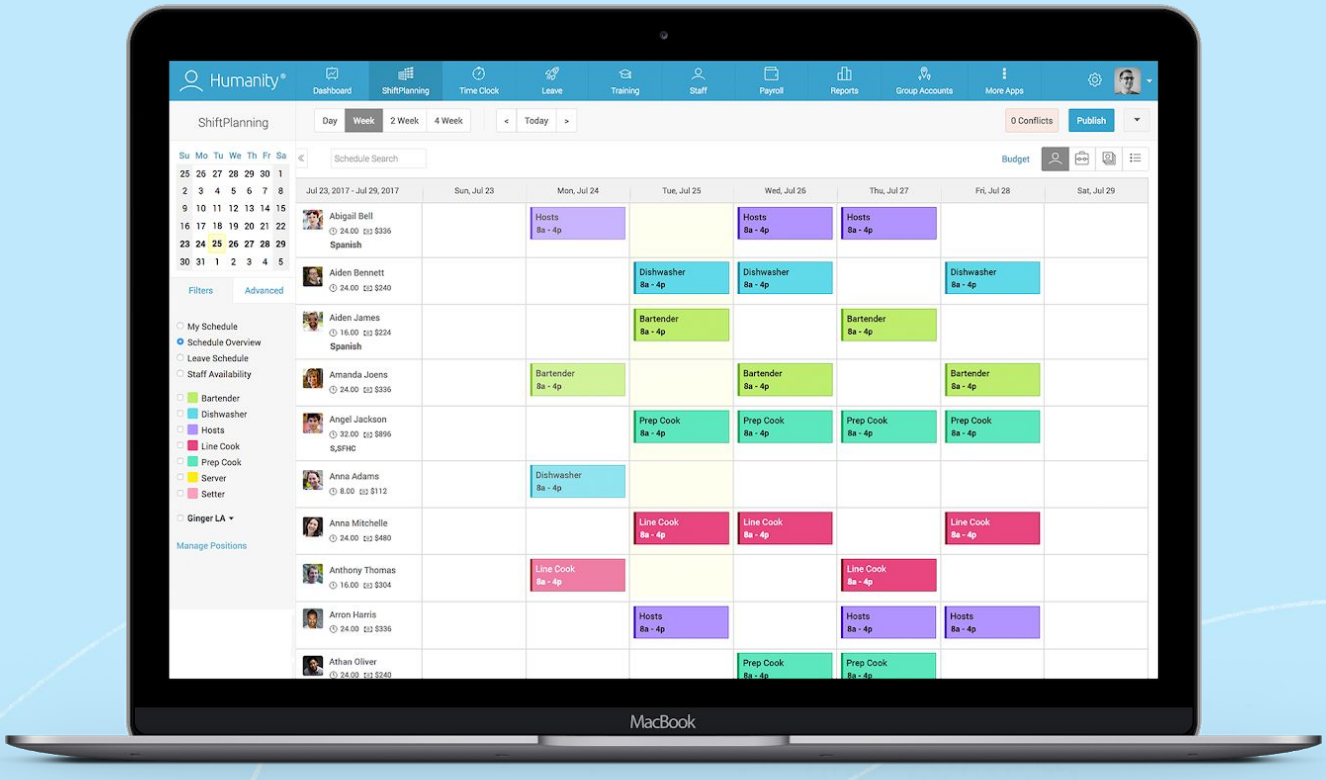
Humanity + workday



Quick Start Guide

Workday Integration

For Managers and Administrators

Quick Start Guide

For Workday Integration Customers

Welcome to Humanity, the online scheduling platform that optimizes employee scheduling, and works in conjunction with Workday for time tracking, vacation management and payroll.

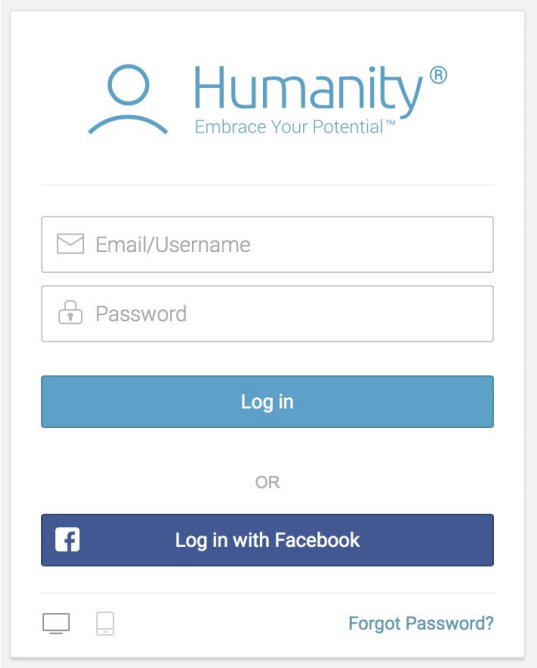
Get started by logging in and review the accounts that were created for your employees. The dashboard is where you'll find the message wall, widgets and any notifications that need your attention.

Once employees enter their availability on Humanity, you're ready to create a schedule! For additional information, best practices and support, visit **helpcenter.humanity.com**.

Step 1: Log In to Your Account

Google Chrome is recommended for the best user experience and performance. Humanity can also be accessed using the latest versions of Safari and Opera, but users may experience performance and/or usage issues.

To access your Humanity account, visit **humanity.com/app** and log in to your account using your Workday email address. If this is your first time logging in, use the generic password provided by your admin. If you have not set a password previously, you cannot use the "Forgot Password?" link on the sign-in page.



Step 2: View Employee Accounts

With the Workday integration, you will not need to create user accounts for your employees. Each of your active employees will have a Humanity user account created, with the following information pulled from Workday:

- Legal First Name
- Legal Last Name
- Work Phone Number
- Work Email Address
- Employee (Worker) Status
- Employee (Worker) Hire Date
- Employee (Worker) Time Zone
- Employee ID/ Contingent Worker ID

Any changes or revisions that need to be made for the above fields, MUST be completed in Workday. Any changes made in Humanity will be overridden by the integration sync that occurs hourly.

Additional information available in your Humanity account due to the Workday integration:

- Employees' Workday Leave of Absence requests
- Employees' Workday Time Off requests
- Employees' assigned Workday Job Profiles (optional)

Step 3: Customize Settings

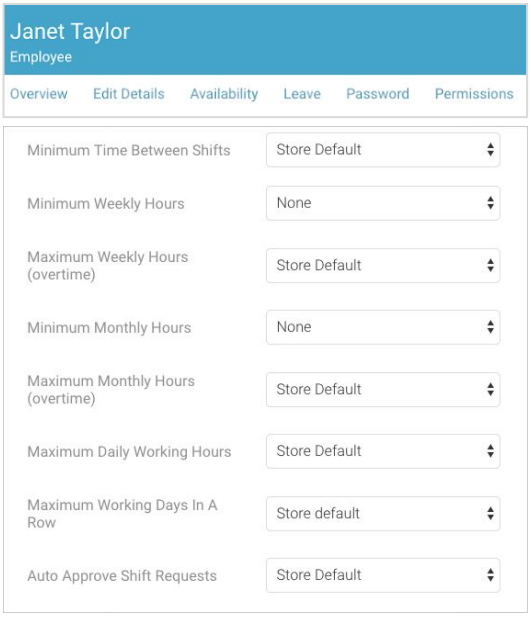
Customize Settings for the Account Level

- Under ShiftPlanning, enable employees to trade shifts and drop shifts, with or without manager's approval.

Customize Settings for the Employee Level

- Under Edit Details, set up minimum and maximum hours an employee can work in a day and week. Inputting this information for each employee will make building out a schedule effortless.

- Under Permissions, change the account type to Schedulers, Supervisors and Managers. Employees and Schedulers can be granted permissions to manage specific positions and locations.



Step 4: Availability

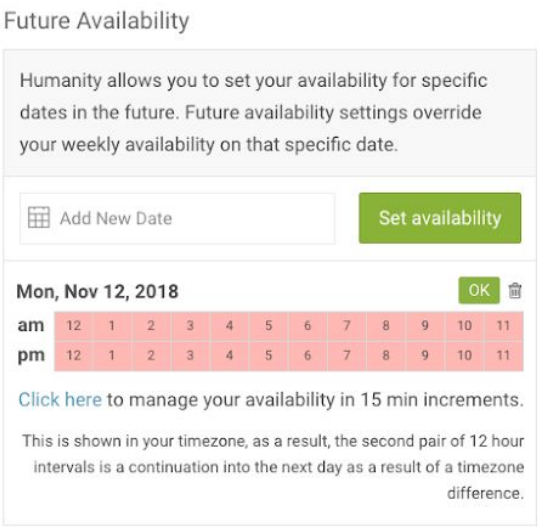
Best Practice: Create a schedule after employees update their availability. All employees are defaulted to available 24 hours a day.

As an employer, you have the option to update your employees' available working hours. However, it is recommended that employees set their availability from the mobile app (or by signing in to their accounts from their desktop).

By default, their availability indicates they are available to work, everyday and all hours of the day. It is important for employees to input the hours they are able to work, so they are not scheduled for shifts they are not available.

Future availability is used by employees to let employers know when they are not available for a one-off instance, when their weekly (regular) availability states otherwise. Also, it can be used to let your employer know when you are available to work, when normally you cannot.

Use future availability for an upcoming doctors appointment, or to pick up extra hours over the holiday season.

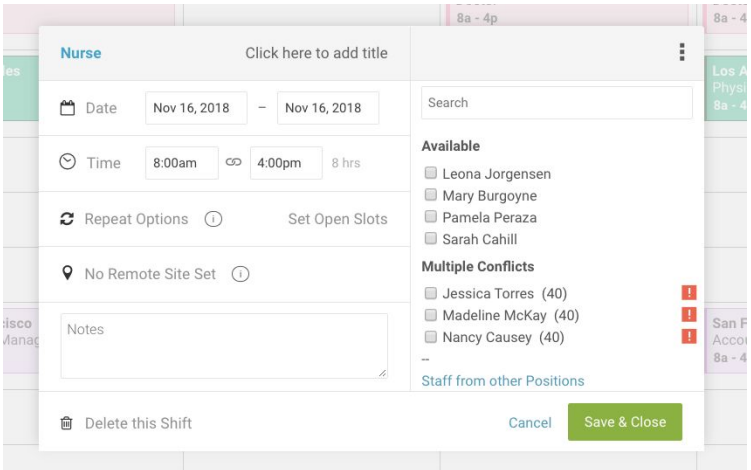


Step 5: Build a Schedule with ShiftPlanning

From the ShiftPlanning tab, create a shift for your positions or employees. It is recommended to build out a schedule from the Position View at a week's glance.

After you've created a shift, select the shift to input additional details:

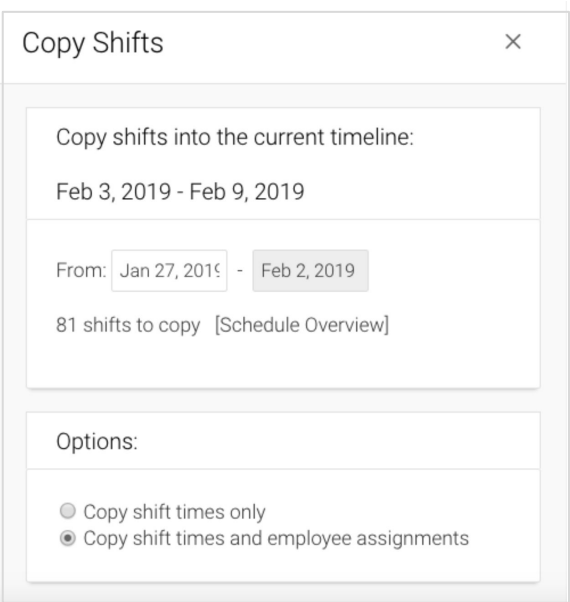
- Create a Recurring Shift
- Assign Staff -- they will appear on the right hand side as Available
- Set Open Slots
- Add Shift Notes
- Add a Required Skill
- Fill Created Shifts using Auto-Fill Schedule

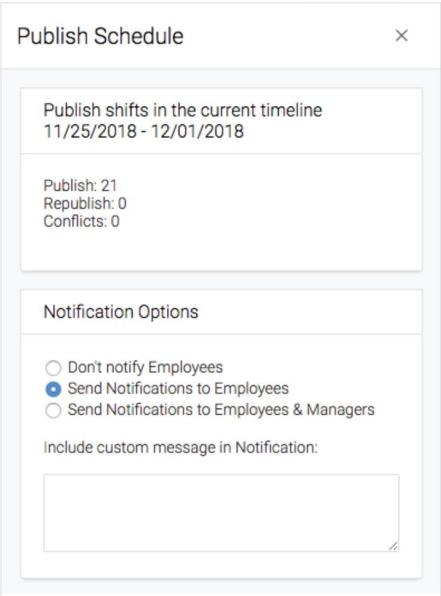


Once you've selected a shift, on the right side you'll see Available employees and others with conflicts. A number in parentheses represents the number of hours they've been assigned for the week. Workers with a red warning icon indicate a conflict of some type in their schedule, leave, or future availability.

Best Practice: Save Schedule Templates by clicking the star icon at the top right of the schedule. Changes made to templated schedules will override the previously saved template and used going forward.

When you start a new week, select Copy Schedule from the dropdown in the upper right corner, to copy one of your templates into the blank week. You can choose to copy the shifts alone or the shifts with the specific employees assigned to them. After you've made all of your changes, be sure to Publish the schedule.





Publish schedule to release your current schedule to all employees. The schedule you're currently viewing will be the shifts that are published (one week, four weeks, etc.,). Any changes to a previously published schedule, needs to be published again.

Step 6: Running Reports

Humanity allows you to generate reports on demand. There are many reports to choose from but here's some we recommend checking out:

- Scheduled Hours
- Scheduled Summary
- Position Summary
- Create a Custom Report

General

- What will already be in Humanity when the initial sync is complete?
    - After the initial sync is completed the following data will be visible in the Humanity GAP account:
        - Complete organization structure from Workday will be visible in Humanity in GAP module as child accounts
        - Employees and their data:
            - Legal First Name
            - Legal Last Name
            - Work Phone Number
            - Work Email Address
            - Employee (Worker) Status
            - Employee (Worker) Hire Date
            - Employee (Worker) Time Zone
            - Employee ID/ Contingent Worker ID
        - Employees' Workday Leave of Absence records as Leave events in Humanity
        - Employees' Workday Time Off records as Leave events in Humanity
        - Employees' assigned Workday Job Profiles as Positions in Humanity (optional)

- Where do I log into Humanity?
    - Upon account creation, the domain for the account will be created, so employees can log in using the default URL **(humanity.com/app)** or their dedicated URL (https://DOMAIN.humanity.com/app/ - i.e. if domain for the company is testcompany, URL will be https://testcompany.humanity.com/app/)

- What is the difference between Humanity and Workday?
    - Humanity is an Employee Scheduling software and Workday is a Human Capital Management tool.

- What do I use to log in to Humanity? Do I use my work email, personal email or username?
    - "Work email address" from Workday
    - If no email address is entered in Workday, then the sync cannot occur.
    - If an employee has an active status in Workday, then they will be an activated user in Humanity. However, no activation email will be sent.
        - You must deactivate and then activate the account:
        - *Set that user's status in Humanity to "Inactive".*
        - *Click on the Staff module and select "Not Activated" from the left side panel*
        - *Choose one of the available options - "Send Activation Email Now"*
        - The user can then set up their username and password.

- I'm an admin user of Humanity. What is my password?
    - There is a default password that is automatically generated. If you have lost your password, reach out to Humanity Support or your Humanity representative.

Integration/Sync

- How often does the integration sync between Workday and Humanity occur?
    - The sync occurs every hour.

- What information is pulled through to Humanity from Workday?
    - Employee Data
    - Time Off Data
    - Leave of Absence Data

- What information is pulled through from Humanity to Workday?
    - Schedule Data

- What kinds of things can “break” the integration - what NOT to touch as a Manager (or Employee?)
    - Any data synced from Workday to Humanity (mentioned above) shouldn’t be changed in Humanity
    - Also, Time Zone set on the account level should not be changed after initially set to match your Workday Tenant time zone

Managers

- As a Manager, where do I create the schedule? Where do I make changes to the schedule?
    - All changes to the schedule should be made in Humanity.

- After making changes, how do I re-publish? Who sees the updates to the schedule? Do they automatically go into Workday?
    - Re-publishing of schedules is done in Humanity by pressing the ‘Publish’ button.
    - Who sees the updates to schedule depends on the option the Scheduler chooses in Humanity when publishing the shifts (Don't notify Employees/Send Notifications to Employees/Send Notifications to Employees & Managers).
    - Yes, upon publishing, shifts are automatically synced to Workday, on an hourly basis.

- As a Manager, where do I approve Leave?
    - You will approve Leave of Absence and Time Off requests in Workday.

- As a Manager, can I approve my employees' availability?
    - This is independent of the integration, it depends on how you use the Availability feature. If settings require you to approve availability before it goes into effect, yes you can approve their availability.

- As a Manager, where/how do I set permissions and is that in Humanity or Workday?
    - After employees are synced from Workday to Humanity, appropriate permissions have to be set in Humanity.

- As a Manager, how/where do I set important settings like break/overtime rules?
    - These settings are managed in Humanity.

- As a Manager, how do I add or remove an employee in Humanity?
    - Any employee who is synced from Workday to Humanity MUST NOT be changed/deleted in Humanity. You can manually create/update/delete employees in Humanity, but those employees won't be picked up by integration - their data, leaves and shifts won't be synced back to Workday.

Humanity

Refer to our Help Desk for a quick how-to on any of our features.

For support, chat with us on the web or the Humanity App.

www.humanity.com