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Workday Training

for HR Generalists

Duration: 90 min

Session Ground Rules and Logistics

Turn your hand-held devices to silent mode

Minimise side conversations

Please do not work on your computers during the presentation

- Session Recordings
  - Please note that the sessions will be recorded.
- Parking Lot
  - The instructor will document any questions that cannot be answered immediately.
  - The instructor will research these questions and provide responses to all class participants.

Agenda

1. Introduction to Workday
2. HR Core
3. Recruitment
4. Hire to Retire
5. Expenses
6. Workday Help
7. Absence & Time Off
8. Q&A and Wrap-Up

Introduction to Workday

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At Landal, our future success depends on how well we align our people strategy with our business ambitions

Workday will enable us to ...

- Align people strategy with business goals
- Connect the full employee journey to strategy
- Drive smarter decisions and faster teamwork
- Deliver consistent, future-ready experiences
- Unlock capacity and fuel growth across all parks

What will be included?

Workday modules along the Landal employee journey:

First scope:

- ❑ HR Core: Centralizes employee data and streamlines HR processes
- ❑ Recruiting: Enhances hiring with tools for job postings, candidate tracking, and interview scheduling
- ❑ Onboarding: Facilitates smooth transitions for new hires with structured plans
- ❑ Expenses: Simplifies expense reporting and reimbursement
- ❑ Benefits: Direct access to employee benefits programs via Workday
- ❑ Core Compensation: Direct access to employee compensation plans and salary structures
- ❑ Workday Help: Centralized platform for employee support and inquiries
- ❑ Absence: Manages employee absence

Second scope:

- ❑ Time Tracking: Manages employee time tracking and attendance
- ❑ Learning: Provides online access to training and development resources
- ❑ Talent & Performance : Supports performance management, goal setting, and career development
- ❑ Scheduling: Helps efficiently staff operations with control over work schedules

HR Core

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Introduction to HCM

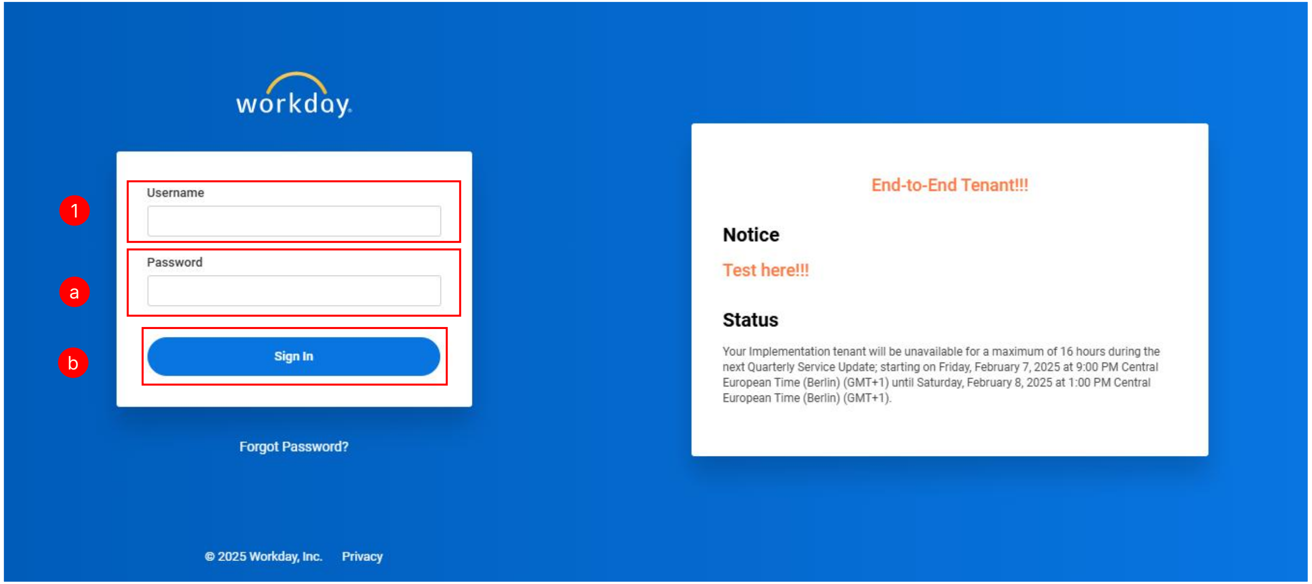
Workday's **Core Human Capital Management** (HCM) is the backbone of HR operations, bringing people, data, and processes together in one system. It centralizes employee information, organizational structures, and workforce planning to ensure accuracy and efficiency.

It also streamlines position management, staffing actions, and employee transitions, while maintaining compliance and transparency across the employee lifecycle.

In this section, you will learn how to:

- **Log into Workday**
- **Navigate the homepage, the menu and the worker profile**
- **Set up change your language preferences and delegation**
- **Perform actions and see notifications**
- **Change your own personal information**
- **View your support roles**

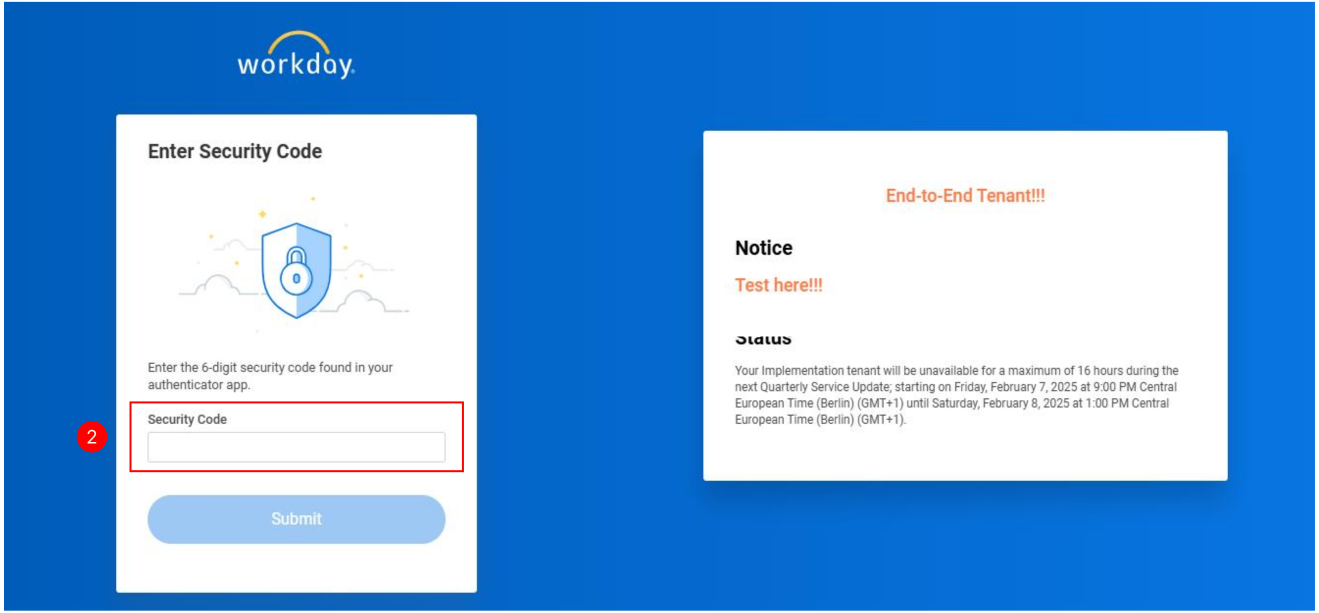
How to Log in to Workday



In the login fields, enter your **Workday username** and **password**.

– Click on the Sign In button.

How to Log in to Workday



Open the **Microsoft Authenticator app** on your mobile device.

- Retrieve the 6-digit verification code displayed in the app.
- Enter the code in the Workday login screen and click Submit.

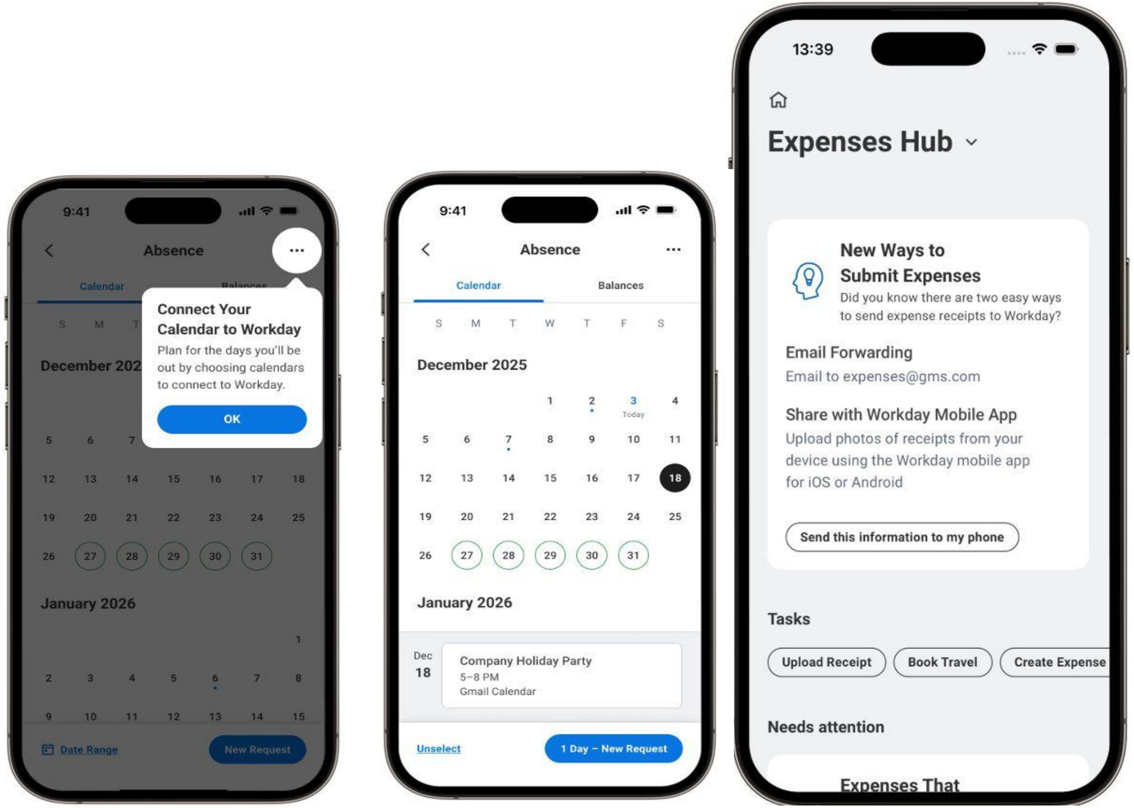
Workday via Mobile

Download the **Workday** app on your mobile device through the app store.

– Connect with organization ID **x**

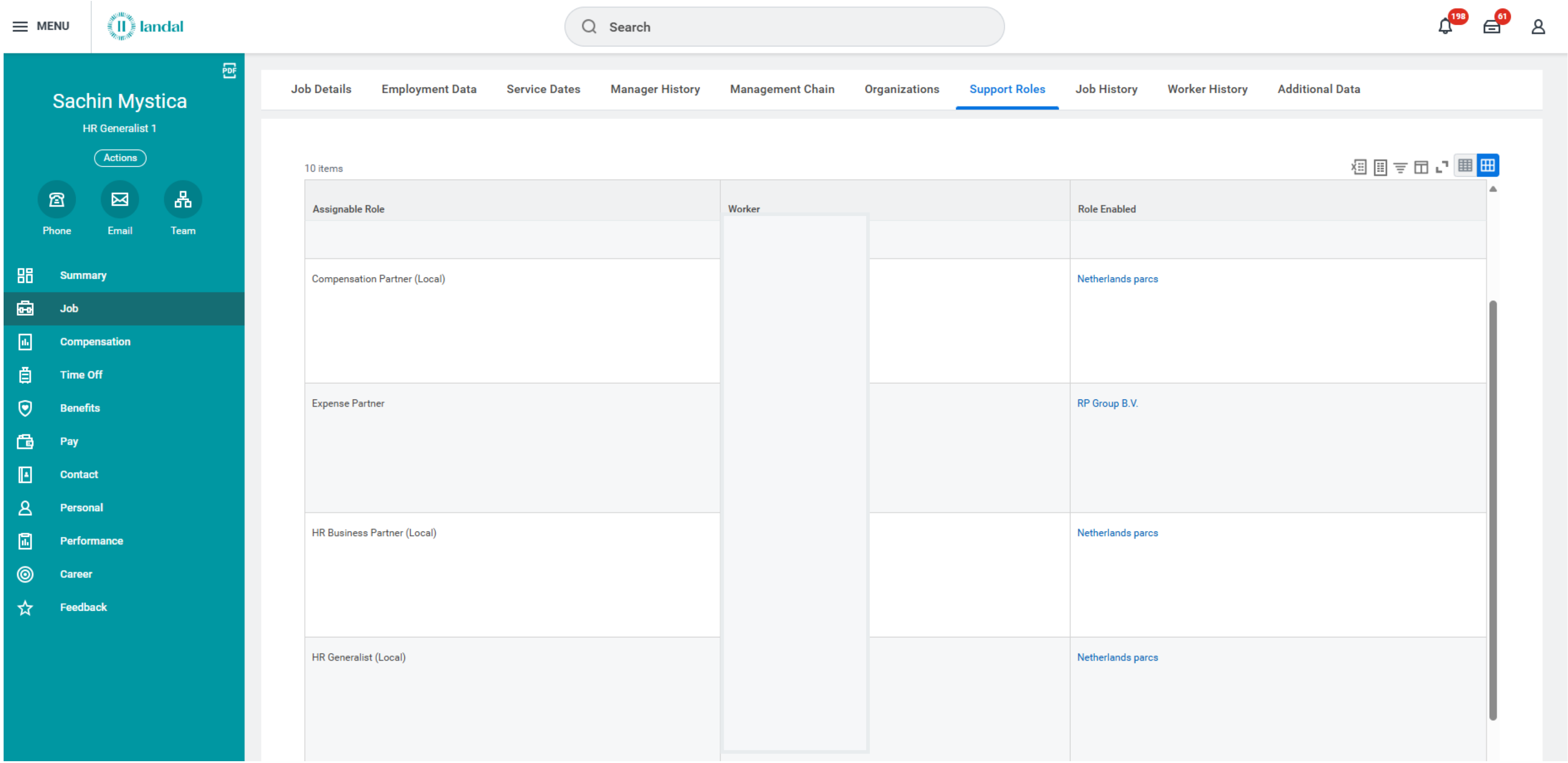
– Enter your username and password and log in

Easily change your personal information, add your expenses or enter absence through your mobile device.



Live demo

Support Roles



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Recruitment

Introduction to Recruitment

In Workday HCM, **Recruitment** helps streamline and manage the entire hiring process, from job requisition creation to candidate selection. Managers and recruiters can create and submit job requisitions, review applications, track candidates, and manage approvals.

In this section, you will learn about:

- Starting a job requisition process
- The candidate lifecycle – reviewing applications and progressing candidates
- Offer and hire process – managing interviews and candidate evaluations
- Onboarding – hire completion, pre-hire completes onboarding tasks

Live demo

Hire to Retire

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Introduction to Hire to Retire

During an employee's lifecycle, there can be changes in their contract that need to be processed. They can move to another position within the organization or they can move out of the organization.

In this section, you will learn about:

- **Change job details**
- **Termination**
- **Manager insights hub**

Live demo

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Expenses

Introduction to Expenses

The Expense Module in Workday allows employees to create and submit expense reports.

In this section, you will learn about:

- Create Expense Reports
- Add Expense Lines

After submission, Expense Reports will be sent for approval to the Manager and Payroll Team.

Live demo

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Workday Help

Workday Help Introduction

The Workday Help is a centralised support system that allows users to submit, track, and manage help cases efficiently. Its purpose is to provide quick access to assistance and streamline issue resolution.

In this section, you will learn about:

- **Create Cases**
- **Help Articles**
- **Help Cases Workspace**

Live demo

Absence & Time Off

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Leave of Absence and Time Off Introduction

Leave of Absence is a **long-term absence** from work (usually days or weeks) and may include specific leaves like maternity or long-term care. Eligibility to claiming these leaves may differ from role to role.

Time Off is a **short-term absence** (usually hours or a day) requires prior approval. This can include appointments or sudden days off. Eligibility to claiming these leaves may differ from role to role.

In this section, you will learn how to:

- **Request Leave of Absence for Employee(s)**
- **Return from Leave of Absence**
- **Request Time Offs for Employee(s)**
- **Viewing Absence Balances of Employee(s)**
- **View the Team Absence Calendar**

Live demo

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Q&A and Wrap-Up

Wrap-Up

- Quick Reference Guides:
  Workday @ Landal - HR System Modernisation
- Drop-in sessions:
  - 13th of October 10.00 CEST
  - 20th of October 10.00 CEST
  - 27th of October 10.00 CEST
- Any questions?

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Thank you

Supporting Slides for Trainers

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Navigation Workday Foundations

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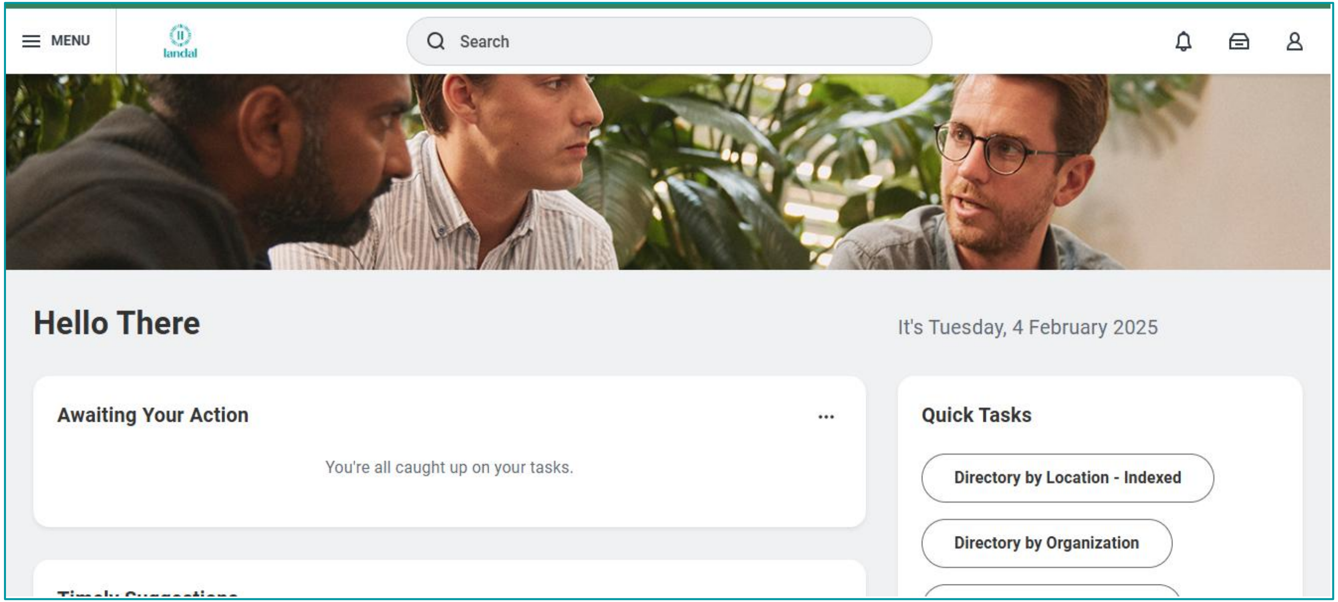
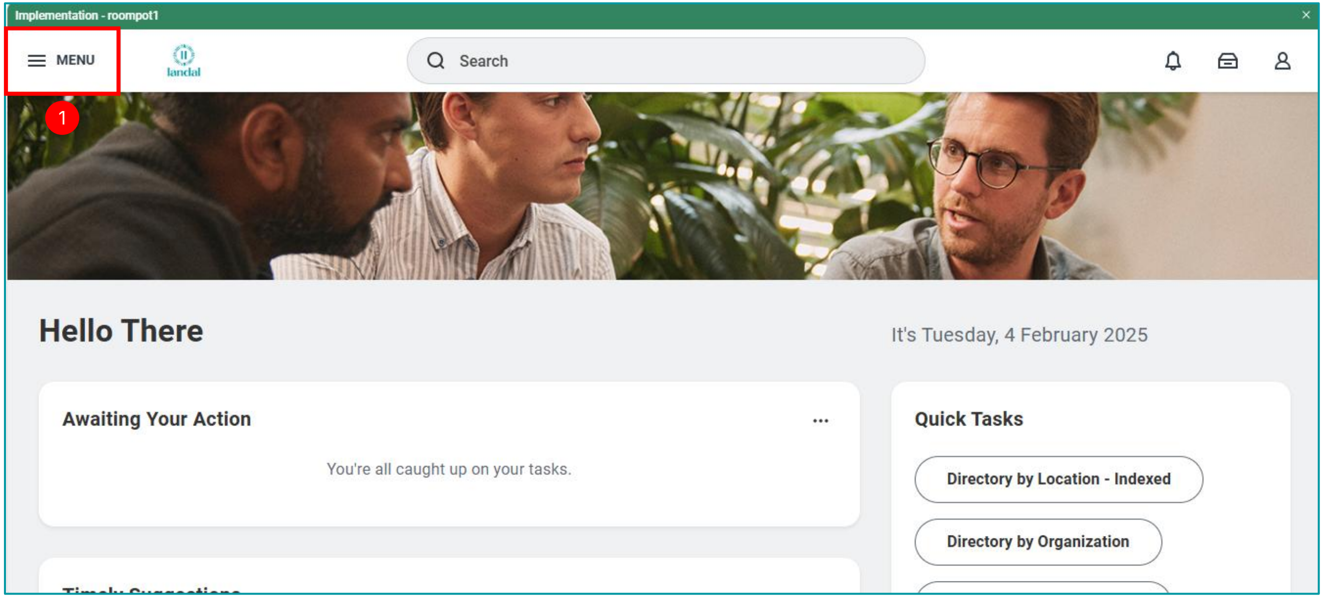
Navigation to Workday Features



Note: Once logged in, you will land on the **Workday homepage.**

– From here, you can navigate through features such as personal information management, pay stubs, time-off requests, and other HR-related tasks.

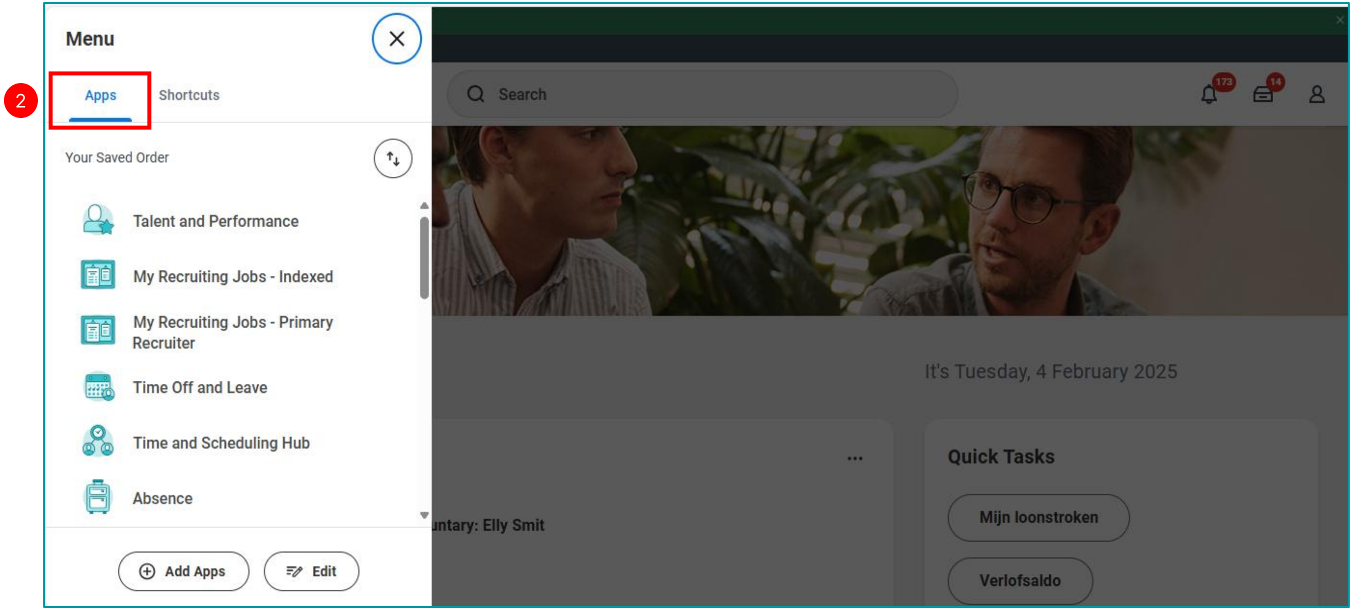
Navigation to Workday Features (Contd.)



1. Click the **MENU** button in the top-left corner of the homepage.

– The **Workday MENU** button provides quick access to all applications, tasks, and reports in one central location.

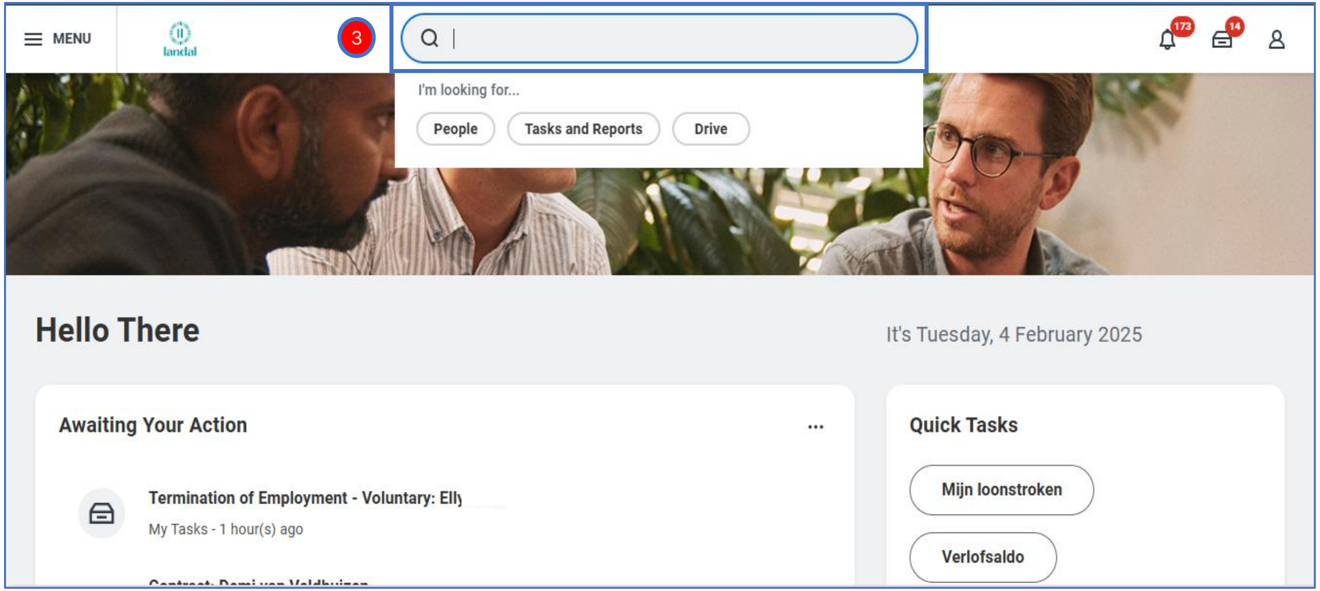
Navigation to Workday Features (Contd.)



2. Click the **Apps** tab to select the required process to be performed.

- The **Apps** tab displays different Workday modules (also known as worklets) that provide quick access to key HR functions.
- The **Shortcuts** tab allows users to customise and access their most frequently used processes for quicker navigation.

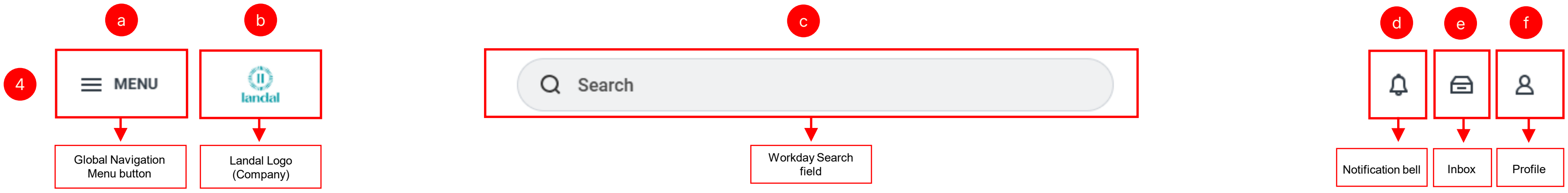
Navigation to Workday Features (Contd.)



3. Click the **Search** bar desired result to navigate directly to that section.

- The **Search bar** is located at the top of the screen.
- It allows users to quickly find employees, reports, tasks, and other Workday functions.

Navigation to Workday Features (Contd.)



4. The **navigation bar** is located at the top of the Workday homepage.

   a. **Global Navigation Menu –** To access all Workday modules.

   b. **Company Logo (Landal)** – To return to the Workday homepage from any screen.

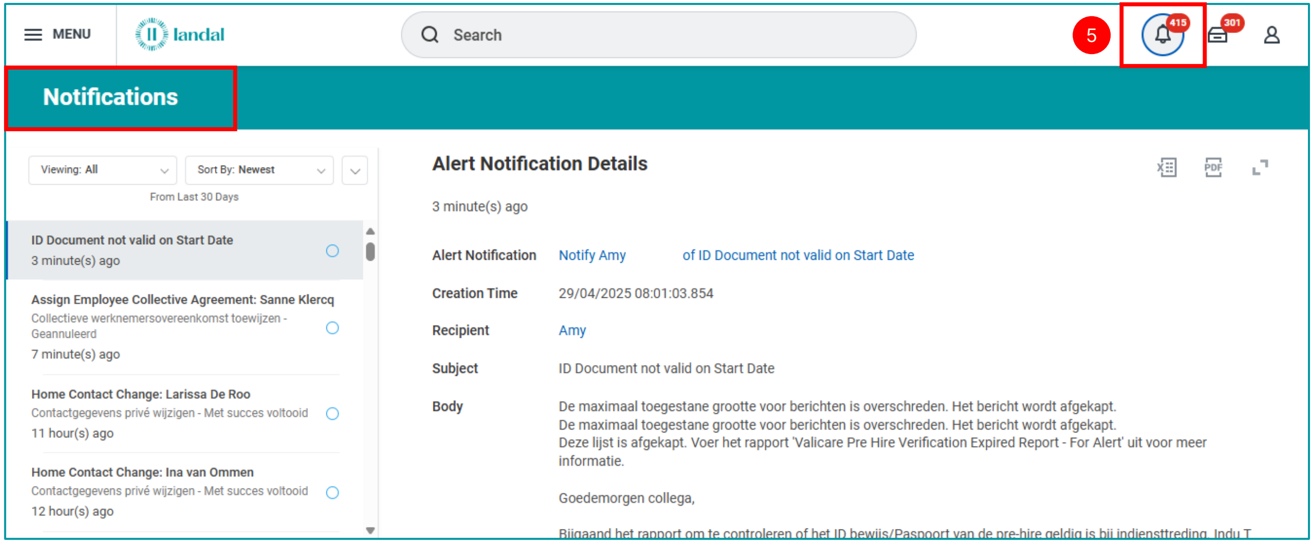
   c. **Workday Search Feature –** To quickly find tasks, employees, and other Workday functions.

   d. **Notification Bell** – To view system notifications, reminders, and important updates.

   e. **Inbox –** To access pending tasks, approvals, and messages.

   f. **Profile** – To manage personal settings, preferences, and security options.

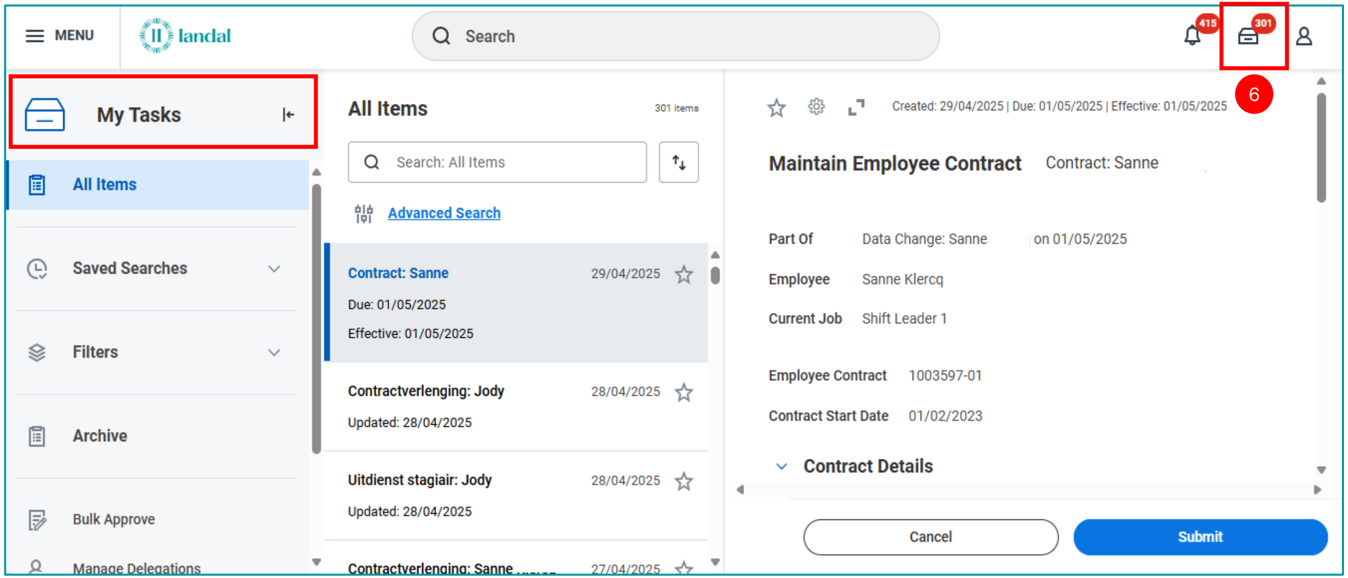
Navigation to Workday Features (Contd.)



5. Click the **Notification bell** icon to view the list of alerts, approvals, and system updates.

- The **Notification Bell** icon displays alerts, announcements, and items requiring your attention.
- Helps you stay updated with system-generated notifications.

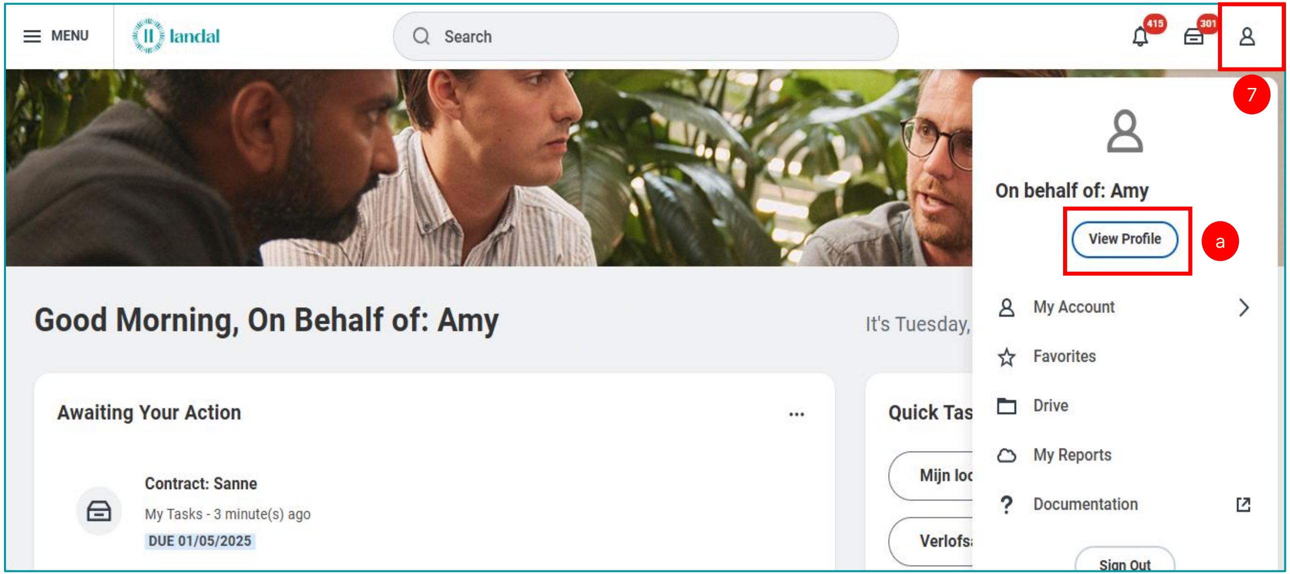
Navigation to Workday Features (Contd.)



6. Click the **My Tasks** icon to see your pending to-dos and complete required actions.

- The **My Tasks** icon will show your pending tasks and to-do items.
- Use it to quickly access actions awaiting your input.

Navigation to Workday Features (Contd.)

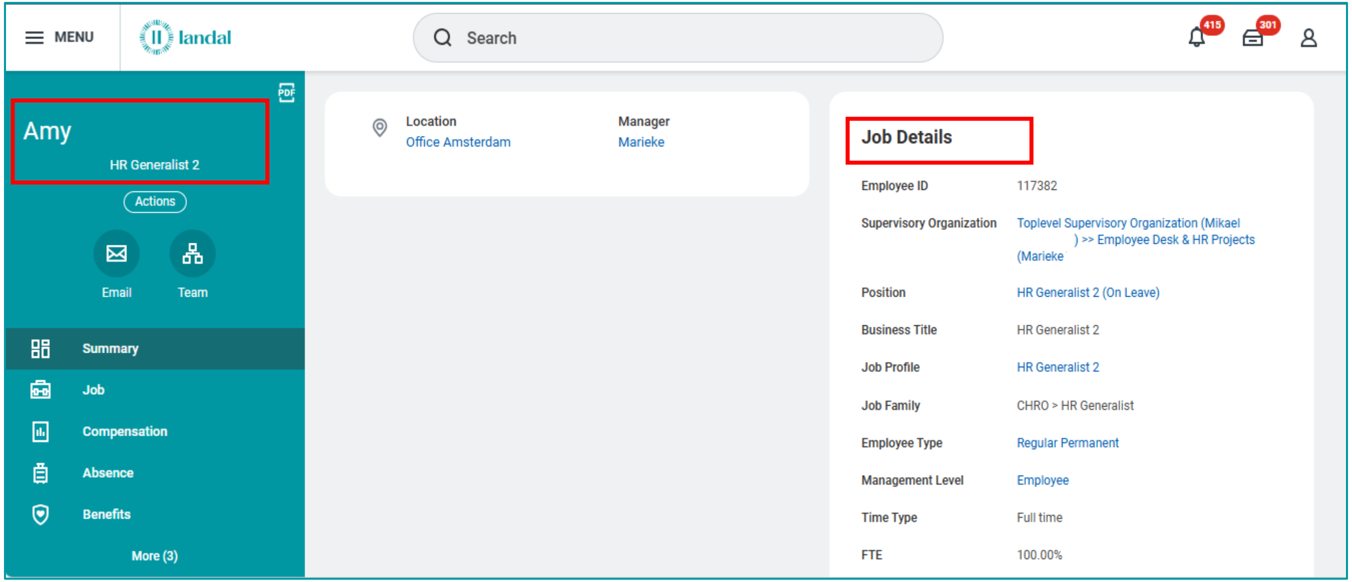


7. Click the **Profile** icon at the top right to access your account settings.

- The **Profile** icon opens your Workday account settings and user preferences.
- From here, you can log out or update basic information.

a. Click the **View profile** button to go to the **Profile page**.

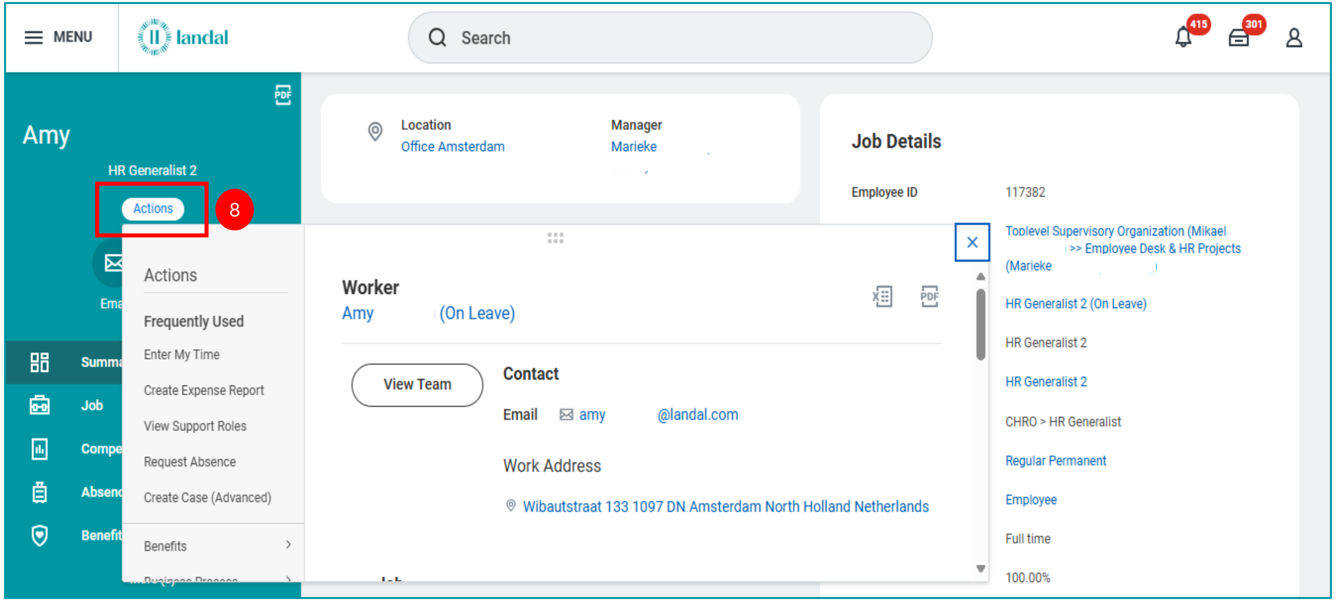
Navigation to Workday Features (Contd.)



Note: You will be navigated to the **Profile page**.

- The **Profile page** contains your personal, job, and contact details.
- Also includes tabs for career, compensation, hierarchy and more.

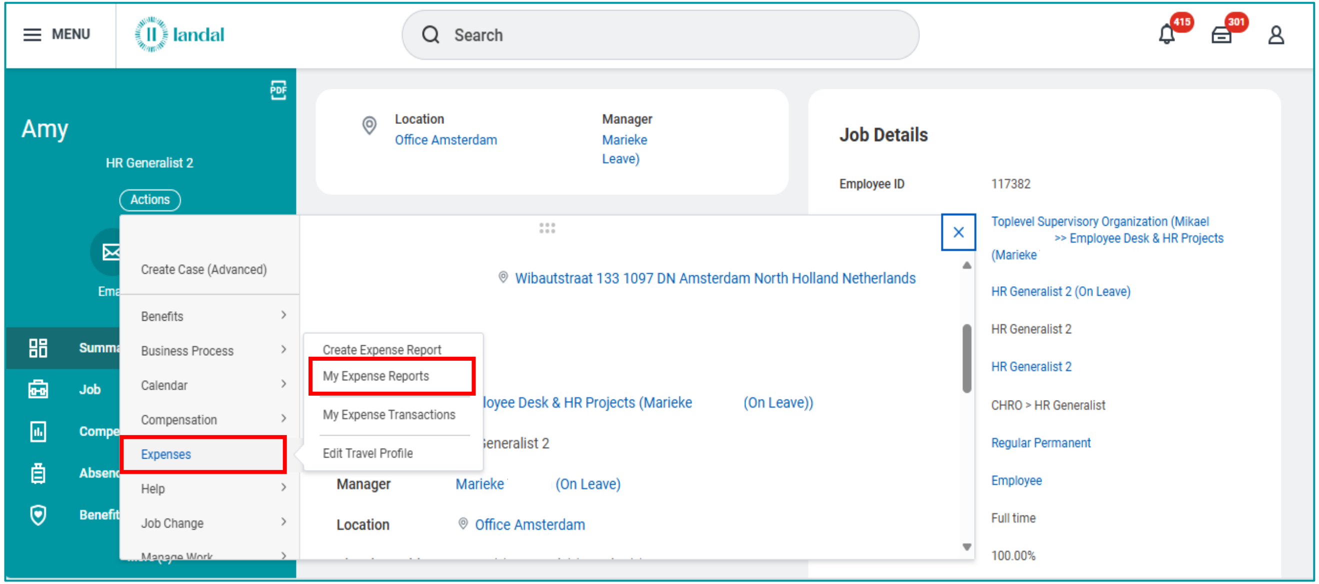
Navigation to Workday Features (Contd.)



8. Click the **Actions** button to view available options and actions.

- The **Actions** button **o**ffers context-specific options for the selected item.
- Use it to initiate actions like editing or viewing details.

Navigation to Workday Features (Contd.)



Note: Scroll down the actions list to discover more functions related to your tasks.

In this example, we will scroll and click **Expenses** to select **My Expense Reports** tab.

- Allows you to explore extended functions and features.
- Scroll down to access additional options not shown initially.

Navigation Recruitment

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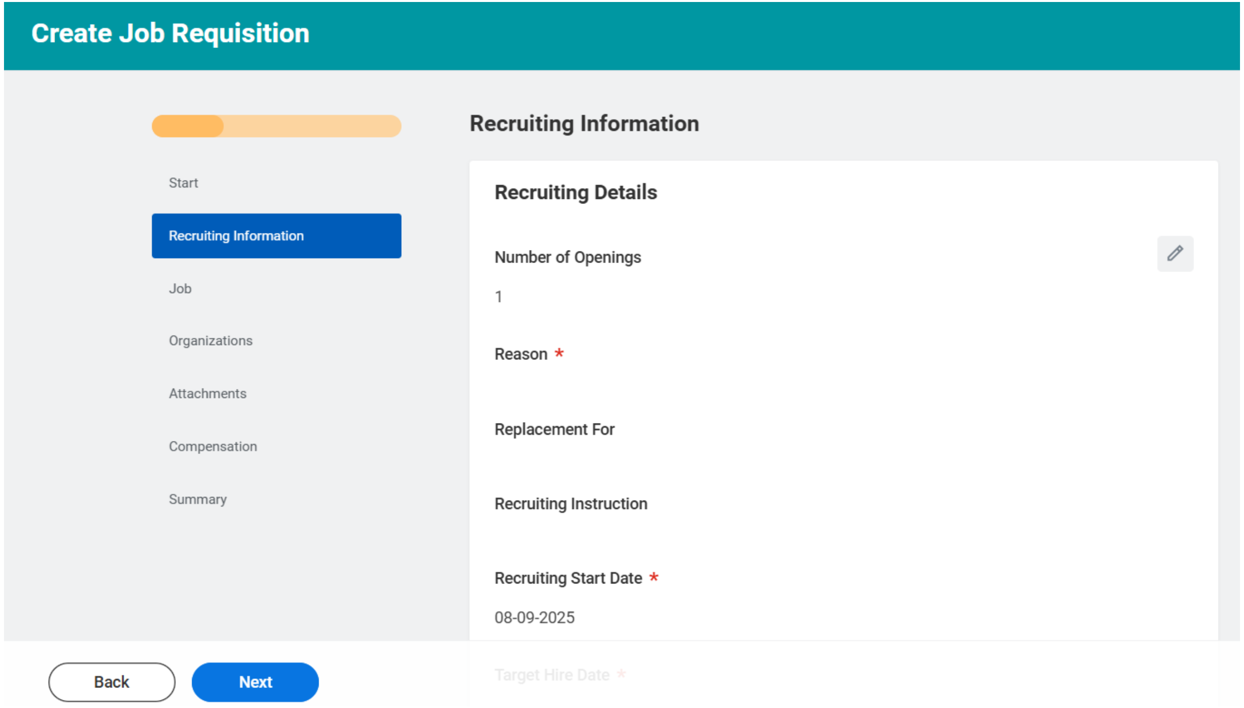
Create Job Requisition

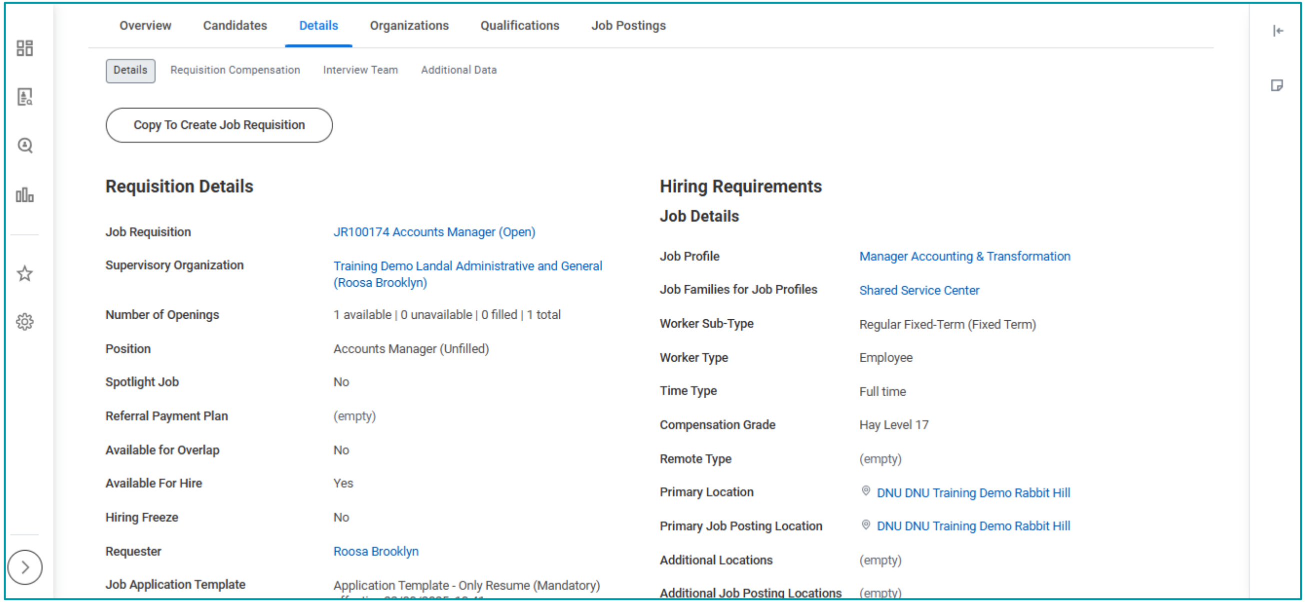


To create a new job requisition, follow these steps:

1. Type **Create Job Requisition** in the search bar
2. In the first screen that opens you can decide how many positions you want to open
3. Fill in all the required fields of each page and click **Submit**

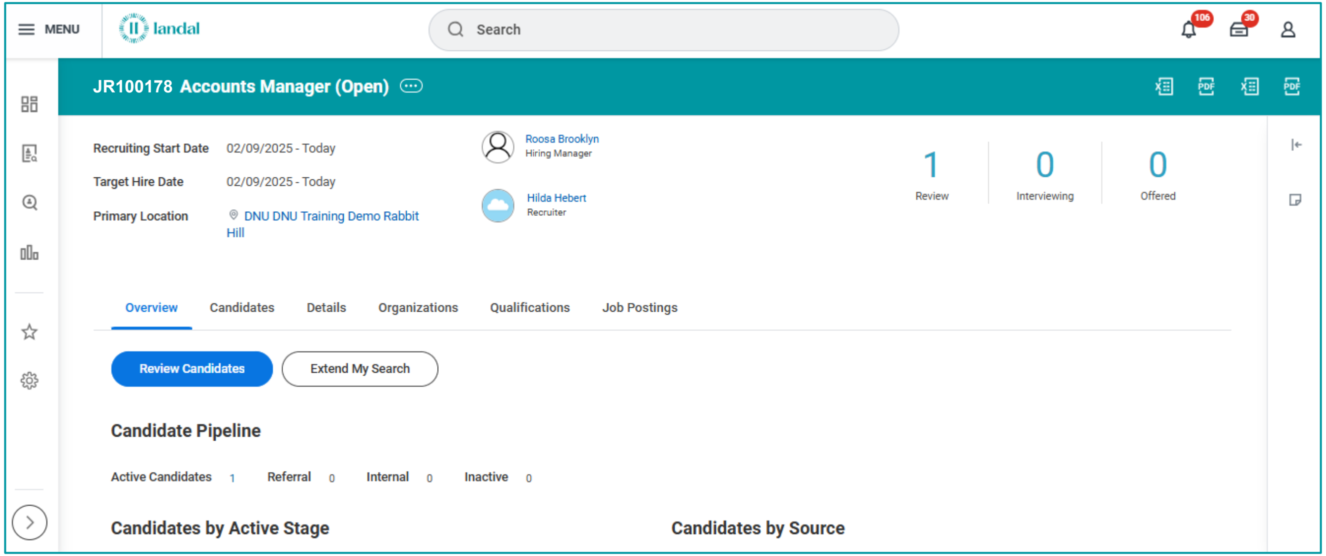
Note: This process is part of the Job Requisition Business Process, which Landal has designed with approvals and routing.

Job requisition Detailed View



Detailed View of the **Job Requisition** once created.

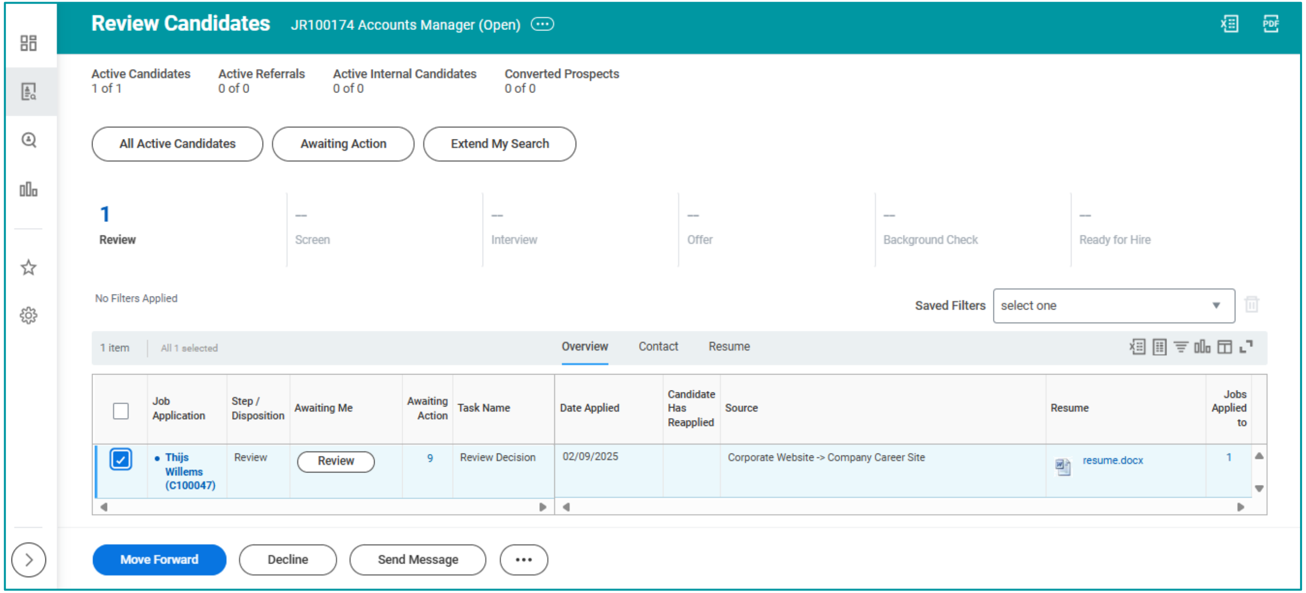
Candidate Review, Interview and Offer



Candidate Review: Recruiter/Hiring Manager evaluating and progressing applicants through defined stages.

Offer Process: Formal workflow to create, approve, and extend an offer, then capture the candidate's response.

Review, Screening and Interview

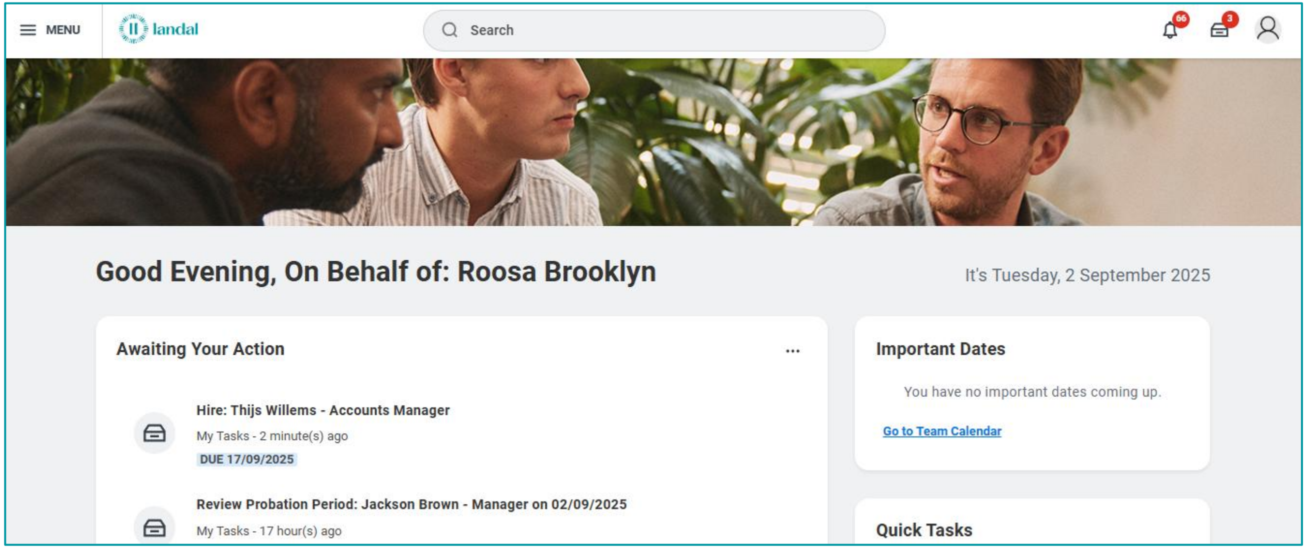


Review → Recruiter checks application against requirements.

Screening → Recruiter or HR conducts an initial evaluation (phone/virtual screen).

Interview → Structured assessments with the hiring team, feedback captured in Workday.

Hiring (Manager)



Once a candidate is selected:

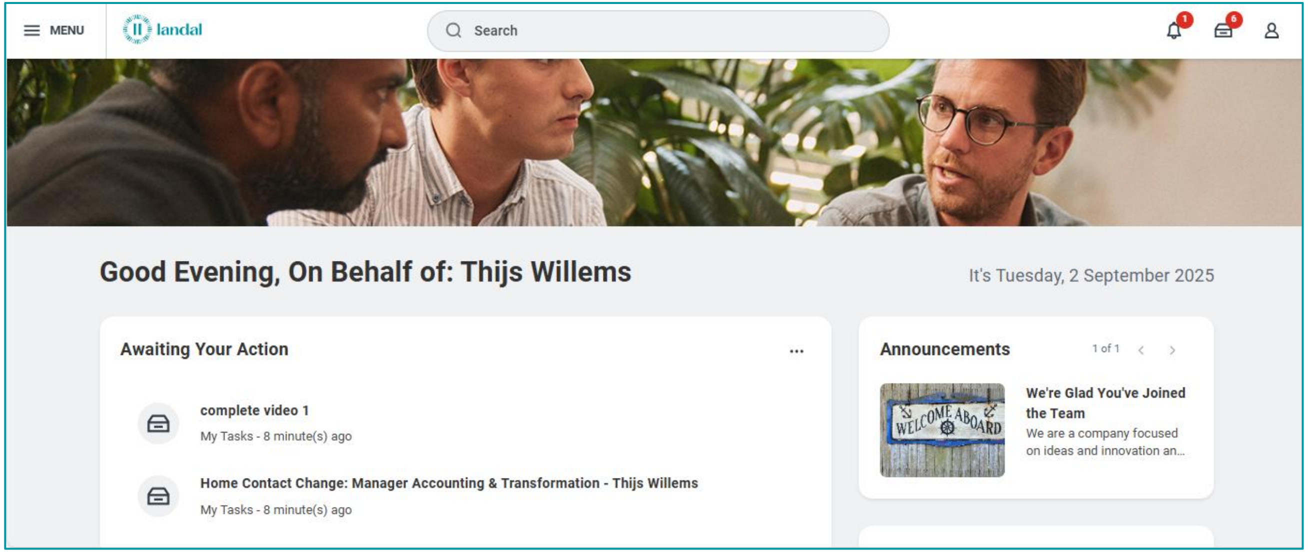
Extend offer in Workday (Recruiter initiates, Hiring Manager reviews).

Candidate reviews and accepts offer.

Background checks and pre-employment verification are completed.

Initiate the Hire business process in Workday to add the employee record.

Onboarding Setup (Employee)



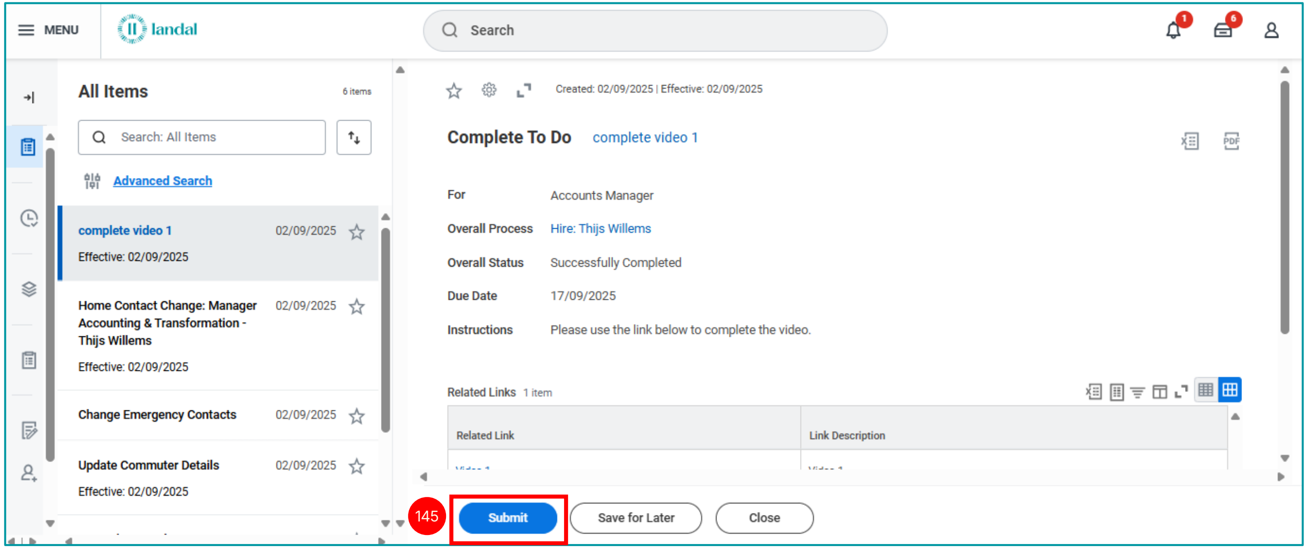
Onboarding ensures a smooth transition for new hires. Workday automates key tasks:

Employee completes personal information, tax, and bank details.

HR sets up benefits enrollment.

Manager assigns onboarding tasks and introductions.

Onboarding Setup (Employee)



Manager assigns onboarding tasks and introductions.

Navigation
Hire to Retire

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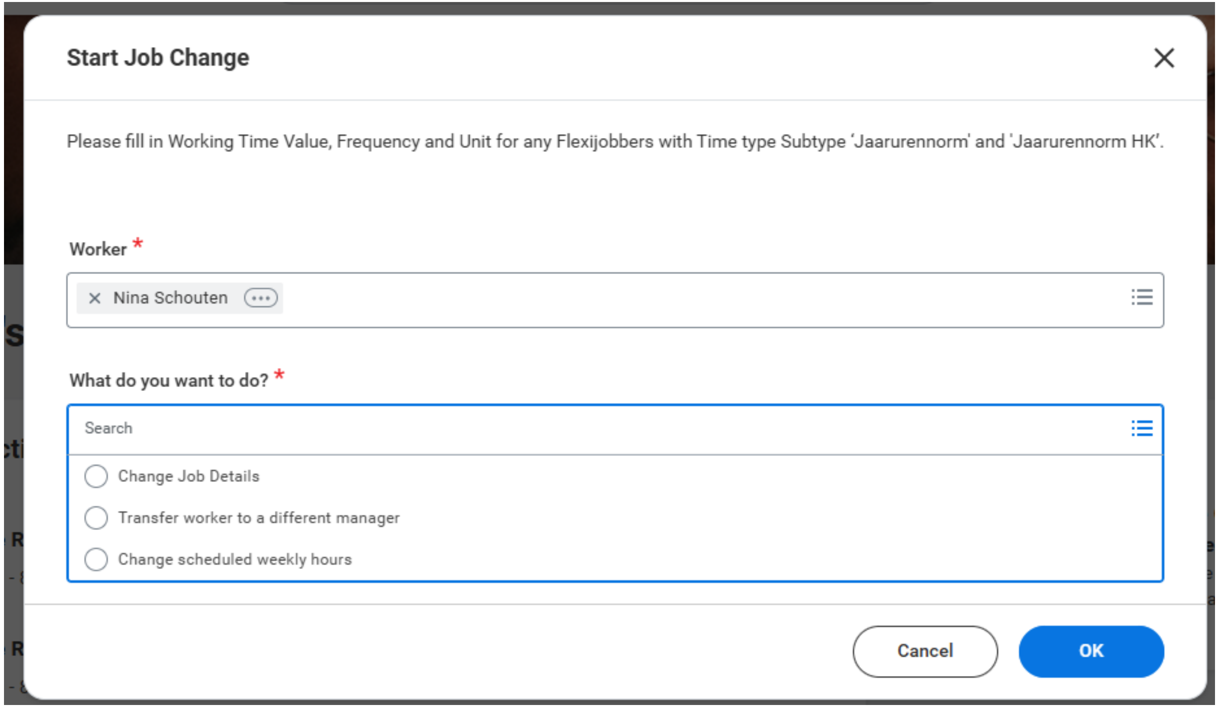
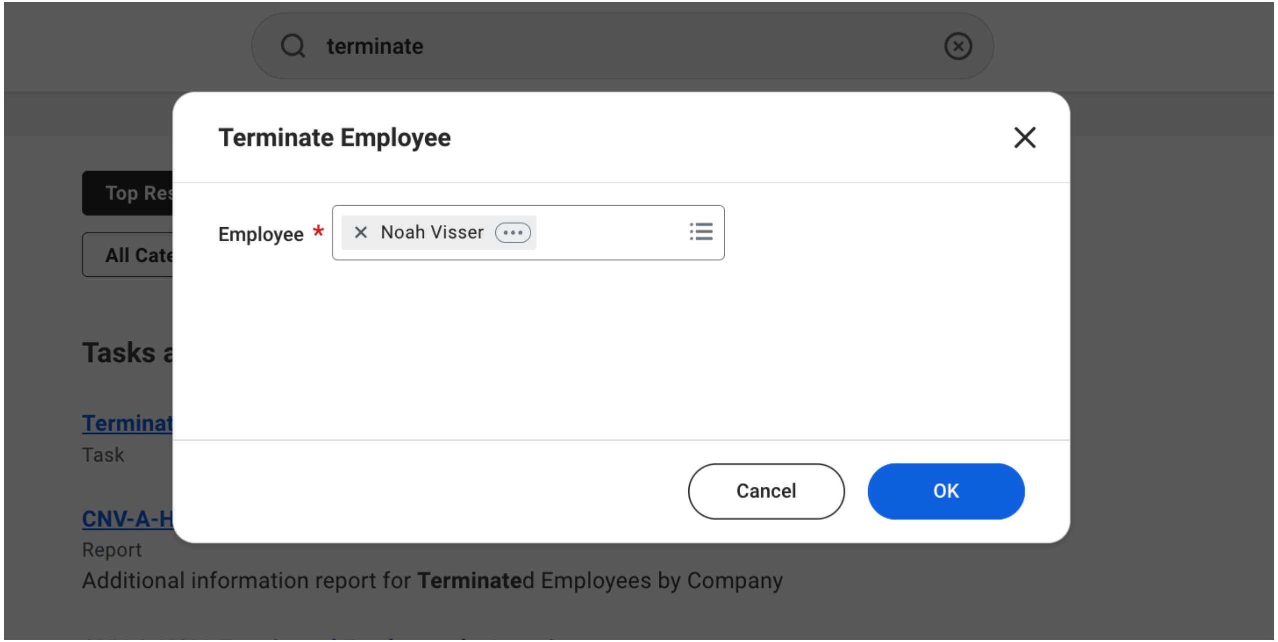
Start Job Change

To start a job change, follow these steps:

1. Type in the search bar **Start Job Change**
2. Fill in the name of the **Worker** you want to start the change for
3. Choose what **type of job change** you want to do
   - Change Job Details
   - Transfer worker to a different manager
   - Change scheduled weekly hours
4. By choosing Change Job Details, you can make multiple changes at the same time (use this for example for Promotion)



Offboarding & Terminate



The termination process ensures a compliant and smooth exit:

Manager or HR initiates termination.

Workday routes approvals and captures termination reason.

IT deactivates system access and retrieves assets.

HR manages exit interviews and final settlement.

Navigation Expenses

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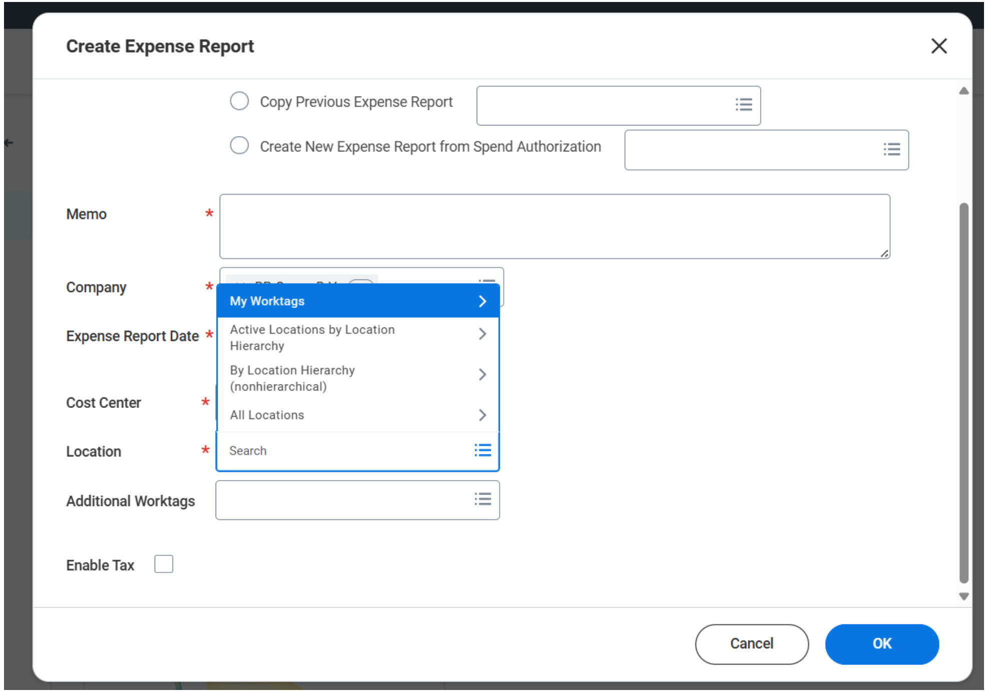
Create Expense Report

Note: In **Expense Hub**, you can also view existing expense reports, access expense transactions, view your travel profile and payment election details.

Here are the steps to create and submit expense reports:

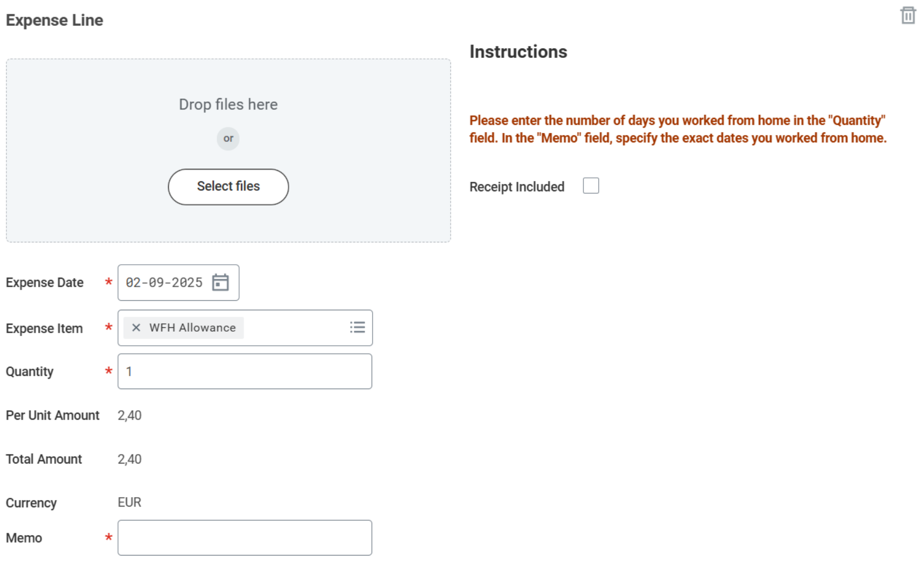
1. Click on **Expense Hub** from the menu on the left side on the homepage and click on **Create Expense Report** under the Tasks section on the first page
2. You can also type **Create Expense Report** in the search bar to immediately go to the task
3. Add a description of the expenses under **Memo**
4. The fields **Company**, **Expense Report Date** and Cost **Center** are auto populated
5. Fill in the **Location** according to **My Worktags**
6. Select **Enable Tax** to apply tax to the expense report
7. Click **OK** to proceed



Add Expense Lines

After creating the Expense Report, follow these steps to Expense Lines:

1. Click **Add** under **Expense Lines**, to add your expense line details
2. Select the **Expense Date** and **Expense Item**
3. You can filter the Expense Item by **Expense Item Group**, **Spend Category** or **By Alphabetical Order**
4. Based on the Expense Item that you select, certain fields will auto populate or become required
5. Fill in all required fields
6. Click on **Submit** if you only have one Expense Line or scroll up and click on the **Add** button to add another Expense Line in the Expense Report
7. The request will be sent to the **Manager** and **Payroll Team** for approval



Navigation Help

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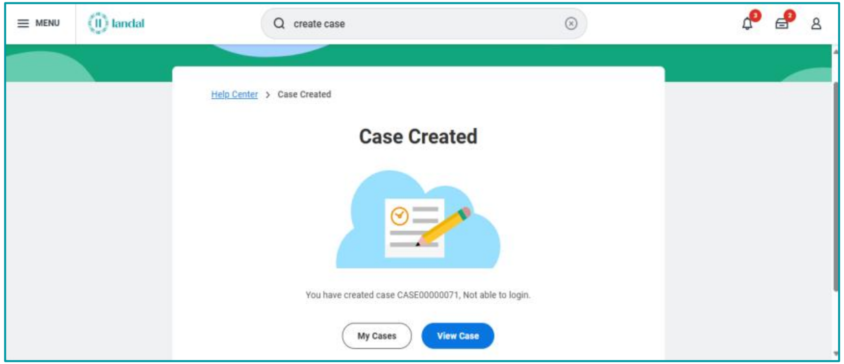
Create Case for Self

To create a help case, follow these steps:

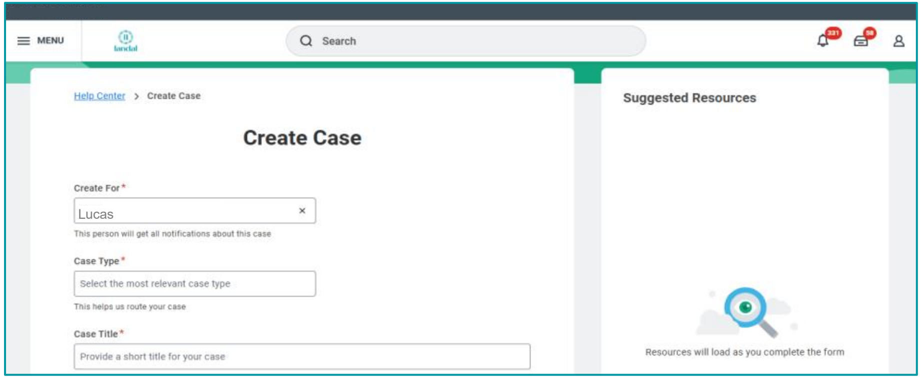
1. Go to **Help** from the left side menu on the homepage on click on **Create Case** or type Create Case in the search bar
2. Fill in the **Case Type**, **Case Title** and **Detailed Description**
3. You can also add an attachment (for example a print screen)
4. After you filled in all the fields, click on the **Create Case** button
5. When the case is created, you are redirected to a confirmation page where you can navigate to all the cases you have logged or view the case you just submitted



Create Case for Employee

To create a help case, follow these steps:

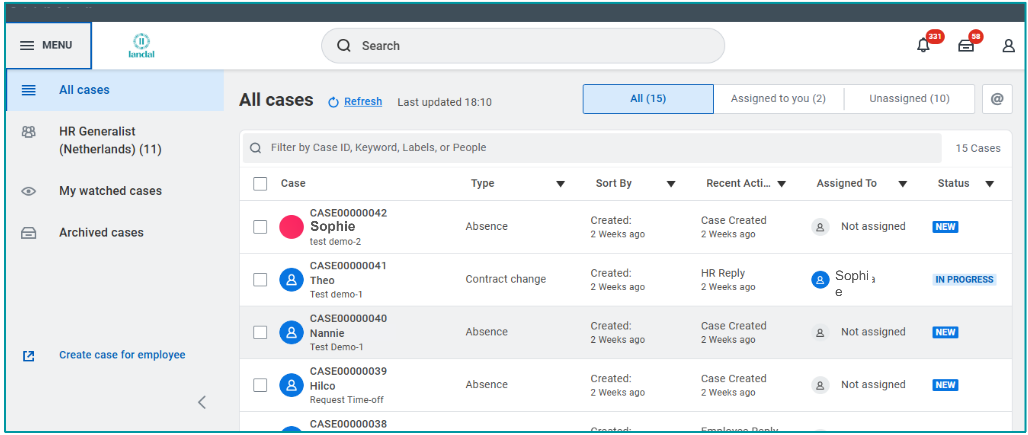
1. Go to **Help** from the left side menu on the homepage on click on **Create Case** or type Create Case in the search bar
2. Fill in who you want to open a case for in the field **Create For**
3. Fill in the **Case Type**, **Case Title** and **Detailed Description**
4. You can also add an attachment (for example a print screen)
5. After you filled in all the fields, click on the **Create Case** button
6. When the case is created, you are redirected to a confirmation page where you can navigate to all the cases you have logged or view the case you just submitted



Help Cases Workspace

To navigate to the Help Cases Workspace as a Case Management Administrator to manage all cases, follow these steps:

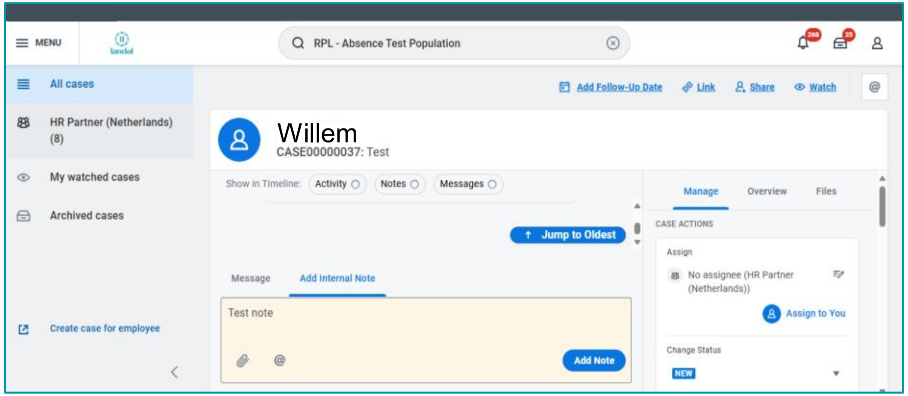
1. Go to the **Help Case Workspace** from the left side menu on the homepage
2. You will automatically see all cases that are currently open
3. In the menu on the left you can select a group to only see the tickets that are assigned to that group
4. You can click on **Assigned to you** on the homepage to only see the tickets that are assigned to you
5. You can also use the filter options to sort and filter on **Type** or **Status**



Manage Cases

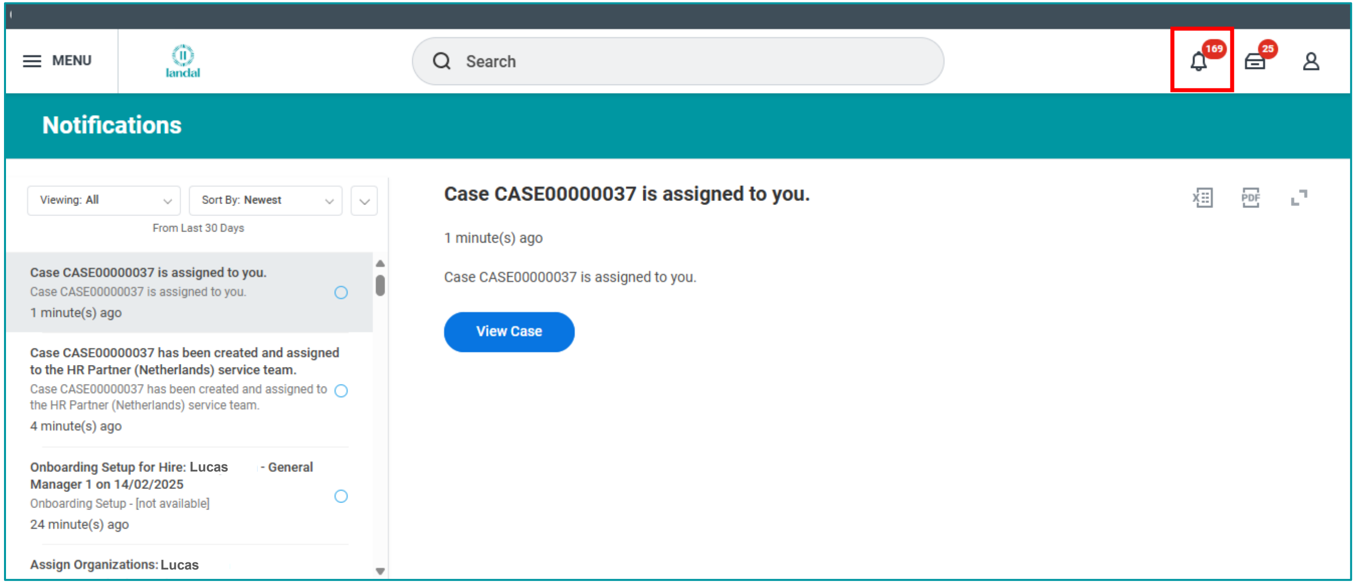
To manage or resolve a case, click on the case you want to manage or resolve and follow these steps:

1. From the Message tab you can use predefined templates by clicking on the **Add Template** button
2. You can also message the ticket creator directly by typing a message and clicking on **Send**
3. **Add Internal Notes** to tag colleagues you might need help from direct in the ticket. This will not be shown to the ticket creator
4. In the right-side menu, you can assign the ticket to a **Team** and/or to an **Assignee** directly, **Change Status**, **Update Type**, **Add Flag** or **Label**
5. On the right-side menu if you scroll down, you can also find personal information about the ticket creator (for example location)



Notification

If a case is assigned to you, you will receive a notification in the bell icon. You can directly go to the case by clicking on the button **View Case:**



Help Articles Workspace

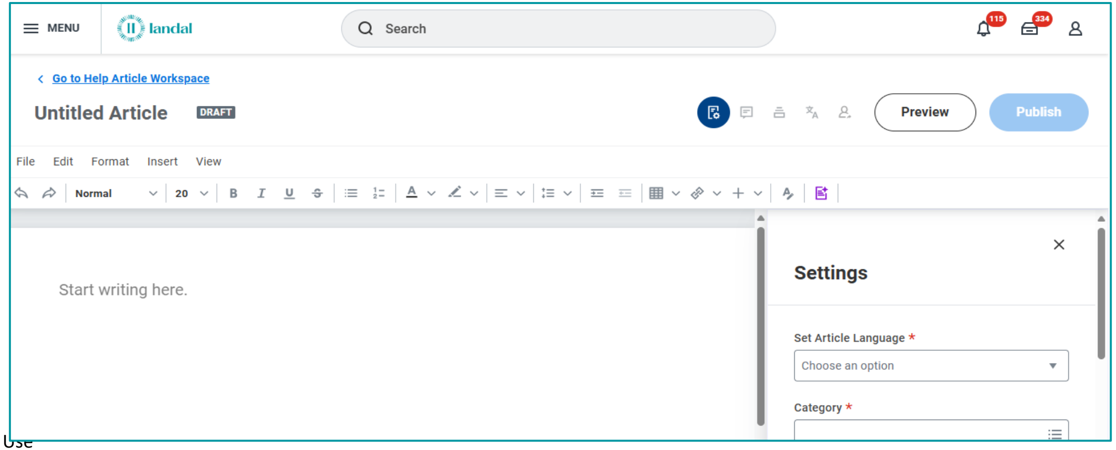
To navigate to the Help Articles Workspace as a Case Management Administrator to manage articles, follow these steps:

1. Go to the **Help Articles Workspace** from the left side menu on the homepage
2. Click **My Drafts** section to access your draft articles
3. Click **My Published** section to access your published articles
4. Click **Published** section to access all the published articles
5. Click **Archived** section to access the archived articles
6. Click the **Create New Article** button section to create and publish new articles

Create New Article

To create a new article, follow these steps:

1. Enter a title (this is how employees can find the article)
2. Enter the content of the article on the main page and use formatting where necessary
3. Enter the mandatory details in the **Settings** section on the right side as per your article requirements
4. When you are done, click **Preview** to see how the article will look
5. Once you are satisfied, click **Publish** to make the article available



Navigation Absence & Time Off

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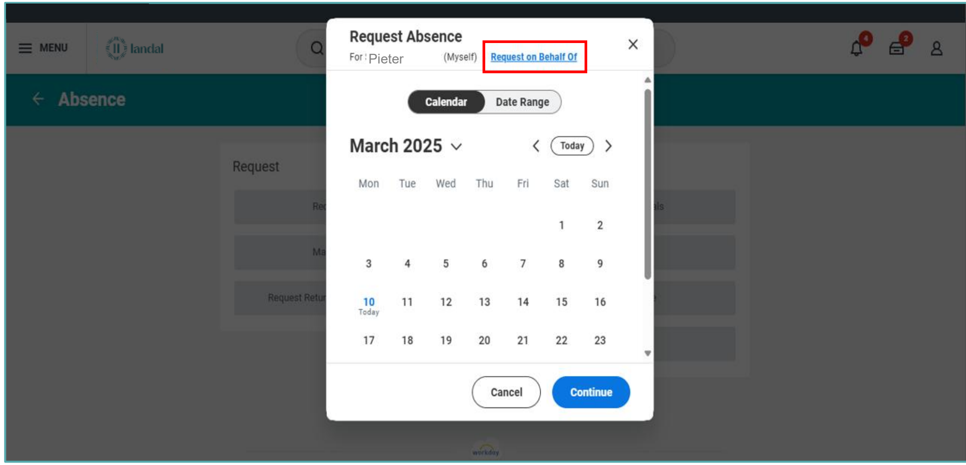
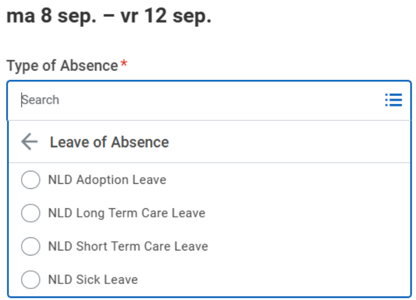
Request Absence (on behalf of)

Here are the steps to **Request Leave of Absence** on behalf of another employee:

1. Go to the **Worker Profile** of the employee you want to request leave for, click on Actions, choose **Time and Absence** and click on **Request Absence for a Worker**
2. You an also select **Absence** from the left-side menu on the homepage, click on **Request Absence,** click on **Request on Behalf Of** and select an employee
3. You can use the **Calendar** to click on individual days or fill in a **Data Range**
4. Click on **Continue** and a **Type of Absence**: **Leave of Absence** and choose a type of absence (for example NLD Sick Leave)
5. Fill in additional fields if needed and click on **Submit** and **Done**

Note: if you fill in an Estimated Last Day of Leave, it does not mean that the employee is automatically returned on that day. You still have to initiate a Return from Leave of Absence process





Return from Leave of Absence

Here are the steps to **Return from Leave of Absence** on behalf of another employee:

1. Go to the **Worker Profile** of the employee you want to return from leave, click on Actions, choose **Time and Absence** and click on **Return Worker from Leave**
2. You can also go to **Absence** from the left menu on the homepage, click on **Request Return from Leave** of Absence and select the worker you want to return from leave
3. Fill in the **First Day Back** at Work and the **Actual Last Day of Absence** (note: the First Day Back at Work needs to be after the Actual Last Day of Absence)

Return Worker from Leave Pieter (On Leave)

First Day Back at Work 08-09-2025

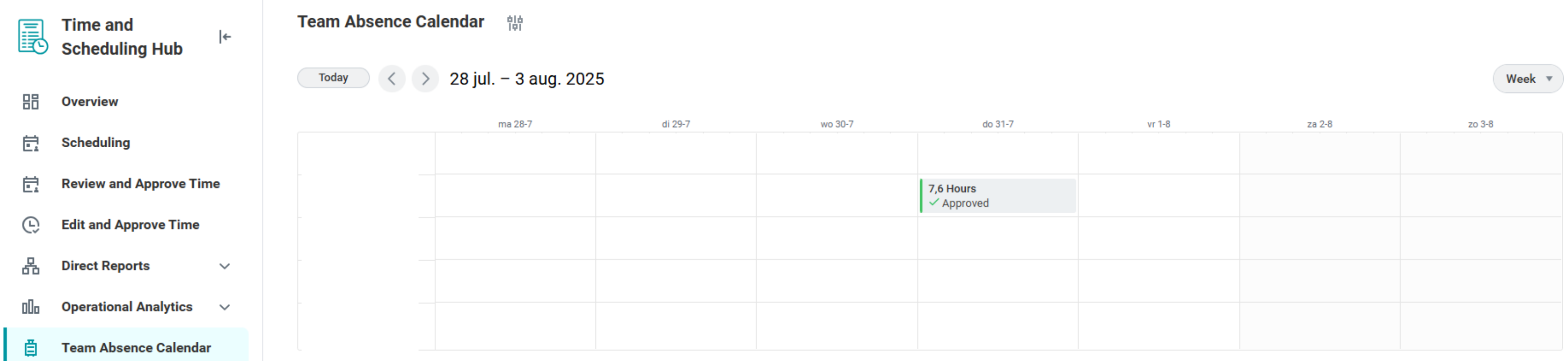
Absences Returned From 1 item

Select	*Event	First Day of Absence	Estimated Last Day of Absence	Actual Last Day of Absence
☑	NLD Sick Leave (04-09-2025)	04-09-2025	09-09-2025	07-09-2025

Team Absence Calendar (Managers)

To see who of your team is currently on leave and for how many hours:

1. Go to the **Time and Scheduling Hub** from the menu on the left side
2. Click on **Team Absence Calendar** and click on the OK button
3. You will see the current week and any absences that are planned and the status.
   You can navigate between weeks or click on **Week** to change the view to a monthly view.



Team Absence Calendar (HR)

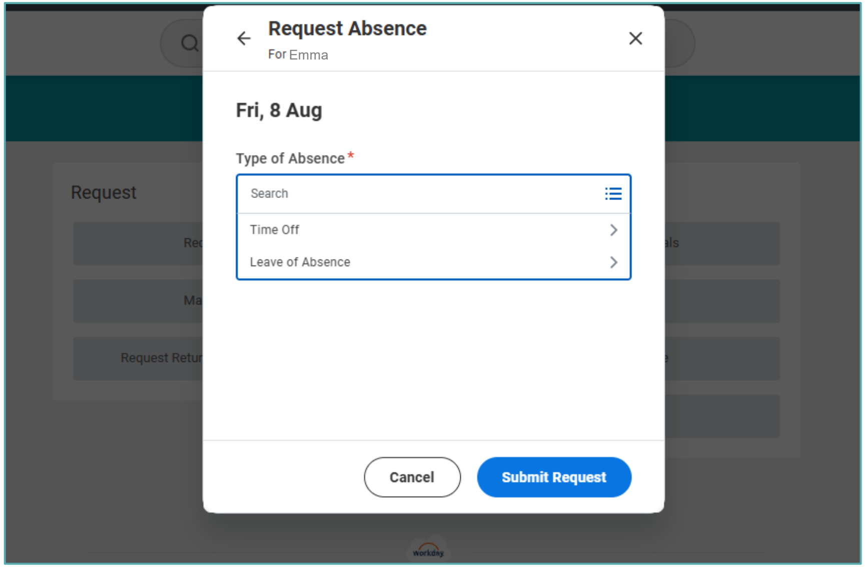
To see who is currently on leave and for how many hours:

1. Go to the **Time and Scheduling Hub** from the menu on the left side
2. Click on **Team Absence Calendar** and click on the OK button
3. Select an Organization or one or multiple Workers
4. You will see the current week and any absences that are planned and the status.
   You can navigate between weeks or click on **Week** to change the view to a monthly view.

Request Time Off (on behalf of)

To request Time Off (on behalf of) you follow the same steps as :

1. Select **Absence** from the MENU list
2. Click on **Request Absence**
3. Click on **Request on Behalf Of** and select an employee
4. You can use the **Calendar** to click on separate days or fill in a **Data Range**
5. Click on **Continue** and a **Type of Absence**: **Time Off** or **Leave of Absence**
6. Fill the amount of hours in **Hours (Daily)** and click on **Submit Request**
7. To view the request, you can click on **Go to Calendar** to see the request in the Manage Absence task of the employee



Absence Balances

To view the absence balances of employees you can:

1. Go to the **Worker Profile**
2. Click on **Absence**
3. Click on the tab **Absence Balance**

You will find all absence balances as of the current period you are in.