May 2026
Volume 2, Issue 5

Workday News

Empowering People, Enhancing Processes, Driving Innovation

Welcome to the ***May 2026*** edition of our Workday monthly e-newsletter, your source for updates and insights about Dickinson's transition to Workday. Enhancements continue to be added as we complete additional integrations and processes and move toward beginning phase II (Student) this fall. In this edition, we'll share information about what's coming next, and what you can now do in Workday!

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Workday Project Update

Behind the scenes in **Workday**, ongoing efforts include the continued development and refinement of Finance, HR, and Payroll reports in alignment with updated reporting standards. Our Workday team has also completed most configuration for **Workday Adaptive Planning** and started testing to enhance financial and budget management capabilities. In addition, developers are using **Workday Extend** to build expanded functionality for managing position descriptions. The **Workday Prism** pilot has been finalized, including the creation of a financial reconciliation report that integrates Workday data with *Raiser's Edge*. As Workday becomes an increasingly integral part of daily operations, helpful resources remain available at dickinson.edu/workday.

Workday Wednesdays continue through June 10 as a casual, drop-in opportunity to ask questions, review processes, or build confidence using the system. Sessions are held in the HUB lower-level conference room and are open to anyone needing quick assistance or task support. (See the details for dates and times in this e-newsletter.)

The fall 2026 semester will be here before you know it! In September we will begin to plan, develop and build the Workday ***Student*** tenant (phase II), with an ultimate go-live goal for Student in 2028. To explore what happens in these next phases of Workday, please visit the Workday Project Website.

Please let us know if you have questions or find any issues by sending an email to helpdesk@dickinson.edu.

Thank you all for your collaboration across campus throughout our technology transformation to Workday. Together, we're upgrading our technology to create a modern system that will support Dickinson well into the future.

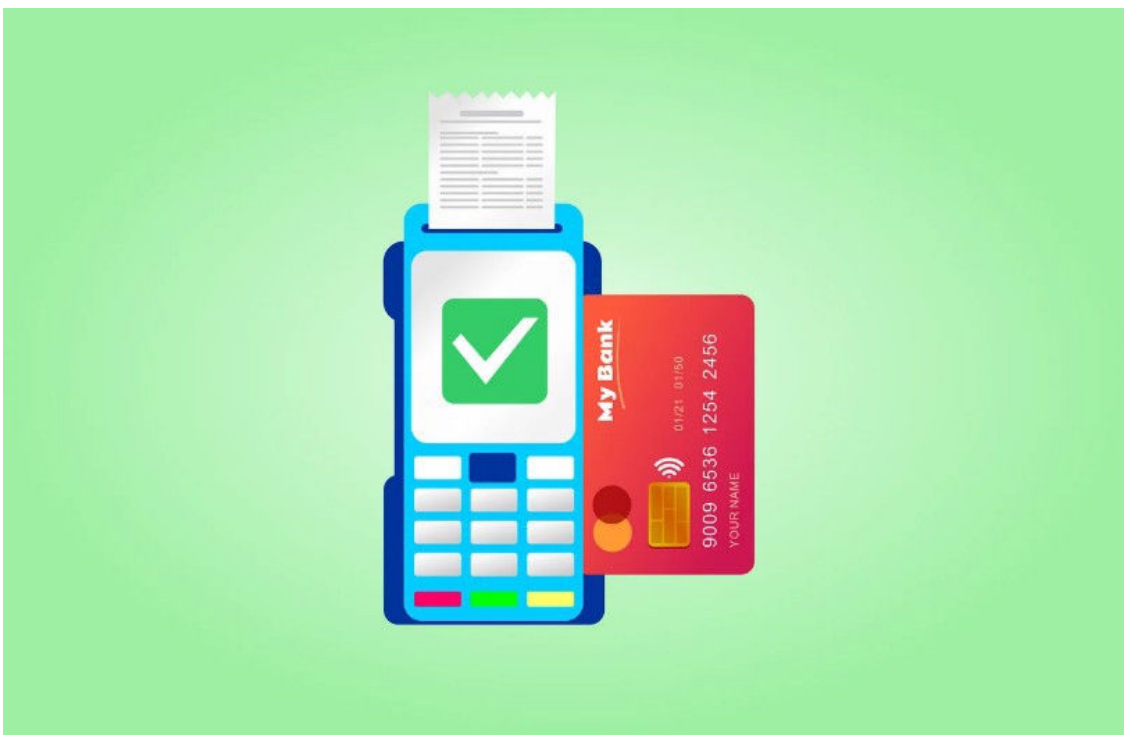
Workday Finance Highlights

Workday Finance tasks and tools continue to be refined and enhanced as we learn more about functionality available.

New! DC FIN Gift Manager Balance Report

The **DC FIN Gift Manager Balance Report** (GMB) is now available for use with Gift Worktags. The gift worktag codes start with GF. This works very similar to the MBB and MOBB reports. The opening balance will show in accounts 3010 and 3110 very similar to how they looked in Banner. If you don't have access to a Gift Worktag, please request access by emailing finops@dickinson.edu.

For assistance with the **GMB report**, or any other questions related to Workday Finance functions, please email finops@dickinson.edu.



Workday Expense Reports: Pcard coding and submission

Pcard purchase transactions in Workday have streamlined the process for completing reconciliation/expense reports and approval all in one app! To keep your budget and

finance reports up to date throughout the year, ***please code and submit your pcard transactions in a timely manner***, preferably within two weeks of when they appear in Workday. *Although Workday does not have a set deadline - keeping your items coded and submitted promptly helps to keep your budget on track.*

As the fiscal year nears the end on June 30, it will become increasingly important to code and submit your expense reports promptly to keep all expenses within the appropriate fiscal year.

Open Enrollment in Workday

It's that time of year again! **Open Enrollment** (OE) on campus rolls around each year during the month of May. For 2026, OE takes place in Workday and runs Monday, May 11 through Monday, May 25!

To get started with OE on or after May 11, look for an assigned ***Open Enrollment Journey*** from Human Resource Services (HRS) in your **Notifications** area of Workday. The Journey will guide you through all steps of the OE process to make this a snap to complete!

Current insurance benefits and retirement contributions will continue into 2026-2027 if no changes are made and ALL changes will be effective July 1, 2026. Employees who have not updated their life insurance beneficiary designations in Workday during the current year must complete this update as part of the open enrollment process. Throughout the open enrollment period you can access open enrollment via the Open Enrollment Change task in your My Tasks area of Workday and via the Announcement on your Workday Home Page.

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Reminder: *If you are signing up for Flexible Spending (FSA), this needs to be updated annually. Your selection(s) for the current year will not carry over after July 1 - you MUST sign-up again during Open Enrollment.*

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If you have any ***Workday OE technical questions****,* ***Workday Wednesdays*** *take place every Wednesday in May in the HUB lower level conference room adjacent to The Underground. Check with HRS staff members for assistance directly regarding your benefits or benefits selection details.*

Workday Wednesdays this spring

Workday provides ability to complete tasks and processes online in a unified platform. We are all still learning about this new technology that went live in December 2025 and in January 2026.

Questions? Assistance is available at Workday Wednesday sessions scheduled through June 10 in the HUB lower level conference room.

Upcoming session dates and times:

- **May 6 - 13 - 20 | 11 a.m. - 12:45 p.m.**
- **May 27, June 3, June 10 | 11 a.m. - 1 p.m.**

Drop by at any of these open sessions to get your questions answered or to receive assistance with Workday.

Thank you for your questions!
Your inquiries are helping us to refine Workday and identify areas where more training is needed. These insights allow us to better understand how the Dickinson community works in Workday, and where to focus future enhancements!

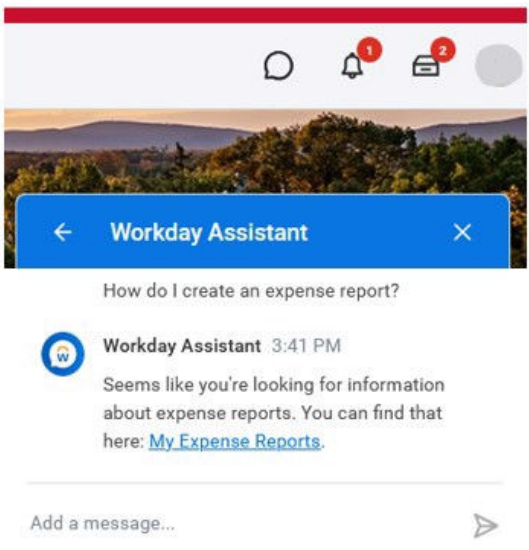
Workday Training Resources

Our training resources include job aids and training videos posted by category on the ***Workday Training Resources*** *webpages. In addition to these resources, check-out other learning options below.*

- **Live Session Recordings** are available for you to watch at your convenience. All recordings are posted in the **Learning Pathways** as well as the topic areas within the **Workday Training Resources online**.
- **FAQs and Glossaries** are available online with Workday's terminology using easy-to-read glossaries that explain common terms and system language. Workday Glossaries are located on the **Workday FAQs** webpage.

- **The Account Crosswalk Tool** translates your old Banner FOAPAL accounts into Workday equivalents.

Workday Learning Pathways suggest training based on your role at Dickinson to help you get started in Workday! Click the image to view Workday Learning Pathways now.



What is Workday Assistant?

Workday Assistant is an AI chatbot that is part of Workday desktop and mobile. Ask the Workday Assistant simple questions to instantly find information and/or tasks, and receive secure personalized, context-aware answers. The assistant ensures security by only accessing data authorized for your specific role.

Workday Assistant is accessible by clicking the chat bubble icon on the right side of the toolbar on your Workday desktop (near your profile picture) or mobile device.

Workday FAQs

Delegating Tasks in your Absence

Question: ***I am going on vacation or leave soon - How do I delegate my tasks in Workday?***

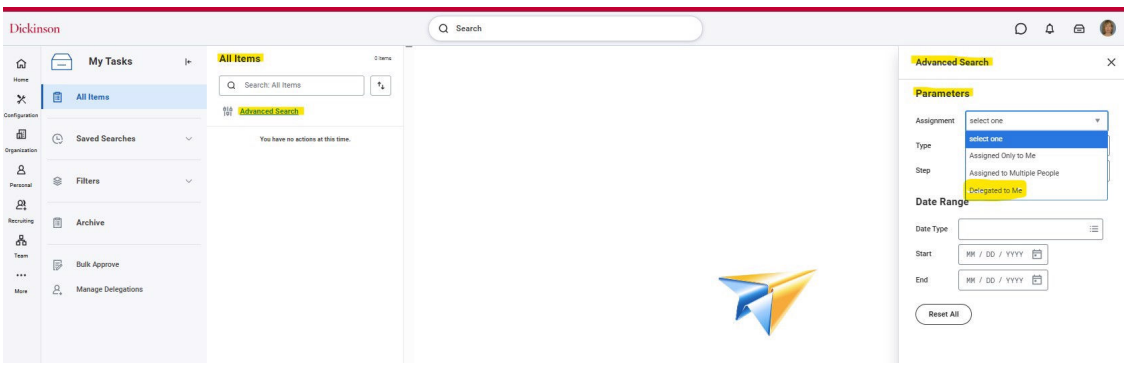
Answer: *When you are preparing to be away from work - whether it is for a planned vacation or for another type of leave - the ability to delegate your tasks to a peer or a supervisor is part of Workday's available tools!*

- *Go to **My Tasks** on your Homepage toolbar option and select **Manage Delegations***
- *On the Current Delegations tab, select the **Manage Delegations** button..*
- *Enter the **begin and end dates** for the delegation.*
- *In the Delegate field, select a user to delegate your tasks to (must be a peer - someone at your level or above).*

  ***Note**: If you are only delegating inbox tasks, leave the **Start On My Behalf** field blank. This field option is for delegating business processes.*
- *In the **Do My Tasks On My Behalf** field, select whether to delegate all business processes, specific business processes, or none of the above.*

  ***Note**: From your **My Delegations** page, select the **Business Processes Allowed for Delegation** tab to view which business processes you can delegate.*
- *Select **Retain Access to Delegated Tasks** within **My Tasks** checkbox to view and modify your **My Tasks** while delegated.*
- *Select **Submit.***

***Question**: How do I view tasks that have been delegated to me?*



Answer:** Find **Delegated Tasks** by following the steps below to see them in **My Tasks.

- *Go to **My Tasks** on your Homepage tab, and click on **Advanced Search** under **All Items.***
- *Select **Delegated to Me** in the **Assignment** drop-down list.*
- *Click **Search** to **View My Delegation Assignments** report.*

Perform Delegated Tasks

When tasks are delegated to you, you switch accounts to perform the tasks on behalf of another Workday user. Workday displays the Switch Account Option in two locations:

- *Click your **Name** or **Profile Photo** in the homepage header.*
- *Within **Delegated Items** in **My Tasks**.*

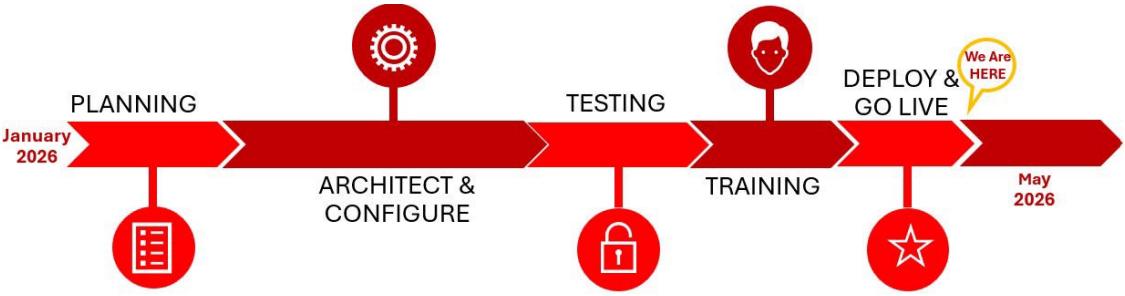
Selecting **Switch Account** displays a list of users who have delegated **My Tasks** items **or** initiating actions to you**.**

- *Select the user for whom you want to act as a **delegate**.*
- ***After switching accounts**, Workday displays:*
  - *the **Delegation Dashboard**, which includes the **Delegated Actions worklet** where you can take initiating actions on delegated business processes;*
  - ***My Tasks**, which contains only My Tasks items delegated to you and the delegated task details.*
- ***To switch back to your Workday account**, simply select **Switch Accounts** again, and select your own name.*

The transition to Workday naturally prompts many questions. *Please remember to visit our FAQs webpage to view the current content anytime. Updates will happen continually as we receive and answer your questions. To submit a question and have it added to the FAQs webpage, simply click to submit to our* **Workday FAQs online form.**

Where are we on the Workday implementation journey?

See the timeline below...



Stay Connected!

Visit our Workday **project website** for the latest updates. Have questions? Click the link to reach out to the **Workday project team.**

Thanks for being part of this exciting transformation!

Learn More About the Workday Tech Transformation!

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