



General Workday Help



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Overview

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

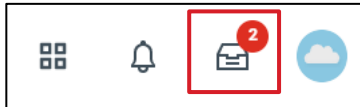
Managing your Workday Inbox

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

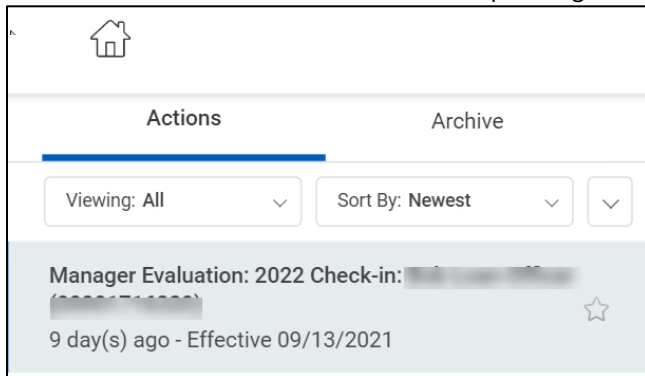
Viewing and managing your Workday Inbox

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.

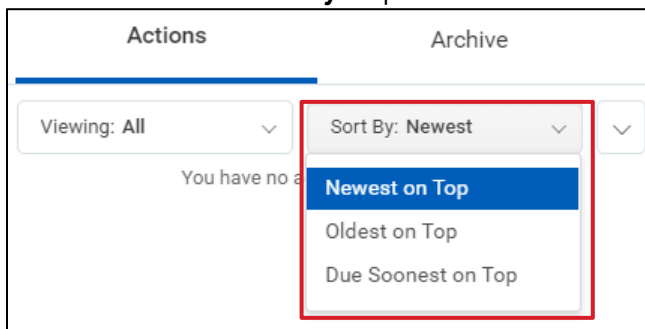


2. The **Actions** tab shows the tasks that are pending an action.



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**.

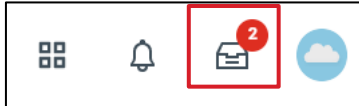


5. Select the relevant filter to sort your inbox from the **Newest on Top**, **Oldest on Top**, or **Due Soonest on Top** options.

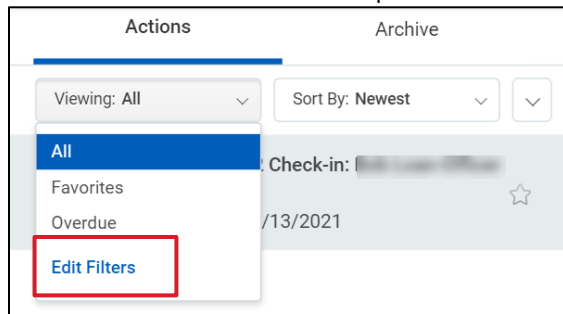
Creating and adding filters in your Workday Inbox

Filters help organize your tasks with preset options to help manage 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 drop-down list.



4. The **My Inbox Filters** page appears. Select **Create Inbox Filter**.
5. Enter the filter description, definition, and add your desired tasks or reports to the filter.
6. Select **OK** to create the filter.

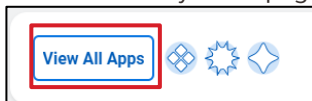
Managing your personal data on Workday

Workday allows employees to add or update their personal information through Employee Self-Service (ESS) options. Certain employee personal data elements are mandatory, while others are optional.

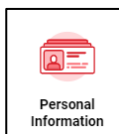
Accessing your personal data on Workday

Workday enables you to access, view, and update most of your personal data. Some updates are visible immediately, for example, preferred name. Some updates may require internal review prior to becoming visible, for example, legal name. Follow these steps to access your personal data:

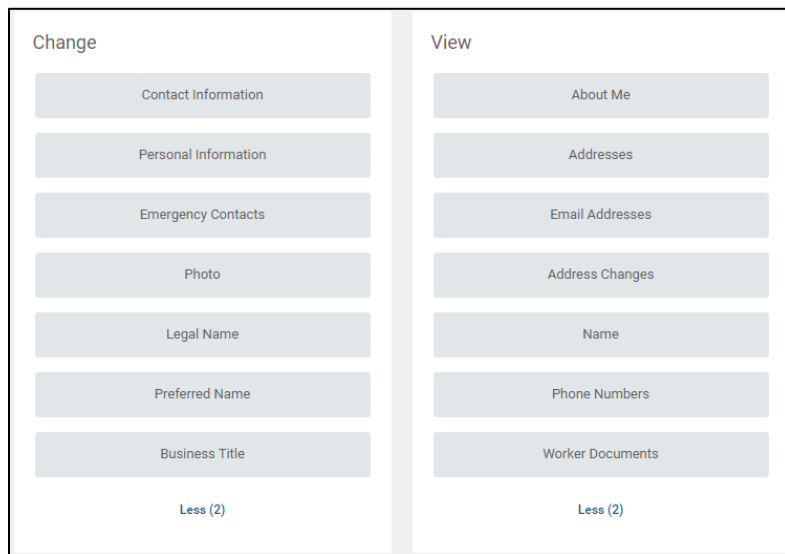
1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



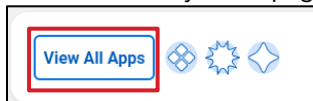
3. On the **Personal Information** landing page, you can access personal information under the **Change** and **View** sections.



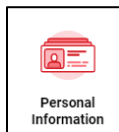
Changing your legal name

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

1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



3. Select the **Legal Name** option under the **Change** section.
4. The **Change My Legal Name** page opens. Complete the required fields indicated with a red asterisk (*). Required fields vary by country.

Change My Legal Name

- Complete your **Change My Legal Name** request with an effective date of either today's date or a future date.
- Attach a digital photo or scan of an official document, showing your new legal name.
- Ensure your requested name matches your documentation.
- Supporting documentation:
 - Varies by country, this is generally a national ID document.
 - For U.S. employees, attach a copy of your Social Security card.

For more information, see [Change My Personal Information](#) on the HR Services & Support site.

Effective Date * 09/21/2021

Country * United States of America

Prefix

First Name * Z...

Middle Name

Last Name *

Suffix

enter your comment

Attachments

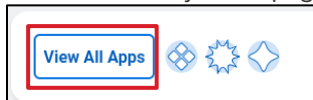
Submit Save for Later Cancel Drop files here

5. Attach supporting documentation to verify your new legal name, such as a social security card or other government ID.
6. Select **Submit**.

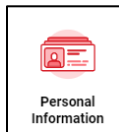
Changing your preferred name

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

1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



3. Select the **Preferred Name** option under the **Change** section.
4. On the **Change My Preferred Name** page, deselect the **Use Legal Name as Preferred Name** checkbox.

Use Legal Name As Preferred Name

Country * United States of America

Prefix (empty)

First Name

Middle Name

Last Name

Suffix (empty)

5. Enter your new information including **First Name** and **Last Name**.

Change My Preferred Name ⋮

Add or update a legitimate preferred name if you are commonly addressed by a name other than your legal one (for example, if you go by your middle name). For more information, see the [Name Change Support site](#).

Note: The Wells Fargo Information Security Policy covers any data you submit to the HR system including preferred name. Misuse or abuse of this feature is prohibited.

Use Legal Name As Preferred Name

Country * x United States of America ⋮

Prefix

First Name *

Middle Name

Last Name *

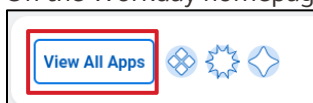
Suffix

6. Select **Submit**. Once you have submitted your preferred name change, this will display throughout Workday.

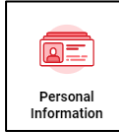
Changing your photo

Your chosen photo is the image that is visible on your Workday Profile. You can select and upload a professional photo that is work appropriate. Photo's should clearly show your face and should not include other people or pets. The photo will be visible to employees in Workday and Teamworks. Follow these steps to initiate this change:

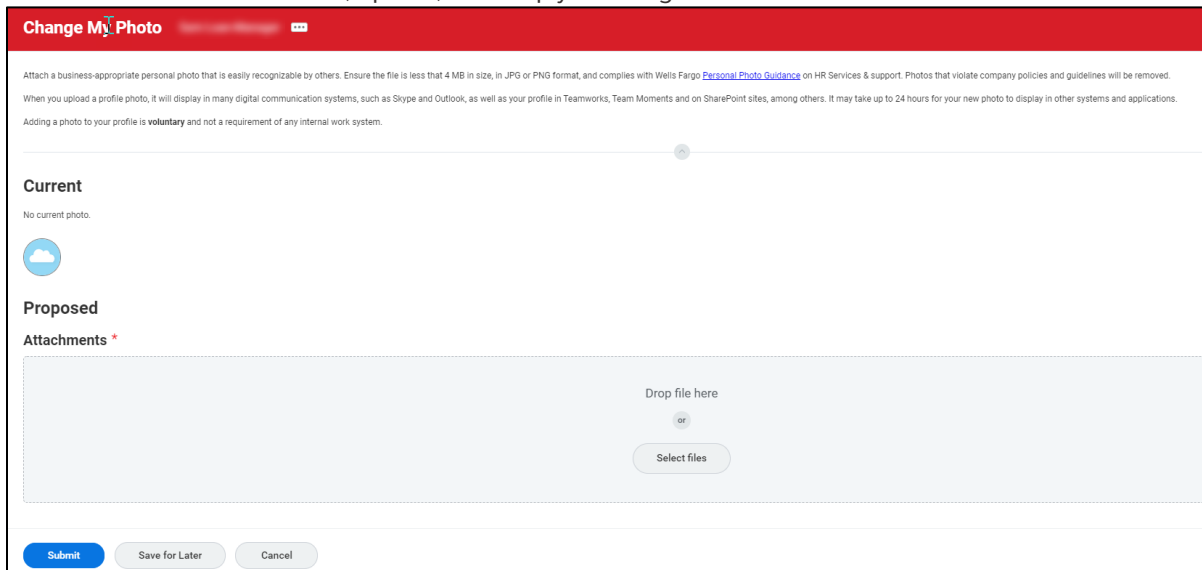
1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



3. Select the **Photo** option under the **Change** section.
4. Choose **Select Files** to locate, upload, and crop your image in the **Attachments** section.



5. Select **Submit**.

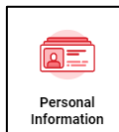
Changing your home address, personal phone number, or personal email address

Workday enables you to initiate a change of home address. Follow these steps to initiate this change:

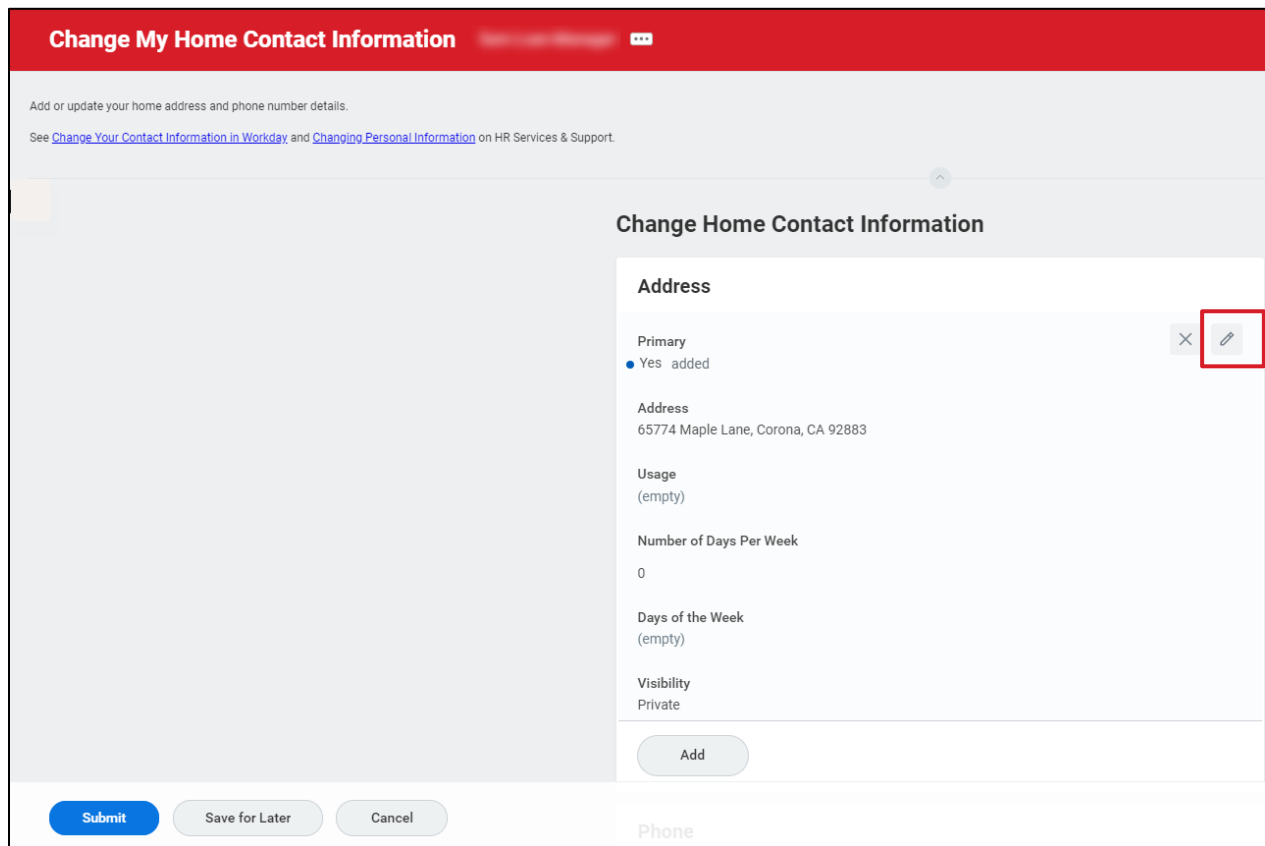
1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



3. Select the **Contact Information** option under the **Change** section.
4. On the **My Contact Information** page, select **Edit** above the **Home Contact Information** section.
5. Select **Change My Home Contact Information** from the drop-down list.
6. Select the **pencil** icon to edit your information under the **Address**, **Phone**, and **Email** sections. 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.



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

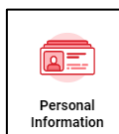
Changing emergency contacts

Workday enables you to add or edit your emergency contacts. Follow these steps to add or edit an emergency contact:

1. On the Workday homepage, select **View All Apps**.



2. Select the **Personal Information** app.



3. Select the **Emergency Contacts** option under the **Change** section.
4. On the **Change My Emergency Contacts** page, select **Add** to add a new emergency contact.

Note: Select **Edit** on this page if you already have an emergency contact added. The first emergency contact you add defaults as your primary emergency contact. If you want to update your primary emergency contact, check the **Mark as Primary** box when adding the contact information of another emergency contact.

5. Enter the required fields including **Legal Name** and **Relationship**, along with any other relevant details.

Change My Emergency Contacts

Update your emergency contacts' names and details. See [Change Your Emergency Contacts in Workday](#) on HR Services & Support.

Primary Emergency Contact

Legal Name	<input type="text"/>	
Legal Name *		
Relationship	<input type="text"/>	
Relationship *	Spouse	
Preferred Language	<input type="text"/>	
Preferred Language		
Primary Address	<input type="button" value="Add"/>	

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

Note: Required fields are marked by a red asterisk (*).