

Workday Spotlight: Shortcuts

Shortcuts are customized quick links that can be accessed from the left-hand Menu. Users can add apps, reports, and other links to their shortcuts menu. This is the perfect place to tuck away those items you access rarely so have difficulty finding as well as those items that are accessed frequently. Adding a shortcut can be as simple as this example!

Add a report to your shortcuts tab on the Menu on the Workday home screen:

1. Open the Menu on the home screen.
2. Select the "Shortcuts" tab.
3. Click "Add Shortcuts."
4. Enter the name of the report you commonly use.
5. Click the plus sign to add the report.

The next time you want to run that report, go to the "Shortcuts" tab and click the report.



Workday Nuggets: Contracts

It's contract time again! Were you a little too quick to click?

If you received, reviewed, and returned your contract in the inbox but forgot to print a copy for your records, it's easy to find your acknowledged contract in Workday. Follow these steps:

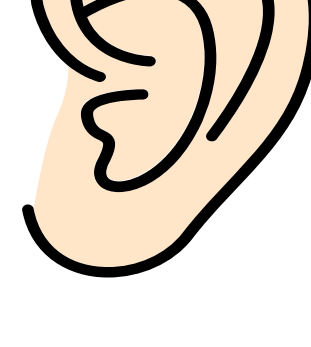


1. Log into Workday.
2. Go to your worker profile.
3. Click on the "Personal" link on the left-hand menu.
4. Select the "Documents" tab to see previously acknowledged contracts or Period Activity Pay.
5. Select the document you want to view or print.

Alternatively, type "My Documents" in the search bar and click on the "Maintain My Worker Documents" report to see the results found in step 4, above.

You Asked, We Listened: Reporting (Contd.)

In the reporting series, we have explored where to get information on the CHESS.edu website, valuable tip sheets, and within Workday what reports you have available based on your security role.



Next, we explore the difference between Standard and Custom reports and how to access them.

Standard Reports

Workday generally includes standard reports as part of a product feature and Workday maintains these reports. There are two types, Xpresso and Report Writer. Example: My Payslips.

Custom reports

Custom reports come from a variety of sources. They can be built from scratch or built from a copy of a report and enhanced. Maintenance of these reports is the responsibility of the Reporting team.

An easy way to identify custom reports is the inclusion of a Custom Report (CR) four-digit inventory number. Example: Budget vs Actual by Cost Center / Ledger Account / Spend Category for Organization - **CR1237** – CHESS.

To search for available reports, Workday makes the process simple and intuitive. There are two main ways to find a report. Follow these simple steps:

1. In the search bar, enter the name of the report, or
2. Type in key words in the search bar, and the system will identify related reports that match the full or partial key words.
3. To select the report, either click on the name of the report from drop down list or hit enter to return all report results.

Workday makes it easy to **manage your favorite reports**. Follow these simple steps:

1. Select your employee profile icon.
2. Scroll down to favorites and click to open your favorite reports and tasks window.
3. Click on manage favorites, click in the search box for the key words to display the available reports.
4. Select all that apply and click "Ok."

You can now access these reports at any time with the simple click of your "Favorites" button.

I love the Budget Vs Actual by Cost Center / Ledger Account / Spend Category - CR1237 Report. This report gives everyone a simple way to view your Budget without staffing. It is great for my employees who only need to worry about their supplies budget. I can easily track the cost centers throughout my division.

-- Cori Bergen, CIO, SFCC

Website Access to Workday Support

You can now find Tenant Management (refresh schedules), Workday Maintenance, and links to Workday Support on the chess.edu website! Click on the images below to visit the web pages.

2023 Extended Maintenance Schedule
Weekly, Monthly, Quarterly, and Feature Releases

[Tenant Management](#)

[Service Requests](#)

Workday Support: Get Ready!



2023R2 Feature Release is coming to a Sandbox-Preview tenant near you on August 5th and a Production tenant on September 9th! Please visit Workday Community by clicking here for more information.



We Want to Hear from You

If you have feedback about the **Workday ERP** (Finance/HR/ Payroll), please fill out the online form [HERE](#) to let us know how you think it's going.

For feedback about **Workday SIS** (Student), fill out the online feedback form [HERE](#) with your thoughts and questions about the upcoming implementation.



What's Happening with SIS (Student)?

DATE	EVENT	DESCRIPTION
Current through June 2023	Pre-Plan Stage	A stage to evaluate lessons learned from the ERP, define the governance structure, understand alignment intent and decisions, design team structures and roles/responsibilities.
May-June 2023	DPN (Deployment Prep Navigator)	College teams prepare for the Plan Stage through information gathering exercises that include guided questions and customer information workbooks.
First Half June 2023	Workstream Onboarding	The Change Management Team will provide onboarding to the Workday SIS Wave 1 project Workstreams and Leadership.
June-Sept. 2023	Plan Stage	A stage to hold discovery sessions; train Workstreams; kick off security, data conversion, integrations, and reporting; start customer readiness reviews; and build the foundation tenant.
Fall 2023	Official Kickoff Celebration	Our opportunity to come together as all member colleges celebrate the kickoff of the architect (configuration) stage.

CHESS Job Opportunities



Technical Project Manager
Implementation Project Manager
Senior Program Manager

Click [HERE](#) for job descriptions and application information.

Contact CHESS

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The *CHESS Connection* provides news about CHESS and our Workday Enterprise Resource Planning and Student Information System projects. Please share.

CHESS, the Collaborative for Higher Education Shared Services, is a nonprofit comprised of member colleges that employ a unique approach to transform the student experience and streamline administrative operations through state-of-the-art technologies. *Mission: All Together* is the CHESS initiative to launch Workday.