay period along with deductions and net pay.
- **Voluntary Deductions:** Deductions from an Associate's paycheck that are not mandated but are chosen by the Associate.

J. Contact: This section of the profile lists an Associate's contact information, including home address, phone numbers, and email addresses. It allows Associates to update these details to ensure that communication and necessary documentation reach them correctly.

- **Contact Details**: Home address, phone numbers, and email addresses, work contact information.
- **Emergency Contacts**: Information about designated emergency contacts.

K. Personal Information: This section contains demographic and other personal information such as date of birth, marital status, gender, and nationality or ethnicity. This information can be crucial for administrative purposes, compliance, and benefit management.

- **Names:** Display legal name and Preferred Name
- **IDs:** Display National Id (SSN) and Other ID
- **Documents:** use to upload worker document

L. Career: Designed to support and track an Associate's career development within Sizemore.

- **Career History**: Historical data on past roles within the organization.
- **Skills and Competencies**: A list of skills and competencies that the Associate has developed or is recognized for.
- **Development Plans**: Plans and activities aimed at career development and progression.

Associate Self-Service for Associate

As a Sizemore associate, you can view your information within Workday and perform many self-service tasks. Workday allows for easy time tracking, updating personal information, reviewing compensation, benefits, and more.

Associates can:

1. Make changes to address, bank account and other personal information.
2. Update or change benefit elections.
3. Review and update income tax withholding for federal and state taxes.
4. View payslips and W-2s
5. Request time off*
6. Review absence balances*
7. Time tracking*

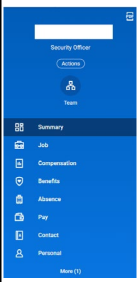
Workday to manage several HR tasks through Associate self-service:

Personal Information	Payroll	Benefits	Absence	Time
View and Update: Home Address • Phone Numbers • Personal Email • Emergency Contact Info Submit Legal Name Changes	View/print: • Payslips • State withholding. • Federal withholdings Manage direct deposit accounts.	View Benefit elections Enroll in benefits: • Open Enrollment • Qualified Life Event Designate beneficiaries	• View leave balances • Request a leave. • Request return from leave.	• Enter time worked. • Enter time off. • Request time off.

Note: When you log into Workday, you will have access to specific workday modules and functions. The applications you see on your home dashboard depend on your job and assigned role(s) in Workday.

Associate Checklist

List of tasks for associates to get familiar with Workday.

LOGIN	Log into Workday—
TOOLS AND NAVIGATION	REVIEW: Navigate the **Home Page** • Become familiar with your **Profile Menu** and Related Actions • Become familiar with your **Inbox** and **Notifications**
PERSONAL INFORMATION 	REVIEW: • Personal Information (Gender, Race/Ethnicity, etc.): On Profile Menu --> **Personal**; --> **Personal Information**; --> **Edit** • Home Address: On Profile Menu select **Contact**; **Home Contact Information** • Job Title: On Profile Menu select Overview -->**Job Details** tab. • Salary (as of March 2020): On Profile Menu select **Overview** --> **Compensation** tab. • Supervisory Organization: On Profile Menu select **Team.** • Emergency Contacts: On **Profile Menu** select "**Contact", select Emergency Contacts** tab.
PAY Pay	REVIEW: • Banking Information: select the **Pay** app; --> **Payment Elections** under **View/Update Elections**, Accounts
ABSENCE	REVIEW: • Paid Time Off (PTO) Balance: select the **Absence** app; accrued hours are listed under **Available Balance as of Today**
BENEFITS Benefits and Pay	REVIEW: • Benefit Elections: select **Benefit Elections** under **View**. Verify your benefit elections listed.

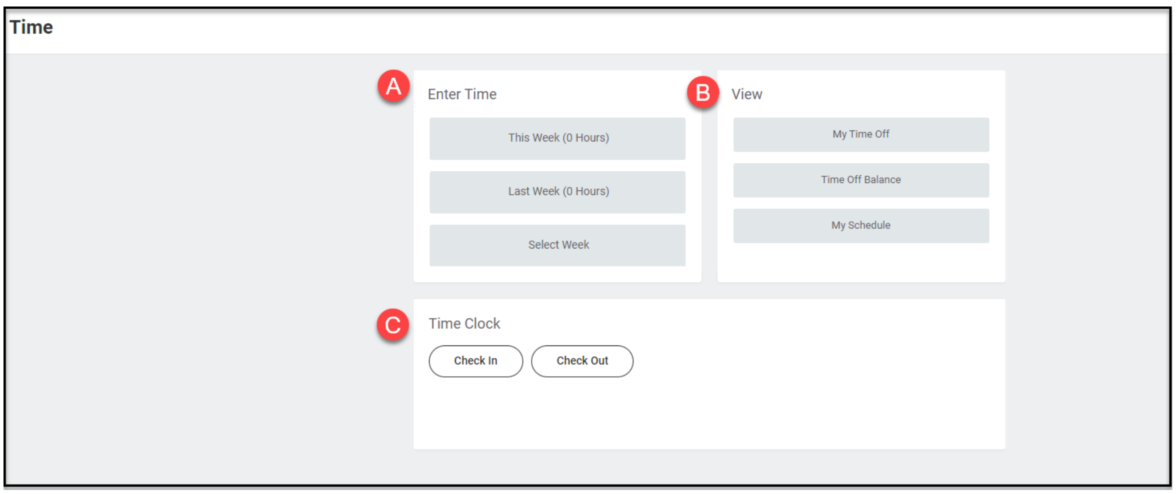
Workday Time and Absence

This module is designed to track associate hours and how they handle absences due to vacations, sick leave, and other forms of leave.

Hours are entered into Workday in two methods:

- Timeclock Integration
- Workday Time Clock (Clock In and Clock Out) *Staffing Associate Only

Time Dashboard

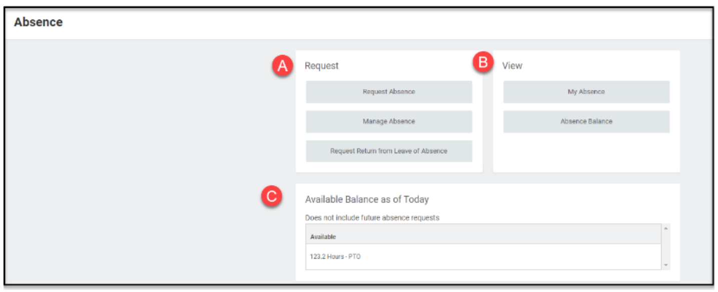


A. **Enter Time:** This section is where you review entered time (hourly associates)
B. **View:** This section will allow you to view your schedule, view any time off requested, view your time off balance (if applicable), and view your time clock history.
C. **Time Clock:** Using the web clock feature, hourly associates will Check In and Check Out to record their work-related activities in this section.

Absence

Absence Dashboard

When you click on the **Absence** application,  there are three main areas to review:



A. **Request:** This section is where staff can report absences and request scheduled time off
B. **View**: This section is where staff can review any input time off, balances, and time off results by period
C. **Available Balance as of Today**: This section provides a quick view summary of accrued hours.

Reporting Time Off

If you miss scheduled work days because of illness or another reason, you will need to report these absences as time off. In most cases unscheduled absences will be for unforeseen sickness and emergencies. Unpaid absence times will reduce pay for that period. Other absences such as vacations and personal holidays should be scheduled in advance.

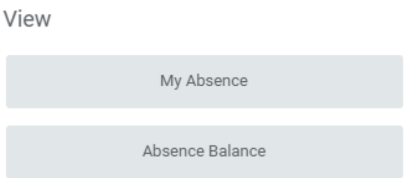
Absence types may include:

Time Off	**Leave**
• Bereavement Leave • Jury Duty • PTO • Unpaid Time Off • Voting	• USA Military Service • USA Personal leave

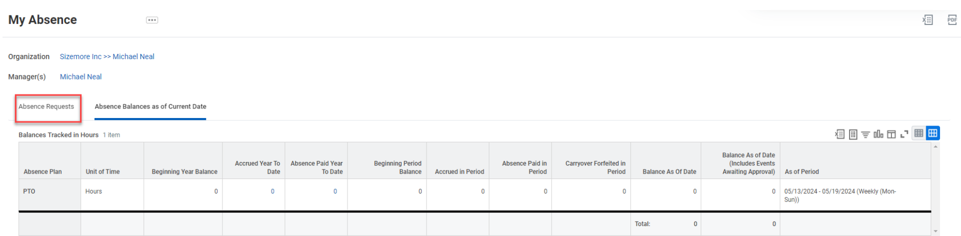
View Time Off and Leave of Absence

From the Absence application:

1. Click **My Absence** under the View section.



A report of your Absence Request is displayed. The first tab will display your absence requests.



My Absence

Organization Sizemore Inc >> Michael Neal

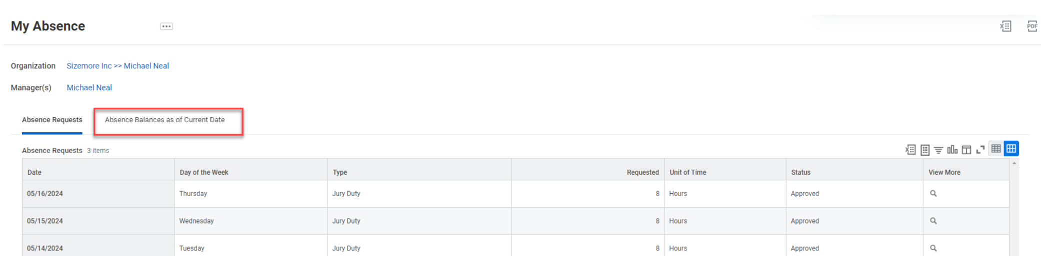
Manager(s) Michael Neal

Absence Requests | Absence Balances as of Current Date

Balances Tracked in Hours 1 item

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date	Balance As of Date (Includes Events Awaiting Approval)	As of Period
PTO	Hours	0	0	0	0	0	0	0	0	0	05/13/2024 - 05/19/2024 (Weekly (Mon-Sun))
									Total: 0	0	

2. Click the **Absence Balances as of Current Date** tab to see your absence balances as of today's date. Depending on the type of absence plan, Workday tracks balances in either days or hours.



My Absence

Organization Sizemore Inc >> Michael Neal

Manager(s) Michael Neal

Absence Requests | Absence Balances as of Current Date

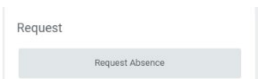
Absence Requests 3 items

Date	Day of the Week	Type	Requested	Unit of Time	Status	View More
05/16/2024	Thursday	Jury Duty	8	Hours	Approved	
05/15/2024	Wednesday	Jury Duty	8	Hours	Approved	
05/14/2024	Tuesday	Jury Duty	8	Hours	Approved	

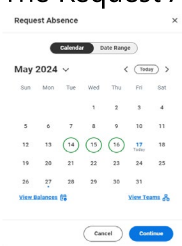
Submit Time Off and Leave of Absence Requests

From the Absence application:

1. Click **Request Absence** under the Request section.

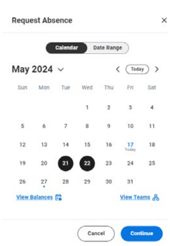


2. The Request Absence calendar displays.



Note: You will be able to see your other coworkers' absence requests by clicking View Teams. This gives insight into when your coworkers will be absent and decreases the likelihood of too many workers being out at the same time.

3. If your request is for one day or falls within the same month, Click the day you wish to take off or click and drag to select multiple days. Click a selected day to deselect it.



4. Select the **Type of Absence**.
5. Click **Submit Request**.

Note: You can view the status of your request at any time by returning to the My Absence report. Paid time off will route to your manager for approval.

Note: Once your manager approves your time off, the request in your calendar will show green. Pending requests will display in gray.

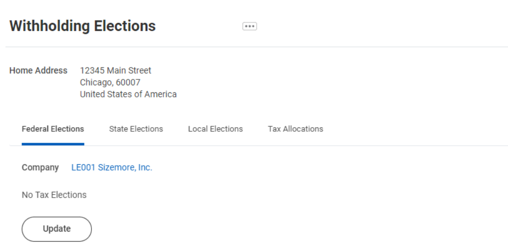
Pay

To manage your pay options, click the **Pay App**. The Pay application contains links to payroll-related tasks and information.

Pay Dashboard

View Your Withholding Deductions

1. Under Actions, select **Withholding Elections**.
2. View your **Federal Elections** or click the **State Elections**, **Local Elections**, or **Tax Allocations** tabs to review your status.

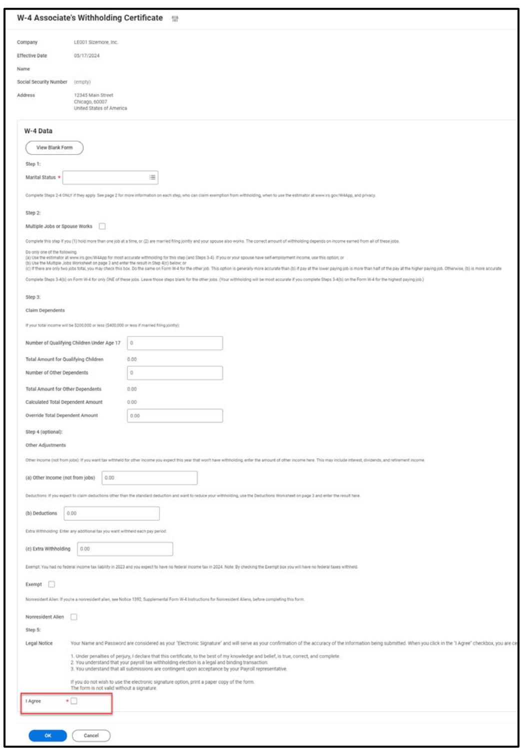


3. Click the **Update** button on the bottom of each tab to make election changes.

4. Select effective date and state (if applicable)

Federal Elections	State Elections	Local Elections	Tax Allocations
• Effective Date • W-4 Associate Withholding Certificate	• Effective Date • State • Withholding Form Type (Auto populate based on State)	• Effective Date • State • Withholding Form Type (Auto populate based on State)	Not Applicable

5. Select **OK**
6. For Federal elections (W4) make sure you complete all required information and click Agree field at the bottom of for, Click OK



W-4 Associate's Withholding Certificate

Company LE001 Sizemore, Inc.

Effective Date 05/17/2024

Name

Social Security Number (empty)

Address 12345 Main Street
Chicago, 60007
United States of America

W-4 Data

View Blank Form

Step 1:

Marital Status *

Complete Steps 2-4 ONLY if they apply. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2:

Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following.
(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4). If you or your spouse have self-employment income, use this option; or
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is generally more accurate than (b) if pay at the lower paying job is more than half of the pay at the higher paying job. Otherwise, (b) is more accurate

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3:

Claim Dependents

If your total income will be $200,000 or less ($400,000 or less if married filing jointly):

Number of Qualifying Children Under Age 17 0

Total Amount for Qualifying Children 0.00

Number of Other Dependents 0

Total Amount for Other Dependents 0.00

Calculated Total Dependent Amount 0.00

Override Total Dependent Amount 0.00

Step 4 (optional):

Other Adjustments

Other Income (not from jobs): If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income.

(a) Other Income (not from jobs) 0.00

Deductions: If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here.

(b) Deductions 0.00

Extra Withholding: Enter any additional tax you want withheld each pay period.

(c) Extra Withholding 0.00

Exempt: You had no federal income tax liability in 2023 and you expect to have no federal income tax in 2024. Note: By checking the Exempt box you will have no federal taxes withheld.

Exempt

Nonresident Alien: If you're a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

Nonresident Alien

Step 5:

Legal Notice Your Name and Password are considered as your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are ce

1. Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
2. You understand that your payroll tax withholding election is a legal and binding transaction.
3. You understand that all submissions are contingent upon acceptance by your Payroll representative.

If you do not wish to use the electronic signature option, print a paper copy of the form.
The form is not valid without a signature.

I Agree *

OK Cancel

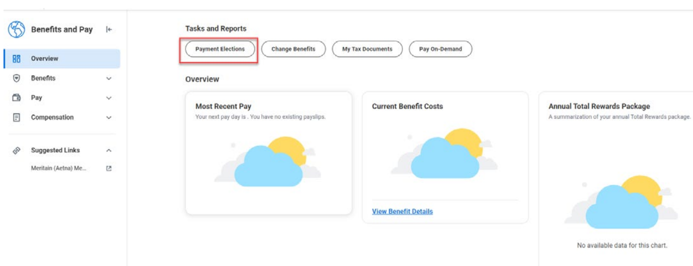
7. Your changes will go to the HR Partner for approval.

Payment Elections

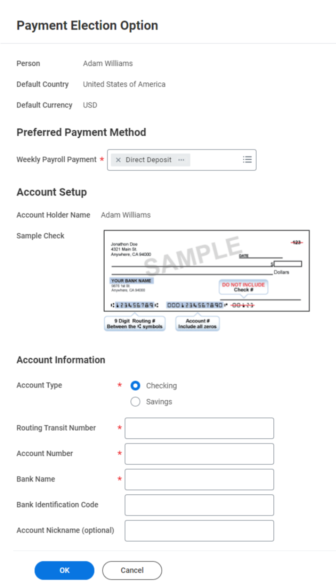
Add a Direct Deposit Account

Add a direct deposit account if you want your payments deposited electronically in your bank account.

1. Click the Benefits and Pay application.
2. Select **Payment Elections**.



3. Click **Add**.
4. Select the **Account Type** and enter the **Bank Name**, **Routing Transit Number**, and **Account Number**.
5. Enter Account Nickname (optional)
6. Click **OK** to save. Once the account has been added, you can use it to make payment elections.



Workday Learn

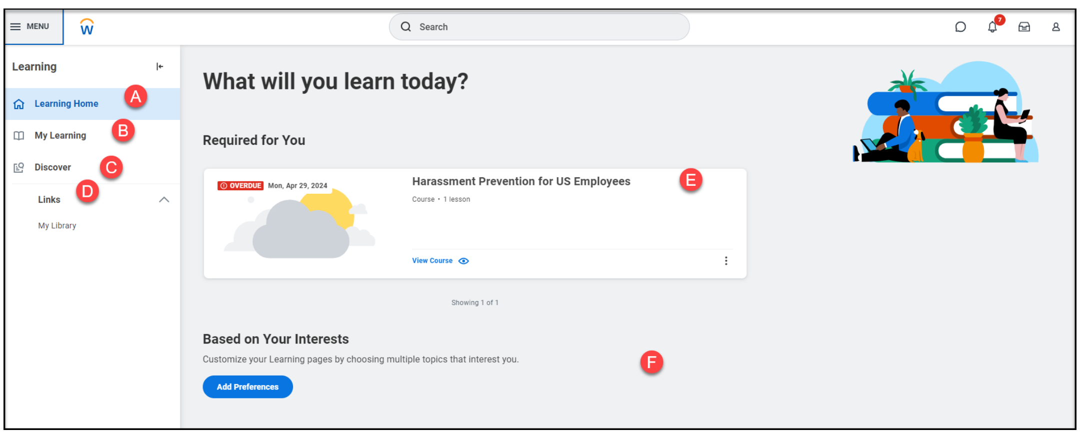
What is Workday Learning?

Associates will use Workday Learning to explore and enroll in content. Course owners will use Workday Learning to upload and manage courses, track completion, and engage with associates through learning campaigns.

Workday Learning will be your "one-stop-shop" for associate development and compliance training and tracking.

Workday Learning will integrate with:

Learning Dashboard



Enroll and Drop a Course

Type of Courses

Blended Course
A Learning Course that is offered with an in-person (or virtual) instructor-led component, compared to the Digital Course (that is digital only with no instructor portion).

Digital Course
A Learning Course that is offered on-demand (i.e., enrollment is not required) and does not require a scheduled offer or an instructor. Courses enable several lessons to be combined into one learning package.

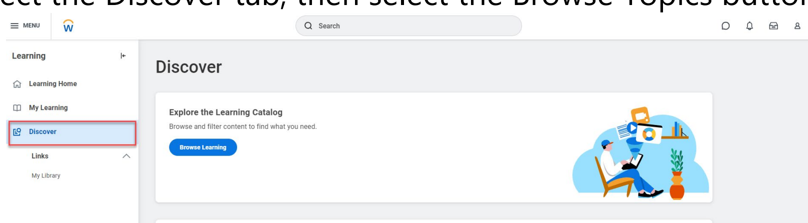
Enrollment
The process of signing up for a Learning course. Enrollments can be processed by associates via self-service, by Managers, or by Unit Initiators.

Campaign
A functionality that pushes content (such as a learning course or survey) to a group or identified audience. Campaigns may be required or not required. Initial launches of a campaign can be followed by subsequent launches depending on triggers and timing set up when creating a campaign.

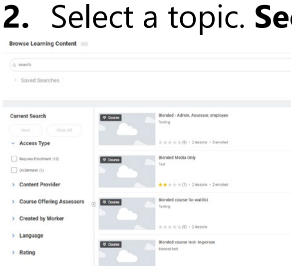
How to Enroll in a Course

From the Learning application complete the following steps to enroll in a course:

1. Select the Discover tab, then select the Browse Topics button.



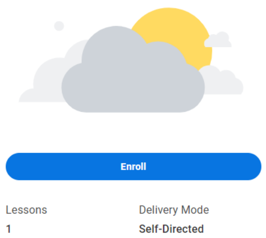
2. Select a topic. **Security Note: You will only see topics available to you**.

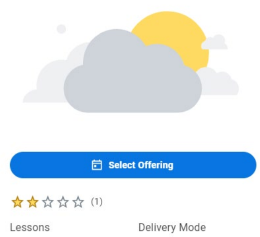


3. All available courses and lessons related to the topic display. You can narrow down your results using:
    a. the search bar
    b. or the search filters on the left side of the page.

    Tip: Under Current Seach, you can select Save so frequently used searches can be easily accessed under Saved Searches.

4. Select a course or lesson to enroll in by clicking its title. Choose the **Enroll** or **Select Offering** button.





5. View information about the offering such as the date, time, location.
6. Select the offering that works best for you.
7. Select **OK**.
8. From the Review page, select **Submit**. Workday will send a request for approval to your manager before the system enrolls you in an offering.

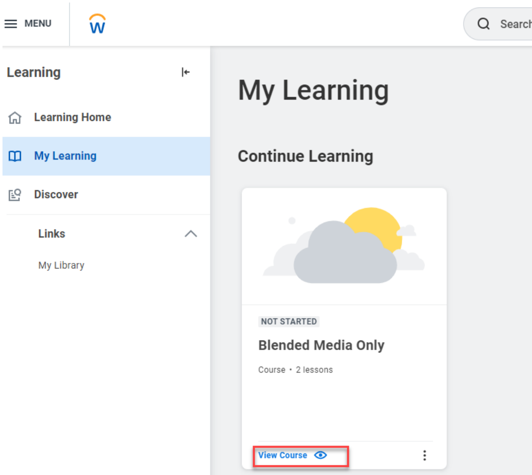
Dropping a Course

Complete the following steps to drop a course:

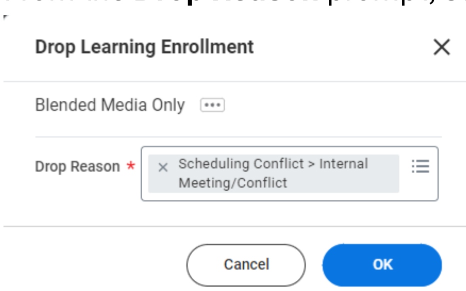
Note:

- To change the offering date, you must drop the course before you can enroll in a different offering.
- Mandatory training cannot be dropped.

1. From the Learning menu on the left, select My Learning.
2. On the My Learning page, select the **program or course** you want to drop.



3. Click **View Course**.
4. Navigate to the lower right side of the page and click on **Drop Course**.
5. From the **Drop Reason** prompt, select a reason.



6. Select **OK**.
7. Enter a **comment** and select **Submit** to drop the course.

Workday Mobile

Installing Workday Mobile

ANDROID

To download Workday Mobile on your Android device:

1. From your device, navigate to the **Google Play Store**.
2. In the search field, enter **Workday** and select **Workday** from the results.
3. Tap Install, then Open to launch the **Workday Mobile** app.
4. Tap the **Log In** button.
5. Follow the onscreen prompts to complete the initial setup steps for Sizemore.

IPAD AND IPHONE

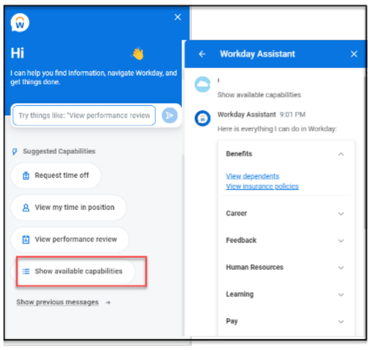
To download Workday Mobile on your iPad or iPhone:

1. From your device, navigate to the **App Store**.
2. In the search field, enter **Workday** and select **Workday** from the results.
3. Tap **Get**, then Install.
4. Tap **Open** once the app has downloaded.
5. Follow the onscreen prompts to complete the initial setup steps for Sizemore.

Workday Support

Workday Assistance

Workday Assistant is Workday's purpose-built chatbot that can help you complete common tasks, answer questions, and navigate around Workday. It makes interacting with Workday as simple as starting a conversation!



Help Center

Workday Help includes a robust searchable database where Associates can find articles, guides, FAQs, and troubleshooting tips related to different aspects of Workday. This knowledge base is designed to provide quick answers to common questions and issues that Associates may encounter.

Workday Case

Workday cases are created to manage inquiries or issues related to HR, payroll, IT, benefits, and other administrative functions. Associates will provide concise title for their case, which summaries the issues or request. Additionally, the Associates will provide a detailed description of the issue, including any specific details that would help the support team understand and resolve the case.