General Workday Help

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Overview

This document takes you through managing your personal inbox and data in Workday.

Managing your Workday Inbox

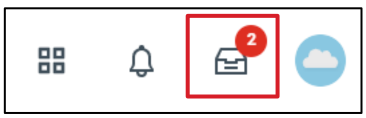
Employees can access the Workday Inbox from the Workday homepage. The Workday Inbox includes messages about tasks, approvals, due dates, and other items sent to you as part of everyday business processes.

Viewing and managing your Workday Inbox

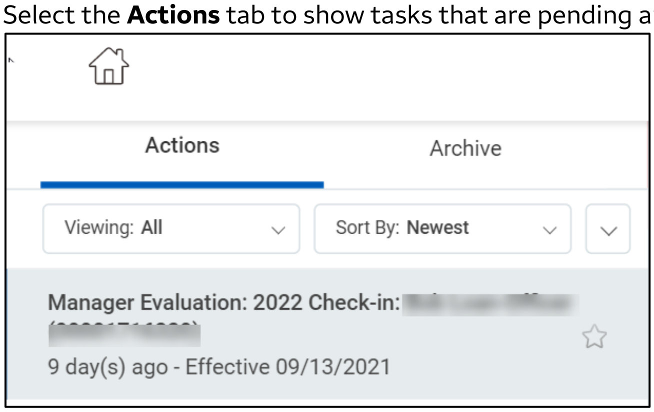
The Workday **Inbox** contains information about your tasks, due dates, and approvals. For example, managers receive tasks to approve their employee's time away requests. All Workday Inbox items require action. You will receive an email when you have a new task in your Workday Inbox.

Follow the steps below to access and act on tasks in your Workday Inbox:

1. Select the Workday **Inbox** icon from the top right corner of the Workday homepage.

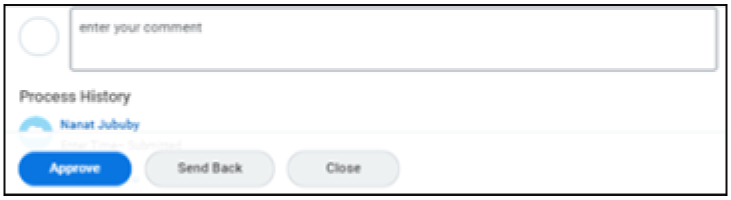


2. Select the **Actions** tab to show tasks that are pending an action.

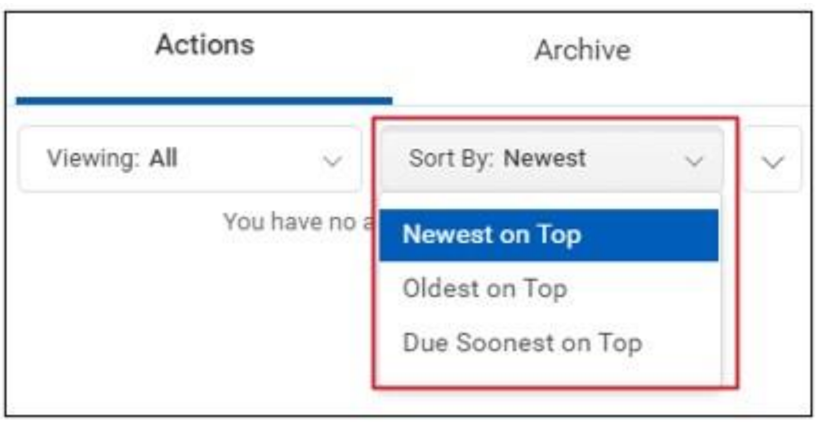


Actions available for Inbox items will vary based on business process, your security role(s), and whether you are a reviewer or approver.

Common Inbox actions

Action	Description
Approve	Approves a specific step in a business process and moves it to the next step or completes it (if you are the last reviewer). 
Deny	Does not approve a request and ends the business process. Not always a displayed option.
Close	When you are not ready to take action, this closes the screen. The task remains in your Inbox.
Save for Later	Saves your input before submitting so it can be reviewed or changed later. You can access transactions that have been saved for later from your inbox.
Cancel	Closes the item without saving changes. Selecting Cancel from the Inbox does not cancel the transactions.
Send Back	Sends the current step back to a prior step or person.

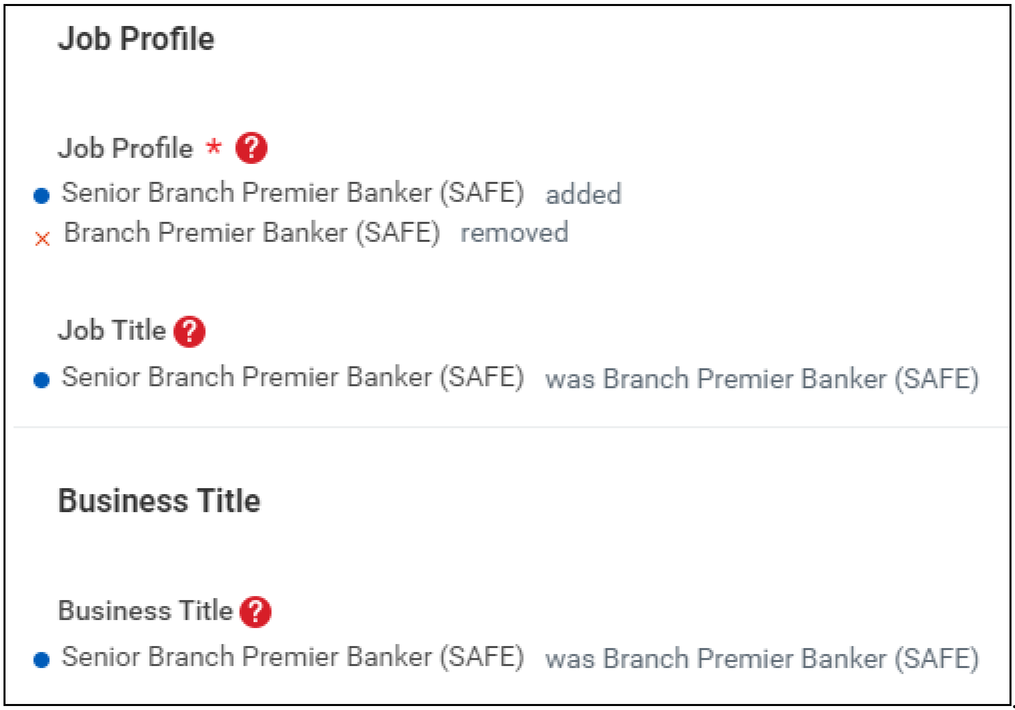
3. The **Archive** tab includes all the actions completed by you in the past 30 days.
4. You can also use the **Sort By** drop-down list to further sort your Inbox. Select the relevant filter to sort your inbox from the **Newest on Top**, **Oldest on Top**, or **Due Soonest on Top** options.



Identifying updated values in approval transactions

For certain tasks requiring approval, such as processing a promotion, managers receive an approval action in their Workday Inbox. Updates are indicated with a red x or blue dot. Items that were removed are marked with a red x and new information is marked with a blue dot.

The following image shows an example of a job profile change, from Branch Premier Banker (SAFE) to Senior Branch Premier Banker (SAFE). A red x is displayed to the left of the removed item (Branch Premier Banker (SAFE)) and a blue dot is displayed to the left of the new item (Senior Branch Premier Banker (SAFE)).

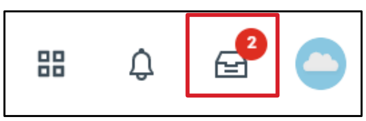


Creating and adding filters in your Workday Inbox

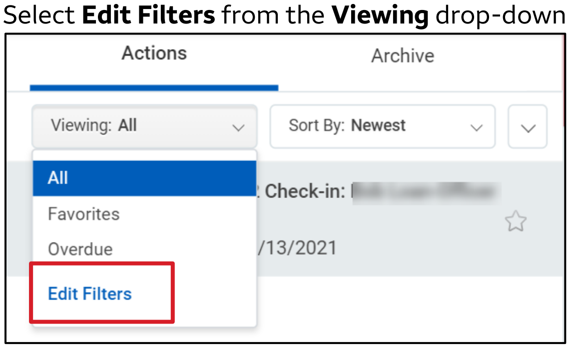
You can also add custom filters to your Inbox to help organize across task or report types.

Follow the steps below to create filters for your Workday Inbox:

1. Select the Workday **Inbox** icon from the top right corner of the homepage.

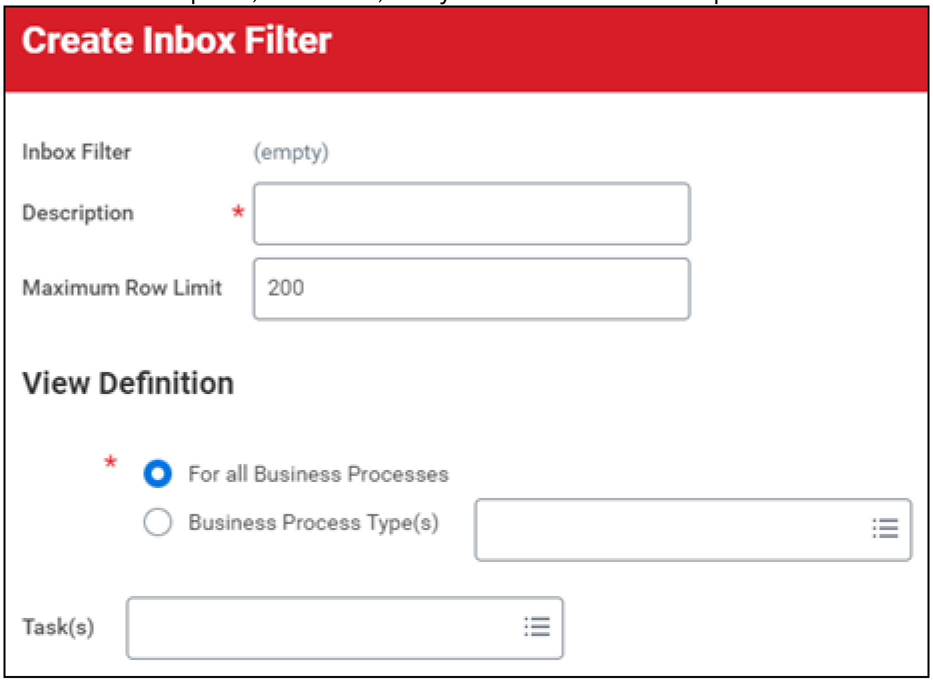


2. Select the **Actions** tab and select the **Viewing** drop-down list.
3. Select **Edit Filters** from the **Viewing** drop-down list.

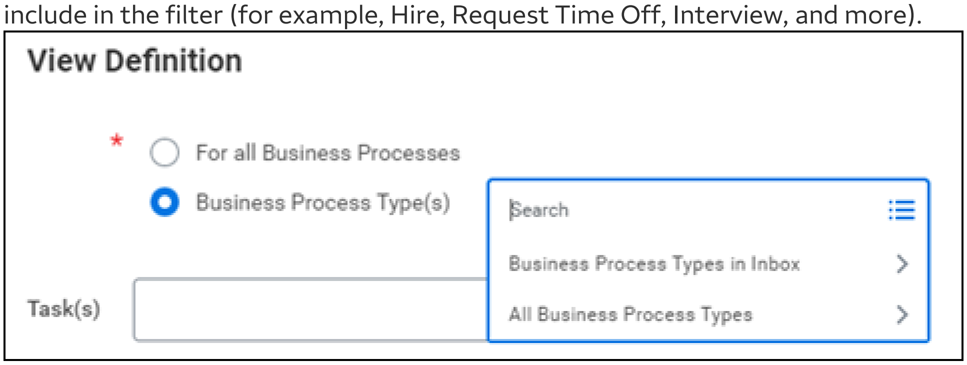


4. The **My Inbox Filters** page appears. Select **Create Inbox Filter**.

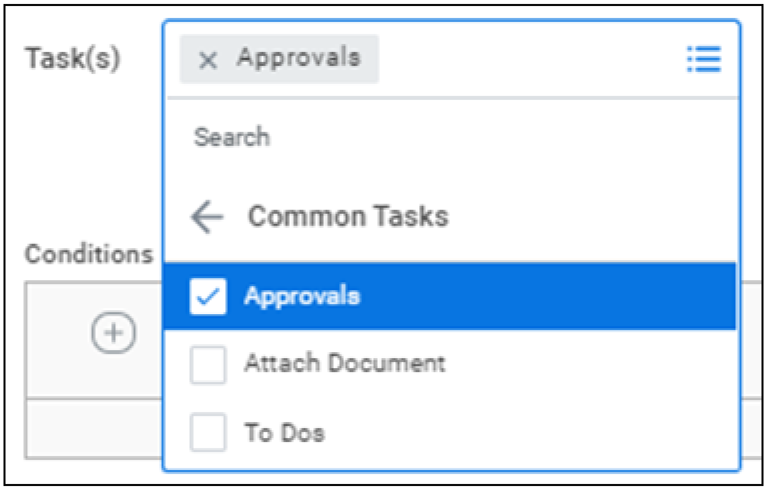
5. Enter the description, definition, and your desired tasks or reports to the filter.



- **Description:** Choose a name for the filter. This name will display in the filter menu so you can choose it later.
- **Maximum Row Limit:** Set the number of records that will return at a time (the default is 200).
- **View Definition:** Select whether you want to apply the filter to all business processes or only specific processes. If you want to select specific business processes, use search to find the ones you want to include in the filter (for example, Hire, Request Time Off, Interview, and more).



- **Task(s):** You can also sort by task type. Select **Common Tasks** to sort by Approvals, Attach Document, or To Dos.



Examples

- Select **Request Time Off** in the **Business Process Type(s)** field to limit the list to time off requests.
- Select **Approvals** in the **Task(s)** field to filter by items requiring your approval.

6. Optionally, you can select the **plus sign** under **Conditions** ( ) to set additional conditions to narrow the filter. This is not required.
7. Select **OK** to create the filter.
8. To apply your filter, return to your inbox and select the **Viewing** drop-down menu to select the filter. This will hide all inbox tasks that do not meet the filter criteria.

Managing your personal information in Workday

Wells Fargo must have up-to-date personal information — including your name, home address, and phone numbers — on file in our personnel records to make sure you receive company communications promptly and to manage business operations. In some locations, incorrect information (such as your home address) may affect your eligibility for benefits.

You're responsible for promptly reporting any changes to your personal information. Workday enables you to access, view, and update most of your personal data, including legal and preferred names, contact information, business title, government IDs, personal details such as marital status, and your photo. Some updates are visible immediately, for example, preferred name. Some updates may require internal review prior to becoming visible, for example, legal name.

> **Important:** By providing your contact information, you are giving consent to its use for business purposes, general emergencies, relevant Human Resources information, or safety-related reasons. This includes, but is not limited to, consent to contact you via automated technology at the email address you provide. Wells Fargo will not use personal email to communicate any type of solicitation without your consent.

Access the personal information app in Workday

Follow these steps to access your **Personal Information** app in Workday:

1. On the Workday homepage, select **View All Apps**.
2. Select **Personal Information**.

3. On the **Personal Information** landing page, you can access personal information under the **Change** and **View** sections.

4. Select the choice appropriate for the change you want to make, then follow the instructions in the appropriate section of this document.

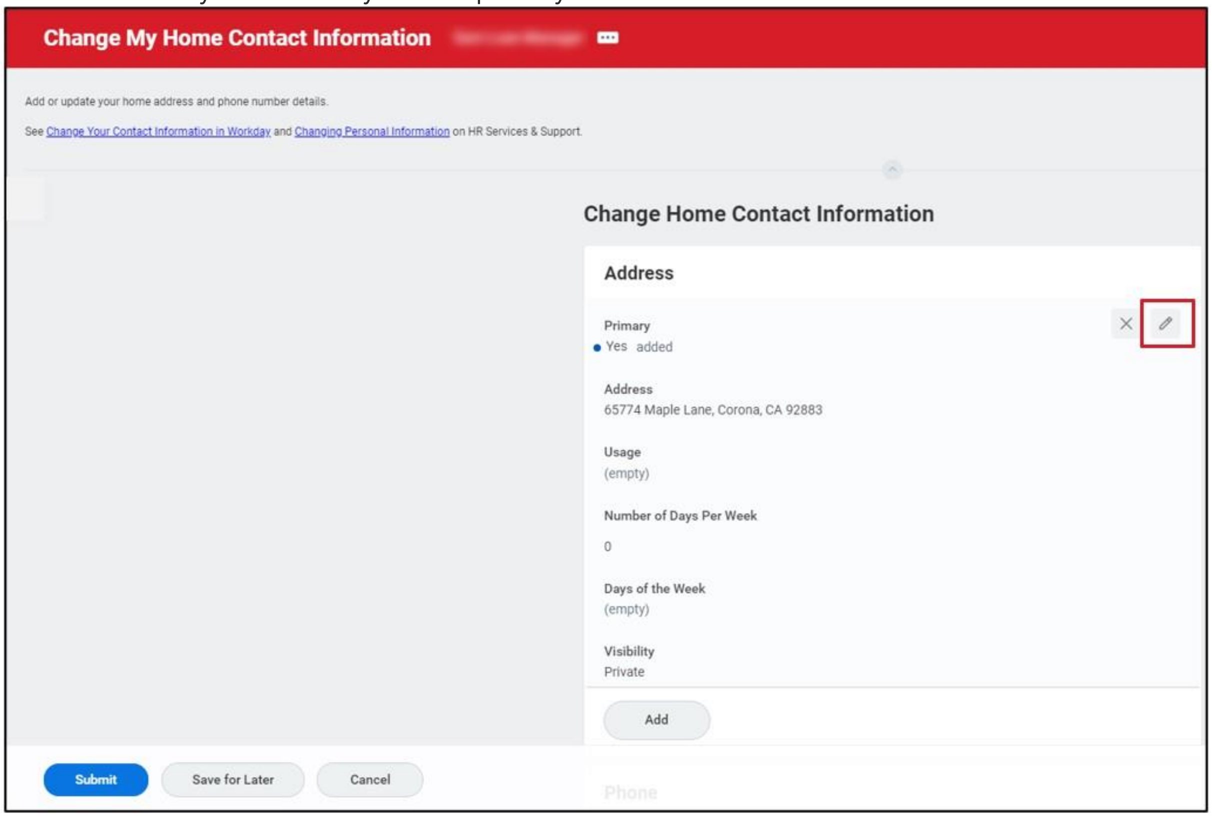
Change your home address, phone number(s), and personal email address

Workday lets you change your home address, home phone number, and personal email address. You can also update your work phone number. Follow these steps to make these changes:

1. On the Workday homepage, select **View All Apps,** then select the Personal Information app.
2. Select the **Contact Information** option in the Change section.
3. To edit your home contact information:

    a. On the My Contact Information page, select **Edit** above the Home Contact Information section.
    b. Select **Change My Home Contact Information** from the drop-down list.
    c. Select the pencil icon to edit your information in the Address, Phone, and Email fields. For address changes, you must also enter the desired effective date. If you are adding a second address, you must

check the Primary box if this is your new primary address.



d. Select **Submit** to save the changes.

Note: If you are fully remote and change your home address, ask your manager to also update your Alternate Work Address; they will need to submit an Employee/Job Information Change Request.

4. To edit your work phone number:

    a. Select **Change My Work Contact Information section**. Only the phone number is editable; your manager must make any changes to your work location or MAC.
    b. Enter your new phone number.
    c. Select **Submit** to save the change.

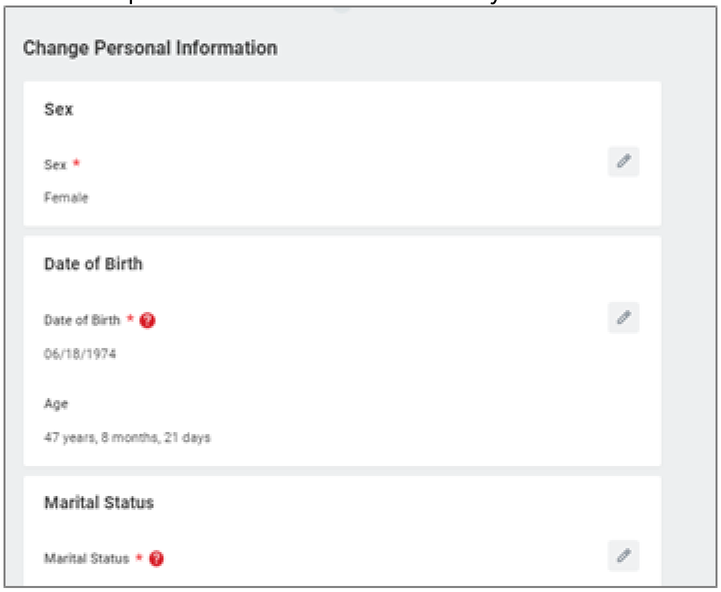
Changing personal information such as date of birth and marital status

Workday enables you to update key personal details such as your date of birth and your marital status. The fields available in this space will vary depending on your location; for example, **U.S. employees** can optionally enter **Sexual Orientation**, **Gender Identity**, **Pronoun,** and **Military Service** details.

Follow the steps in this section to add or edit these details.

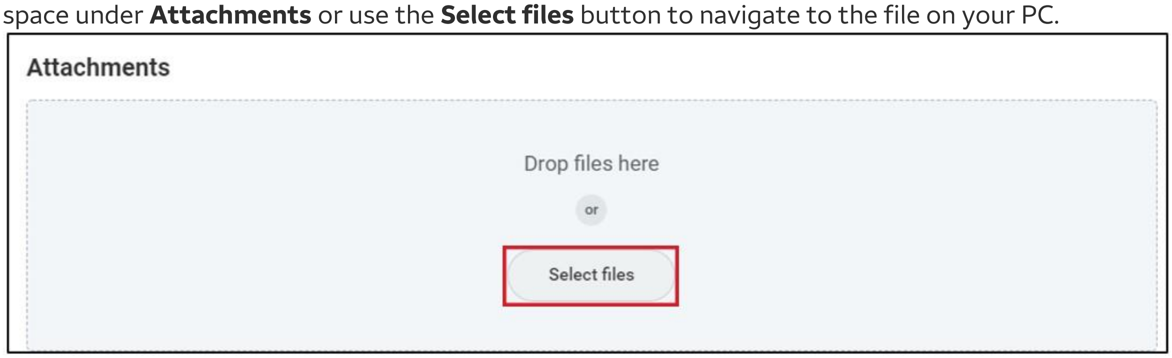
1. On the Workday homepage, select **View All Apps**, then select the Personal Information app.
2. Select Personal Information in the Change section.

3. Select the pencil icon for the information you want to edit.



Note: The Military Service field is used to indicate if you are the current or former spouse or domestic partner of someone who is in the military or who is a veteran. Read the related article on HR Services & Support: **Self-identifying Veteran Status in Workday** to learn how to capture your own military service.

4. Attach supporting documentation to update Citizenship Status or Date of Birth. Drag and drop the file into the space under **Attachments** or use the **Select files** button to navigate to the file on your PC.



Be sure to attach the appropriate supporting documents based on your location:

If you are updating:	These are acceptable supporting documents:
Citizenship Status	**U.S:** Passport or birth certificate **Canada and Latin America:** Passport or birth certificate **APAC (including India):** Passport **Philippines:** Passport or Certified True Copy of Identification Certificate **EMEA:** Passport and visa, if applicable
Date of Birth	**U.S:** Birth certificate or government ID **APAC:** National ID or passport **Canada and Latin America:** Birth certificate or valid government ID **EMEA:** Birth certificate, passport **India:** Aadhar/Permanent Account Number (PAN) **Philippines:** Certificate of birth

5. Select **Submit.**

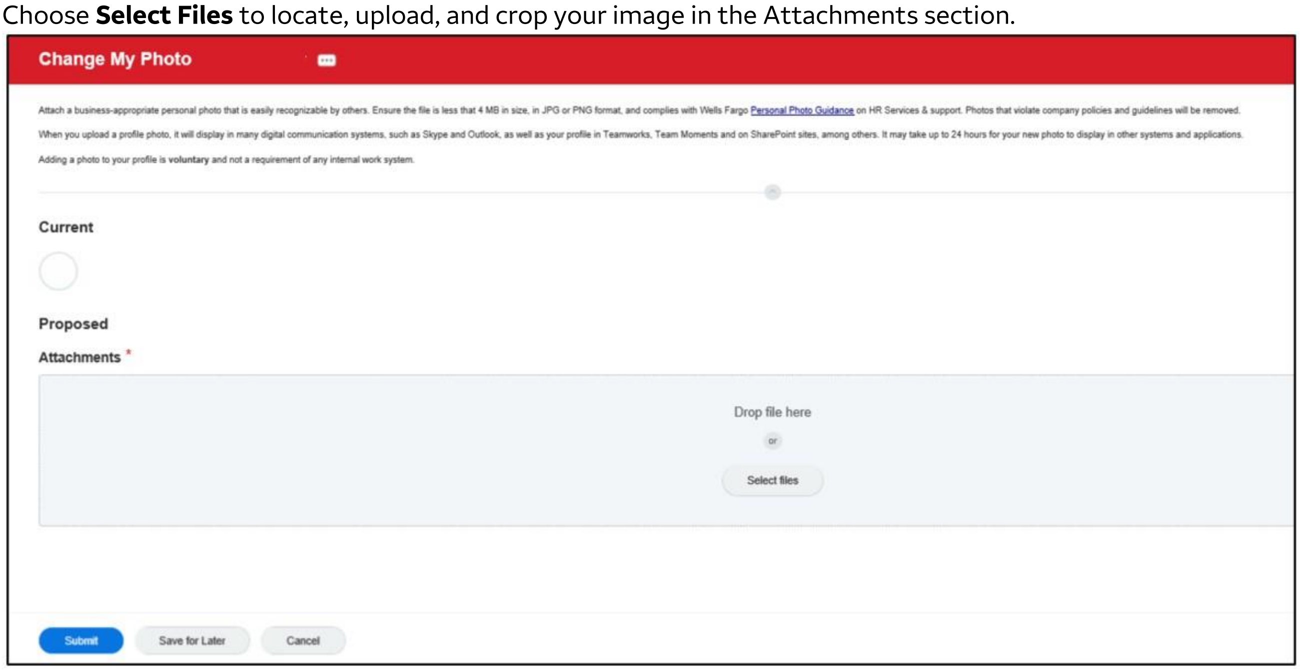
   Important: U.S. employees have the option to make pronoun selections visible to other employees. See the Change Public Profile Preferences in Workday article for more information.

Add, update, or delete your photo

Your chosen photo is the image that is visible on your Workday Profile and on Teamworks. Photos should be professional, work appropriate, and clearly show your face; photos should not include other people or pets.

Follow these steps to add or change your photo:

1. On the Workday homepage, select **View All Apps,** then then select the **Personal Information** app.
2. Select **Photo** in the Change section.
3. Choose **Select Files** to locate, upload, and crop your image in the Attachments section.

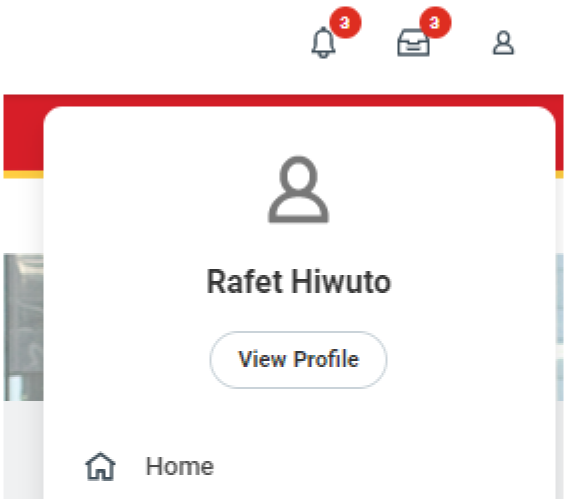


4. Select **Submit.**

5. To update your photo with a new one, repeat steps 1-4.

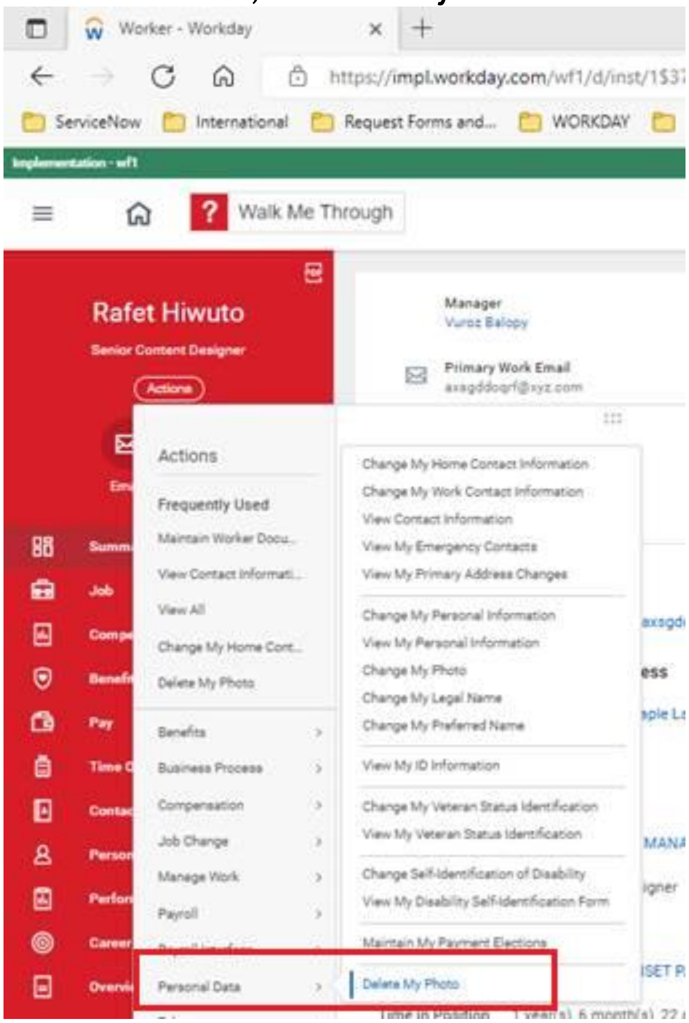
To delete your photo:

1. Access your Workday Profile.

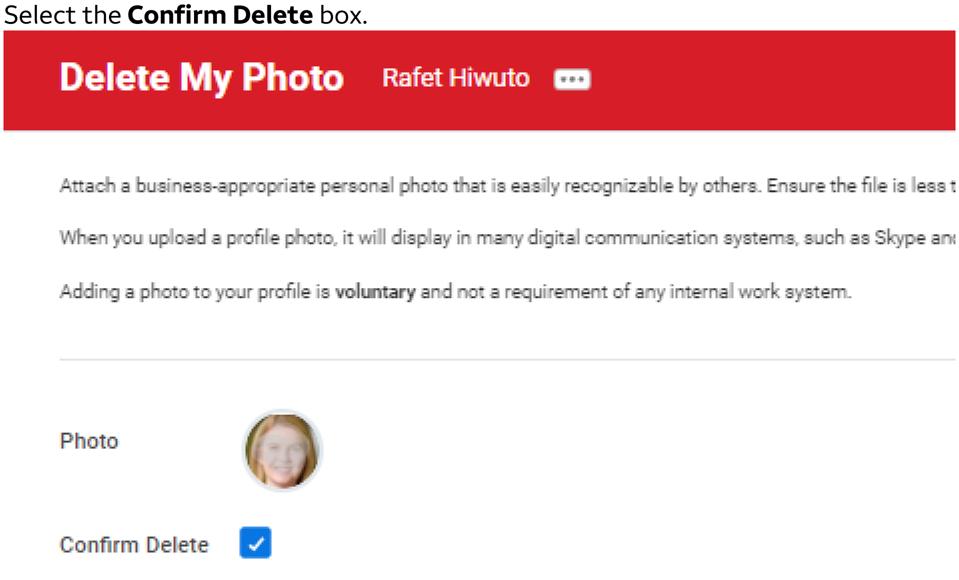


2. Select **Actions.**

3. Select **Personal Data,** then **Delete My Photo.**



4. Select the **Confirm Delete** box.

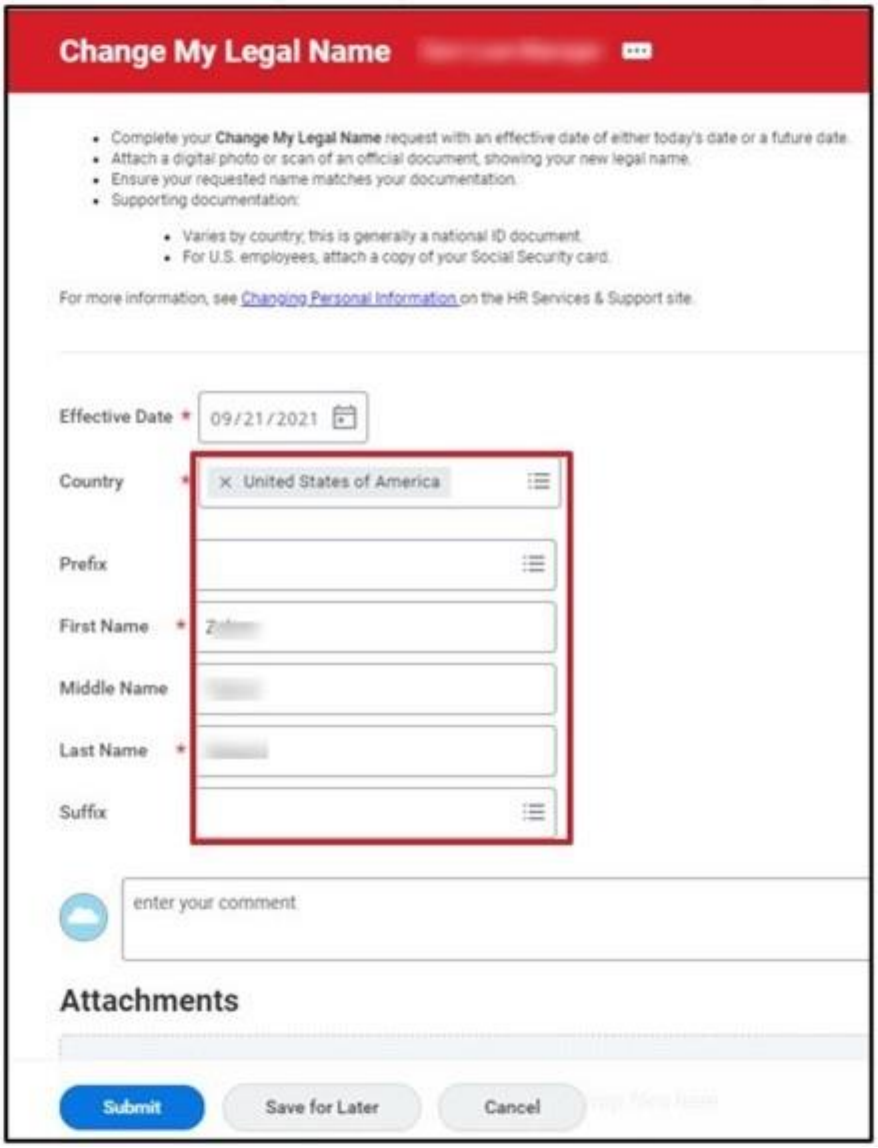


5. Select **Submit.**

Change your legal name

Workday enables you to initiate a legal name change, for example, after you get married. Follow these steps to initiate this change:

1. Select **Legal Name** in the **Change** section.
2. On the **Change My Legal Name** page, complete the required fields indicated with a red asterisk (*). Required fields vary by country.



3. Attach supporting documentation to verify your new legal name:

   a. **U.S.:** Social Security card
   b. **EMEA:** Official deed of name change

c. **Philippines:** Certificate of birth, or marriage certificate; Court order (in case of change of name) or Local Civil Registry order (in case of correction of name) are required to verify new legal name.
d. **Other locations:** National ID or valid government ID

4. Select **Submit.**

Other considerations when updating your legal name

Updating your legal name in Workday is the first step to ensuring your name is updated across internal systems and accounts. For example, your updated legal name will appear in your Workday Profile and on Teamworks. However, you may need to take additional steps to ensure all the appropriate updates are made.

- If you are changing your legal name due to marriage or divorce, you should also change your marital status in Workday. You'll also want to consider updates to your tax withholdings, as needed.
- For securities accounts (for example, stock purchase plan, vested restricted stock awards, or other financial accounts), you must contact your provider directly to share your legal name change. You may be required to submit additional documentation.
- If you need a replacement building access badge, visit the Guardian site for information on requesting one.

Change your preferred name

Workday allows you to change your preferred name. Follow these steps to initiate this change:

1. On the Workday homepage, select **View All Apps**, then select the **Personal Information** app.
2. Select the **Preferred Name** option in the Change section.
3. On the **Change My Preferred Name** page, deselect the **Use Legal Name as Preferred Name** checkbox.

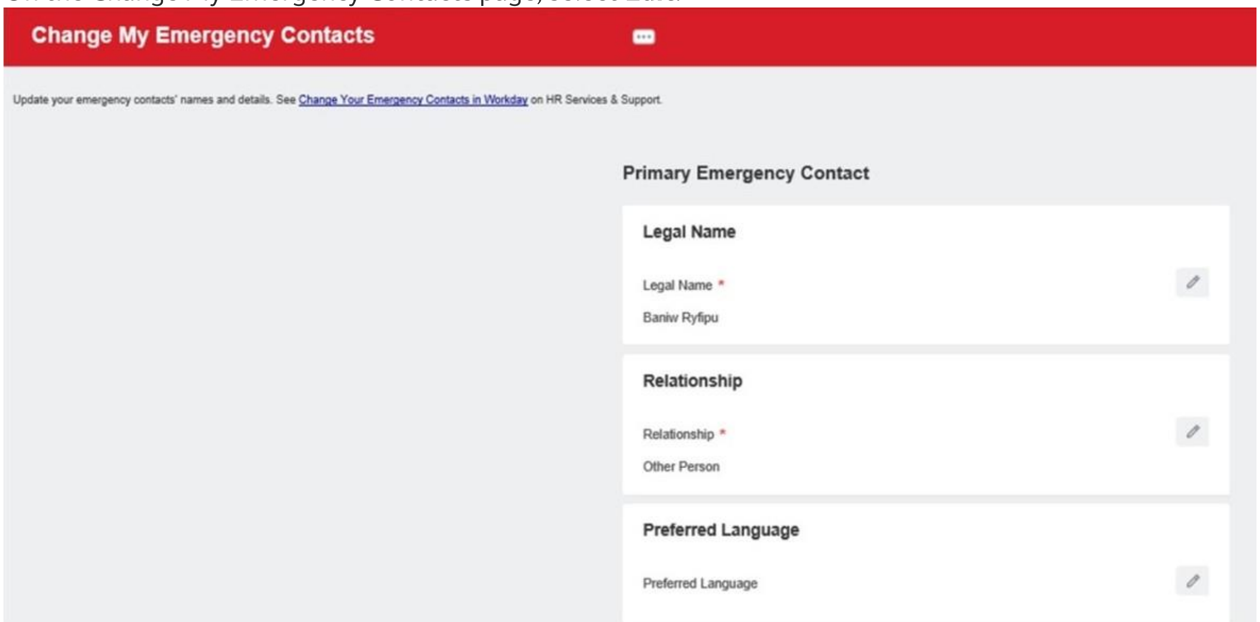
4. Enter your new information, including **First Name** and **Last Name**.
5. Select **Submit.** Once you have submitted your preferred name change, this will display throughout Workday.

Add or edit your emergency contact(s)

You can update your emergency contacts in Workday. Follow these steps to add or edit an emergency contact:

1. On the Workday homepage, select **View All Apps**, then select the **Personal Information** app.

2. Select **Emergency Contacts** in the Change section.
3. To edit an emergency contact:
    a. On the Change My Emergency Contacts page, select **Edit**.

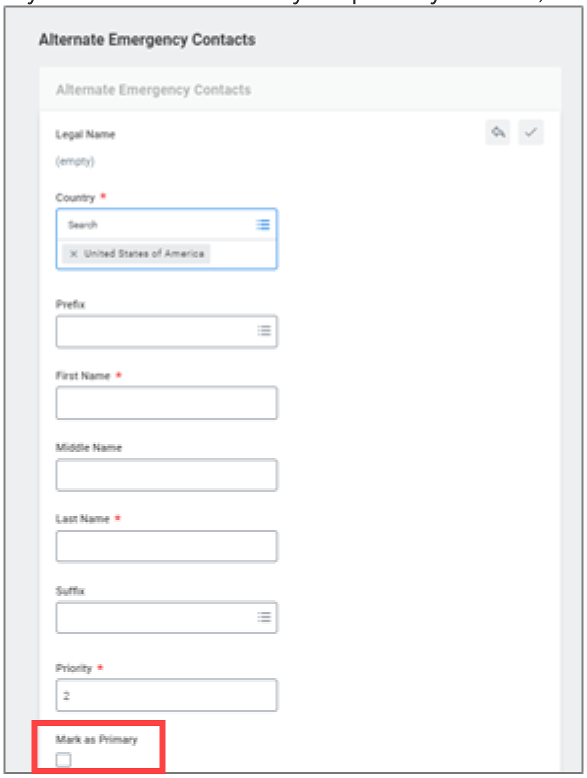


    b. Update the required fields as needed.
    c. Select **Submit** to save the changes.

4. To add an emergency contact:

    a. On the Change My Emergency Contacts page, select **Add**.
    b. Enter the required fields including Legal Name, Relationship, and any other relevant details.

c. If you want to make this your primary contact, select **Mark as Primary.**



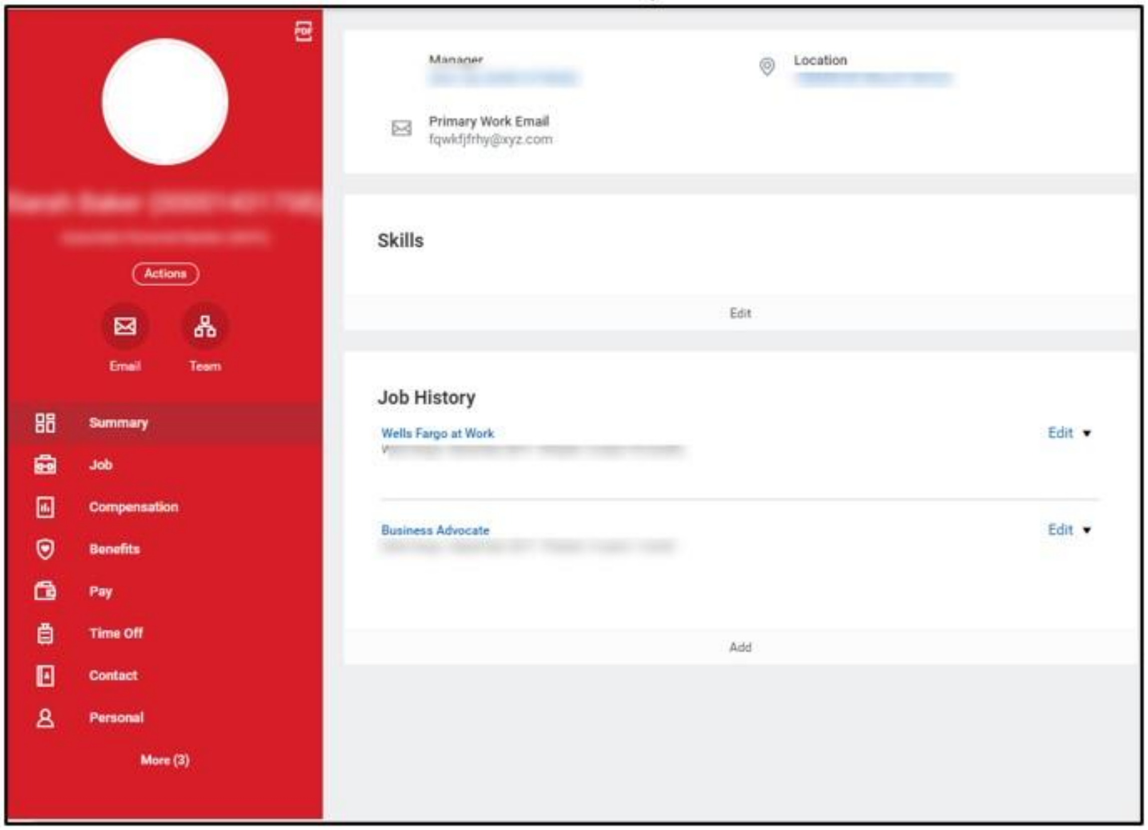
d. Select **Submit** to save the changes. If you selected **Mark as Primary**, the new contact becomes the primary contact and the old contact becomes an alternate.

Edit or add a national or government ID

Follow the steps below to edit or change your National or Government ID:

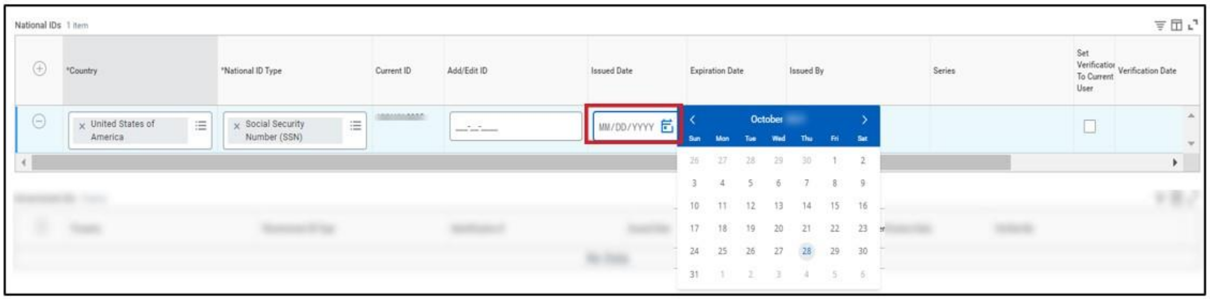
1. Select the **Profile** icon from the top right corner of the Workday homepage.
2. Select the **View Profile** button.

3. Select the **Personal** tab in the red pane.



4. Select the **IDs** tab, and then select the downward arrow next to the edit button.
5. Select **Change My Government IDs**.

6. The **Change My Government IDs** page opens. Scroll to the **National IDs** section.
7. To edit existing information, select the relevant field to edit and update the information. For example, if you need to edit the date of issue, select the **Issued Date** field, and then select the updated date from the calendar.



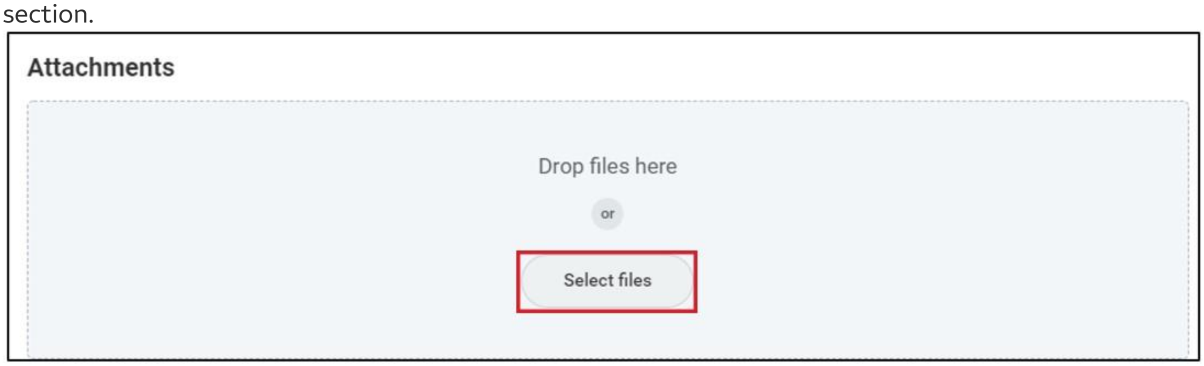
8. Select **Submit** to save your changes.
9. To add a new ID, select the **add** icon. A new row is added.

10. Select the **prompt** icon next to **Country** to select the required country from the drop-down list.

11. Select the **prompt** icon next to **National ID Type** to select the required ID type from the drop-down list.

12. Type your ID details in the **Add/Edit ID** field.
13. Select the appropriate date from the calendar under **Issue Date** and **Expiration Date**. A verification date will appear as today's day by default.

14. Attach supporting documents by dragging the files into the field or choosing **Select Files** in the attachments section.



15. Select **Submit** to save the updates. This routes for HR approval.