Workday VNDLY

Product Summary

July 23, 2026

Contents

Workday VNDLY

Welcome to the Workday VNDLY Guide, where you can learn how to configure and use Workday VNDLY, a vendor management system (VMS). This guide covers the following product areas:

- Extended Workforce Management - Supports the ability to source, onboard, manage, invoice, and offboard contingent labor.
- Statement of Work - Supports the ability to track projects against key areas, manage change orders, and build process controls on Statements of Work (SOW).
- Worker Profile Management - Supports the ability to capture data for headcount and individual workers for programs that track time or expenses outside Workday VNDLY.

To learn more about how to use our documentation, click here or watch the video.

Sign In to Workday VNDLY

Profile Preferences: Change Your Password

Context

You can change the password for your Workday VNDLY account. Passwords don't expire.

Steps

1. Access the **My Profile** page from the drop-down menu under your name.
2. Select the **Change Password** button.
3. Create a new password that contains at least 8 characters.

Change Your Profile Preferences in Workday VNDLY

Context

You can update your preferred name, contact number, and default location information.

Steps

1. Access the **My Profile** page from the drop-down menu under your name.
2. Select **Edit Profile**.

   Note: Changes to your name won't update your **Email Address**.

Set Up Sign-Up Token Expiration Period

Prerequisites

Have these permissions:

- *settings.admin* at the top level Organization Unit
- *admin.settings.security.configuration.read*
- *admin.settings.security.configuration.write*

Context

Depending on how new users are set up in VNDLY, they might receive an invitation email with a link to sign in to VNDLY for the first time. For security purposes, the link is only valid for a specific length of time. You can adjust how many hours that link is valid for in your tenant.

Steps

1. From the header, click **More** > **Company Settings**.
2. From the **Organization** section, click **Security Settings**.
3. Click the **Configuration** tab.
4. In the **Sign Up Token Expiration (Hours)** field enter the number of hours the invitation link is valid for.
5. Click **Save**.

Related Information
Concepts
Concept: Email Invitations to Sign In

Multi-Factor Authentication in Workday VNDLY

Set Up Multi-Factor Authentication in Workday VNDLY

Context

Workday VNDLY supports enhanced security for accounts with multi-factor authentication (MFA). When enabled, users must present a separate token that validates their identity. This validation provides additional security by preventing unauthorized access in the event that a password is compromised.

Note: The authentication type on the user profile must be set to *VNDLY Login*, and the user must use a VNDLY work email.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. Click the **Configuration** tab.
4. In the **Multi-factor Authentication** section, select the **Enabled** check box.
5. From the **Applies to User Types** prompt, select the user types for which you want MFA to be required.

Set Up Multi-Factor Authentication as a User in Workday VNDLY

Prerequisites

- The authentication type on the user profile must be set to *VNDLY Login*.
- The active user must be provisioned in VNDLY.

Context

After multi-factor authentication (MFA) is enabled, applicable users are prompted to set up MFA, and won't be able to access VNDLY before doing so.

Steps

1. Click **Next** under **Enable Two-Factor Authentication** to display a QR code.
2. Download your authenticator app of choice on your smart device.
3. Open your authenticator app and scan the QR code on the page.
4. Enter the token that's generated by the authenticator app and click **Next**.
5. Click **Continue to Home Page**.

Next Steps

- Log in to VNDLY with MFA.

Related Information
Reference
Reference: Recommended Authenticator Apps

Reset Multi-Factor Authentication

Prerequisites

Multi-factor authentication is enabled.

Context

You can reset your multi-factor authentication (MFA) as a vendor or user if you purchase or receive a new device.

You must be logged in to VNDLY to reset your MFA. If you can't sign in or have misplaced your device, please contact VNDLY Support.

Steps

1. Sign in to VNDLY.
2. Click **My Profile**.
3. Click **Actions** > **Reset MFA Token**.
4. Click **Confirm**.

Result

The existing MFA configuration is cleared from the system. You are logged out of the application and redirected to the MFA Setup page.

Next Steps

Set Up Multi-Factor Authentication as a User in Workday VNDLY

Reset Contractor Multi-Factor Authentication

Prerequisites
Multi-factor authentication is enabled.

Context

Contractors can reset their multi-factor authentication (MFA) for Workday VNDLY if theypurchase or receive a new device.

They must be logged in to VNDLY to reset their MFA. If they can’t sign in or have misplaced their device, please contact VNDLY Support.

Steps

1. Sign in to VNDLY.
2. Click **My Profile**.
3. Click **Reset MFA Token**.
4. Click **Confirm**.

Result

The existing MFA configuration is cleared from the system. The contractor is logged out of the application and redirected to the MFA Setup page.

Next Steps

Set Up Multi-Factor Authentication

Reset Multi-Factor Authentication For Another User

Prerequisites

Have the following:

- The *user.multi_factor_authentication.reset* permission. VNDLY administrators have this permission. If other users need this permission, they need to request this permission from the administrator.
- Be logged in as your role. You can't impersonate another user.
- Multi-factor authentication (MFA) is enabled in VNDLY.
- Be a client user. Vendors and contractors can't reset someone else's MFA token.
- The user must have *VNDLY Login* selected as the authentication type on their user profile.

  Note: For contractors, when you edit their profile, ensure that *VNDLY Login* is selected as the authentication type in the **Authentication** field.

Context

An administrator can reset the MFA token for users who have previously established their MFA and have lost their credentials. Example: A user lost their phone and needs to set up MFA on a new device.

Steps

1. Navigate to the user that you want to reset the MFA token and edit the user.

User	Navigation
Client	From the header, select **More** > **Users**. Open the desired client user profile.
Contractor	From the header, select **People** > **Contractors**. Open the desired contractor profile, then click **Edit**.
Vendor	From the header, select **More** > **Vendors**. Open the desired vendor data. Click on the **Contacts** tab, then the pencil icon.

2. Click the **Reset Multi-Factor Authentication** link associated with either the **Authentication** or **Authentication Type** field.
3. Click **Confirm** to reset the MFA token.

Next Steps

When the user signs in to VNDLY, they'll be redirected to the same MFA setup process that appeared when they initially signed in. See Set Up Multi-Factor Authentication as a User in Workday VNDLY.

Sign in to Workday VNDLY with Multi-Factor Authentication

Prerequisites

- Set up your multi-factor authentication (MFA) device. See Set Up Multi-Factor Authentication as a User in Workday VNDLY .
- Have your password and your token generated by the authenticator app that you selected when signing up.

Context

You use multi-factor authentication to make your sign-in more secure.

Note: For convenience, you can select the **Don't ask again on this device for 30 days** check box. When you select this check box, you won't be prompted to provide your token for 30 days.

Steps

1. Navigate to the **Workday VNDLY Sign In** page.
2. Enter your username and click **Continue**.
3. Enter your password and click **Continue**.
4. Open your authenticator app and type your token.
5. Click **Next**.

FAQ: Multi-Factor Authentication

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What if I don't have a mobile device?	If you don't have a mobile device, you can use a browser-based option, such as 1Password. These services provide browser plugins that can scan a QR code displayed on the browser page.
Can Single Sign On (SSO) users enable multi-factor authentication (MFA)?	No. Currently only users with the authentication type of *VNDLY Login* can use MFA.
What happens if an administrator selects to disable multi-factor authentication (MFA) for a set of users?	If MFA is disabled for a user, they won't be prompted for a device token upon logging in to Workday VNDLY.
What happens if a user loses their token or they get a new phone?	If a user no longer has access to their token, they must contact Workday VNDLY Support to have

	their device record removed. After the record has been removed, the user can re-enroll using their new device. See Set Up Multi-Factor Authentication as a User in Workday VNDLY.
Why is my token being rejected as invalid?	Ensure that the time on your device is synced correctly. The tokens are generated based on the current time, so both the site and authentication device must display the same time. Also, if you have multiple tokens for different sites, ensure that the token matches the site you're wanting to log in to.
I provided a token in my authenticator app after it expired, but it was recognized as valid. Shouldn't it only accept the currently displayed token?	Due to network latency, it’s policy for our system to validate a token for the previous 30 seconds. There might be an acceptable time delay between when the token is generated and when it’s validated in our system.
What happens when a user has multi-factor authentication (MFA) set up, but no longer has access to the 6-digit token required for login?	This typically occurs when the user has a new device, or reinstalled or removed their authenticator app, resulting in the loss of their previously configured MFA token. An administrator with the necessary permissions can reset MFA for the user. See Reset Multi-Factor Authentication For Another User .

Reference: Recommended Authenticator Apps

When setting up multi-factor authentication (MFA) in Workday VNDLY, you’re prompted to download an authenticator app. An authenticator app provides added security around your Workday VNDLY account.

Each authenticator app has varying set up processes. We recommend these apps:

- Authy
- Duo Mobile
- Google Authenticator
- LastPass Authenticator
- Microsoft Authenticator

SAML Single Sign-On

Steps: Set Up SAML Single Sign-On

Prerequisites

VNDLY:

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Have the role of Admin.
- Determine which users will use single sign-on (SSO).
- Determine whether users will initiate SSO using the service provider, identity provider (IdP) or both.
- Accounts must be set up first in VNDLY and marked as active before an SSO user can sign in.

Identity Provider (IdP):

- Determine if a single or multiple IdPs are required in VNDLY. VNDLY supports multiple SAML integrations per tenant.
- Purchase and configure an IdP. Your VNDLY Test and Production tenants can use either:
  - a production IdP.
  - a test and a production IdP.

  Note: VNDLY only connects with IdPs that allow service provider based authorization.

Context

SSO allows users to access VNDLY using credentials managed by your company's IdP. Each user has an account in VNDLY.

SSO can be implemented for client users, contractors and vendors.

VNDLY is a SAML 2.0 Service Provider. When SSO via SAML is enabled, VNDLY supports:

- Service Provider initiated login.
- Identity Provider initiated login.
- Signed and encrypted assertions.

Steps

1. Collect VNDLY Metadata Files .
2. Configure SAML Single Sign-On .
3. Set Up Default Authentication Method for New Users .
4. Update authentication methods. See:
   - Update Authentication Method for a Single User .
   - Update Authentication Method for Multiple Client Users .
   - Update Authentication Method for Multiple Contractors .

Collect VNDLY Metadata Files

Prerequisites

Have these permissions:

- *sso.saml.settings.edit*
- *sso.saml.settings.read*

Context

Setting up single sign-on (SSO) requires you to exchange Security Assertion Markup Language (SAML) metadata files between VNDLY and your identity provider (IdP). VNDLY exposes 1 metadata file per VNDLY tenant. Each of your Test and Production tenants has its own URL for the SAML metadata.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **SAML Single Sign On**.
3. Click **Default**.
4. On the **Details** tab, copy the URL in the **Metadata URL** field.

5. Open a browser window and paste the URL and press **Enter**.
   SAML 2.0 XML data displays.

   If you encounter an error opening the metadata file in the browser window, navigate back to the **Details** tab and:

   a. Select the **Allow unsolicited** check box.
   b. Click **Save**.
   c. Repeat step 5.
6. Right-click the browser window and select **Save As**.
7. Save the file as .xml format.
8. Repeat the steps for your other tenant.
9. Send the VNDLY Test and Production tenant metadata files to your IdP administrator.
   The IdP administrator uploads the files to the IdP.
10. Obtain the IdP Test and Production tenant metadata files from your IdP administrator.

    If there's only 1 IdP instance, only 1 metadata file is required.

Configure SAML Single Sign-On

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- The full metadata files in .xml format from your Identity Provider (IdP). If you use the same IdP for your Test and Production tenants, only 1 metadata file is required. See Collect VNDLY Metadata Files .
- Determine whether users will initiate single sign-on (SSO) from VNDLY (service provider) or from the IdP.

Context

Metadata files are usually in a .xml file format and are not a certificate. VNDLY uses the metadata files to finish the SSO setup.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **SAML Single Sign On**.
3. Click **Default**.
4. As you complete the **Details** tab, consider:

Option	Description
Label	Enter a name for the server.
Service provider entity ID override	Enter a different entity ID if you want to override the default service provider entity ID and change how VNDLY identifies itself as the SAML service provider.
Allow unsolicited	Select the check box if your tenant is set up to use IdP-initiated login to allow users to initiate a login from the IdP.
Require Signed Response	Select the option whether the IdP requires a signed response and/or a signed assertion.

Option	Description
	The recommended option is *Require signed response*.
Allowed clock skew	Enter the number of seconds that VNDLY allows for assertion timestamps to skew past their cutoff. Clocks between remote systems can often differ by significant amounts of time and clock skews can help to account for the varied time differences. Example: Server clocks are often not in sync with each other. If an authorization message arrives after its valid date/time, then VNDLY rejects it. Adding time with the clock skew field allows for additional time to account for the slight differences in the server clocks and VNDLY will accept messages that arrive within the allowed clock skew range.
Metadata valid duration	Enter the number of hours to mark the VNDLY metadata as valid. When the VNDLY metadata expires, your IdP can automatically obtain an updated VNDLY metadata file.
Allowed name ID formats	Indicates the name ID formats that are allowed from a dropdown menu. Ensure all values are selected.
PREFERRED SINGLE-SIGN-ON BINDING ORDER	Defines the order VNDLY searches IdP metadata files when looking for SSO bindings.
PREFERRED SINGLE-SIGN-OUT BINDING ORDER	Defines the order VNDLY searches IdP metadata when looking for single logout bindings.

5. Click **Save**.
6. On the **Identity Providers** tab, click **Single Sign On - SAML**.
7. As you configure the **Identity Provider** settings, consider:

Option	Description
Label	Label for the identity provider. The label appears as a dropdown option when updating a user's authentication method.
External Identifier	Value used when referring to the IdP in external integrations. It indicates which IdP should be used when performing account bulk uploads in VNDLY.
IdP metadata	Copy and paste the SAML metadata from the metadata file provided by your IdP for this tenant.
Bypass metadata validation	Select the check box to enable VNDLY to bypass the metadata validation. Some metadata files may contain SAML extensions that cause validation errors even when valid.

Option	Description
Name ID policy format	Select the name identifier to use for users. You can obtain the policy format from the IdP metadata file. If the name ID policy format is missing within the metadata, select *unspecified*.
Signing algorithm	Select the signing algorithm indicated in the IdP metadata file. You can search for keyword *signing* in the IdP metadata file.
Digest algorithm	Select the digest algorithm indicated in the IdP metadata file. You can search for keyword *digest* in the IdP metadata file.
Chained logout URL	Enter a custom URL if you wish to skip the SAML logout process and redirect the user to the specified URL when the user logs out of VNDLY. The user is also logged out of all other applications from the user's IdP. If the chained logout URL is blank, a user may still be logged out of all applications if single logout (SLO) is set up within your IdP.
Use subject as username	Select the check box to use the subject value as the highest priority username option. SAML assertions contain a subject field and additional attributes. Typically, the username comes from the attributes. In some cases, the IdP expects to use the subject field as the username instead.
USERNAME ATTRIBUTES	Add SAML attributes for VNDLY to search and use as the username during authentication. Attributes may be customized as needed to align with your IdP configuration. It's recommended to use the username attribute to identify the user, as the username attribute in VNDLY is unique. This means the same username cannot be used twice when creating a user. Example of Username Attribute: test.user Recommended attributes: • NameID • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn • nickname • principalname • urn:mace:dir:attribute-def:eduPersonPrincipalName • urn:oid:1.3.6.1.4.1.5923.1.1.1.6 • Username

Option	Description
	A sample of user attributes exposed by the IdP may assist with mapping user attributes in VNDLY.
EMAIL ATTRIBUTES	Add SAML attributes for VNDLY to search and use as the e-mail during authentication. Attributes may be customized as needed. It’s not recommended to use an email field to identify the user as multiple user accounts in VNDLY can have the same email address. Example of Email Attribute: test@email.com Recommended attributes: • http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress • urn:mace:dir:attribute-def:mail • urn:oid:0.9.2342.19200300.100.1.3

Take note of the value you entered in the **External Identifier** field. You'll need it when setting the authentication method for users.

8. Click **Save**.
9. (Optional) To configure an additional IdP:
    a) Navigate to the **Identity Providers** tab.
    b) Click **Create**.
    c) Complete Steps 7 and 8 for the additional IdP.
10. Repeat the above steps for your other VNDLY tenants.

    We recommend that you save the original metadata file from your IdP in case you need to make updates or revert to a previous version.

Set Up Default Authentication Method for New Users

Prerequisites

- Have these permissions:
    - *sso.saml.settings.edit*
    - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you can specify a default authentication method for new client and contractor users (optional). A default authentication method must be set for the Test and Production tenants to allow new users to log into VNDLY using SSO. If a default authentication method isn't set, then users will use a username and password to log into VNDLY by default.

The authentication method for new vendors is set when creating each vendor profile.

Steps

1. Configure the default authentication method for contractors. Complete the steps for your VNDLY Test and Production tenants.
    a) From the header, select **More** > **Company Settings**.
    b) From the **People** section, click **Candidate Profile**.
    c) In the **Default authentication provider** field, enter the identity provider's (IdP's) **External Identifier** for your tenant.

       Use the value you entered in the **External Identifier** field on the **Identity Providers** tab when you configured SAML SSO. See Configure SAML Single Sign-On .
    d) Click **Save**.
2. Configure the default authentication method for clients in your VNDLY Test tenant.
    a) In a new browser window enter the URL for your VNDLY Test tenant.

       Enter *https://<tenant name>.test.vndly.com/settings/integrations/user-import* and replace <*tenant-name*> with the name of your VNDLY Test tenant.
    b) In the **default_auth_provider** field, enter the **External Identifier** of the IdP for your Test tenant.
    c) Click **Save**.
3. Configure the default authentication method for clients in your VNDLY Production tenant.
    a) In a new browser window enter the URL for your VNDLY Production tenant

       Enter *https://<tenant name>.vndly.com/settings/integrations/user-import* and replace <*tenant-name*> with the name of your VNDLY Production tenant.
    b) In the **default_auth_provider** field, enter the **External Identifier** of the IdP for your Production tenant.
    c) Click **Save**.
4. Test to ensure SSO works for VNDLY Test and Production tenants. If you require additional assistance, submit a product support case.

Update Authentication Method for a Single User

Prerequisites

- Have these permissions:
    - *sso.saml.settings.edit*
    - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing clients and contractors. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. If you don't set a default authentication method, users will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. From the header, navigate to 1 of these options:
    a) For users, select **More** > **Users**.
    b) For contractors, navigate to the **Contractors** page.

       Depending on your permissions, you can access this page directly from the header or in the **People** > **Contractors** drop-down menu.

2. Select the user or contractor profile to update.
3. From the **Authentication** prompt, select the SSO authentication method.

   This will be the **Label** you entered on the **Identity Providers** tab when you configured SAML SSO. See Configure SAML Single Sign-On .
4. Click **Save**.

Next Steps

Test to ensure that SSO works for VNDLY Test and Production tenants. Submit a product support case you're unable to resolve an error.

Update Authentication Method for Multiple Client Users

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing clients. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. Use these steps when you update the authentication method for a large number of existing clients. If you don't set a default authentication method, users will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Search for the **User Master Data** report.
3. Click **Export**.
4. Open the report and filter the data for the users you wish to update.
5. From the header, select **More** > **Users**.
6. Click **Bulk Upload**.
7. Click **Download Format** to download the .csv format template.
8. Open the downloaded template and remove all the columns in the template except for **user_principal_name** and **authentication_method**.
9. Populate the **user_principal_name** column using the data in the **Username** column from the **User Master Data** report for the users you wish to update.
10. For the **authentication_method** column, use the **External Identifier** of the IdP to indicate which SSO configuration should be used for each user.

    Use the value you entered in the **External Identifier** field on the **Identity Providers** tab when you configured SAML SSO. See Configure SAML Single Sign-On .
11. Save your changes for the bulk upload template.
12. Upload the bulk upload template into VNDLY and view the results.

Next Steps

Test to ensure that SSO works for clients in Test and Production tenants.

1. From the header, select **More** > **Users**.
2. Select a client user that you imported.
3. Confirm the **Authentication** field displays the desired SSO option.

Update Authentication Method for Multiple Contractors

Prerequisites

- Have these permissions:
  - *sso.saml.settings.edit*
  - *sso.saml.settings.read*
- Set up SAML single sign-on (SSO) for your Test and Production tenants.

Context

After you set up SSO for your Test and Production tenants, you must update the authentication method for existing contractors. This must be done for the Test and Production tenants for users to log into VNDLY using SSO. Use these steps when you update the authentication method for a large number of contractors. If you don't set a default authentication method, contractors will use a username and password to log into VNDLY by default.

To update the authentication method for existing vendors, submit a product support case.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Search for the **Contractor Detail List** report.
3. Click **Export**.
4. From the header, select **More** > **Company Settings**.
5. In the **Vendors** section, click **Import Contractor Updates**.
6. Download the bulk_update_contractors template.
7. Open the downloaded template and remove all the columns except for **system_id** and **authentication_method**.
8. Populate the **system_id** column using the data from the **System ID** column in the **Contractor Detail List** report.
9. Populate the **authentication_method** column using the **External identifier** of the IdP to indicate which SSO configuration to use for each user.

   Use the value you entered in the **External Identifier** field on the **Identity Providers** tab when you configured SAML SSO. See Configure SAML Single Sign-On .
10. Save your changes for the bulk_update_contractors template.
11. Upload the file into VNDLY and view the results.

Next Steps

Test to ensure that SSO works for contractors in Test and Production tenants.

1. Navigate to the **Contractors** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Contractors** drop-down menu.
2. Select a contractor that you imported.

3. Confirm the **Authentication** field displays the desired SSO option.

Related Information
Examples
Contractor Updates Inbound

Concept: SAML Single Sign-On

Overview

Security Assertion Markup Language (SAML) is an XML-based framework for transferring identity data between 2 entities: a service provider (SP) and an identity provider (IdP). VNDLY is considered an SP. With SAML, the SP (VNDLY) agrees to trust the IdP to authenticate users. In return, the IdP performs the authentication and generates an authentication assertion, which indicates that a user has been authenticated. This is also known as Federated Identity. Authentication information is exchanged through digitally signed XML documents.

SAML is mostly used as a web-based authentication mechanism as it relies on using the browser agent to manage the authentication flow.

SAML is flexible enough to support the authorization workflow being initiated by either the SP or the IdP. When setting up SAML single sign-on (SSO), customers determine where users will initiate the SSO.

Benefits of SAML SSO

There are many benefits of implementing SAML SSO:

- Ease of access for users
- Increased security with a single point of authentication
- Reduced costs for user maintenance in VNDLY
- Increased compliance

Example of SAML Flow for Service Provider Initiated Sign In

This is an example SAML flow when a user tries to sign into VNDLY using SSO.

1. A user signs into VNDLY from a browser with their username, which is configured to use SSO.
2. The browser redirects the request to the IdP.
3. The IdP authenticates the user (through username and password or two-factor authentication) and generates a SAML response.
4. The IdP returns the encoded SAML response to the browser.
5. The browser sends the SAML response to the SP for verification.
6. If the verification is successful, the SP grants the user access to VNDLY.

Sign In to Workday VNDLY Concepts

Concept: System Requirements

This topic lists the minimum software requirements for a customer or its clients, users, or suppliers to access and use the Workday VNDLY vendor management system (VMS).

Workday VNDLY requires an active Internet connection and supports these browsers and the versions that the vendor supports:

- Chrome
- Edge
- Firefox

- Safari

At a minimum, Workday VNDLY supports the most recent version of each browser and the second most recent version for up to one year after the release of the latest version. We recommend that you use the latest browser version available.

Concept: VNDLY Authentication Methods

VNDLY supports 2 types of user authentication methods that provide different levels of security:

- VNDLY sign-in with username and password.
- SAML Single Sign-On (SSO).

Sign-in With Username and Password

This is the basic authentication method offered by VNDLY. Users input their assigned VNDLY username and their password. VNDLY verifies the password entered matches the user's record and grants them access. There's no additional verification or authentication unless multi-factor authentication (MFA) is also configured for the tenant.

Administrators can configure VNDLY to use MFA for enhanced security for client users, vendors and contractors. MFA is a method of confirming the identity of a user by requiring more than 1 type of identity verification. Workday recommends that you enable MFA in all of your tenants to provide additional security. When enabled, users must present a separate one-time password (OTP) token that validates their identity. This validation provides additional security by preventing unauthorized access in the event that a password is compromised. Most often, VNDLY users will download an authenticator app on their smartphone and use it to obtain the OTP token. Users without a smartphone can use a browser-based option. The OTP token is only available for a particular site and user account, and is only valid for a short period of time (usually 30 seconds).

Key Features	• The username and password authentication method is VNDLY’s standard sign-in method and doesn’t include any other identity validation. • VNDLY stores user passwords in an AES-256 encrypted database and uses the PBKDF2 algorithm with a SHA256 hash, a password stretching mechanism recommended by the National Institute of Standards and Technology (NIST). • When implementing MFA, VNDLY administrators must configure MFA for each user type (client users, vendors and contractors) and users must set up MFA on their smartphone. • Users signing in with MFA can opt to trust the device they’re using to bypass the need for an OTP token at each sign-in for 30 days. • Multiple authenticator apps integrate with VNDLY.
Example Sign-in Process With MFA	Note: The user must complete a one-time MFA setup prior to signing in with MFA. 1. A user signs into VNDLY from a browser with their username and correct password.

	2. VNDLY verifies their password is the expected password and displays the token login window. 3. The user accesses the designated 3rd party authenticator app (or designated website) and obtains the OTP token. 4. The user inputs the token (usually 6 digits) into the token login window. 5. VNDLY verifies the token is valid and grants the user access.

SAML Single Sign-On (SSO)

Security Assertion Markup Language (SAML) is an XML-based framework for transferring identity data between 2 entities: a service provider (SP) and an identity provider (IdP). VNDLY is considered an SP. With SAML, the SP (VNDLY) agrees to trust the IdP to authenticate users. In return, the IdP performs the authentication and generates an authentication assertion, which indicates that a user has been authenticated.

Key Features	• Ease of access for users. • Increased security with a single point of authentication. • Reduced costs for user maintenance in VNDLY. • VNDLY administrators must configure SSO for the user type (client users, vendors and contractors). • VNDLY supports the SAML 2.0 SSO standard for signing in to VNDLY from other identity providers.
Example of Sign-in Process With SAML SSO	1. A user signs into VNDLY from a browser with their username, which is configured to use SSO. 2. The browser redirects the request to the IdP. 3. The IdP authenticates the user (through username and password or two-factor authentication) and generates a SAML response. 4. The IdP sends the SAML response to the SP for verification. 5. If the verification is successful, the SP grants the user access to VNDLY. Note: Clients can also set up links within their intranet portal to authenticate and log users into VNDLY using SSO.

Concept: Email Invitations to Sign In

VNDLY uses an email invitation with an activation link for new users to sign in to VNDLY for the first time. For security purposes, the activation link is only valid for the number of hours that a VNDLY Administrator enters in the **Sign Up Token Expiration (Hours)** field on the **Configuration** tab of the **Security Settings** page of **Company Settings**. When a user clicks the link in the invitation after the expiry period, they aren't able to log in. The VNDLY Administrator can resend the invitation to the user, and the activation link is valid for the same duration.

When a VNDLY Administrator creates the user profile, VNDLY automatically sends an email invitation to the user based on:

- The method used to create the user profile.
- The authentication type on the user profile.

  VNDLY only sends an invitation to users who have *VNDLY Login* selected in the **Authentication** or **Authentication Type** field on their user profile.

User Profile Creation Method	Type of User	Invitation Automatically Sent?
From Users page	Client Contractor Vendor	Yes
Through an integration	Client	No
Bulk upload	Client Contractor Vendor	No

Concept: Users Initial Sign In to VNDLY

When a client, contractor, or vendor is onboarded to their new job, they might receive an email invitation, depending on how their user profile is created. The email invitation contains a link for them to sign in to Workday VNDLY for the first time. They can create their password when they:

1. Click the link in the email.
2. Follow the on-screen instructions to set up their password.
3. Sign in to VNDLY using the provided username and the password they just created.

Related Information

Reference

Reference: Password Standards

FAQ: Sign In to Workday VNDLY

- FAQ: Sign In to Workday VNDLY
- FAQ: Sign In to Workday VNDLY
- FAQ: Sign In to Workday VNDLY

<table>
<tr><td>What are the password requirements for VNDLY login authentication?</td><td>
<table>
<tr><td>Requirement</td><td>Description</td></tr>
<tr><td>Password Length</td><td>Your password must be at least 8 characters long.</td></tr>
<tr><td>Complexity</td><td>Your password must contain at least 8 characters and can't be a commonly used password.</td></tr>
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<tr>
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<table>
<tr><td>Requirement</td><td>Description</td></tr>
<tr><td>Expiration</td><td>Currently, passwords for VNDLY login don’t have an expiration period.</td></tr>
<tr><td>Maximum Failed Login Attempts</td><td>Your account will be locked for 30 minutes after 5 consecutive incorrect login attempts.</td></tr>
<tr><td>Password History</td><td>When you perform a password reset, there's no restriction on reusing previous passwords.</td></tr>
</table>
</td>
</tr>
<tr>
<td>How can I regain access to my VNDLY account when it's locked because of multiple incorrect login attempts?</td>
<td>Your locked account will be automatically unlocked after 30 minutes. After this time, you can attempt to log in again using the correct credentials. If you don't remember your password, use the Forgot Password option.</td>
</tr>
<tr>
<td>How do I update my expiring Single Sign-On (SSO) certificates in VNDLY?</td>
<td>To ensure continuous login access, we recommend performing these steps to update expiring, single sign-on (SSO) certificates:

Planning and Preparation

Confirm which tenant needs the SSO certificates to be updated: Production, Test, or both tenants.
Note the expiration date of your current certificates.
Obtain the full SAML metadata file from your Identity Provider (IdP). If you only have certificates, you must acquire the complete metadata file.
Coordinate a specific date and time with your team to perform the updates.
Ensure an active user who can log in to VNDLY using SAML SSO is available for verification and testing.
Before you make any changes, thoroughly document your current metadata:
<ol type="a">
Duplicate the current browser tab to keep the original IdP metadata accessible for quick reference or a potential revert.
Save the current metadata to a separate local file.
Take screenshots of the current metadata configuration within VNDLY.

</td>
</tr>
</table>

	2. Update IdP Metadata in VNDLY a. After the update has been performed on your IdP, log in to VNDLY and navigate to **More** > **Company Settings**. b. From the **Security** section, click **SAML Single Sign On**. c. Click **Edit** for the desired SAML authentication server. d. On the **Identity Providers** tab, click **Edit** for the desired IdP. e. Paste the content of your full, new SAML metadata file into the **IdP metadata** field. f. Click **Save**. 3. Verification and Testing To confirm the update was successful, log in to VNDLY with the designated SSO test user to verify a successful login. We strongly recommend that you perform these changes and verify them in your Test tenant first before deploying them in your Production tenant.

Troubleshooting: Unable to Sign in to Workday VNDLY

This topic provides strategies for diagnosing and resolving these sign in to VNDLY issues:

- Troubleshooting: Unable to Sign in to Workday VNDLY
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Users receive the "Unable to login. Please contact an administrator." error message.

Cause	Solution
The VNDLY-generated email wasn't used for the initial sign in to Workday VNDLY.	When your account is created, an automated email is sent to the email address in your profile. To log in to Workday VNDLY for the first time, you must access the link provided in the email, where you can create your password.
Email address was used instead of username to sign in.	For some Workday VNDLY accounts, your username might differ from your email address. If you prefer them to be identical, you can update your username by modifying your profile within Workday VNDLY. However, if you utilize single sign-on and need to adjust your password or username, reach out to your IT team for assistance.

Cause	Solution
You can't remember your password.	To reset your password: 1. On the **Sign In** page, enter your username in the **Username** field, and click **Continue**. 2. On the **Password** page, click **Forgot Password**. 3. On the **Forgot Password** page, enter your username in the **Username** field, and click **Email Me Reset Instructions**. You'll receive an email with details on resetting your password.
The username entered isn't valid.	To confirm your username is accurate: 1. Verify you're using the correct username and check for any spelling errors. 2. Remove any extra spaces by closely checking both the start and end of your entry to ensure no additional spacing is included. 3. Check for invisible characters by reviewing your username in a text editor to find and delete any invisible characters that may be at the end of your username.
The initial sign-up registration process hasn't been completed.	To finish registering your account, complete the initial sign-up process: 1. Locate the Workday VNDLY invitation email by searching your inbox as well as your spam and junk folders. 2. Finalize your registration by clicking the link provided in that email.
You're trying to log in using the same device that your authenticator app is running on.	If you enabled multi-factor authentication (MFA) for your user account, try to log in using a separate device from the one running your authenticator application.
Your user account configuration specifies an incorrect login method. For example, you might be attempting a VNDLY login when your organization requires single sign-on (SSO), or the other way around.	Contact your administrator to confirm whether you should be using SSO or the standard VNDLY login. Then sign in using the appropriate login method.
You're using an incorrect tenant URL for the Workday VNDLY tenant.	Confirm the tenant URL. To ensure you're accessing the correct Workday VNDLY tenant, verify the URL with your administrator.
Your VNDLY account is locked because of too many failed login attempts.	Your account will be automatically unlocked after 30 minutes. Once this period has passed, try logging in again with your correct credentials. If you don't remember your password, use the **Forgot Password** link.

SSO login failures display an "Oops, our circuits got crossed" message and error code.

Cause: The message in the error log is "Attempted log in via SAML failed. Unable to find user for Username." The username provided by your Identity Provider (IdP) doesn’t match the Workday VNDLY username. This often occurs when a user's username or email has recently changed on the IdP, but hasn’t been updated accordingly in VNDLY.

Solution:

1. Verify that the username is in Workday VNDLY.
2. Compare the username used in your IdP with your Workday VNDLY username.

   If the usernames are different, your administrator will need to update the Workday VNDLY username to precisely match the username used by your IdP. Once the usernames are identical, you should be able to successfully log in to Workday VNDLY via single sign-on (SSO).

A contractor didn’t receive an email invitation for VNDLY sign in.

Cause	Solution
The email address entered for the contractor was incorrect or the email was filtered into the contractor's spam or junk folder.	After confirming the email wasn't filtered into the contractor's spam or junk folder, a program team user or vendor user should log in to Workday VNDLY, navigate to the contractor's profile, and click **Resend Credentials**. After resending, the contractor should check their email inbox, including spam and junk folders, and verify their login using the provided link. They'll be able to log in after their email is verified.
The contractor's email domain may be on a suppression list.	Check the notification settings in VNDLY. From the header, click **More** > **Company Settings**. From the **Communication** section, click **Notifications**, then the **Settings** tab. In the **Email Recipient Rules** section, ensure that either the: • **Email notifications allowed for any domain** is selected. • **Email notifications allowed for specific domains and/or email addresses (enter below)** is selected, and the contractor's specific email domain is added in the **Domains** field.
The contractor might have previously blocked incoming emails from Workday VNDLY.	For potential blocking or whitelisting issues, the contractor should contact their internal IT team for further investigation and assistance.

A contractor receives the "Oops, our circuits got crossed" error when trying to log in to VNDLY.

Cause	Solution
An incorrect username is being used for login.	Verify the contractor's username in their user profile in VNDLY. Once confirmed, ask the contractor to use that exact username for all login attempts.
If the contractor uses single sign-on (SSO) to log in to VNDLY, the SSO details don’t match between VNDLY and the Identity Provider (IdP).	Verify all SSO-related details within the client's IdP configuration aligns with the authentication type settings configured for that contractor in VNDLY.

A new SAML SSO setup generates assertion errors for test users, even though it was successful in test environments.

Cause: If your team has verified all configurations, and users encounter login issues during the Identity Provider initiated login flow, the **Allow unsolicited** setting in VNDLY might not be selected. This setting controls whether VNDLY accepts authentication assertions that it didn't explicitly request.

Solution: Selecting the **Allow unsolicited** setting enables VNDLY to accept assertions initiated directly by the Identity Provider (IdP), which is common in IdP-initiated login scenarios. Note: This setting should be unselected unless your tenant is configured for IdP-initiated login.

Select the **Allow unsolicited** check box. For navigation instructions, see Configure SAML Single Sign-On.

Reference: Password Standards

Single Sign-On

Single Sign-On (SSO) user account passwords aren’t stored in Workday VNDLY and are managed by your identity provider (IdP).

Workday VNDLY Password Standards

This information applies to user accounts configured to use VNDLY Login, where user account passwords are stored and managed directly in Workday VNDLY.

VNDLY Login credentials are stored in an AES-256 encrypted database using the PBKDF2 algorithm with an SHA256 hash, a password stretching mechanism recommended by the National Institute of Standards and Technology (NIST). It is outlined in NIST Special Publication 800-132 Recommendation for Password-Based Key Derivation Part 1: Storage Applications. We follow NIST recommendations for password strength as outlined in NIST Special Publication 800-63B, Digital Identity Guidelines.

Component	Description
Password length	Minimum of 8 characters and configurable up to 64 characters
Allowed characters	All printable characters allowed, including spaces
Special characters	Permitted, but not required
Password comparison	Workday VNDLY compares passwords to dictionaries and a list of 20,000 common, easily guessed passwords.
Expiration period	None
Password hints	None
Knowledge-based authentication	None. Example: Who was your best friend in high school?
Reauthentication	Required using configurable session timeout
Temporary account lockout	30 minutes after 5 invalid attempts
Multi-factor authentication (MFA)	Configurable by user type. Example: Client, vendor, contractor.

Related Information

Tasks

Set Up Multi-Factor Authentication as a User in Workday VNDLY

Examples

National Institute of Standards and Technology

Navigation

Save Filter Settings

Context

You can save commonly used filter settings in various pages throughout Workday VNDLY. This allows you to access more relevant information quickly.

Steps

1. Navigate to the appropriate screen.
2. From the **Filters** sidebar, click **Clear**.
3. Select the filters that you'd like to save for the search.
4. Select **Save current filters (n)**, where n is the number of filters that you've selected.
5. Name your filter and click **Save Filters**.

Result

Each time you return to the page, the new filter is available for selection in the **Saved Filters** section.

Example

If you regularly navigate to the **Work Orders** page to look up various source types and their statuses, you can save time by using filter settings.

1. From the header, select **Work Orders**.
2. Under **Filters**, click **Clear**.
3. Click the **Current Status** filter and select *Offer Released*.
4. Click the **Source Type** filter and select *Payrolled* and *Supplier Sourced*.
5. Click **Save current filters (3)** and enter the **Saved Filter Name**.
6. Click **Save Filters**.

The filter is available at any time on the **Saved Filters** section of the **Work Orders** page.

Concept: Workday VNDLY Home Page

The Workday VNDLY home page serves as your starting point and acts as a landing page with key information and links to make it easy to navigate to action items. The home page content will vary based on the role of each user and how you configure your tenant. Example: A resource manager views data for jobs that they have visibility to whereas an administrator, who has access to the whole organization, views jobs across all resource managers.

Header

The header provides access to the various modules of Workday VNDLY and includes menus with additional navigation options. The **More** menu provides access to numerous options including the **Company Settings** page for configuration settings to customize Workday VNDLY for your environment.

The **Tasks** drawer next to your name provides easy access to a filtered list of tasks:

- **My Tasks**: list of tasks specifically assigned to you.
- **All Tasks**: list of tasks assigned to user roles that you belong to.

Hovering over your name provides access to:

- **My Profile**
- **Notification Preferences**
- **Switch Account**
- **Manage Delegation**
- **Sign Out**

Note: Workday VNDLY uses a responsive display based on the device, screen size, and display magnification. The header might display across the top of the page or collapse on the left side and it's accessible by clicking the hamburger icon.

Cards

Below the header, a set of cards related to key areas of Workday VNDLY display relevant metrics to each of those areas (depending on the setup of your environment):

- **Jobs**
- **Work Orders**
- **Pending Modifications**
- **Contractors**
- **SOWs**
- **RFP**

Clicking the metric numbers quickly links you to the main page of the relevant area. If you click one of the more specific metrics within the card, the related page opens filtered to that category. Example: When you click the **On Hold** number in the **Jobs** card, the **Jobs** page opens with the filter of **Current Status** set to *On Hold*. You can filter the data as needed and save the filters on the related page. The filters don't affect the filtered data displayed in the scorecards on the home page.

The cards displayed are dependent on the functionality enabled in your environment. Example: You will only view the **SOWs** card if you have SOW enabled in your environment.

Quick Actions

A group of quick action buttons display below the cards, enabling you to jump to common actions. The buttons vary based on the security permissions assigned to your role.

Tasks

The **Tasks** section on the home page enables you to view important to-do items by category. A maximum of 14 task categories can display, and you can click a task category to view those tasks in the **Tasks** list. From the **Tasks** list, you can set up filters and view approvals.

Notifications and Messages

Adjacent to the **Tasks** widget, is a section containing 2 tabs: **Notifications** and **New Messages**.

Icon	Description
Notifications	Alerts generated as a result of different workflows and actions taken in Workday VNDLY display here, based on the settings for your company. Use the **Notification Preferences** option under your name in the global navigation bar to configure how to receive notifications (In app or email). Your **Notification Preferences** will override the notification settings of your tenant. View Concept: Notification Recipients in Settings for more information.
New Messages	In-app messages from vendors display here. You can see more messages by clicking **Inbox**.

Favorite Reports

This widget displays all of your favorite reports for quick access. Click the report name to access the report to run it or take other actions for the report. You can manage the list of favorite reports from the **Reports** page, under **Reports** tab, by clicking the heart icon on the desired report.

Spend and Headcount Graphs

At the bottom of the Workday VNDLY home page, 2 reports—**Spend by Month** and **Headcount By Vendor** illustrate the data by graphs for easy visualization. You can download the chart image as a PNG or click **View as Report** to see the table view of the report.

Related Information
Concepts
Concept: Work Orders
Concept: Tasks in Workday VNDLY
Concept: Timesheets

Concept: Company Settings

As a program administrator, you can use the **Company Settings** page to make changes to the settings and configuration of your Workday VNDLY environment.

To navigate to a particular setting, use the **Search for Configuration** bar and search across the settings pages using key words. Alternatively, use the **Jump To** menu to navigate to a particular category of settings and select the associated settings page.

In the tables below, you'll find an overview of the categories and settings pages available to program administrators. There are security permissions tied to access to the **Company Settings**.

Foundational Data

Create and manage tenant-level configurations that may impact all areas of VNDLY.

Settings Page	Description
Custom Data Sources	Create tables of data used as predefined options or values for custom fields.
Custom Fields	Custom fields enable you to add a field to a form that you want to collect information from.

Settings Page	Description
Lists	Configuration of legacy custom lists that are not managed under **Custom Data Sources**.
Miscellaneous	Various settings that do not fit into other categories.
Reports	Configure and manage report settings, include standard date formats, report sharing, and standard export results.
Sequences	Manage system-generated ID numbers.

Organization

Configurations that handle the foundational structure of your organization including workflow approvals and location settings.

Settings Page	Description
Locations	Set specific locations in which a company is looking to hire. The following information is required for locations: • Address • Code • Name • Region
Management Levels	Define your organization's management levels and the associated spend authority for each level.
Organization Hierarchy	Set organization levels and define your organization's structure and hierarchy.
Regions	Set the regions in which a location can be associated.
Workflow Approvals	Build approval flows across multiple workflows: • Jobs • Work Orders • Timesheets • Expenses • Invoicing • Statement of Work

Security

Configurations that handle various security settings and ensure compliance with data privacy and protection.

Settings Page	Description
Data Privacy	Erase personal data for inactive users in the system.
Delegation Settings	Define who users can delegate to and set up time limits for delegation assignments.

Settings Page	Description
SAML Single-Sign On	Create and manage single sign-on services and identity providers.
Security Settings	Configure and manage security roles, including new roles, permission management, policy management, and log in and session management.

Localization

Configurations related to locale management and terminology customizations.

Settings Page	Description
Locale Configuration	Configure locales available for selection on company and user profiles.
Term Overrides	Manage translations and term overrides for a curated list of Workday VNDLY terminology.

Communication

Configurations that provide messaging, context, or other forms of communication to users.

Settings Page	Description
Emails / Tags	Manage email related communication information and configure groups.
In-App Help Text	Customize visibility for help text within the application.
Notifications	Manage notification rules, templates, recipients, and recipient groups.
Reminder Notifications	Manage timing and conditions for emailed notification reminders.
Tasks	Manage all system tasks and view the details and recipients of each task.
Terms & Conditions	Manage custom terms and conditions prompts.

Accounting

Configurations that control how billable values are processed and communicated.

Settings Page	Description
Accounting	Create and manage codes that allow you to enter client-specific codes for invoices.
Budgets	Manage budget-based spend controls on timesheets and expense reports.
Calculation Engine	View and manage formulas and formula components used to calculate billable system values.

Settings Page	Description
Charge Codes	Create and manage accounting codes that provide detailed information about financial entries in time, expenses, adjustments, and SOW.
Currency	Manage allowed program currencies and currency conversion rates.
Event-based Expenses	Manage system events to automatically create expense reports based on entered time or a defined schedule.
Expenses & Adjustments	Configure program expenses and adjustment types, including mileage.
Invoice & Payments	Configure program fees, billing cycles, and invoice settings, including approvals, scheduling, and files.
Invoice Template Rules	Manage rules to select and automatically assign PDF templates during invoicing.
Manage Taxes	Customize and manage tax rates and tax subjectivity for different locations.

Timekeeping

Configurations that manage timekeeping and time-related premiums.

Settings Page	Description
Calendar-based Premium Pay	Create and manage important dates with the option to support date-based premium rates.
Overtime	Configure overtime rates and rules to manage how auto-classified overtime is calculated in timekeeping.
Premium Rates	Configure rates and differentials for use in timekeeping.
Shifts	View, create, and manage shifts that can apply and calculate shift premiums to time entered on timesheets.
Time Entry System	Configure where time should be captured.
Timekeeping	Configure and manage timesheets, including timesheet type, classification, approvals, lockouts, and notifications.
Work Hours Types & Rates	Manage work types and rates used for classifying and compensating time in timekeeping.

Integrations

Configurations that manage synchronization of data with Workday and third-party systems.

Settings Page	Description
Workday	Configure Workday connections, scheduling, and general configuration that determines APIs and data mapping.
Imported Locations Configurations	Customize CSV delimiters used with vendor locations. Displays if the custom data source contains at least 1 location group.
Provisioning Controls	Controls the display and value of the field in VNDLY which drives downstream provisioning in integrated systems.

Jobs & Work Orders

Configurations that relate to sourcing, work order management, and other Workday VNDLY jobs workflows.

Settings Page	Description
Checklists	Manage checklist requirements for workers and vendors.
Job Application	Manage various behaviors for the **Job Application** workflow.
Job Categories	Creating job categories is the first step in creating a job profile. Job profiles are aligned to categories. This allows for better use of rate cards, distribution rules, and other system criteria by job category.
Job Compensation	Configure several items that display on the **Job Form** that tie to how a job or contractor is paid and managed.
Job Templates	Configure, add, or delete job profiles. Templates are the defaults used when publishing a job.
List/Card View Defaults	Customize the data users can view in list results.
Pre-Identified Intake Form	Customize the intake form for Pre-Identified candidates using the AOR/EOR module.
Rate Card	Rate cards help clients control and manage pay/bill rates that vendors use when submitting candidates to jobs. These can be configured a variety of ways depending on client or MSP needs.
Tenure Policy	Manage working term limits to comply with local and federal government regulations.
Work Order	Configure and manage work order settings, including onboarding, editing, modification, end, reopen, and imports. This section also includes vendor action settings and approval fields.
Worker Profile Management	Manage settings and field visibility related to Worker Profile Management workers.

Settings Page	Description
Workday - Bulk Update Jobs	Bulk update jobs in Workday VNDLY from Workday data.
Workday - Bulk Update Work Orders and Worker Profiles	Bulk update work orders and worker profiles.

People

Configurations that manage contractors, candidates, and other settings related people.

Settings Page	Description
Bulk Upload Contractors	Creates work orders in bulk for pre-existing or new contractors in the program.
Candidate Profile	Manage customizations and field visibility on the Candidate Profile.
Candidate Submission Rules	Manage rules and behaviors for limitations on how many candidates can be submitted per job or position.
Candidate User Settings	Manage how the default username for the candidate is created during onboarding.
Import Contractor Updates	Bulk upload used to update some contractor and work order fields.

Statement of Work

Configurations related to Statement of Work (SOW) and other SOW configurations.

Settings Page	Description
SOW Bulk Uploads	Bulk upload existing SOWs and their related data.
SOW Configuration	Manage multiple configurations that affect the Statement of Work module.
SOW Templates	Manage SOW clause templates for consistent use in SOWs.

Vendors

Configurations that allow you to manage **Vendor Profiles**.

Settings Page	Description
Vendor Distribution & Groups	Manage rules to distribute jobs to vendor based on scenarios and tiering.
Vendor Settings	Configure and manage vendor settings, including authorized services, vendor terms, and vendor attachment types.

Foundational Configurations

Add an Organization Level to Organization Hierarchy in Settings

Context

Organization Levels enable you to label each level in your organization. These levels help you identify the appropriate areas of your organization on forms and reports.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Organization Hierarchy**.
3. Click **+ Add Organization Level**.
4. Name your new Organization Level and click **Add**.

   If you need to remove a level or expand your hierarchy beyond 14 levels, please contact the Workday VNDLY Support team.

Change Company Profile Preferences

Context

Administrators and MSPs can:

- Edit their company profile.
- Determine what modules they want to turn on and off within the system.

Steps

1. Access the **More** drop-down.
2. Select **Company Profile** and edit the task.
3. Toggle on or off the relevant modules in the **Preferences** section.

Add Currency to Workday VNDLY in Settings

Context

The currencies you select to add to Workday VNDLY impact several areas of the application, like invoices. It's important to add the currencies your organization uses for proper reporting and representation in the application.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Currency**.

3. Click **+ Add** to add a single currency or **+ Bulk Upload** to add several currencies.

   If you're adding a single currency, complete the fields in the pop-up window and click **Save**. If you're bulk uploading currencies, download the document format from the pop-up window and add your data to the fields.
4. Upload your file.

Enable Multiple Currencies in Settings

Context

Workday VNDLY users with access to **Company Settings** can set **Allowed Currencies** and **Default Currencies** on a worksite. Default currencies can only be sourced from allowed currencies.

Multiple currencies can be added to a single worksite.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Currency**.
3. Click **Edit**.
4. Click **Enable Multiple Currencies?**

Add Locations in Settings

Prerequisites

- Set up regions.

Context

Locations specify where a program wants to hire workers or where a job takes place. Workday VNDLY also uses this information to assist in calculating accurate taxes if a program decides to manage taxes in the application.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Locations**.
3. Click **Add**.
4. When adding a location, consider these options:

Option	Description
Accounting Location Code	Used when generating an invoice.
Overtime Profile	Linking an **Overtime Profile** applies all **Overtime Profile** rules to a location, which saves time for users when creating jobs and work orders. This field only displays when your environment doesn't use overtime **Rules** in the **Overtime** section of **Company Settings**.
Allowed Currencies	The default enables all currencies set up in VNDLY. Users can adjust the currencies

Option	Description
	applied to locations and available when creating jobs. In addition, the setting can help users avoid accidentally changing currencies, which could impact rate cards associated with a job.
Default Currency	Sets a default currency for job forms with the location selected.
Tags	Serves as an additional source of tag. If using the tax location tag, the location won’t be eligible for selection on jobs and work orders. However, the location will display for tax purposes, like Work Site Tax Overrides.
Features	Benefits associated with a location.

5. Click **Save**.

   You can edit a location by clicking the pencil icon or delete a location by clicking the trash can icon.

Add Locations in Bulk in Settings

Prerequisites

- Set up regions.

Context

Locations specify where a program wants to hire workers or where a job takes place. Workday VNDLY also uses this information to assist in calculating accurate taxes if a program decides to manage taxes in the application. You can add locations in bulk by importing a file with the appropriate data.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Organization** section, click **Locations**.
3. Click **Bulk Add**.
4. Click the **Here** link to download the bulk upload file.
5. Fill out the file fields.
6. Select the file from the pop-up window.
7. Click **Upload**.

Create Term Overrides

Prerequisites

To configure term overrides, you must be an Admin or MSP and have the *admin.settings.locale.term_overrides.manage* permission.

Context

You can adapt system terminology to use words that are familiar to your users. You can customize any term within a predefined list. Use the International Components for Unicode (ICU) format to include both singular and plural variations of the term. Example: {count, plural, one {Feature} other {Features}}.

When overriding terms, use the correct language setting for your tenant.

Steps

1. From the header select **More** > **Company Settings**.
2. From the **Localization** section, select **Term Overrides**.
3. (Optional) When you have multiple locales configured on the tenant, select a language from the left panel.
4. Click **Add Translation**.
5. From the **Term** prompt, select the term you want to override.
6. In the **New Translation** field, enter the new term.

   To include both singular and plural variations, use the International Components for Unicode (ICU) format.
7. Click **Create**.

Set Up Help Text

Prerequisites

To configure in-application help text, users need *settings.admin* permission.

Context

Administrators and MSPs can customize the text that Workday VNDLY displays on the:

- **Sign In** page when users are logging in.
- Configurable tenant banner.
- Pop-up when you select **Publish Job** from the **Home** or **Job Dashboard** page.

Steps

1. From the header select **More** > **Company Settings**.
2. From the **Communication** section, click **In-App Help Text**.
3. Complete the task:

Option	Description
Sign In Help Text	Detail company specific processes, such as who to reach out to with login issues or which credentials to use to help users log in. Displays on the **Sign In** page for all users.
Publish Job Help Text	Instruct users on how to select a job template, and provide links to internal job creation resources. Example: Job catalogs. Displays near the top of the **Publish Job** pop-up below the title.
Banner Text	Display company-wide announcements and reminders. Examples:

Option	Description
	• Program team contact information. • Links to internal resource sites. • Timely reminders such as upcoming holidays or timelines for timesheet approvals. Displays at the top of every page in VNDLY below the header. Users can close the banner for a page that they're on.

You can format text using bold or italics and can include hyperlinks.

Result

In-application text updates are immediate. Refresh open pages to see the changes.

Configure Emails and Tags

Prerequisites

Have the *settings.admin* permission.

Context

You can customize these communication settings in **Emails/Tags**:

- Contact Us Form.
- Blocked Email Patterns.
- Work Order Print Header.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communications** section, click **Emails/Tags**.
3. As you customize your email communications, consider:

Option	Description
Contact Us Form	Update your Contact Us form (on the sign-in page) to include: • A custom URL that directs users to an external site. Example: You add a link that directs users to a site where they can enter their own support cases. • Hide the Contact Us Form from all VNDLY users.
Blocked Email Patterns	Add email addresses you'd like to block from receiving notifications, even when they aren't listed in your email list notification groups. Adding an email address to this list doesn't prevent you or other users from adding it

Option	Description
	to another email list in VNDLY. You can add blocked email addresses to other communication lists, but they won't receive any notifications. This feature is case sensitive. Verify you enter the email address correctly. See: Create Notification Groups in Settings.
Work Order Print Header	Add text to display on a work order page when it's printed or saved as a PDF. See: Print Work Orders.

Concept: Sequences

Sequences in Workday VNDLY determine how system IDs are formatted and displayed across your tenant. You can customize sequences by adding custom prefixes and specifying padding values.

VNDLY uses these sequence strings by default:

Name	Format	Example
Work Order	WO{seq}	WO00323
Statement of Work	SOW{seq}	SOW00456
Contractor	C{seq}	C00004320
Vendor	V{seq}	V0000216
Position ID	P-{seq}	P-912

Note: The Position ID only displays in VNDLY tenants that have the Workforce Connector integration enabled.

To manage sequences, from the header select **More** > **Company Settings**. From the **Foundational Data** section, click **Sequences**. You can edit sequences by clicking the pencil icon, or add new sequences by clicking the **Add** button. You can't delete sequences. When you edit or add sequences, consider:

Field	Description
Name	Name of the sequence. You can't enter duplicate names.
Format	Specifies how to format the sequence. The format must always be enclosed in curly braces. Example: {V-{seq}}
Padding Minimum Width	Specifies the minimum character length of the sequence. The default value is 7. Example: A value of 7 generates IDs within the range 0000000 to 9999999.
Increment By	The amount that increases with each instance of a sequence.
Starting Value	Defines the starting value of the sequence. After a sequence has started, this field becomes read-

Field	Description
	only. You can request changes to this field with VNDLY support if necessary.

Example: You edit the vendor sequence to use the prefix *VD* instead of the default *V*, so a vendor ID displays VD00213 instead of V00213. This change applies across your tenant where the ID displays, including the **Vendors** home page, **Vendor Details** page, and **Active Vendor List** page.

Changes you make to the contractor sequence prefix only impacts future contractors. VNDLY doesn't retroactively apply changes to existing contractors.

For the vendor sequence, VNDLY uses any existing custom prefix for contractors and amends it with the letter V. Example: If you have the contractor sequence configured with the prefix C, a vendor ID would display as CV0000216.

For the position ID sequence, you can customize how position IDs display when VNDLY generates them. After you set up the format within sequences, navigate to **More** > **Company Settings**. From the **Integrations** section, click **Workday**. From the **General Configuration** tab, enable the setting **Use Workday VNDLY to generate position IDs** for the appropriate module. This setting enables VNDLY to use the custom sequence when creating position IDs for Job or Worker Profiles.

Configure Management Levels

Prerequisites

To configure management levels, users need these permissions:

- *settings.admin*
- *user.management_level.update*

Context

Management levels enable you to map your organizations unique hierarchical structure, whether you use a strict top-down hierarchy or a more decentralized hierarchy. They also enable you to set approval limits and configure delegation restrictions in your tenant.

You can create as many management levels as needed. Once you create them, you'll need to associate each one to a user profile.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Management Levels**.
3. Select **Add Management Level**.
4. As you complete the task, consider:

Option	Description
Name	Name for the specific management level. The name is used to identify the management level when its used for approvals.
Code	Code for the specific management level.
Parent Management Level	Assign an existing management level as the parent level.

Option	Description
Job Approval Limit	Maximum spend authority amount for jobs and work orders associated with managers within this hierarchy.
Expense Approval Limit	Maximum spend authority amount for expense reports and misc. adjustments associated with managers within this hierarchy.
SOW Approval Limit	Maximum spent authority amount for SOWs associated with managers within this hierarchy.
SOW Payments Approval Limit	Maximum spend authority amount for SOW payments associated with managers within this hierarchy.

5. Click **Add**.
6. From the header, select **More** > **Users**.
7. Locate the appropriate user and click **Edit**.
8. Select the **Management Level**.
9. Click **Save**.

Result

Once you add management levels, they will display on the **Management Levels** page. You can click an individual management level to view its details, and you can click the three dots next to it to use these options:

- **Add Management Level**: Add a child level to the selected level.
- **Edit Management Level**: Edit the details for the selected level.
- **Deactivate Management Level**: Deactivate the selected level. If you deactivate it, you'll need to manually update all items assigned to it.

The **Management Levels** page displays each management level using a tree structure. You can view the tree branches to understand how management levels relate to each other, and you can click the arrow icon on a parent level to display or hide any of its child levels beneath it.

Example

Example

This first example illustrates how you can utilize approval rules with management level hierarchies to ensure the correct approver reviews the item.

Scenario: A Work Order Modification has been submitted to which it greatly increases the work order budget by $15,000 USD. Due to the fact that it's a large budget modification, the Work Order Modification needs to be approved by a Manager User who has the right spend authority amount before it becomes effective. Budget Approver works off of a Delegation of Authority (DoA) concept and uses a hierarchical system to determine the correct approver who needs to approve or reject the item.

The management levels:

Management Level	Job Approval Limit
Manager A	$1,000 USD
Manager B	$10,000 USD
Manager C	$20,000 USD

Result: Because the modification results in a $15,000 USD budget change, the approval routes to Manager A, B, and C. Even though the approval limit for Managers A and B is less than $15,000, it must route through these two before moving to Manager C.

This second example illustrates how you can use management level hierarchies to ensure that users can only delegate tenant access to specific users.

Scenario: You want to restrict User A from delegating tenant access to users with higher management levels. User B has a higher management level than User A and therefore has more approval authority. If User A grants tenant access to User B, they could approve transactions that exceed User A's approval authority. When you set up delegation on the **Delegation Settings** page in **Company Settings**, select a:

- **Delegation Restriction** of *Restrict by Management Level*.
- **Management Level** of *Same Level* and *Lower Level*.

Result: User A:

- Can't delegate tenant access to users with higher management levels, such as User B, which helps prevent unwanted approvals.
- Can delegate access to users with the same or lower management level.

Related Information
Examples
2024R2 Feature Release Note: New Management Level Approver Type for Workflow Approvals

Reference: Miscellaneous Tenant Settings

Configure and manage tenant-wide settings for VNDLY in these miscellaneous areas (**More** > **Company Settings** > **Foundational Data**):

Contractors can be Managers	Enable to configure contractors with resource manager permissions. See: Configure Contractor as Manager.
Department	Toggle on so that users can select an organization unit on a job form or when they adjust work orders. If you've not configured **Department** in **Settings** > **Organization Hierarchy**, verify this setting is toggled off. When toggled on, users can't configure a fourth tier in the organizational hierarchy (**Organization** > **Business Unit** > **Department**.
Disable Messaging for Managers	Toggle on to prevent in-app messaging between vendors and managers.
Edit Ended Contractor	Allows users to edit contractor's profiles with ended work orders.
Hide Managers for Vendors	You can hide these roles/personas from vendors on pre-onboarding EWM work orders: • RM • Timesheet Approver • Expense Approver • Timekeeper • Additional Manager

	Vendors can still see manager names on actions if they view a candidate's activity log.

Global Settings

Show Candidate Experience	Select to display the **Experience** field in the **Worker Information** section of candidate profiles. Clear the check box to hide the field from candidate profiles. This setting doesn't control the **Experience Summary** tab.
Validate Postal Codes	Automatically enabled. Verifies entered postal codes match the required format for the applicable country. Applicable to postal codes imported from Workday.

Documents

Configure Document Types

Prerequisites

No security permissions are necessary.

Context

Document types enable users to categorize the documents they upload to the tenant and send to vendors. VNDLY delivers default document types that you can edit, or you can create new ones.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Foundational Data** select **Lists**.
3. Update these default documentation types as needed:
    - Business Policy
    - Contracts
    - Insurance
    - Invoices
    - Operational
    - SOW
    - Timesheets
    - Others
4. Click **+Add New Value**.
5. Enter the name of the new document type.

Result

Users can select one of the configured document types to tag when uploading a document.

If the document type is in use and you:

- Edit it, the document type name is updated across the tenant.
- Delete it, the document type is deleted across the tenant.

Upload and Send Documents

Prerequisites

No security permissions are necessary.

Configure document types.

Context

You can upload documents to your tenant. Documents you add to a tenant are visible to all users within the tenant.

You can send documents in your tenant to vendors. You can’t unsend a document once you have sent it to a vendor.

Steps

1. From the header, select **More** > **Documents**.
2. Click **+ Upload**.
3. Click **Select Document Type**.

   Use the dropdown menu to choose the type that best fits the document you're uploading.
4. Click in the main box to browse and select the document.
5. (Optional) Send documents to vendors.

   - Select the relevant documents using the left hand check box.
   - From the popup, select the **Send** arrow.
   - In the new window, select the relevant vendors.
   - Click **Share** to send the document to the vendor's tenants.

Result

Users in the tenant can view the documents you’ve uploaded.

The vendor can view the document in their **Documents** page.

Next Steps

You can manage documents from the **Options** menu (hover over the three dots on the right hand side):

- Download
- Send. Enables you to send the document to vendors.
- Rename
- Archive. Doesn’t archive the document for vendors.
- Delete file

Custom Fields and Custom Data Sources

Create Custom Fields in Settings in Workday VNDLY

Context

Custom fields enable you to add a field to a form that you want to collect information from. You can configure:

- The field type.
- A source for the available options.
- Default values.
- Client and vendor permissions.

Adding a default value to your custom field ensures you can:

- Confirm that a value is accurate, instead of inputting the same response in multiple forms.
- Reduce the likelihood that an incorrect response is added.
- Select a different response, if needed.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Fields**.
3. Click **Create a Custom Field**.
4. Complete the **Type of Field** section:

Option	Description
Type of Field	Select the type of field that you want to capture your data: • *Dropdown (Single-Select)*: Select 1 from a list of options. • *Dropdown (Multi-Select)*: Select 1 or more options from a list of options. • *Text Input*: Enter one or more lines of text. • *Boolean (True/False)*: Select true or false. • *Number*: Enter numbers. • *Decimal*: Enter a number with a decimal. • *Date*: Select a date using the date picker.
Source Type	Identifies the source type to use for your drop-down field. These sources vary according to what is set up in your tenant. Example: Select the **Charge Code Source Type** if you want to enter a charge code for this field.
Source	The dataset used to populate your drop-down field. If the dataset that you want isn't available from the **Source** drop-down menu, you need to create it. You can create a dataset from **Custom Data Sources** or **Charge Codes**.

Option	Description
Choose a default value for this custom field.	When selected, the **Default Selection** field displays.
Default Selection	Enables you to select or enter a value that will be the default for the field. This value populates on every form this field displays on.
Client Permissions	Select the client permissions that you want to assign to your user roles. By default all client roles will be able to view and edit the field. If you select **Set up custom permissions for specific Client** roles, you can select the role and permission level you want them to have. If you don't see a role, select **I don't see the role I need** and set up the role. Permission levels are either **Can View** or **Can View & Edit**. If you don't specify a role and permission, then no one can see or edit the field.
Vendor Permissions	By default all vendor roles are able to view and edit the field. If you select: • **All vendor roles can view this field**: Vendors can view the field but not edit them. • **Hide this field from all vendors**: Vendors can't view or edit the field.

5. Select the forms and templates in which you would like to make your custom field available.
6. (Optional) Click **Configure Advanced Settings** for each form that you selected to add additional parameters for the form or template.

   You can indicate whether or not the field should be required. If a custom field is configured to use a default value, it is automatically marked as required and cannot be changed unless the default value is removed. You can specify which business unit the field should apply to if you don't want it to apply to all business units.
7. Complete the **Visibility Conditions** tab in the **Advanced Settings** section:

Option	Description
Make this field conditionally visible	Create relationships between custom fields on the same form. These relationships ensure that fields only display on the form when the appropriate conditions are met. You can only select a field that is already a field in the form group. Example: if you select the Job Edit form, you'll only be able to select fields in the Job Form, not in groups such as Candidate and Contractor or Work Order.
And/Or	The operator that you want to control the appearance of the custom field. • And: indicates that all conditions must be met to make the field visible.

Option	Description
	• Or: indicates that only one of the condition statements must be met to make the field visible.
Add Condition	You can only add a condition operator that matches the previous condition operator. Example: if your first operator is an Or statement, any additional conditional statements must be Or statements.
Add Condition Group	You use condition groups to create more complex conditions. With conditional groups, you can link an And statement with an Or statement.

8. Click **Continue**.

Example

This example illustrates how you can create a condition that would control when a custom field displays.

Say you want the custom field **Performance Details** on a **Contractor Profile** to display only if the performance of the contractor is **Needs Improvement** or **Poor**. To generate a condition for the custom field, click **Add Condition** and enter the following on the **Visibility Conditions** tab:

Field	Value
And/Or	Or
Custom Field 1	What was the contractor's overall performance on previous assignments?
Operation	Equals
Value	Needs Improvement
Add Condition	
Custom Field 2	What was the contractor's overall performance on previous assignments?
Operation	Equals
Value	Poor

Create Custom Data Source Tables in Workday VNDLY

Context

Custom data source tables enable you to source data into custom fields. Example: if you're creating a custom field and want to provide 3 options available for selection, you could create a custom data source table.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Data Sources**.
3. Click **Create a Custom Data Source**.

4. Name your data source and click **Create**.
5. Click **Add Column**.
6. Name your column and click **Create**.
7. Continue adding columns until you've reached your desired amount and then click **Upload**.
8. Select your file and click **Upload**. The page populates with your data.

Update Display Rules for Custom Data Source Table

Context

Updating display rules for custom data source tables enables you to configure the data that displays to various users. You can only update the display rules for user generated custom data sources.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Custom Data Sources**.
3. Click the custom data source that you wish to edit.
4. Click **+ Update Display Rules**.
5. Select the columns that you wish to display within Workday VNDLY.

   You can drag and drop column names to reorder them.

Tasks

Change Available Tasks

Prerequisites

- Have a Workday VNDLY superuser implement the correct feature flag. To have this done, contact the Workday VNDLY Support team.
- Have the *settings.admin* permission.
- Have the *user_tasks.settings.manage* permission.

Context

Tasks delivered to recipients in the **My Tasks** and **All Tasks** sections can be activated or deactivated based on your organization's needs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Tasks**.
3. Open the desired task from the **Task List**, and click **Activate** or **Deactivate**.

   When a task is deactivated, new tasks won't be created. Tasks that have already been generated are not removed.

   Check the **Task Recipients** section to see how the task delivers differently between users receiving it in the **My Tasks** section and the **All Tasks** section.

Concept: Tasks in Workday VNDLY

Tasks help you better manage your day-to-day tasks by keeping track of to-do items assigned to a user or a group of users. Tasks are available to all user roles, except contractors.

You can access tasks from 3 main places:

- The **Home** page.
- The **Task** side panel.
- The **Tasks** list.

Tasks List

To view the **Tasks** list, click **View All Tasks** from the **Home** page or from the **Tasks** side panel.

The **Tasks** page is a comprehensive list of all of your tasks. In addition, you can filter, sort, and search. Bulk action functionalities are available.

The **Tasks** page has tab filters for **My Tasks** And **All**, with the default filter being **My Tasks**. You can also narrow the tasks that display using the filters on the left side bar. Example: If you'd like to see *Interview* tasks in *Pending* status, you could check those boxes.

You can filter the **Tasks** page by:

- **Pinned**.
- **Current Status**.
- **Categories**.
- **Locations**.
- **Assignees**.

You can also search for tasks by:

- *Description*
- *Category Name*
- *Component Name*
- *Component ID*

You can sort tasks by:

- **Important** (default).
- **Category A - Z**.
- **Category Z - A**.

When using **Sort By: Category** the **Important** section doesn't display.

The **Tasks** list page also gives users an extended view of their tasks' information, like what user roles a task gets assigned. Near the bottom of each task, you see the **Assigned to roles** information. Example: Assigned to roles: Administrator, Program Team.

For each task, you can perform 4 actions using the **Actions** drop-down:

Option	Description
Pin to top	Moves task to top of task list and marks it as **Important**. This option only displays if the selected task isn't currently pinned.
Unpin from top	Moves task from top of task list back to its original place based on order of importance. This option

Option	Description
	only displays if the selected task is currently pinned.
Dismiss for Me	Removes task from your personal task list. The task will no longer be visible to you, but remains visible and accessible to other users with previous joint access to the task.
Dismiss for All	Resolves and removes the task from all **Tasks** lists for all users. The task will no longer be viewable or accessible to users.

Concept: Bulk Actioning Tasks

At the top of the **Tasks** list, the bulk action bar saves you time by allowing you to select multiple tasks and performing a single action on them. Using the check box next to the title of the task, you can select specific tasks from their lists and perform these actions:

Option	Description
Pin Task(s)	Moves a task to the top of the **Tasks** list and marks it as *Important*.
Dismiss for Me	Removes a task from your personal task list, and makes it invisible to you. The tasks might remain visible and accessible to other users with previous joint access to the tasks.
Dismiss for All	Resolves and removes a task from all task lists for all users. The task will no longer be viewable or accessible to all users.

By default, the options on the bar display unusable unless you select one or more tasks from the list. When you select at least 2 tasks, the bar displays the total number of selected tasks. You can click the **Select All** check box to select all tasks on a page. If you have more than 30 tasks and wish to bulk action all of your tasks in Workday VNDLY, you can click **Select all *number***.

Reference: Tasks Available with Tasks V2

Currently, not all tasks are available with Tasks V2. Similar to the Notification Engine, we'll add additional tasks to this feature over the course of future releases. Below is a list of all tasks currently available with Tasks V2.

Tasks are available for these categories:

- Billing Cycle
- Expense
- Interview
- Job
- Job Applicant
- Job Offer
- Timesheet
- Vendor
- Work Order

Billing Cycle

Name of Task	Description	User Roles	Task Trigger	Action
Update billing cycle for "name"	Reminds Admins/ MSPs to update billing cycles by extending date	Admins and Program Team	Work Order Extended	Billing Cycle is updated

Expense

Name of Task	Description	User Roles	Task Trigger	Action
Approve Expense Report "name" for "name"	Requires approval action on submitted expense report	Admins and Program Team	Expense submitted	Expense approved

Interview

Name of Task	Description	User Roles	Task Trigger	Action
Reschedule Job Interview for Candidate "name" for Job "name"	Prompts user to act on job interview reschedule request	Admins and Program Team	Interview reschedule request	Interview is rescheduled

Job

Name of Task	Description	User Roles	Task Trigger	Action
Approve Job edit for "name"	Prompts user to approve an edited Job	Approver	If Job is edited and Job Change workflow approval is enabled	Job is approved after edit
Resubmit Job Change for "name"	Prompts user to act on rejected Job Change approval	Admins and Program Team	If Job is rejected and needs to be resubmitted	Job Change has been resubmitted or canceled
Resubmit Job Post for "name"	Prompts user to act on rejected Job Publish Approval	Admins and Program Team	Job Post was rejected	Job Post was resubmitted or canceled
Approve published Job "name"	Requires internal approval of job published	Admins and Program Team	Job has never been Active and is going through Job Publish workflow approval rule	Job Publish workflow approval is complete (fully approved or rejected)
Reminder: Open Job "name" inactive for 4 weeks	Prompts user to act on jobs open for over 4 weeks	Admins and Program Team	Open date exceeds 4 weeks without action	Any action taken on Job

Job Applicant

Name of Task	Description	User Roles	Task Trigger	Action
Add New Candidate rating for "name"	Requests candidate feedback on contractor rating	Vendor and MSPs	Interview Completed	Feedback added
Missing email for Contractor		Admins and Program Team	Saved contractor/ candidate profile without an email	Email added to contractor/ candidate profile
Offer Declined by Vendor "Name" for Job ID "number"	Prompts user to act on Vendor rejecting candidate's job applicationPrompts user to act on contractor's missing "Email" after onboarding	Admins and Program Team	Vendor declines a Job Offer, Applicant has Job Applicant status Rejected	Job Applicant status is no longer Rejected
Onboard Candidate "name" for "job"	Requires Vendor to process and/ or onboard candidate	Admins and Program Team	Offer sent	When onboarding is completed
Reminder: Onboard "Candidate" is past due	Prompts user to act on past due onboarding for candidate	Admins and Program Team	If job applicant is past due for job onboarding	Job onboarding is completed
Approve "Candidate" for onboarded "name" Job	Requires approval on applicant onboarding for job	Admins and Program Team	After Job Applicant is onboarded and approvals are needed	Approvals completed
Onboard Candidate "name" for Job "name"	Prompts user to process candidate ready for onboarding	Admins and Program Team	Onboarding ready for candidate on job	Onboarding completed

Job Offer

Name of Task	Description	User Roles	Task Trigger	Action
Reminder: Offer Rejected for "Job"	Prompts user to act on offer release that was rejected for applicant	Admins and Program Team	Offer rejected	Job is closed, reopened, another offer is sent, job is canceled.
Approve job offer release for Job "name"	Prompts user to act on pending internal approvals on job offer release	Admins and Program Team	Job offer released for approvals	Approvals completed

Timesheet

Name of Task	Description	User Roles	Task Trigger	Action
Submit missing timesheet for "name"	Prompts user to act on missing timesheet from the previous week	Admins and Program Team	Timesheet is missing from prior week	Timesheet submitted

Vendor

Name of Task	Description	User Roles	Task Trigger	Action
Onboard Vendor "name"	Prompts user to onboard Vendor	Admins and Program Team	New Vendor added	Onboarding complete

Work Order

Name of Task	Description	User Roles	Task Trigger	Action
End Work Order "number"?	Requires user to end work order after contractor onboarding	Admins, Program Team, and Resource Managers	Work Order status is Active and Work Order End Date is today's date or prior	Work Order status is Ended
Approve payment for Work Order "number"	Prompts user to act on pending payment approvals on Work Order	Admins and Program Team	Payment is submitted for approval	Approvals completed
Approve Work Order "number" Ending	Requires approval to end a Work Order	Admins and Program Team	Work Order is triggered to end that has approvals	Work Order is approved to end
Approve modification for Work Order "number"	Prompts user to act on pending approval to made modifications to a Work Order	Admins and Program Team	Modification for Work Order was submitted	Approval for modification is completed
Remind Vendor to approve Work Order "name"	Prompts user to act on a Work Order modification awaiting Vendor approval	Admins and Program Team	Modification is pending Vendor approval	Vendor approves modification

Notifications

Create Notification Groups in Settings

Context

Notification groups enable you to customize the recipients of a notification. You can select recipients by role or role tags, as well as individually by name or email. Example: Five finance approvers want to see when an invoice is submitted. You can add all 5 to a notification group to receive a notification each time this occurs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Notifications**.
3. Click the **Groups** tab and click **Create New Group**.
4. As you complete the task, consider:

Option	Description
Group Name	Displays on the **Notification Recipient** page.
Which organization unit will trigger a notification?	Limits notifications to a particular organization unit.
Recipients	Users added to the group, which can include Users, Roles, Role Tags, and Emails.

Set Up Email Notifications

Prerequisites

Have these permissions:

- *notifications.content.update*
- *notifications.read*
- *notifications.recipient.update*

Context

You can control which users receive email notifications.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, click **Notifications**.
3. Complete the **Settings** tab:

Option	**Description**
Email Recipient Rules	Enables you to turn email notifications on and off, as well as control where the emails are sent. Select:

Option	Description
	• *Email Notifications Allowed for any Domain* when you don't want any restrictions. We recommended this setting for Production tenants. • *Disable Email Notifications* to completely disable all notifications. • *Email notifications allowed for specified domains and/or email addresses (specify below)* to enter a comma-separated list of domains and emails. Notifications will only be generated for recipients who have domains or email address in the list. We recommend this setting for Test tenants so that users can specify only the specific email addresses being used for testing. This prevents unwanted email notifications from being sent from the Test tenant.
Notification Email Limits	Controls the maximum number of recipients allowed for a single email notification event. This limit ensures that sending mail stays within manageable boundaries. The default limit is 1,000 recipients per single notification sent.

4. Click **Submit**.

Set Up Reminder Notifications

Prerequisites

Have the *settings.admin* permission.

Context

You can set up reminder notifications to automatically send email alerts for these scenarios:

- Work Order End
- Contractor Ratings

These reminders ensure that users receive a notification when a specific time-based condition occurs. Users will be able to see what steps they need to take in the notification content.

Note: The content and recipients for these reminder notifications are based on the **Work Order: End Reminder** and **Work Order: Feedback Request** notification templates on the **Notifications** page of your tenant. For more information about notification templates, such as customizing recipients for them, see, Edit Notifications.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Communication** section, select **Reminder Notifications**.
3. Click **+Add**.

4. Complete the task:

Option	Description
Days	Enter the number of days before or after the condition date to send the notification.
Prior	Select to send the notification prior or after the amount of days you entered in the **Days** field.

5. Click **Save**.

Result

VNDLY sends an email notification to the selected recipients or user groups according to the scenario, condition, and timing that you configure.

Example

You can create an email reminder with these values:

Field	Value
Scenario	*Contractor Ratings*
Condition	*Work Order Start*
Days	*7*
Prior	*After*

VNDLY sends an email reminder for contractor ratings 7 days after a work order starts. Users will see instructions in the notification they receive.

Next Steps

Edit Notifications

Context

Editing a notification ensures that the messaging is accurate and the appropriate people receive the notification. You can also configure how the recipients receive the notification: *In App Notification*, *Email Notification*, or both.

You can create multiple versions of the same notification by user locale as needed. This can be helpful to ensure the intent of the message is clear across languages and locations. Note: The ability to view and edit notifications in non-US English language is available only when using the localization capability. VNDLY-supplied content is already translated in the languages we support. Any language content that you customize must be translated separately. VNDLY won't automatically translate non-US English language content.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Communication** section, click **Notifications**.
3. Click **Edit** to the right of the notification you want to modify.
4. From the **Templates** tab, click **Edit**.

5. On the **General** tab, select the recipients and the method of delivery.

   VNDLY displays recipients in context user groups. These recipients vary depending on the context of the notification and its triggering event. Example: When you select the **Contractor** context user group as a recipient for an unsubmitted timesheet notification, VNDLY sends the notification to the specific contractor associated with the timesheet.

   VNDLY will send notifications to all the recipients that have a method of delivery selected.
6. (Optional) Select additional recipients. You can search by roles, role tags, user groups, users, and email addresses. Example: When you select the **Program Team** role tag, VNDLY sends the notification to everyone who has the Program Team role tag on their user profile.

   When a recipient belongs to a selected context user group and is also an additional recipient, they receive only 1 notification.
7. On the **Notification Content** tab, select the language you'd like to modify notification content for.

   Each notification type displays as a preview of what's been entered.
8. Click **Edit**.

   You can edit the text for each content type as needed. You can add system variables as needed to customize the content. Example: You could insert the *name* system variable to personalize the message with each recipient's name automatically.

   You have additional formatting options when modifying the **Email Content**.

Example
Your notification template, Checklist Action Expired, triggers when a checklist item has not been completed and has expired. You selected **Contractor**, **Resource Manager**, and **Vendor** as recipients. You added the **Administrators** user group as an additional recipient. A contractor has failed to complete the onboarding checklist on a job. This triggers a notification. VNDLY sends the notification to: the contractor, the resource manager, the vendor that is associated with the job, and everyone in the **Administrators** user group.

Concept: Notification Recipients in Settings

Notifications enable you to set up notices that are triggered automatically when an event occurs in Workday VNDLY. You set up notifications by enabling a template that sends a predetermined message to the recipients specified in the template. Depending upon the template, you can have Workday VNDLY send an email to recipients as well as notifying the recipients directly in Workday VNDLY. Also, depending upon the template and your permissions, you can edit the message and recipients of the email.

Example: You want to make sure that the resource managers are notified when a candidate accepts a scheduled interview. In Notifications, you can enable a template that sends an email to users automatically when a candidate accepts a scheduled interview and adds the Resource Manager user role as a recipient.

Not all notifications are editable based on criteria that are within the notification.

From the header, go to **More** > **Company Settings** to view and manage notifications. From the **Communication** section, click **Notifications**.

Note: We're in the process of adding to notification templates the ability to customize recipients and specify how the notification is delivered. Not all notifications have been converted to this functionality.

When managing your notifications, consider:

Tab	Definition
Settings	Controls how you edit and distribute email notifications. See Set Up Email Notifications
Templates	Lists notification templates that you can enable and disable. Depending on the template, you

Tab	Definition
	can also edit the recipients and the notification message. See Edit Notifications .
Groups	Creates and edits groups of users that you can add to a notification template. Example: You want to make sure that Workday VNDLY alerts both users with the MSP role and users with the Administrator role when a bulk upload fails. Instead of adding 2 different role tags as recipients for the notification, you can create a user group called Troubleshooters with both the MSP and Administrator tag. You can use that user group as recipients for the notification. See Create Notification Groups in Settings .

Users and Security Settings

Create New Users

Prerequisites

- You must have the *settings.admin* permission.
- You must have the details of the user that you want to create a profile for. Example: username and email address.

Context

You can create and configure new user profiles for customer and program team users in VNDLY to enable access and assign roles based on your organizational needs. You can add users manually or by bulk upload. You can assign each user a security role that determines what they can do and view in Workday VNDLY.

Steps

1. From the header, select **More** > **Users**.
2. Click **Create New User**.
3. As you complete the **Details** section, consider:

Option	Description
E-mail	Enter the user's email address.
Organization Unit	Select the user's level in the organization structure. This sets the default organization unit when creating jobs in VNDLY.
Management Level	Assign management levels to users. Examples: *Manager*, *Sr. Manager*. You can configure levels in **Company Settings**.
External ID	Enter the user's internal system ID.

Option	Description
Report to User	Enter the name of the user's manager or lead. Certain approval types require managerial approval. The manager must already have a user profile.
Allowed Work Sites	Select 1 or more sites. If you leave it blank you make all locations accessible.
Default Work Site	Set the default location that appears when the user creates a new job in VNDLY.
Authentication	Select the authentication method that the user will use to access VNDLY. Example: standard login, SSO.

4. Under **Security Roles**, select the appropriate role for the user and assign security policies. You can limit user access in VNDLY by associating security roles with specific levels in the organization structure.
5. Click **Save**.

   The user must have a valid email ID to receive login instructions.

Next Steps

We recommend you regularly review user accounts and roles to ensure compliance and security.

Change User Profiles

Prerequisites

Have these permissions:

- Settings.admin
- rbac.bindings.create
- rbac.bindings.delete
- User.employer.update

Context

You can manage user information for both your customers and program team users in your organization, including:

- General user information
- Authentication methods
- Organization details
- Security roles

See Create New Users for details on the specific fields you want to revise.

When you change a user profile, you can set approval limits for the user.

When you change a username or authentication method, Workday VNDLY doesn’t send automatic notifications. You must notify users manually. Users can sign in once they receive their new credentials.

Security roles define your access level and match your position in your organization. You can assign multiple roles to a single user.

Steps

1. From the header, select **More > Users**.
2. Select the user you want to change and click **Edit**.
3. Complete the task:

Option	Description
Maximum Expense Approval Limit	Enter the maximum spend amount you authorize to approve for jobs.
Maximum Job Approval Limit	Enter the maximum spend amount you authorize for expenses and miscellaneous adjustments.
Maximum SOW Approval Limit	Enter the maximum spend amount you authorize for statements of work (SOWs).
Maximum SOW Payment Approval Limit	Enter the maximum spend amount you authorize for SOW payments.

4. Click **Save**.

Result

VNDLY updates the user profile with your changes.

Example

Next Steps

Bulk Upload User Profiles

Prerequisites

- Have the *settings.admin* permission.
- Have a completed user bulk upload CSV file.

Context

You can use update multiple customer or program team user records with 1 file upload. Workday VNDLY provides a pre-formatted CSV file template that you can download and fill out. Once you import the CSV file, VNDLY processes the data and you can view the import results.

When you change a user's organization unit using an import file without specifying a supervisor, VNDLY updates the user's pinned security role for their new organization unit.

For more information, see the Employee User Inbound section of the VNDLY File Import Specifications

Steps

1. From the header, select **More** > **Users**.
2. Click **Bulk Upload**.
3. (Optional) Click **Download Format**.

   Download the template to complete and upload.
4. Click **Select File**.

   Select the template you completed.

5. Click **View Results** to validate the outcome.

Result

The upload's outcome displays on the File Transfer Reports page. The outcome may be:

- Failure
- Partial Success
- Success

If the upload is successful, VNDLY updates the existing user profiles or creates new ones.

Example

Next Steps

You can:

- Click **More Details** in the Transfer Details column to view more information about the upload, including error messages for any partial successes or failures.
- Correct any errors and re-upload the file.

Deactivate Users

Prerequisites

Have these permissions:

- *settings.admin*
- *delegation.manage*

Context

You can deactivate client and program team users to remove their Workday VNDLY account access. When you deactivate users, they can no longer sign in, but their profiles still exist in VNDLY, and you can reactivate them.

You can also deactivate users in bulk by selecting *N* in the **Active** column of the bulk upload users file. For more information, see Bulk Upload User Profiles.

Steps

1. From the header, select **More > Users**.
2. Select the user to deactivate.
3. Click **Deactivate**.

Result

VNDLY removes the user’s account access.

Example

Next Steps

You can:

- Transfer the user’s responsibilities using bulk updates.
- Reassign the deactivated user's tasks, such as timesheet approvals, to an active user.

Steps: Set Up Security Settings

Prerequisites

Have the *settings.admin* permission. This gives you access to the **Company Settings** page.

Context

Security settings in VNDLY allow administrators to configure and manage security roles, including new roles, permission management, policy management, and log in and session management. By configuring these settings, organizations can maintain security and ensure that users have the necessary access to perform their tasks.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. On the **Roles** tab, Create Security Roles .
4. On the **Policies** tab, Set Up Security Policies .
5. On the **Permissions** tab, Add Permissions to a User Role in Settings .
6. On the **Configuration** tab, review each section:

Section	Consideration
Reporting Hierarchy Access	Allows users to manage and view reports based on their organizational structure and ownership of records. When you select the check boxes for each module, any user with an owned-read permission passes that permission up their reporting line according to the **Report to User** field in their user profile.
Session Management	Configure the global session expiration and session inactivity timeout. See Set Up Session Management .
Sign-up Token Expiration	Enables you to define the validity period, in hours, for the initial sign-in link provided to new VNDLY users. See Set Up Sign-Up Token Expiration Period .
Password Management	Enables you to define the minimum length of characters required to enforce a company's security policies. If this field is empty, the password follows the Workday VNDLY password standards. See Reference: Password Standards .
Multi-factor Authentication	Enables you to configure multi-factor authentication (MFA). See Set Up Multi-Factor Authentication in Workday VNDLY .
Vendor Auth	Enables you to configure vendor user permissions. When you select the **Allow Vendor Auth Management** check box, you

Section	Consideration
	enable client-side users to edit and manage vendor users and contacts. By default, this option is cleared. Consider these client-side permissions: • Add a vendor contact: *vendor_user.create* • Reset vendor user password: *vendor_user.reset_password* • Update authentication type: *vendor_user.auth.update* • Update username: *vendor_user.username.update*

Steps: Set Up Reporting Hierarchy Access

Prerequisites

Have the *invoicedata.owned.read* permission.

Context

You can configure the reporting hierarchy for the users to view reporting data, such as expense reports, timesheets, and work orders, based on the modules you select on the security settings page.

Steps

1. Enable **Reporting Hierarchy Access** to grant visibility for the reporting line.
   a) From the header, select **More** > **Company Settings** .
   b) From the **Security** section, click **Security Settings**.
   c) On the **Configuration tab**, select the modules you want the users to view the records in the **Reporting Hierarchy Access** section.
   d) Click **Save**.
2. Establish hierarchical relationships on the user's profile.
   a) From the header, select **More > Users**.
   b) Select the name of the user that you want to configure.
   c) In the **Organization Details** section, select the user in the **Report to User** field to establish the reporting hierarchy structure.
   d) Click **Save**.

Result

VNDLY grants visibility into the user's reporting structure to view and manage reports.

Example

Next Steps

Create Security Roles

Prerequisites

- Have these permissions:
  - *settings.admin*
  - *rbac.roles.create*
  - *rbac.roles.update*
  - *rbac.roles.read*
- Any child roles you want to link must exist.

Context

VNDLY has a set of preconfigured security roles, but you can create additional security roles to meet the needs of your organization.

You can also clone an existing security role by clicking **Clone** next to the appropriate role.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Security**, click **Security Settings**.
3. Click **Create Role**.
4. As you create the role, consider:

   Only the **Name** of a role is required when creating, but the role will lack applicability unless other fields are completed.

Option	Description
Name	Required to create a new role. Identifies the role.
Description	Enables you to provide additional details about the role.
Role Usage	Indicates the permissions that can be applied, as well as the types of users who can have this role.
Policy	You can use this to limit the role to specific resources or situations. See: Set Up Security Policies.
Child Roles	Select an existing child role. Any user assigned this role is also assigned this child role. See: Create Child Security Roles.
Role Tags	Role tags are used to select roles and their members for list behaviors. Example: manager selection, notification targets, or report sharing.
Permissions	Select any additional permissions that you want to add to the role. You can find all permissions and their definitions on the **Permissions** tab of the **Security Roles** page. Use these definitions to

Option	Description
	ensure you're selecting the correct permissions for the role.

5. Click **Save**.

Result

The new role is now available to assign to users.

Example

Example: You need a resource manager role that doesn't have rights to edit work orders.

1. Clone the resource manager role and rename the copy **Resource Manager No Work Order Edits**.
2. Keep the same role tags as the original resource manager role.
3. Remove any permissions associated with editing a work order, such as *workorder.timekeeping_settings.edit*.

Create Child Security Roles

Prerequisites

Have these permissions:

- *settings.admin*
- *rbac.roles.create*
- *rbac.roles.read*
- *rbac.roles.update*

Context

Child Roles are specialized types of roles that can be included within standard roles. This allows for a more granular and efficient approach to assigning permissions. Instead of directly assigning numerous individual permissions to each role, you can create focused child roles containing specific sets of permissions and then include these child roles within broader parent roles.

Child roles are applicable to individual user roles and individual vendor roles. They are not supported for profile roles, such as all employers and all vendors, or directly bound roles like Statement of Work (SOW) participant roles.

A child role can apply even if its parent role does not. Child roles are evaluated independently of their parent roles.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Security**, click **Security Settings**.
3. Click **Create Role**.
4. As you create the role, consider:

Option	Description
Name	Required to create a new role. Identifies the role.
Description	Enables you to provide additional details about the role.

Option	Description
Role Usage	Indicates the permissions that can be applied, as well as the types of users who can have this role
Policy	You can use this to limit the role to specific resources or situations. See: Set Up Security Policies.
Is Child Role?	When checked, indicates the role you're creating is a child role. Child roles cannot be directly assigned to users, and must be added to another role.
Permissions	You can find all permissions and their definitions on the **Permissions** tab of the **Security Roles** page. Use these definitions to make sure that you're selecting the correct permissions for the role.

5. Click **Save**.

Example

You need to grant your vendors the ability to create Worker Profile Management (WPM) work orders but want to prevent them from editing existing External Workforce Management (EWM) work orders. Currently, the vendor roles lack the *workorder.modifications.create* permission, preventing them from creating WPMs. However, directly, adding *workorder.modifications.create* to the existing vendor roles would inadvertently grant them editing access to EWM work orders, which is undesirable.

1. Create security roles for Vendor Admin and Vendor Manger. These will serve as the parent roles.
2. Create a Policy to restrict the *workorder.modifications.create* permission to only apply to WPM work orders.
3. Create a child role for Vendor WPM Edit and select the policy created in step 2.
4. Edit the Vendor Admin and Vendor Manager roles and select the child role you created.

When a vendor is assigned either of the parent roles, they inherit the child role. The Vendor WPM Edit child role grants them the necessary permission to create WPM work orders without inadvertently providing them with the ability to edit EWM work orders.

Add Permissions to a User Role in Settings

Context

Adding permissions to a user role enables you to configure what various users can view and modify. Example: if you wanted to add the ability to bulk submit saved timesheets to a timekeeper role, you would type *time.bulk.submit* in the **Permissions** box next to the role.

Note that only Administrator users have the ability to adjust permissions.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings.**
3. Click the **Roles** tab.
4. Click the pencil icon next to the role that you wish to add a permission to.

5. Enter the permission name into the **Permissions** box and select the permission from the list.

   You can find all permissions and their definitions on the **Permissions** tab of the **Security Roles** page. Use these definitions to ensure that you're selecting the correct permissions for the role.
6. After you've added your permissions, click the checkmark icon to save.

Set Up Security Policies

Context

Policies are configurations you can apply to security roles that let you control when and where the role applies. Configuring policies is optional.

Traditionally, when a user is assigned a security role for an organization unit, and if an object is at the same level or under that organization unit, the user is granted the permissions in that security role for the object. Nothing else is considered.

By using policies, you can add additional limitations around attributes. This means for a given object, you may not have this role if the policy doesn't match.

Examples:

- You can only manage Extended Workforce Management (EWM) and Contingent work orders, not worker profile work orders.
- You can only manage work orders that are *Active*, not in pre-onboarded statuses.
- You can only view and edit candidates created by client users, not vendor users.

You can also use policies to control roles based on the circumstances of the user, such as more about where and how they are accessing the functionality. This is referred to as context. Currently there is only one support context policy for *Is Bulk Updating*.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. On the **Policies** tab, click **Create**.
4. As you complete the task, consider the following restriction options:

Context Restrictions Option	Description
Context Restrictions	Restricts the role around the circumstance of the action you're trying to take. Example: You need to restrict the role to only apply when the role attempts to bulk update. Select *Only applies when Bulk Updating*.
Work Order Restrictions	Restricts the role around attributes of the work order you want to view or update. • *Module* • *Status* • *Country* Example: You need to restrict the role to only apply to Worker Profile Management (WPM) work orders. You would select *Module* and *Worker Profile Management*.

Context Restrictions Option	Description
Candidate Restrictions	Restrict your role based on attributes of a given candidate. • *Vendors* • *Created By* Example: You only want to see candidates created by client and not by vendors. Select *Applies only to Client created Candidates*.

5. Within each restriction option, choose the appropriate tab for the policy setup:

Option	Description
Interactive	Shows the circumstances available for easy selection in the user interface. With this option, you can only select one property per restriction on a policy.
JSON	Allows you to create complex expressions with multiple properties including AND/OR logic. Example: If you want to restrict a role to manage active WPM work orders only, you can use JSON syntax to establish a work order restriction on *Module* and *Status*.

6. Save the policy and navigate to the **Roles** tab.
7. Select one or more roles that you want to add the policy to. In the **Edit Role** page, select the policy from the **Policy** drop-down menu.

Example

This example illustrates how you can set up a policy that restricts resource managers to bulk update Worker Profile Management (WPM) work orders only.

Note: In an example like this, you'll likely need multiple resource manager roles, as there may be some resource managers who need access across modules.

Table 1: Context Restrictions Values

Field	Value
Bulk Updates	**Only applies when Bulk Updating**

Table 2: Work Order Restrictions Value

Field	Value
Module	**Worker Profile Management**

After creating the policy, add it to applicable **Resource Manager** roles.

Set Up Session Management

Prerequisites

Have these permissions:

- The *settings.admin* permission. This gives you access to the **Company Settings** page.

- The *admin.settings.security.configuration.read* permission. This gives you access to view the security settings configuration.
- The *admin.settings.security.configuration.write* permission. This gives you access to update the security settings configuration.

Context

You can configure when Workday VNDLY sessions expire and time out due to inactivity. This is a compliance requirement for VNDLY to meet certain certification guidelines. By default, Workday VNDLY sessions are set to expire after 1,209,600 seconds or 14 days when the **Enable Session Inactivity Timeout** check box isn't selected. Configuring the session inactivity timeout option ensures that sessions end automatically once the specified inactivity period is reached. Upon session expiration or an inactivity timeout, users are required to provide their credentials again to access Workday VNDLY.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. Click the **Configuration** tab.
4. Complete the **Session Management** section:

Option	Description
Global Session Expiration (Seconds)	Enter the maximum duration, in seconds, that users can remain logged in to Workday VNDLY continuously. Once this limit is reached, their Workday VNDLY sessions end, and users are logged out. The default value is *1,209,600* seconds or 14 days. You can set a limit with a minimum of *120* seconds or 2 minutes, and a maximum of *7,776,000* seconds or 90 days.
Enable Session Inactivity Timeout	When you select this option, you can configure the maximum duration, in seconds, that a user's Workday VNDLY session can remain idle before it's automatically terminated.
Inactive Session Expiration (Seconds)	Applicable only when you select the **Enable Session Inactivity Timeout** check box. Enter the maximum duration, in seconds, for a user's Workday VNDLY session to remain idle before it's automatically terminated. The default value is *1,200* seconds or 20 minutes. You can set a limit with a minimum of *120* seconds or 2 minutes, and a maximum of *7,776,000* seconds or 90 days.

5. To save any changes, click **Save**.

   Note: Changes to session management settings may take up to 10 minutes to take effect.

Related Information

Concepts

Concept: Session Management

Concept: Session Management

Session Expiration and Timeout

You can configure when Workday VNDLY sessions expire and time out due to inactivity. You can use this configuration to prevent unauthorized access to sensitive data when a user leaves their computer or laptop unattended while still logged in to Workday VNDLY. This is a compliance requirement for VNDLY to meet certain certification guidelines.

Session activity includes clicking links, editing values, mouse movement, and requests to the server. Example: If you're waiting for report results, your session won't time out due to inactivity. When a session times out, the user must reenter their credentials to sign back in to Workday VNDLY.

Sessions time out if:

- You select the **Enable Session Inactivity Timeout** option.
- The sessions haven't been active for the amount of time specified in the **Inactive Session Expiration (Seconds)** field.

You can access session management configuration by navigating to the header and selecting **More** > **Company Settings**. Then from the **Security** section, click **Security Settings**, and on the **Configuration** tab, locate the **Session Management** section.

Related Information
Tasks
Set Up Session Management

Concept: User Type Permissions in Settings

Security roles and permissions are the foundation for managing user access in Workday VNDLY, providing control over what users can do within the application. You can assign each user one or more roles on their user profile, granting them the permissions associated with those roles.

As an administrator, you can grant or remove different permissions to certain user types. You can also grant or remove permissions for profile roles that encompass many different roles. You find these roles by selecting **More** > **Company Settings** >**Security**>**Security Settings**.

Roles

A role is a set of security permissions assigned to a user that defines what actions they can perform and what information they have access to within VNDLY. VNDLY provides a core set of roles, which you can also clone and customize. Or, you can create new roles to fit your organization's needs. For more information, see Create Security Roles .

There are 3 profile roles:

- All Candidates: Candidates and contractors that only sign in to do their personal timekeeping or expenses.
- All Employers: Any client user that is also granted some other role in the system.
- All Vendors: Any vendor users associated as contacts on a vendor profile.

VNDLY grants these profile roles a set of default permissions.

Policies

On the **Policies** tab, you can create and manage security policies. Policies help enforce more granular access control based on the options. For more information, see Set Up Security Policies .

Once you create a **policy**, you can assign it to the security roles on the **Roles** tab.

Permissions

The **Permissions** tab provides a list of every available permission in VNDLY and their definitions. This list is for your reference so you can add them to roles on the **Roles** tab.

Configuration

You can manage various tenant-wide security policies on the **Configuration** tab.

Example: In the **Reporting Hierarchy Access** section, you can grant managers visibility into modules like **Jobs**, **Timesheets**, and **Work Orders** based on their reporting structure.

You can configure these settings:

Option	Description
Reporting Hierarchy Access	Enable visibility for managers into their reporting structure.
Session Management	Configure global and inactive session expiration timeouts in seconds.
Sign-up Token Expiration	Set the duration for which new user invitation links are valid.
Password Management	Configure password requirements.
Multi-factor Authentication	Enable MFA and specify **user types**. Examples: Client, Vendor, Contractor.
Vendor Auth	Allow **vendors** to manage authentication settings.

Concept: VNDLY Allowlisting Protocols

Email Address Allowlisting

Workday VNDLY is a multi-instance cloud hosted Vendor Management Solution (VMS). VNDLY sends email notifications to authorized users based on certain business process conditions. Example: job posting submissions, timesheet approvals, candidate submissions. These emails are sent from the following email address, which should be allowlisted in the client's corporate email system: noreply@vndly.com.

VNDLY uses DomainKeys Identified Mail (DKIM) and all emails sent by VNDLY are signed using a cryptographic key. An email message that is sent using DKIM includes a DKIM-Signature header field that contains a cryptographically signed representation of the message. A provider that receives the message can use a public key, published in VNDLY's DNS record, to decode the signature. This DNS entry is referenced in the selector record of the DKIM-Signature header. Email providers then use this information to determine whether messages are authentic.

IP Allowlisting

Allowing designated IPs isn’t the recommended method to prevent internet traffic intended for VNDLY from being hijacked or rerouted to a rogue website. VNDLY doesn’t recommend allowlisting because when IPs are added to changes, customers can experience connection interruptions until they update their allowlist databases.

Ingress - VNDLY connecting to client

These IPs are for customers who need to allowlist inbound (ingress) connections from VNDLY servers. Note:

- If you're using allowlists for Production 1, please ensure the IP addresses for Production 2 are also included in case a disaster recovery event is needed.
- If you're using allowlists for Production 3, please ensure the IP addresses for Production 4 are also included in case a disaster recovery event is needed.

Production 1 (AWS Oregon - US West 2)

- 52.43.6.70
- 34.214.224.40
- 54.188.53.91
- 35.164.22.135
- 44.226.63.81
- 34.217.1.184

Production 2 (AWS Ohio - US East 2)

- 3.13.20.176
- 13.59.151.166
- 18.191.14.169
- 3.14.208.12
- 18.190.60.168
- 3.132.229.237

Production 3 (AWS UK - EU West 2)

- 18.130.90.0
- 35.177.199.103
- 13.41.234.8
- 18.132.87.198
- 18.135.213.44
- 18.168.102.162

Production 4 (AWS Ireland - EU West 1)

- 52.50.126.26
- 54.72.135.73
- 52.214.255.110

Production 5 (AWS Frankfurt - EU Central 1)

- 3.121.250.19
- 3.122.70.56
- 52.59.46.163

Production 6 (AWS Ireland - EU West 1)

- 34.248.108.93
- 54.229.189.172
- 63.32.187.152

Egress - Client Connecting to Workday VNDLY

IPs for customers to need to allowlist outbound (egress) connectors to Workday VNDLY servers:

Endpoint	Public IP	Cryptographic Algorithms
sftp.vndly.com (US)	52.12.202.235 44.235.231.104 44.233.130.213	Key Types: • rsa • ecdsa Host Keys:

Endpoint	Public IP	Cryptographic Algorithms
	3.131.132.136 52.15.179.5 3.13.183.7	• ssh-rsa • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521 • diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com • umac-64@openssh.com • umac-128@openssh.com • hmac-shad2-256 • hmac-sha2-512 • hmac-sha1

Endpoint	Public IP	Cryptographic Algorithms
sftp-dc1a.vndly.com (US)	44.230.63.7 54.69.232.73 52.34.210.82	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • shh-ed25519 SshCiphers: • aes128-gcm@openssh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 SshMacs: • hmac-sha2-256 • hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
sftp-uk.vndly.com (UK)	18.134.78.80 18.132.253.240 18.135.142.203 54.194.254.236 52.48.198.217 54.217.252.123	Key Types: • rsa • ecdsa Host Keys: • ssh-rsa • rsa-sha2-256 • rsa-sha2-384 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519

Endpoint	Public IP	Cryptographic Algorithms
		SshCiphers: • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521 • diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com • umac-64@openssh.com • hmac-sha2-256 • hmac-sha2-512 • hamc-sha1
sftp-dc2a.vndly.com (UK)	3.10.240.72 18.170.175.172 35.176.210.71	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256

Endpoint	Public IP	Cryptographic Algorithms
		• ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • aes128-gcm@opensh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie--hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 SshMacs: • hmac-sha2-256 • hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
sftp-eu-dc3.vndly.com (Germany)	3.77.99.81 3.76.232.251 18.193.188.83 52.19.97.205 34.249.104.180 52.208.210.45	Key Types: • rsa • ecdsa Host Keys: • ssh-rsa • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers: • aes128-ctr • aes192-ctr • aes256-ctr • aes128-gcm@openssh.com

Endpoint	Public IP	Cryptographic Algorithms
		• aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • ecdh-sha2-nistp256 • ecdh-sha2-nistp384 • ecdh-sha2-nistp521 • diffie-hellman-group-exchange-sha256 • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group14-sha256 • diffie-hellman-group14-sha1 SshMacs: • umac-64-etm@openssh.com • umac-128-etm@openssh.com • hmac-sha2-256-etm@openssh.com • hmac-sha2-512-etm@openssh.com • hmac-sha1-etm@openssh.com • umac-64@openssh.com • umac-128@opensh.com • hmac-sha2-256 • hmac-sha2-512 • hmac-sha1
sftp-dc3a.vndly.com (Germany)	18.197.166.31 18.194.57.30 3.78.65.231	Key Types: • rsa • ecdsa Host Keys: • rsa-sha2-256 • rsa-sha2-512 • ecdsa-sha2-nistp256 • ecdsa-sha2-nistp384 • ecdsa-sha2-nistp521 • ssh-ed25519 SshCiphers:

Endpoint	Public IP	Cryptographic Algorithms
		• aes128-gcm@openssh.com • aes192-ctr • aes256-ctr • aes256-gcm@openssh.com SshKexs: • curve25519-sha256 • curve25519-sha256@libssh.org • diffie-hellman-group16-sha512 • diffie-hellman-group18-sha512 • diffie-hellman-group-exchange-sha256 • SshMacs: • hmac-sha2-256 • hmac-sha2-256-etm@openssh.com • hmac-sha2-512 • hmac-sha2-512-etm@openssh.com
[tenant].vndly.com	VNDLY uses AWS Cloudfront, which means all Cloudfront IPs need to be allowlisted. This process is documented on Amazon's website.	

Please contact the Workday VNDLY Product Support team Monday through Friday 7:00 AM ET to 7:00 PM ET, with additional questions or concerns.

Set Up Contractors as Managers

Prerequisites

Have these permissions:

- settings.admin
- user.employer.read
- user.employer.update
- user.contractor.link_employer

The **Contractors can be Managers** option must be selected from the header, **More** > **Company Settings** > **Miscellaneous**.

Context

You can enable contractors to perform functions as a manager or a supervisor within VNDLY. For example, they may need to be able to:

- Create a job requisition.
- Enter and approve time.
- View invoices.
- View reports.

Steps

1. From the header, select **More** > **Users**.
2. Access the **Contractors as Managers** tab.
3. Click the **Link New User** button.
4. Select a contractor to give manager permissions to.
5. Select **More** > **Users**.
6. Access the **Contractors as Managers** tab.
7. Open the profile of the contractor who you selected.
8. In the **Security Roles** section of the profile, add a new row and select a security role for the contractor.

Result

To view all contractors with manager permissions, from the header select **Profile** > **Users** > **Contractors as Managers tab.**

Contractors with manager permissions have delegation access. When a user is delegated as the contractor, they can't delegate as the contractor's linked manager account.

The user created by making a contractor a manager has a system generated username, and isn't eligible for direct login.

Next Steps

The contractor can go to the header and select **Profile** > **Switch Account** > **All Managed Accounts**

To disable manager permissions for a contractor, access the contractor's profile. From the **Linked Manager Account** section, click **disable**.

Configure Contractor as Manager

Steps

1. Go to **More** > **Users.**
2. Click on the **Contractors as Managers** tab.
3. Select **Link New User**.
4. Select, or search for and select, a contractor profile.
5. On the contractor profile, in the **Linked Manager Account** section:
    - Select **Create** if the profile has never been linked to a manager account. Enter an optional ID, if preferred.
    - Select **Enable** if the profile has been linked to a manager account before but is now disabled.
6. Go to **More** > **Users**.
7. Click on the **Contractors as Managers** tab and locate the user profile.

8. Click **Edit**.
9. To assign security permissions for the contractor's manager role, go to the **Security Roles** section on their profile and click **Add New Row**.
10. Select **Resource Manager** in the **Security Row** field.
11. Click **Save**.

Result

Contractors can now log in with their contractor credentials and switch accounts (**Switch Account** > **All Managed Accounts**) to complete actions in their manager role.

Delegation

Set Up Delegation Settings

Prerequisites

To set up delegation settings, users need these permissions:

- *settings.admin*
- *delegation.settings.read*
- *delegation.settings.edit*

Context

You can set up delegation settings to determine how long users can delegate tenant access and who they can delegate tenant access to. These settings help you prevent unauthorized approvals and control delegation based on specific organizational needs.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Security**, select **Delegation Settings**.
3. Complete the **Delegation Expiration** section:

Option	Description
Allow Users to Delegate Access with No Expiration Date	• If you keep this check box selected, users can delegate access to other users without a specific end date. However, they still have the option to select an end date when delegating access. • If you deselect this check box, enter the **Maximum Delegation Length** that users can delegate access. The default duration is 365 days.
Notify before Access Expires (Days)	This setting enables you to specify the number of days in advance when VNDLY should send the **Delegation Access Ending Soon notification** to delegates and delegators. The default option is 7 days.

Option	Description
	You can also configure notification recipients and delivery methods on the **Notifications** page of **Company Settings**.

4. Complete the **Delegation Restriction** section. This section allows you to restrict delegation for client and MSP users:

   Before configuring settings in this section, we recommend ensuring that management levels or reporting hierarchies have been set in users' profiles.

Option	Description
No Restrictions	This setting, which is selected by default, allows users to grant delegation access to any other users in the tenant.
Restrict By Management Level	This setting allows users to grant delegation access to other users with a specific management level: • *Same Level*: Users can delegate access to other users with the same management level as themselves. • *Higher Level*: Users can delegate access to other users with a higher management level than themselves. • *Lower Level*: Users can delegate access to other users with a lower management level than themselves.
Restrict by Reporting Hierarchy	This setting allows users to grant delegation access to other users with a specific reporting hierarchy: • *Peers*: Users can only grant delegation access to other users who directly report to the same manager as themselves. • *Subordinates*: Users can only grant delegation access to their direct reports or subordinates. • *Superiors*: Users can only grant delegation access to their managers or superiors.

5. Click **Save**.

Result

The settings you selected above are reflected on users' **Manage Delegation** page when they grant or request access. Any previous or future delegations in your tenant are also impacted by these settings, which are effective immediately.

Example

For example, you want to prevent users from delegating access to users with higher management levels. While setting up delegation settings, you select **Restrict by Management Level**, choosing *Same Level* and *Lower Level*.

Request Access to Other Users' Workday VNDLY Accounts

Context

You can request access to another user's Workday VNDLY account when they are unavailable to perform critical tasks such as approving timesheets, jobs, or other workflow actions.

This feature isn't restricted by role. Example: A hiring manager can request access from an administrator. If your program has set up restrictions in **Delegation Settings**, you may be unable to request access from specific users or for specific durations. For more information, view Set Up Delegation Settings.

Steps

1. From the header, click your name and select **Manage Delegation**.
2. Click **Request Access**.
3. Select the delegator.
4. Select the access duration.

   If you select *No, access does not end*, you'll be able to access the delegator's account as long as they're a user in the system. Both you and the delegator can end the delegation any time by clicking **End Access** on the **Manage Delegation** page.
5. Review the access details and click **Request Access**.

Result

VNDLY sends a notification once the delegator approves or rejects your request. In the meantime, the delegation request displays on your **Manage Delegation** page with a *Pending Approval* status.

Accept or Reject a Delegation Request

Context

You can receive a delegation request from another user, such as a delegate. Delegation requests give other users access to your account.

Steps

1. From the header, click your name and select **Manage Delegation**.
2. Click **Approve** or **Reject**.

Result

The delegate receives an approval or rejection notification. If you approve the request, the delegate has access to your account for the duration specified in the request. You and the delegate can also end an approved delegation any time by clicking **End Access** on the **Manage Delegation** page.

Grant Access to Your Account in Workday VNDLY

Context

You can grant another user access to your Workday VNDLY account so they can act on your behalf when you're unavailable to complete tasks such as timesheet approvals, job approvals, or other critical actions.

This feature isn't restricted by role. Example: An administrator can grant access to a hiring manager. Restrictions configured in **Delegation Settings** may prevent you from granting access to specific users or for specific durations. For more information, see Set Up Delegation Settings.

Steps

1. From the header, click your name and select **Manage Delegation**.
2. Click **Grant Access**.
3. Select the delegate.
4. Select the access duration.

   If you select *No, access does not end*, the delegate will be able to access your account as long as you're a user in the system. You and the delegate can also end delegation any time by clicking **End Access** on the **Manage Delegation** page.
5. Review the access details and click **Grant Access**.

Result

The delegate receives a notification that they can access your account. The delegation assignment displays on the **Manage Delegation** page for both you and the delegate with an *Active* status.

Grant Access to Other Users' Accounts on Their Behalf in Workday VNDLY

Prerequisites

- Have the *delegation.manage* permission. This permission is not issued to any user roles or role tags by default.
- Be a client or MSP user. This feature is not available for vendor or contractor users.

Context

Client or MSP user can grant themselves or others access to another user's account. The delegate can then take action such as approving timesheets or managing tasks, in situations where a user is unexpectedly absent or forgets to grant delegation access before a planned absence. Users with the permission can also view all delegation assignments on the **Manage Delegation** page for users who have the same organization unit tied to their security role on their user profile.

While the *delegation.manage* permission can be assigned to any client or MSP user, Workday recommends you only assign it to program administrators or managers who need to manage delegation access during team absences. Any delegation restrictions in **Delegation Settings** still apply. For more information, see Set Up Delegation Settings.

Note:

Delegation can only be issued to users who have the same organization unit tied to the security role on the user profile.

Steps

1. From the header, click your name and select **Manage Delegation**.
2. Click **Grant Access**.
3. Select the delegator.
4. Select the delegate.

5. Select the access duration.

   If you select *No, access does not end*, the delegate will be able to access the delegator's account as long as they're a user in the system. The delegator and delegate can also end delegation any time by clicking **End Access** next to the delegation assignment on the **Manage Delegation** page.
6. Review your grant details and click **Grant Access**.

Result

The delegate has access to the delegator's account, and they both receive notifications about the delegation and its duration. The delegation assignment has an *Active* status on the **Manage Delegation** page, and the activity log records the user who performed the action on behalf of the original user.

To access the delegator's account, the delegate can click their own name in the VNDLY header, select **Manage Delegation**, and click the delegator's name.

Example

Emily Employee, the timesheet approver for project A, is out of office, and timesheets for her assigned contractors need to be approved before the deadline. Alex Administrator, who can manage user permissions, assigns the *delegation.manage* permission to Mandy Manager, the resource manager.

Mandy can then grant herself or someone like Carly Employee, the timesheet approver for project B, delegation access to Emily's account via the **Manage Delegation** page and approve the timesheets on her behalf.

Switch Accounts in Workday VNDLY

Prerequisites

You must be granted access to the other user's account. See Request Access to Other Users' Workday VNDLY Accounts.

Context

Once granted, you can access another user's account in Workday VNDLY. This can enable you to perform critical tasks on the user's behalf if they're unavailable, such as approving timesheets, jobs, or other workflow actions.

Steps

1. From the header, click your name.
2. Select **Switch Account**.
3. In the **Switch Account** pop-up, click **All Managed Accounts**.

   If the desired user's name displays on the **Switch Account** pop-up, you can click it directly instead and skip step 4 below.
4. On the **All Managed Accounts** page, click the arrow in the **Actions** column next to the desired user's name.

Result

The user's account opens, and their name displays in the header.

If you want to switch back to your own account, you can click the user's name in the header and select **End Delegation**.

Data Privacy

Bulk Export Users Before Purging

Prerequisites

Have these permissions:

- *settings.admin* at the ALL Business Unit level or above
- *data_privacy.erasure.read*.

Context

With the Data Privacy feature in VNDLY, you can export a list of filtered VNDLY user IDs in preparation of purging the data of the user records. Exporting a list of users is restricted to records with the status of *Inactive*. After exporting the list of inactive users you can:

- Review the user records.
- Use the data to populate the required fields in the data privacy bulk upload template when you're preparing to delete the user records.
- Archive the list of user records before you purge them from VNDLY.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Data Privacy**.
3. Click **Export**.
4. Enter the **Export Name**.
5. Select the **Export Format**.
6. Confirm the **File Extension** displayed is correct.
7. (Optional) Select the **Include email, phone number and address** check box if you want to include this information for the users in the export file.
8. Click **Export**.

   VNDLY only exports user records with status of *Inactive*.

Result

The file downloads and is available for your review.

Example

Next Steps

Bulk erase users.

Erase User Data

Prerequisites

- **Data Privacy** set up in your tenant.

- Have the *settings.admin* permission at the All business unit level or above.
- Have the *data_privacy.erasure.read* permission.

Context

You can erase a user's personal data from Workday VNDLY in order to comply with certain privacy regulations and laws. Example: The General Data Protection Regulation (GDPR) and the Personal Information Protection Act (PIPA). Some items to consider before deleting personal data:

- Workday VNDLY provides the tools to erase personal data. However, it is your responsibility to ensure the data is erased.
- Once data is erased, it can't be retrieved. It is your responsibility to ensure that erasing that person's data doesn't negatively impact your systems.
- Because **Data Privacy** takes some time to search records, you should limit the number of users that you erase at a time.
- A user must be inactive and not have any work orders in order to erase their data.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Data Privacy**.
3. Locate the appropriate user and click **Erase Personal Data**.

   The user must be inactive and not be associated with any active work orders.
4. Review the explanation of what will be deleted and enter a **Reason for erasure** if necessary.
5. Click **Confirm & Erase**.

Result

You can monitor the process of the **Data Privacy** action from the **History** tab.

Verify that the user's personal data has been erased. Workday VNDLY keeps the user record so that any pre-existing relations between the erased record and any other record in the database are maintained.

Concept: Data Privacy

Data Privacy in VNDLY is a feature that enables you to delete certain personally identifiable information (PII) permanently from your tenant. If you have the proper permissions, you can search records linked to selected user records and erase any personal identifiable information pertaining to those records. Example: Erase personal information for a former employee when they leave a company.

The Data Privacy feature helps you comply with privacy regulations and data protection laws, such as, General Data Protection Regulation (GDPR) requirements.

Erased data displays differently depending on the type of data:

- Text, such as names, get replaced with the word *Erased*.
- Numeric values, like phone numbers, get replaced with zeroes.

Some items that you need to be aware of before deleting a user's personal data:

- Workday VNDLY provides the tools to erase a user's data. It's your responsibility to use these tools as needed based on your company policies.
- When you erase data, you permanently remove it from your tenant. VNDLY can't reverse erased data. It's your responsibility to ensure that erasing data doesn't negatively impact your systems outside of VNDLY.
- Data Privacy doesn't erase content in custom fields. If you have custom fields that display personal data, you need to manually remove the data from the custom fields.

- Because Data Privacy takes some time to search records, you'll want to limit the number of users that you erase at a time.
- User types must be in a specific status:

User Type	Status
Candidate	Inactive
Client	Inactive
Contractor	Inactive with all related work orders ended
Vendor	Inactive
Worker Profile	Inactive

Reference: Types of Erasable Data

VNDLY erases data for multiple fields when you erase personal data with the Data Privacy feature.

User Type	Erasable Fields
Candidate	• First name • Last name • Middle Name • Preferred first name • Preferred last name • Client contractor email • Alternate email • Contact number • E-mail addresses • Experience - title, company name, description, location, start, end date • City • Postal Code • Address Line 1 • Address Line 2 • Address Line 3 • County • Neighbourhood • Residence status • Country • Subdivision • Profile pic • Certifications- Course, institute, certificate location, start date, end date • Education • Feedback • Avatars • Checklists • Resumes • Location
Client	• Name

User Type	Erasable Fields
	• Contact Number • Email • Profile pic • Username • First name • Last name • Client email • Preferred last name • Preferred first name
Contractor	• Resume • Username • First name • Last name • Client email • Preferred last name • Preferred first name • Email • Job application document • Job application note
Vendor	• Name • Contact Number • Email • Profile Pic • Username • First name • Last name • Client email • Preferred last name • Preferred first name
Worker Profile	• First Name • Last Name • Middle Name • Preferred First Name • Preferred Last Name • Email • Residence country • Residence status • Phone number • Client email • Job application document • Job application note

Vendors

Add a Vendor

Context

When you add a vendor to Workday VNDLY, we automatically send a sign-up email to the vendor. You can access the email notification template, titled *Invitation*, from the header by selecting **More** > **Company Settings** > **Communication** > **Notifications**. When you have many vendors to add, you can bulk upload the vendor data. See Bulk Upload Vendors .

Steps

1. In the header, select **More** > **Vendors**.
2. Click **Add Vendor**.
3. Complete the **Add Vendor** workflow, and click **Save**.

Result

The vendor is sent an email. You won't be able to complete onboarding the vendor until they've signed into Workday VNDLY.

Next Steps

- Onboard the vendor.

Suspend a Vendor

Prerequisites

Context

You can suspend a vendor to prevent them from receiving new job notifications and restrict their access to Workday VNDLY. When you suspend a vendor, they can only sign in to VNDLY if they have active **Work Orders**.

Steps

1. From the header, select **More** > **Vendors**.
2. Open the vendor profile that you want to suspend.
3. (Optional) Click **+ Add Violation** to enter a violation.
4. Click **Suspend Vendor**.

   Note: You can click **Activate** to reactivate the vendor at any time.

Result

The vendor:

- Stops receiving new job notifications.
- Can only sign in to VNDLY for the duration of their active **Work Orders**.

Example

Next Steps

Set Up Authorized Services For Vendors

Context

You can specify if certain vendors are the Vendor Lite type. See Concept: Vendor Types. To do this, you need to set up authorized services for vendors.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, click **Vendor Settings**.
3. From the **Authorized Service Configuration** tab, set up the authorized services. As you enter the information, consider:

Option	Consideration
Authorized Services that do not Require an Invite	Vendors added with an authorized service that doesn't require an invite are automatically classified as Vendor Lite. The vendor won't be invited into the system and no vendor users will be associated with the vendor profile. If a vendor is assigned to both an authorized service type that doesn't allow an invite and one that does, the service that allows invites overrides and sends the invite. Example: Worker Profile Management (WPM) is added in **Vendor Settings** as an authorized service type that won't send invites. A vendor is added with both WPM and contingent worker. That vendor will be sent an invite, because contingent worker overrides the WPM restriction.
Allow Voluntary Invite to VNDLY system	This enables vendors to be manually invited into VNDLY once the vendor is already in active status. Note: This triggers the full vendor onboarding process to turn a Vendor Lite type into a Vendor Full type.

Bulk Upload Vendors

Context

You can add multiple vendors to Workday VNDLY in bulk by importing a file with the appropriate information. The vendors will receive an email to set up their profile.

Steps

1. In the header, select **More** > **Vendors**.
2. Click **Bulk Upload**.
3. Click **Select File** and locate the file.

   You can click **Download Format** to download the template for the bulk upload file.

Next Steps

Review the status of the upload by clicking **View Results**, or navigate to **Reports** > **File Transfer Reports**
.
Related Information
Examples
Workday Community: Workday VNDLY File Import Specifications

Onboard Vendors

Prerequisites

- Notification that the vendor has completed their profile.

Context

Once notified that the vendor has completed their profile, you're then prompted to onboard them.

Steps

1. In the header, select **More** > **Vendors**.
2. Open the vendor profile that you want to onboard.
3. Click **Onboard Vendor** and complete the form.
4. As you complete the form, consider:

Option	Description
Authorized Services	Any **Authorized Services** selected determine what actions the vendor can participate in. These options limit the visibility of the vendor within Workday VNDLY.

Result

The vendor is now active.

Communicate with Vendors

Context

You can communicate with any of your vendors by sending an email or scheduling a meeting.

Steps

1. From the **More** menu, go to **Vendors**.
2. Locate the vendor that you want to contact and select the vendor.

3. From the Actions menu, select an option. Consider these options:

Option	Description
Send Message	Sends an email to all contacts for the selected vendors. You can find these contacts listed under the **Contacts** tab.
Schedule Meeting	You can schedule any of these options: • Phone - You must add a phone number. • Video - You must add a video conference link. • In Person - You must add an address to meet.

Edit the User Role for a Vendor

Prerequisites

- Have the *vendor_user.update* permission

Context

If you have administrator rights, you can edit a vendor's user role. Editing the user role enables you to replace a vendor administrator in Workday VNDLY or create a new vendor administrator if necessary.

Steps

1. From the header, select **More** > **Vendors**.
2. Open the vendor profile that you want to edit.
3. Select the **Contacts** tab and click the pencil icon.
4. As you select the **Role**, consider these options:

Option	Description
Admin	Select this role if you want the vendor to be a vendor administrator.
Manager	Select this role if you want to remove the vendor as a vendor administrator.

Vendor Resend Credentials

Context

Vendors can resend VNDLY login credentials to their contractors.

Steps

1. Navigate to the **Contractors** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Contractors** drop-down menu.
2. Open the appropriate contractor with a status of *On Contract*.
3. Click **Resend Credentials**.

Result

The email with contractor credentials is sent.

Create Vendor Groups

Prerequisites

Set up 1 or more of these authorized services on the vendor's profile:

- **Contingent Staffing** if you want to include them in vendor groups for jobs.
- **Statement of Work** if you want to include them in vendor groups for requests for proposal (RFPs).

Context

You can create vendor groups to distribute job requirements to multiple vendors based on their authorized services, such as contingent staffing or statement of work (SOW).

Steps

1. From the header, select **More** > **Company Settings**.
2. From the Vendors section, click **Vendor Distribution & Groups**.
3. Click **New Group**.
4. Complete the task

Option	Description
Group Assignment	Select the: • **Jobs** check box if you set up the authorized service. • **RFP** check box if you set up the **Statement of Work** authorized service.
Add Vendor	When you select vendors without authorized services for the group assignment, Workday VNDLY displays an alert with a link to enable the authorized services. You can still create the group despite the alert, but VNDLY doesn't send the job or RFP to vendors who don't have the necessary authorized services

5. Click **Save**

Next Steps

Create a distribution scenario and attach it to a distribution rule.

Create Distribution Scenarios and Rules

Context

Distribution scenarios enable you to delay job distributions by hours or days. After you create a scenario, you can attach it to a distribution rule. Distribution rules indicate which vendors and vendor groups receive the job.

You can create distribution rules when you activate the job. Workday VNDLY runs the initial distribution when you first distribute the job to a vendor, and not at the time of approval or other statuses.

When you don't select vendors for a distribution tier, VNDLY sends the job to all vendors.

When you publish jobs for initial distribution, you can choose to distribute:

- To specific vendors or vendor groups
- Manually or automatically

For additional distribution, you can select a scenario to apply to a distribution rule.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, Click **Vendor Distribution & Groups**.
3. On the **Scenarios** tab, click **Create New Scenario**.
4. Enter a **Scenario Name** and select the **Conditions** that you want to apply.
5. Click **Save**.
6. (Optional) On the **Configuration** tab, select the **Skip Weekends**check box.
7. Click **Save**.
8. On the **Distribution Rules** tab, edit an existing rule or click **Create Rule**.
9. Complete the task:

Option	Description
Published Distribution Type	Select: • **Contingent: Sourced** if the vendor applies the candidates. • **Contingent: Pre-Identified** if you apply the candidates.
Vendors **Vendor Groups**	Specify the vendors and vendor groups that receive the posting.
Add Additional Distribution	Select a scenario, vendors, and vendor groups to distribute the job posting to. You can only add additional distributions for sourced published distribution types.

10. Click **Save**.

Result

You can:

- View new scenarios in the distribution rule.
- Edit the distribution rule to add or delete scenarios.
- Start the job distribution.

Example

You create a new scenario for additional distribution with these values:

Scenario Name	*48 hours*
When	*Time Elapsed*
is	*48 hrs*

VNDLY distributes job requirements to the second tier of vendors 48 hours after you distribute to the first tier.

Set Up Job Distributions

Prerequisites

Context

You can configure distribution settings to skip weekends for time-based distribution scenarios. You can also configure vendor:

- Visibility on pending jobs.
- Ability to accept jobs before applying candidates.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, click **Vendor Distribution & Groups**.
3. On the **Configuration** tab, select your preferences for distribution timing and vendor visibility.
4. Click **Save**.

Result

Workday VNDLY now applies your:

- Distribution settings across the relevant vendor tiers.
- Vendor visibility and action settings to manage how vendors view, accept, or decline jobs.

Example

Next Steps

Concept: Vendor Types

There are two vendor types in Workday VNDLY, Vendor Full and Vendor Lite, that you can assign to vendors.

Vendor Full

We recommend using Vendor Full if you need vendors to actively participate in the VNDLY system. This vendor type is best for Extended Workforce Management (EWM) and Statement of Work (SOW).

With the Vendor Full vendor type, you need to be aware:

- Can be client-managed or vendor-managed, depending on if there are vendor users or not.
- Customer or MSP has sufficient data to create a vendor profile in VNDLY.
- Customer requires vendors to have access to information in VNDLY.
- Customer needs to delegate some actions to be completed by a vendor.
- Vendor has to complete checklist items to be onboarded.

Vendor Lite

We recommend using Vendor Lite if you need profiles created for vendors, but don't need vendor users in VNDLY. This vendor type is best for Worker Profile Management that's client-managed.

With the Vendor Lite vendor type, you need to be aware:

- Is client-managed.
- Customer or MSP has minimal data about a vendor and isn't required to enter additional data into VNDLY.
- Customer doesn't need to have vendor users that log into VNDLY.
- Customer doesn't need to delegate actions to be managed by a vendor. Actions are managed by the hiring manager or program team or both.
- Checklist items won't be required for the vendor.
- When added, the vendor profile moves automatically into active status.

Vendor types information displays in the vendor dataset and you can report on vendor types.

Changing Vendor Type

You can move Vendor Lite vendors to Vendor Full in one of the following ways:

- Manually invite vendors into VNDLY. This triggers the vendor full onboard process.
- Add additional authorized services that are considered vendor full. This action triggers the vendor full onboard process. See Set Up Authorized Services for Vendors.
- Adding vendor users within a vendor profile changes the vendor's profile from client-managed to vendor-managed.

Note: You can't move Vendor Full vendors to the Vendor Lite type. You can remove access and users as needed.

Steps: Set up Vendor Distribution

Prerequisites

Have the *job.vendor_distribution.edit* permission.

Context

You can distribute jobs to your vendors by assigning the jobs manually or using distribution rules to automate the process. You can create vendor groups, scenarios, and distribution rules to share jobs with specific vendors.

Note: You can’t publish the job without distributing it to a vendor or a vendor group either manually or through distribution rules. Until then, the job remains in a pending status.

Steps

1. (Optional) Set Up Job Distributions .

   Set up settings for vendor distribution, such as time preferences, vendor visibility into pending jobs and accept or decline jobs.
2. Create Vendor Groups .
3. Create Distribution Scenarios and Rules .

   Use distribution rules to automatically distribute jobs to specific vendor groups. You can configure scenarios to distribute jobs to additional vendors or vendor groups after a period of time. This allows the initial vendor group to have time to source candidates.

Result

- VNDLY distributes jobs to vendor tiers according to your configuration.
- The **Distributions** card on a job's **Details** tab displays how many vendors accept, decline, or remain undecided about sourcing candidates for the job.

Example

Next Steps

Job Workflow and Settings

Job Workflow

Create Job Templates

Prerequisites

Have these permissions:

- *settings.admin* to create job templates.
- *job_templates.bulk.create* to bulk load job templates.
- *job_templates.read* to view job templates.

Context

Job templates are customizable templates that users can choose when publishing a job or Statement of Work (SOW) Role in VNDLY. Creating a job template saves time and increases consistency when publishing jobs. Each job template can be configured with different criteria. More than 1 job template can have the same job title as long as they are in different job categories. Example: If you're creating a job for the Business Analyst job title, there may be multiple job templates with that job title. You'll select the Business Analyst job template for the appropriate job category which will pull key information specific to that position in that job category.

If you don't see a field listed in the table when completing the job template, submit a product support case for assistance to review your tenant's job form configuration.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Job Templates**.
3. Click **Add**.
4. Complete the task:

Option	Description
Job Category	Enables job templates to be grouped by broad categories. It can also be used as a criteria for other settings that utilize rules. Note: If you don't see a job category that's expected, ensure it's been added on the **Job Categories** page. See: Create Job Categories.

Option	Description
Is Active	Ensure the option is enabled, otherwise the template is not visible on the **Publish Job** form.
Module Restrictions	Add 1 or more modules to limit when the job template can be used. If you don't add any modules, the template is available for all modules.
Popular Job	Enable to list the job as a commonly used template for all users when they are publishing jobs.
Country Restrictions	Add 1 or more countries to limit when the job template can be used. If you don't add any countries, the template can be used for jobs in any country.
Job Types	If your tenant has custom job types set up, you can include variations such as Junior or Senior. Job Types enable you to create multiple rate cards using a single job template.
Max Duration of Job	When a template includes a maximum number of (calendar) days, and a user attempts to publish a job with a longer duration, VNDLY displays an alert indicating the duration of the job is greater than the max duration of the job. If the user has the *job.max_duration.override* permission, they can accept the alert and continue with publishing the job.
Select Premium Rate on Job Form	Enable this option to select a premium rate when publishing a job. Premium rates allow you to set rates on the job form for different shifts such as the 2nd or 3rd shift.
Hide Expense Type	You can hide this option from displaying when publishing a job.
Hide Weekly Paid Travel	You can hide this option from displaying when publishing a job.
Hide Projects Site	You can hide this option when publishing a job. Note: This field may use a custom data source.
Use Fast Path	If your tenant has **Fast Path** enabled, enable this field for the job to always use fast path. Note: This field is only visible when the option of **Specified in job template** is selected on the **Job Applications Settings** page.
Override Default Fast Path Setting	If your tenant has **Fast Path** enabled, enable this option to override the default candidate status.

Option	Description
Fast Path Candidate Status	If your tenant has **Fast Path** enabled, and you've chosen to override the default **Fast Path** setting of your tenant, select the status you wish VNDLY to place the candidate into when they're submitted for this job.
Apply Shifts	If your tenant has shifts set up, enable this option to display shifts when publishing a job.
Are Shifts Required	Enable this option to make shifts a mandatory field when publishing a job. This option only displays when you've enabled **Shifts.**
Override Default Pre-Id Settings	If your tenant has **Pre-Id Settings** enabled, enable this option to override the default candidate status.
Pre-Id Candidate Status	If your tenant has **Pre-Id Settings** enabled, and you've chosen to override the default pre-ID settings of your tenant, select the status you wish VNDLY to place the candidate into when they're submitted for a preidentified job.
Must Have	Select from the pre-defined skills from Workday Skills Cloud or type your own unique skills.
Nice to Have	Select from the pre-defined skills from Workday Skills Cloud or type your own unique skills.
Description	Enter the details of the job. The content entered can be edited when publishing the job.

5. (Optional) Click **Add Attachment** in the **Add New Documents** section to include other pertinent information.
6. Click **Save**.

Result

VNDLY displays the job template in the list of templates on the **Publish Job** form.

Related Information

Examples

2024R1 Feature Release Note: Resume Parsing and Skills Extract Service

Workday Community: Workday VNDLY File Import Specifications

Create Job Categories

Prerequisites

Have the **settings.admin** permission.

Context

Use job categories to:

- Automate rules for things like rate cards, checklists, or timekeeping settings.

  Note: If you configured rules or custom fields using *Job Category* as criteria and you make changes to the job category, verify your configurations are still correct.
- Organize job templates, which you can add to published jobs.
- Use in reporting metrics, like using job categories to identify trends in vendor performance and adjust distribution scenarios accordingly.

Example: You create job templates for these roles:

- Automation tester
- Front end developer
- Smoke test engineer

You create a *Technology* job category to organize your job templates under. If you create sub-categories under *Technology* labeled *Developer* and *Engineer* and use the Rules by Criteria framework, VNDLY hierarchy rules apply. If you require a certain checklist for all jobs under the *Technology* job category, the job categories *Developer* and *Engineer* will require the same checklist.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Job Categories**.
3. Click the + icon to add a job category. As you complete the fields, consider:

Option	Description
Parent Job Category	This field displays the job category where you selected + by default, but you can select any parent job category to nest your new job category.
Name	We recommend choosing unique or meaningful names for each category you create.
Allow as selectable option?	Toggle on to enable users to select your job category from drop-downs across VNDLY. When this option isn't toggled on, users can't select the option across VNDLY (organization and reporting). The parent category is used instead.
Fee Profile	**Optional.** You can associate a default fee profile to your job category to assign that fee profile by default to any work orders created from a job with that job category. The fee profile must also be assigned to the applicable vendor profile.
Bulk Upload	You can add more than 1 job category at a time using the Bulk Upload feature. Download the formatted CSV file to fill out the requirements using the template or upload your own CSV file. You need **job_categories.bulk.create** permissions to use Bulk Upload.

4. Click **Save** to add your job category.

Next Steps

To delete a job category, verify:

- It doesn't have any child job categories.
- It's not used on an active job template.

Related Information
Tasks
Create Job Templates

Set Up Direct Hire

Prerequisites

Have the *settings.admin* permission.

Context

You can hire vendor-sourced candidates as full-time employees without having to find and screen candidates independently.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Job Compensation**.
3. In the **Hire Type** section, select **Direct Hire**.
4. Complete the **Hire Type** section:

Option	Description
Direct Hire Pay Type	Select the pay types you want to include: • Hourly • Salaried VNDLY displays the direct hire pay type on the job form and work order.
Direct Hire Vendor Payment Terms	Select the payment terms you want to use for invoicing: • Immediate • Weekly • Monthly • Quarterly • Custom Schedule • Pre-Negotiated Agreement See Reference: Direct Hire Payment Terms .

5. Click **Submit**.

Publish a Job

Context

Publishing a job enables you to post job information, compensation, and requirements for an open position.

On the **Publish Job** page, you can select from **Templates** and **Recent Jobs**. When using an existing job template, these fields automatically populate: **Job Title**, **Job Category**, **Job Summary**, and **Job Description**.

Steps

1. Navigate to the **Jobs** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Jobs** drop-down menu.
2. Click **Publish Job**.
3. Select a job template to start from. Consider:

Option	Description
Templates	• Search templates by job title or select from a list of all available jobs. • Use **Filter by Location** to only show jobs that are eligible in the specified job location. • Select **Show Only Popular Jobs** to filter the list of jobs. Your organization determines popular jobs based on the number of requisitions.
Recent Jobs	• Search templates by job title or select from a list of recently used jobs. • Your organization determines recent jobs based on recently used requisitions.

4. Complete the task. Consider:

Option	Description
Hiring Type	Select: • *Contractor* when the job is for a contingent worker. • *Direct Hire* when the job is for a permanent, full-time employee. See Set Up Direct Hire .
Pay Type	For a direct hire, VNDLY calculates the annualized salary range when you select the *Hourly* option and enter values for: • *Min* • *Max* • *Standard Hours Per Week* You confirm direct hire pay at the offer stage.
Payment Terms	This prompt is available for direct hires and when you select *Milestone Payments* for contractor positions. See Reference: Direct Hire Payment Terms .
Add New Documents	Add necessary attachments.

5. Click **Submit**.

   You can also click **Save For Later** to save the job as a draft on the **Job Dashboard** page.

6. (Optional) If you want to review the anticipated salaries of direct hires, create a custom field for the anticipated salary on these forms:
    - Candidate & Contractor Edit
    - Candidate & Contractor View (Read Only)

    When you review offers, you'll be able to review the anticipated salary that the vendor entered on the form.

Example

This example illustrates how you can publish a job for a direct hire with custom payment terms. The vendor will be paid 25% of the candidate salary in week 1 and 75% in week 5. onboarding.

Prerequisite: Set Up Direct Hire .

In the **Compensation** section:

Field	Value
Hiring Type	*Direct Hire*
Pay Type	*Salaried*

In the **Vendor Fees** section, click **+ Add More** twice to add rows for the 2 payment weeks:

Field	Value
Payment Terms	*Custom Schedule*
Payment Week	*1*
Fee Type	*Percentage of Salary*
Fee Amount	*25*
Payment Week	*5*
Fee Type	*Percentage of Salary*
Fee Amount	*75*

Next Steps

Administrator users can modify or assign checklists to the job posting if needed.

If you want to make changes to the payment terms, fee type, or number of payments for a direct hire, edit the job and make the changes before extending the offer to the candidate.

Related Information
Tasks
Create Custom Fields in Settings in Workday VNDLY

Add Job Approvals

Prerequisites

- Configure approval setup.
- As part of the job publishing process, add distribution rules if necessary.

Context

You can request approvals before the job is published. A job remains in pending status and is auto-published only after the approvers approve the job. Once the job is published, the status of the job changes from Pending to Active.

You may also be able to click **Skip Approvals** to skip approval requirements and publish the job immediately if you have the correct permissions.

Steps

1. Select the relevant **Level** of approval.
2. Enter the name or email of the approver.
3. Select if the approval is optional or mandatory.

Apply Candidates to Jobs

Context

Vendors can apply candidates to jobs by:

- Selecting candidates from a list.
- Importing a file with data about the candidates they want to apply to a job.

Steps

1. Navigate to the **Jobs** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Jobs** drop-down menu.
2. Open the appropriate job.
3. Click **Apply Candidates**.
4. Choose 1 of these methods:

Option	Description
Apply Sourced	Select 1 or more candidates from a list. You can edit their bill and pay rates.
Bulk Apply	Upload a file with candidate data. You can click **Download Format** to download the template for the bulk upload file.

Next Steps
Review the status of bulk uploads by clicking **View Results**, or navigate to **Reports** > **File Transfer Reports**.
Related Information
Examples
Workday Community: Workday VNDLY File Import Specifications

Schedule Interviews with Candidates

Prerequisites

- You must have the **Resource Manager** role tag.
- The job you want to schedule an interview for must be active and published.

Context

You can schedule an interview with a candidate when you think they might be a good fit for the role.

This request to interview goes to the candidate's vendor and not the candidate directly. The vendor will schedule the meeting with the candidate.

Steps

1. Navigate to the **Jobs** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Jobs** drop-down menu.
2. Open the appropriate job.
3. Select the **Interviews** tab and click **Create New**.
4. As you complete the **Interview Request** details, consider:

Option	Description
Candidate Name	Select the candidate that you wish to interview from the list of applicants.
Interviewer Name	Select the user who will be leading the interview.
Timezone	Indicate the time zone that the time slots for the interview selected in.
Interviewer Availability	Configure the duration, date, and time you want the interview to be held. You can add up to 10 time slots by clicking **+Add**. Example: You could add multiple options for interview times on December 12, such as 1:00PM, 2:00PM, and 3:00PM.
Preferred Interview Mode	Indicate whether the interview will take place by phone, video, or in person. If you select: • *Phone*, you must indicate whether the interviewer or candidate will initiate the call. If the candidate is selected to initiate the call, you may need to provide the interviewer's phone number. • *Video*, you may need to provide the URL for the interview. If your organization has set URL restrictions, you must enter an allowed URL. If you enter a restricted URL, an error message displays. Example: Your organization only allows Zoom interviews, so you must enter a URL that uses the "zoom.com" domain. • *In Person*, you must provide the location where the candidate will meet you.
Additional Attendees	Enter email addresses for anyone else that should attend the interview.
Interview Notes	Enables you to enter an optional message to the vendor.

5. Click **Send Request**.

Result

The interview request is sent to the vendor, and the interview request displays under the **Interviews** tab with the *Awaiting Vendor Action* status.

Reschedule Interviews

Context

You might need to modify details or reschedule an interview due to unforeseen conflicts.

Steps

1. Navigate to the **Interview Management** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Interview Management** drop-down menu.
2. Click **Edit** on the appropriate interview.
3. Modify the interview details as needed.

   Depending on the fields you modify, the vendor might need to review the updated interview request. Example: If you change the **Interviewer Name**, the vendor doesn't need to review the changes. But if you change the **Date** or **Interview Mode**, the vendor must review and accept the changes.
4. Click **Send Request** when you've made all necessary changes.

Result

If the vendor needs to approve the changes, the interview is adjusted to a status of *Awaiting Vendor Action*.

Release an Offer to a Candidate

Context

Once you've completed your selection process, you can release an offer to a candidate.

Once all the open positions for the job fill and candidates finish onboarding, the job gets closed.

Steps

1. Navigate to the **Jobs** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Jobs** drop-down menu.
2. Open the appropriate job, and select the **Applicants** tab.
3. Click **Offer** to the right of the candidate you wish to release an offer to.
4. As you complete the **Offer Release** section, consider:

Option	Description
Start Date	Enter the effective date when the new hire is expected to begin their employment. This date is communicated in the official offer letter sent by the employer and is determined after mutual agreement between the company and the candidate.

Option	Description
End Date	Enter the final date when the job offer becomes inactive or expires. It typically marks the last valid date that the offer is open for acceptance.
Fee Profile	Enter the financial details associated with a candidate's offer. This ensures transparency and accuracy in the billing and compensation structure.
Offered Pay Rate	Enter the amount that will be paid directly to the worker or contractor for their services.
Offered Bill Rate	Enter the amount the employer will be billed for the worker's services.

5. If you have permission, you can check the **Waive Verification** check box to skip verification for the candidate. You can configure whether to skip candidate verifications in **Company Settings**.
6. Click **Release Offer** to release the offer to the candidate.

Concept: Approvals Widget

The **Approvals Widget** displays throughout the app and provides an easier way to track items that require approvals. Example: when publishing a job on the **Job Dashboard**, the **Approvals Widget** enables you to see what part of the approvals process the job posting is in.

Under the Approvals heading, you see the required approvals and optional approvals. The blue dot displays where the item is in the approvals chain. Once approved, the blue dot changes to a green checkmark and the next user in the approval chain receives a notification.

If you're directly assigned as an approver, you see **Approve** and **Reject** buttons next to your name.

When all approvers in a level are required, you see “and” between the approvers. Optional approvers display below required approvers in the list.

You can add comments to your approvals by clicking **+Add Comment**. Comments are optional, but you must provide a Rejection Reason when rejecting an approval.

Lastly, you can remind other approvers an approval is waiting by clicking **Remind** next to their name. If you’re an Admin user, you can also approve on behalf of other approvers. To approve on behalf of another approver, click the **three vertical dots** next to their name. You can then select **Remind**, **Approve**, or **Reject**.

Concept: Published Jobs

You can view the applicants that have been applied to a job or edit a published job from the **Job Dashboard**.

You can use these options to organize the results and configure the display:

Field	Definition
Filters	You can narrow your search for open jobs with these filters: • Status • Location • Candidate Source • Hire Type • Organization Unit

Field	Definition
	• Created By • Start Date • End Date • Resource Manager • Job Title • Job Category • Pay Type • Favorites
Sort	You can sort the jobs that display using these parameters: • Created Date - Newest • Created Date - Oldest • Job ID (Low - High) • Job Title (A - Z) • Last Modified Date
View	You can toggle between **List View** and **Grid View** depending on how you'd like the jobs to display.
Defaults	You can customize the list data with up to six of these items: • Start/End Date • Bill Rate • Pay Rate • Pay Type • Hiring Type • Location/Work Site • Resource Manager (Reports To) • Program Team Users • Org Unit • Job Type • Job Category • Number of Positions • Number of Open Positions • Created By • Job Summary

You can open a job to view more details. From the **Details** tab, you have these action options:

Option	Description
End	In case you don't need the requisition any longer, you can close or end the published job.
Hold	Temporarily ask vendors not to apply candidates to the job.
Duplicate	Create a cloned job to save time when creating a similar or identical role.
Edit	Make necessary edits to the published job.

Option	Description
Print	Print a copy of the published job details.
Share	Share the published job details with others by email. Recipients must be Workday VNDLY users.
Settings	Adjust settings for candidate submission rules, which enable you to limit the type and number of candidates.

In addition, you can review these options:

Area	Description
Job Status	What stage of the process the job is in, from sourcing to onboarding.
Approvals	Whether the optional people have given or denied approval.
Distributions	Displays tiers and vendors of the job.
Activity Log	Displays what different people have done to the job.

Concept: Job Candidate Applications and Actions

As your vendors submit candidates for jobs, you can view these applied candidates by navigating to the **Jobs** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Jobs** drop-down menu.

Then, locate and open an active, published job. From the **Applicants** tab, you can open a candidate's profile to review their resume and additional details.

Both the **Jobs** page and the **Applicants** tab display in either list or grid view. Configure the details displayed on the entries by clicking the settings icon and then selecting or clearing data points.

When you open a candidate's application, from the **Profile** tab, you can complete these actions:

- Shortlist the candidate.
- Send the candidate's vendor a message. The message only sends to the vendor user who applied to the job on behalf of the candidate.
- Share the candidate's profile with another Workday VNDLY user. The recipient is able to see the:
    - Candidate profile details
    - Resume
    - Candidate's experience summary
- Schedule an interview.
- Reject a candidate.
- Release an offer to a candidate.

Concept: Interview Management

Once you’ve scheduled an interview with a candidate, you might need to view, modify, reschedule, or even cancel an interview.

To view scheduled interviews, navigate to the **Interview Management** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Interview Management** drop-down menu.

This page enables you to view all interviews for which you have access, regardless of job or status. Confirmed interviews display first in chronological order, with interviews awaiting responses displaying further down.

You can expand an interview to view additional details. If an interview request is pending, suggested time slots display for interviewer availability. If the vendor has accepted the interview, the scheduled date and time display. Depending on the interview **Mode** selected when you created the interview, you see the appropriate hyperlink:

- *Video*: Interview URL
- *Phone*: Phone number
- *In Person*: Navigation with Google Maps

You might need to modify an interview request once it's been sent to a vendor. You can click **Edit** on the **Interview Management** page. From here, you're able to modify any necessary details. Example: If the planned interviewer no longer has availability, but your assistant manager is able to fill in and keep the scheduled time, you could modify the interview to reflect the change. In this case, the vendor doesn’t need to review the change and it's applied automatically.

Alternatively, if the scheduled interview date no longer works for you and you need to reschedule, you can modify the interview the same way. This time, you see a message indicating the change requires vendor action. When you save your changes, the vendor must review and accept the updated interview request.

Sometimes, you might fill a role before all interviews have taken place. You can click **Cancel Interview** to unschedule the interview and notify all participants.

Concept: Direct Hire

Clients can hire vendor-sourced candidates as full-time employees (FTEs) instead of as contingent workers.

Clients pay fees to vendors to compensate them for sourcing, screening, and recruiting the candidates. Payments to vendors can be:

- Predetermined fixed sums.
- Percentages of the FTE's projected salary.

Clients can set up payments to occur either upfront or incrementally. Clients often use staggered payments when they want to ensure candidates’ successful integration and performance. This reduces risks associated with premature attrition.

After you publish a job for direct hire, you use the submission and approval processes configured in your tenant. The vendor can then apply a candidate to the job.

VNDLY bases the payment dates for invoicing on the start date that you determine during onboarding not on the planned start date of the job. We process the transactions using standard invoicing procedures and payment terms. If you want to process the transactions sooner, you need to invoice manually.

Direct Hire in VNDLY is exclusively a payment processing mechanism. All contractual terms regarding employment and vendor remuneration are negotiated and finalized directly between the client and the vendor.

Steps: Apply and Hire Contractors to Jobs

Prerequisites

Set Up Job Application Settings . Configure the fields to display on the Onboarding section of a job application.

Context

The job workflow in Workday VNDLY includes:

- Applying candidates to jobs.
- Scheduling interviews with those candidates.
- Sending an offer to the candidate.
- Onboarding them.

You can also pre-configure an approval workflow by selecting **More** > **Company Settings** > **Organization** > **Workflow Approvals**. This enables stakeholders to approve specific work order criteria changes. When configured, VNDLY initiates the approval workflow automatically at the workflow stage based on your settings. For more information, see Reference: Workflow Approval Criteria .

Note: These instructions include steps for different roles, such as client users and vendors. Based on your role, some steps may not apply to you.

Steps

1. Apply Candidates to Jobs .

   When vendors apply candidates to jobs, VNDLY creates a work order with contract and payment details for the candidates.
2. (Optional) Apply pre-identified candidates.

   See:

   - Pre-Identify Candidates During Job Publish .
   - Pre-Identify Candidates After Job Publish .

   Client users can apply pre-identified candidates for the job.
3. (Optional) Schedule Interviews with Candidates .

   Client users can schedule interview slots for applicants. Vendors must send confirmation when the applicant is available for an interview.
4. Release an Offer to a Candidate .

   Once client users select a candidate, they can release an offer to that candidate's vendor.

   Vendors can:

   - Accept or decline the offer.
   - Suggest a new candidate.

   When the candidate's vendor accepts the offer, VNDLY updates the candidate's job application page status to either:

   - *Verification in Progress* , if there are pending checklist items.
   - *Ready to Onboard* , if all checklist items are complete.
5. Onboard the candidate.

   Client users can onboard candidates on the **Jobs** page.

   a) Navigate to the **Jobs** page.

      Depending on your permissions, you can access this page directly from the VNDLY header or in the**Jobs** > **Jobs**drop-down menu.

   b) Click the job to view the details.

   c) On the **Applicants** tab, click **Onboard** next to the applicant's name.

   d) Verify the job details and complete the contractor information.

   e) Click **Onboard Candidate**

Result

VNDLY:

- Updates the work order with information about the job and the contractor, such as their timekeeping settings.

- Changes the work order status to *Active*.
- Updates the job application status to *Onboarded* .
- Sends a welcome email to the candidate.

Related Information

Concepts

Concept: Interview Management

Reference: Direct Hire Payment Terms

VNDLY provides these options for setting up payment terms of vendor fees for direct hires.

Payment Term	Description	Fee Type	Number of Payments
Immediate	VNDLY triggers the payment when the work order goes live.	Fixed amount or percentage of starting salary.	1
Weekly	Enter the number of weekly payments and the fee type. The payments will be in consecutive weeks with no gaps.	Fixed amount or percentage of starting salary.	Any. There is no minimum or maximum.
Monthly	Enter the number of monthly payments and the fee type. The payments will be in consecutive months with no gaps.	Fixed amount or percentage of starting salary.	Any. There is no minimum or maximum.
Quarterly	Enter the number of quarterly payments and the fee type. The payments will be in consecutive quarters with no gaps.	Fixed amount or percentage of starting salary.	Any. There is no minimum or maximum.
Custom schedule	Use this option when you want mixed fee types or gaps in payments. You can configure different fee types and amounts for specified weeks. Example: You can set up a payment of a fixed amount every 3 months.	Any combination of fixed amount and percentage of starting salary. Example: You can pay a fixed amount in week 1 followed by a percentage of salary for each of the next 20 weeks.	Any. There is no minimum or maximum.
Pre-negotiated agreement	Use this option to track headcount for reporting purposes when payments will	None	None

Payment Term	Description	Fee Type	Number of Payments
	be made outside of VNDLY.		

FAQ: Direct Hire

<table>
<tr><td>Do vendors have to do anything differently to apply candidates to direct hire job postings?</td><td>Vendors need to select the Direct Hire check box in the Worker Information section on candidates' worker profiles to be able to apply those candidates to direct hire job postings.</td></tr>
<tr><td>How are payments processed?</td><td>VNDLY calculates payment dates based on the start date that you determine during onboarding. Transactions occur automatically based on the job's:
Fee type.
Number of payments.
Payment term.
The invoicing and payment terms set on your tenant control when VNDLY processes payment transactions. If you want these transactions to process sooner, use manual invoicing.

You can view pending transactions until the next Invoicing Cycle Occurs. From the header, select Invoices > Invoices Summary, and select the Transactions Tab.</td></tr>
<tr><td>How is a direct hire presented on an invoice?</td><td>On the transaction, VNDLY displays:<table><tr><td>Field</td><td>Value</td></tr><tr><td>Period Ending</td><td>Payment date</td></tr><tr><td>Fee Type</td><td>Payment-Direct Hire</td></tr></table>The remaining fields populate based on the billing criteria outlined on the job form.

If you need additional documentation on the invoice to indicate that this is a direct hire, we recommend using a custom field on the invoice or writing a message on the invoice while processing the transaction.</td></tr>
<tr><td>Why does my full-time employee (FTE) have a contingent work order?</td><td>The work order acts as a place holder for headcount and billing purposes only. The FTE will never enter time in VNDLY, and you won't need to maintain the work order. The work order will end as soon as the payment terms are complete.</td></tr>
</table>

Job Workflow Configuration

Create a Rate Card in Settings

Context

With rate cards, you can set up pre-determined rates or rate ranges to add controls to available rates associated with a job. You can set up rate cards based on various criteria, such as:

- Job Template
- Job Category
- Vendor

Example: You may have a pre-determined bill rate range per job title. If you don't want candidates being submitted or hired outside of that rate range, you can set up a rate card per job template and use the configuration options to enforce them.

You can create separate rate cards for Extended Workforce Management (EWM) and for Statement of Work (SOW). You can also create a rate card to cover both EWM and SOWs.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Rate Card**.
3. Click **New Rate Card**.
4. Select the **Criteria** for the rate card.

   You must select at least one criteria from the following fields:

   - **Country**
   - **Subdivision**
   - **Region**
   - **Location**
   - **Job Category**
   - **Job Template**
   - **Vendors**

   Note: The **Module** drop-down menu only displays if you have both the Extended WFM and SOW modules.

   - To create a rate card for EWM, select a **Module** of *Contingent Staffing*.
   - To create a rate card for SOW, select a **Module** of *Statement of Work*.
   - To create a rate card for both, leave *All* as the default.
5. In the **Values** section, select a **Rates**value of *Bill Rate* or *Pay Rate*.

   Bill Rate: The base rate for billing.

   Pay Rate: The rate the worker is being paid.
6. Click **Add Rate** and consider:

Option	Description
Pay Type	Indicates the frequency of the pay.
Rate Type	Indicate if you want to set a minimum and maximum rate or just a maximum rate. If you selected *Pay Rate*, you also have the option to *Set Rate*.

Option	Description
(Optional) Min Rate	The minimum rate for applicants. You must enter any rate data as digits.
Max Rate	The maximum rate for applicants. You must enter any rate data as digits.
Set Rate	A fixed rate that all applicants for the job are restricted to. You must enter any rate data as digits.

Click **Add Rate** to add another rate.

7. (Optional) Click **Add Suggested Rate** and consider:

   Suggested rates enable you to provide a suggestion for the market rate without restricting managers' ability to determine rates. This field only displays if **Activate Suggested Rates** is enabled on the rate card **Configuration** tab.

Option	Description
Pay Type	Indicates the frequency of the pay.
Rate Type	Indicate if you want to set a minimum and maximum rate or just a maximum rate.
Set or Max Suggested Rate	The suggested maximum rate or set rate for applicants.

8. Click **Add Markup** and consider:

Option	Description
Source Type	**Sourced Markup**: Indicates the candidate was applied by a vendor. **Pre-Identified Markup**:Indicates the candidate was pre-identified.
Time Classification	Select the time classification for the markup. You can choose from: • *Standard* • *Overtime* • *Double Time* If you have enabled the **Additional Markups for Pay Rate Jobs** check box on the **Offer Release** and **Onboarding** sections of the **Job Application Settings** page in **Company Settings** and you have a rate card that matches a pay rate-based job, Workday VNDLY displays your selected markup values from the rate card during offer release and onboarding for the job. See Set Up Job Application Settings. If a rate card doesn't have values entered for the *Overtime* and/or *Double Time* time classifications, Workday VNDLY automatically displays the rate card's *Standard* time

Option	Description
	classification markup value on the associated pay rate-based job. Example: A rate card has markup with a *Standard* time classification value of 10% and no values entered for the *Overtime* or *Double Time* time classifications. Workday VNDLY displays 10% for all 3 markup time classifications during offer release and onboarding for the job, unless clients with the *candidate.compensation.update* permission update the values during offer release.
Markup Value	Enter the maximum percentage of markup that should apply.

9. Enter a **Name**.
10. Click **Save**.

Result

When you publish a job, if the job matches the criteria set on the rate card, the rate card is applied.

Manage Rate Card Configurations

Prerequisites

Have these permissions:

- *ratecard.create*
- *ratecard.delete*
- *ratecard.read*
- *ratecard.update*
- *settings.admin*

Context

You can configure rules and validation options for rate cards. This helps ensure that your rate cards align with your organizational policies for contingent jobs, statements of work (SOWs), pay parity rate, and suggested rates.

Steps

1. From the header, select More > Company Settings.
2. From the Jobs & Work Orders section, click Rate Card.
3. Click the Configuration tab.
4. (Optional) Complete the Contingent Jobs section:

   VNDLY applies these settings to contingent jobs.

Option	Description
Markup Validation	Allow Offer Release Above Markup: Select to enable the release of a job offer even when the markup exceeds the predetermined limit. Allow Candidate Submissions Above Markup: Select to enable the submission of a candidate

Option	Description
	for a position even if the proposed markup is higher than the predetermined maximum.
Bill Rate Validation	Allow Offer Release Above Bill Rate: Select to enable the release of a job offer even when the bill rate for the position exceeds the predetermined maximum. Allow Candidate Submissions Above Bill Rate: Select to enable the submission of a candidate even if the proposed bill rate is higher than the predetermined maximum.
Pay Rate Validation	Allow Offer Release Above Pay Rate: Select to enable the release of a job offer even when the pay rate for the position exceeds the predetermined maximum. Allow Candidate Submissions Above Pay Rate: Select to enable the submission of a candidate even if the proposed pay rate is higher than the predetermined maximum.

5. (Optional) Complete the SOW section:

   VNDLY applies these settings to your SOW.

Option	Description
Markup Validation	Allow Candidate Submissions Above Markup: Select to enable the submission of a candidate for a project defined by an SOWeven if the markup is above the set limit.
Bill Rate Validation	Allow Candidate Submissions Above Bill Rate: Select to enable the submission of a candidate for an SOW project even if the bill rate is above the set limit.
Pay Rate Validation	Allow Candidate Submissions Above Pay Rate: Select to enable the submission of a candidate for an SOW project even if the pay rate is above the set limit.

6. (Optional) Complete the Pay Parity Rate section:

   VNDLY applies these settings to your pay parity rules.

Option	Description
Activate Pay Parity Rate	Select to enable the activation of the pay parity rate feature, ensuring equitable compensation.
Applicable Countries	Select the countries where the pay parity rate rule is enforced.

7. (Optional) In the Suggested Rates section, select the Activate Suggested Rates check box.

   This selection enables VNDLY to provide automated rate recommendations.
8. Click Save.

Set Up Job Application Settings

Context

Job Application Settings enable you to configure numerous options related to publishing jobs and how vendors submit candidates to jobs. The options span these areas:

- Workflow
- Job Card
- Fast Path
- Job Applicant
- Interview and Meeting
- Pre Identified Job

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Job Applications**.
3. As you complete the **Workflow Settings** section, consider:

Option	Description
Offer Release	Select options to control the offer release: • **Allow Vendor Verification Override** • **Block Offer Release if there are any Pending Approvals** You can also add these additional fields to display in the offer release: • **Job Type** • **Work Type Profile** • **Calendar Pay Profile** • **Overtime Profile** • **Additional Markups for Pay Rate Jobs**: If selected, *Overtime* and *Double Time* markup options display along with the standard *Markup* option.
Onboarding	Select to add these additional fields to display for onboarding: • **Job Type** • **Work Type Profile** • **External ID** • **Calendar Pay Profile** • **Overtime Profile** • **Client Contractor ID** • **Timesheet Approvers** • **Expense Approvers** • **Expense Type** • **Source Type** • **Additional Markups for Pay Rate Jobs**: If selected, *Overtime* and *Double Time* markup options display along with the standard *Markup* option.

4. Click **Save**.
5. As you complete the **Job Card Settings** section, consider:

Option	Description
Allow BMI Service	Select to enable Best Match Indicator (BMI). VNDLY assesses skills listed in the job against an applicant's resume and provides a BMI calculation.
Allow Skills Extract Service	Select to enable the Skills Extract Service to generate a list of potential skills associated with the **Job Description** of a job or job template that users can search and select from when publishing a new job.

6. Click **Save**.
7. As you complete the **Fast Path Settings** section, consider:

Option	Description
Enable Fast Path	Enables you to move applicants to a status other than *Applied* when they're submitted to a Fast Path job.
For any job	You can indicate whether Fast Path is usable for any job or is specified in the job template. If you select the *Specified in job template* option, a toggle for the Fast Path setting displays on the job template. This option only displays when the **Enable Fast Path** check box is selected.
Applied Candidate Status	You can specify whether a vendor applicant moves from *Ready To Onboard*, *Onboarded*, or *In Verification* status. This option only displays when the **Enable Fast Path** check box is selected.

8. Click **Save**.
9. As you complete the **Job Applicant Settings** section, consider:

Option	Description
Default Filter to Shortlisted Candidates	Select to display by default a filtered list of candidates who have been shortlisted.
Highlight Rate Exceptions in List/Card	Enables VNDLY to display the applicant's bill rate in red font and displays a warning when the applicant's bill rate exceeds the job's maximum bill rate.

10. Click **Save**.
11. As you complete the **Interview and Meeting Settings** section, consider:

Option	Description
Phone Number Required for Interviews	Enables you to determine whether the **Interviewer Phone Number** field is required or optional when scheduling phone interviews.

Option	Description
	When scheduling phone interviews, you can determine whether interviewers or candidates will initiate the call. However, this setting only applies when candidates initiate the call.
Video Link Required for Video Interviews and Vendor Meetings	Enables you to determine whether the **Interview URL** field is required or optional when scheduling video interviews.
Allowed Interview URLs	Enables you to specify the domains that can be used when scheduling video interviews. If you don't enter any domains in this field, users can schedule video interviews with any URL. Example: You want your users to only use Zoom for video interviews, so you enter "zoom.com" in this field. When scheduling video interviews, users will only be able to enter URLs with the zoom.com domain.

12. Click **Save**.
13. As you complete the **Pre Id Settings** section, consider:

Option	Description
Enable Pre Identified Job	Enables you to add a pre identified candidate when publishing a job.
Applied Candidate Status	Specify the status to place pre identified candidates. This option only displays when the **Enable Pre Identified Job** check box is selected.

14. Click **Save**.

Related Information
Examples
2024R1 Feature Release Note: Resume Parsing and Skills Extract Service

Set Default Fields for Job Views

Context

You can customize the default job view data points for both client and associated vendor tenants, enabling you to select the fields most relevant to you. You can focus on key information and review records more efficiently across list and card views.

These settings control the information that company users see for Applicants, Contractors, Jobs, and the information that vendors can view.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the Jobs & Work Orders section, click List/Card View Defaults.
3. Click Customize Tenant Defaults.

4. You can select up to 6 data points for each list.
    a) *Job List Data (Client View)*
    b) *Job List Data (Vendor View)*
    c) *Applicant List Data (Client View)*
    d) *Applicant List Data (Vendor View)*
    e) *Contractors List Data (Client View)*
    f) *Work Order List Data (Client View)*
    g) *Work Order List Data (Vendor View)*
5. (Optional) To remove a data point, clear the corresponding check box.
6. Click **Apply**.

Reference: Job Compensation Settings

Job compensation settings enable you to configure how you pay and manage a contractor for a particular job. From the header, select **More** > **Company Settings**. Under **Jobs & Work Orders**, click **Job Compensation**.

As you modify job compensation settings, consider:

Option	Description
Contractor Pay Type	You can turn different contractor pay types on or off. When enabled, you can click the gear icon to configure the **Max Bill Rate** for each **Currency Code**.
Milestone Payment Terms	Configure the various milestone payment types. This setting is only applicable to the Extended Workforce Management module.
Bill Rate	There are 3 available **Bill Rate Types**: • *Min/Max*: Enables bill rate ranges. Example: $25.00-$30.00 • *Single*: Enables a set rate. Example: $15.00 • *None*: Won’t force vendors to enter a bill rate. Enables vendors to submit candidates at the rate they want. Note: If you’re using rate cards, the set bill rate only loads for job profiles that don't have a rate card.
Alternate Compensation	To support healthcare clients, you can turn on **Orientation Tracking** that enables additional features to work on a contractor's timesheet.
Hire Type	Direct hire displays on the job form and work order if enabled.
Contract to Hire	If **Show Contract to Hire** is enabled, you can configure how to display the **Expected Conversion Salary**. This ensures candidates know what the hire rate is upon taking a contract role.
Direct Hire Pay Type	When enabled, the direct hire pay type displays on the job form and work order.

Option	Description
Direct Hire Vendor Payment Terms	Configure how vendors are paid for direct hire roles. This ties directly to invoicing. See Reference: Direct Hire Payment Terms .

Agency of Record (AOR) and Employer of Record (EOR)

Enable AOR/EOR

Context

The Agency of Record (AOR) and Employer of Record (EOR) module is the only system functionality that permit candidate records to exist independently of a vendor association. It serves to validate whether a candidate should be classified as a W2 employee, a 1099 worker, or an Independent Contractor.

Agency of Record: A vendor responsible for managing Independent Contractors (ICs) engaged on a 1099 or Corp-to-Corp basis.

Employer of Record: A vendor that manages worker payroll and is qualified to issue W2 forms.

To onboard a candidate through this module, you must gather specific candidate details to make an informed qualifying decision, ultimately classifying them as either W2 (EOR) or 1099 (IC/AOR).

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Foundational Data**, select **Company Product Profile**.
3. Check the **aor** box.
4. Click **Save**.

Configure Pre-Identified New Candidate Intake Request Form

Prerequisites

The AOR/EOR module must be enabled.

Context

You can add additional yes and no questions to the Pre-Identified New Candidate Intake Request Form.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Pre-Identified Intake Form**.
3. Click **Add More Questions**.
4. Enter the question.

   It must be a yes or no question.
5. Click **Save**.

Complete the Pre-Identified New Candidate Intake Request Form

Prerequisites

An administrator must:

- Enable the AOR/EOR module.
- Configure the Pre-Identified New Candidate Intake Request Form

Context

The Pre-Identified New Candidate Intake Request Form enables you to select a pre-identified candidate during the job workflow process.

Steps

1. Complete the previous steps in the Publish a job workflow.
2. When prompted with **Have your pre-identified a candidate?**, select *Yes*.
3. When prompted with **Is the candidate profile in VNDLY?**, select *No*.
4. Complete the following fields:

   These fields are included in the form automatically.

   a) Has the contractor been notified of the engagement and the onboarding services provided to your company?
   b) Has the contractor been notified of the contractor pay details noted above?
   c) May we contact the contractor and begin the engagement and onboarding process?
   d) Do you want the program administrator to contact you prior to reaching out to the contractor?
   e) Has the contractor ever worked for your company?
5. Click **Save**.

Send Profile Request to Contractor

Context

Sending a profile request to contractors enables you to collect required and relevant information to be used to determine if the worker will be W2 or 1099 worker.

Steps

1. From the header, select **People** > **Pre-Identified Candidates**.
2. Locate and open the correct candidate.
3. On the **Intake Form** tab, click **Next**.
4. Click **Send Profile Request to Contractor**.
5. Enter **Comments**.
6. Click **Submit**.

   The Intake form status updates.

Workflow Approvals

Steps: Set Up Workflow Approvals

Prerequisites

You must have the *approval_rules.write* permission.

Context

Workflow approvals enable administrators and MSP users to create and configure approval criteria and approver types. By managing the various elements of approval rules, you cancontrol business user flows and ensure the workflows are compliant with both internal and external regulations.

Steps

1. Create Workflow Approvals.

   See: Reference: Workflow Approval Criteria for more information on the available criteria.
2. Create Approver Types.
3. Configure Workflow Approvals.

Create Workflow Approvals

Prerequisites

You must have the *approval_rules.write* permission.

Context

Approval rules enable you to configure what drives approvals and who's involved in the approval process. Example: You can create a job posting approval rule where if the budget exceeds $100,000, an approval is needed from both the budget approver and the resource manager's manager.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Workflow Approvals**.
3. On the **Rules** tab, click **Add Approval Rule**.
4. As you create a new approval rule, consider:

Option	Description
Approval Types	Indicate the type of approval the approval rule should apply to. You can select one or more as needed. The options you select here limit the option available to select for the**Criteria Type**and**Approver Name**fields.
(Optional) **Add Criteria Group**	Enables you to add specific criteria that must be met for the approval workflow to be utilized. The options are limited based on the approval type or types selected.

Option	Description
Organization Unit	Indicate the organization unit the approval rule should apply to.
(Optional) **Add Approver**	Enables you to add an approver based on the selected approval type or types. You can use an existing approver or create a new one as needed.
(Optional) **Skip Approval Role Tags**	Indicate a specific role tag for which users can skip approvals.
Approval Strategy	Select the amount of approvals required for the approval rule: • **Approval required by all approvers in each level**. Example: You create a Job Publish approval rule and add these Level 1 approvers: Program Team, and Resource Manager’s Manager. VNDLY requires approval from both approvers before publishing the job. • **One approval required per level**. Any additional approvers can approve on behalf of the system generated approver. Example: You create a Job Publish approval rule and add these Level 1 approvers: Program Team, and Resource Manager’s Manager. The Program Team manager approves, and VNDLY publishes the job.
Approval Restart Policy	Only applies to the *Job Publish* and *Job Change* approval types. Select when an approval should restart: • **Approvals will only restart on approval impacting edits**. When selected, approvals restart when you modify fields on the job that impact budget, such as **Start Date**, **End Date**, **Positions**, and **Bill Rate**. • **Approvals will restart on any edit**. Approvals restart when you modify any fields on the job. Example: You select **Approvals will only restart on approval impacting edits**. You've created an approval rule for the Job Publish approval type with a 1st Level Approver and 2nd Level Approver. After the 1st Level Approver approves the job, the 2nd Level Approver edits the: • Positions field on the job.VNDLY restarts the approval process as it impacts the budget of the Job.

Option	Description
	• Job description. VNDLY doesn't restart the approval process as it is a minor change that doesn't impact the budget.

Related Information

Examples

The Next Level: Workday VNDLY Workflow Approval

Create Approver Types

Context

Approver types enable you to configure the user who should be the approving authority on the item.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Workflow Approvals**.
3. On the **Approver Types** tab, select **Create**.
4. Select an **Approver Type**.

Approver Type	Eligible Approval Types	Additional Details
Specific Email	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify the email that belongs to the approving authority of the item. This approver type is often used to specify users who are not necessarily part of the system but still need to approve the item. Note: If the configuration for **Allow anonymous approvals through email notification** is turned off, then this approver type cannot be used for an approval rule.

Approver Type	Eligible Approval Types	Additional Details
Specific User	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	This approver type is often used to specify a user within the system who is higher up in the management level chain. Example: A VP level approver.
Resource Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Work Order End	You can use this approver type to specify if the resource manager listed on the item needs to be the approving authority of the item. Example: The resource manager listed on the work order needs to approve or reject work order modifications.

Approver Type	Eligible Approval Types	Additional Details
Resource Manager Plus	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Work Order End	You can use this approver type to specify if the manager of the resource manager listed on the item needs to be the approving authority of the item.
SOW Manager	• SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the SOW manager of the SOW needs to be the approving authority of the SOW-related item.
SOW Manager Plus	• SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the manager of the SOW manager listed on the item needs to be the approving authority of the item.
SOW Manager From Top	• SOW Acceptance • SOW Change Orders • SOW Closure • SOW Reopen • SOW Payments • SOW Adjust Approved Payment	You can use this approver type to specify the approving authority for several SOW approvals using the SOW manager's reporting chain.

Approver Type	Eligible Approval Types	Additional Details
First Level Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Reopen	You can use this approver type to specify if the manager of the user who's submitting the item for approval needs to be the approving authority of the item.
Timesheet Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Scheduled Payments Approval (Milestone)	The timesheet approver listed on the work order needs to approve or reject the timesheets submitted for the particular work order.
Vendor Approver	• Timesheet • Expenses & Adjustments	You can use this approver type to specify if the vendor company listed on the timesheet, expenses, and adjustments need to be the approving authority of the item. Example: The vendor company listed on the work order needs to approve or reject timesheets submitted for the particular work order.
Expense Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Scheduled Payments Approval (Milestone)	You can use this approver type to specify if the expense approver listed on the item needs to be the approving authority of the item. Example: The expense approver listed on the work order needs to approve or reject the expense reports submitted for the particular work order.

Approver Type	Eligible Approval Types	Additional Details
Program Team	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	You can use this approver type to specify if the program team listed on the item needs to be the approving authority of the item. Example: The program team listed on the work order needs to approve or reject the work order modifications.

Approver Type	Eligible Approval Types	Additional Details
Role Tag Group Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Timesheet • Expenses & Adjustments • Invoice • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments Approval (Milestone) • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Payments • SOW Reopen • SOW Adjust Approved Payment	Every MSP user within the system should be able to approve work order modifications submitted across all business units regardless of whether or not they're assigned to the item or not.
Management Level Approver	• Job Publish • Job Change • Offer Release • Offer Acceptance • Onboarding • Work Order Modification • Work Order Reopen • Work Order Termination • SOW Acceptance • SOW Closure • SOW Reopen • SOW Work Order End • SOW Payments • SOW Adjust Approved Payment • Timesheets • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • Scheduled Payments (Milestone)	You can use this approver type to incorporate manager users into an approval chain based on the **Management Level** set on their user profile. See:

Approver Type	Eligible Approval Types	Additional Details
Second Level Manager	• Job Publish • Job Change • Offer Release • Offer Acceptance • Work Order Modification • Work Order End • Work Order Reopen • Worker Profile Creation • Worker Profile Date Change • Worker Profile Termination • SOW Acceptance • SOW Change Order • SOW Closure • SOW Work Order End • SOW Reopen	You can use this approver type to specify if the manager up two levels from the user who's submitting the item for approval needs to be the approving authority of the item.

Related Information

Tasks

Configure Management Levels

Configure Workflow Approvals

Context

You can customize your approval workflow configuration.

The **Configuration** tab enables you to:

- Set additional approvers to be optional to avoid delays.
- Enable non-VNDLY users to approve through email.
- Specify duplicate approver instructions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Organization**, select **Workflow Approvals** and select the **Configuration** tab.
3. As you modify workflow approval configurations, consider:

Option	Description	Example
Allow Additional Approvers to be Optional	Enables you to add optional approvers into your approval rule for these approval types: • *Job Publish* • *Job Change* • *Offer Release* • *Work Order Modify* • *Work Order End* • *Work Order Reopen*	You have a Work Order Modification Approval Rule with the Resource Manager as Level 1, but the manager of the Resource Manager is the Level 2 approver and is optional. The Level 2 approver isn't required for the approval to go through successfully, but they can approve if they

Option	Description	Example
	• *SOW Acceptance* • *SOW Change Order* • *SOW Closure* • *SOW Reopen* • *Worker Profile Creation* • *Worker Profile Termination* • *Worker Profile Date Change* You must have the *approval.additional_approvers.add* permission to add additional approvers. You can mark those approvers optional.	choose to and for visibility sake.
Allow anonymous Approval through email notifications	If enabled, individuals who aren't registered VNDLY users will be able to approve or reject an item through an email notification. Users can use the *Specific User* approver type on approval rules. When unchecked, only listed approvers can approve or reject an item through email notifications.	A VP who's not a VNDLY registered user needs to approve a work order extension that causes the budget to increase more than a certain threshold as a one-time only approval. With this setting enabled, the resource manager of the work order can forward the email approval notification to the VP and have them approve the modification without having to be registered as a VNDLY user.
Allow Additional Approvers to be added on the same level as system generated Approvers	Enables users to add additional approvers on the same level as any system-generated approvers configured in related approval rules.	A user creates a job publish approval rule with Level 1 and Level 2 system-generated approvers (whether they're required or optional approvers). If this setting is enabled, additional approvers can be added at any level, including Level 1 or Level 2. If this setting is disabled, additional approvers can only be added at Level 3 or above, which can help ensure the approvals occur in the correct order.
Duplicate Approver Handling	• *Remove duplicate approvers in the same level*: This is the default setting for duplicate approvers. When an approver displays more than once for	You select a **Duplicate Approver Handling** of *Remove duplicate approvers across all levels (lowest level takes precedence)*.

Option	Description	Example
	an approval within a single level, VNDLY will only send 1 approval request to the approver. • *Remove duplicate approvers across all levels (lowest level takes precedence)*: The duplicate approver is shown once within the approval chain at the lowest approver level they're assigned to. • *Remove duplicate approvers across all levels (highest level takes precedence)*: The duplicate approver is shown once within the approval chain at the highest approval level they're assigned to.	A Work Order Modification Approval Rule has Resource Manager in Level 2 and Timesheet Approver in Level 4, and both resolve to the same manager who's assigned as the Resource Manager and Timesheet Approver of the work order, that user only displays once as a resource manager approver in Level 2.

Reference: Workflow Approval Criteria

Option	Description	Eligible Approval Types	Examples
Bill Rate Offered is Different from the Job Bill Rate	Rule is only applied if the bill rate amount set in the offer release differs from the amount on the job post. You can use this criteria to specify if the bill rate offered to the candidate, within the **Offer Release** page, is modified from the initial bill rate on the job published.	Offer Release	The approval rule should run if the **Offer Release Bill Rate** is modified. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Any* The approval rule should run if the work order bill rate is increased by at least 5% compared to the bill rate on the job. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Increase*

Option	Description	Eligible Approval Types	Examples
			• **Change Amount** drop-down: *Percentage* • **Change Amount**: *5*
Budget is Modified	Rule is only applied if the total budget amount is modified. You can use this criteria to specify if the approval rule should run if: • The item's budget is modified, whether an increase or decrease. • The item's budget is specifically increased or decreased. • The item's budget is specifically increased or decreased by a set amount.	Job Change Job Publish Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Reopen SOW Acceptance SOW Change Order Statement of Work Payment	The approval rule should run if the item's budget is modified. You would select: • **Applies if Condition is**: *True* • **Budget Change Type**: *Any* The approval rule should run if the item's budget is increased by at least 5%. You would select: • **Applies if Condition is**: *True* • **Budget Change Type**: *Increase* • **Change Amount** drop-down: *Percentage* • **Change Amount**: *5*
Budget Exceeds Amount	Rule is only applied if the item's budget exceeds the threshold amount you specify. You can use this criteria to specify if the approval rule should run if the budget exceeds the amount specified or not.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen SOW Acceptance SOW Change Order Statement of Work Offer Acceptance	The approval rule should run if the item's budget exceeds $500. You would select: • **Applies if Condition is**: *True* • **Budget Exceeds By**: *500* The approval rule should run if the item's budget does not exceed $500. You would select: • **Applies if Condition is**: *False* • **Budget Exceeds By**: *500*

Option	Description	Eligible Approval Types	Examples
Expense Report Type	Rule is only applied if the expense report type submitted for approval has the report type specified. You can use this criteria to specify if the approval rule should run if the item submitted for approval has the **Expense Report Type** specified or not. The Expense Report Type drop-down displays information from the Report Types list on individual tenants. You can review the list by navigating to **More** > **Company Settings** > **Accounting** > **Expenses & Adjustments** > **Report Types tab**.	Expenses & Adjustments	The approval rule should run if the item submitted is a miscellaneous adjustment without a work order. You would select: • **Applies if Condition is**: *True* • **Report Type**: *Misc. Adjustment without Work Order*
Expense Report Type is Expense	Rule is only applied if the expense report type purpose is expense. You can use this criteria to specify if the approval rule should run if the item submitted for approval is an expense report or not.	Expenses & Adjustments	The approval rule should run if the item submitted is an expense report. You would select: • **Applies if Condition is**: *True*
Expense Report Type is Miscellaneous Adjustment	Rule is only applied if the expense report type purpose is miscellaneous adjustment . You can use this criteria to specify if the approval rule should run if the item submitted for approval is a miscellaneous adjustment or not.	Expenses & Adjustments	The approval rule should run if the item submitted is a miscellaneous adjustment You would select: • **Applies if Condition is**: *True*
Geographic Location	Rule is only applied if the item is in a specific	Expenses & Adjustments	The approval rule should run if the item

Option	Description	Eligible Approval Types	Examples
	geographic area you specify: • Country • Subdivision • Region • Location You can use this criteria to specify it the approval rule should run if the item has the specified location, region, subdivision or country or whether it doesn't. Parameter order from the most specific to the least is: 1. Location 2. Region 3. Subdivision 4. Country	Job Publish Job Change Offer Release Onboarding Work Order Modification Work Order Reopen Work Order Termination Timesheet Worker Profile Creation Worker Profile Termination Worker Profile Date Change Offer Acceptance Scheduled Payments (Milestone) SOW Acceptance SOW Change Order SOW Closure SOW Work Order End SOW Payments SOW Reopen SOW Adjust Approved Payment	has a location within the United States. You would select: • **Applies if Condition is**: *True* • **Country**: *USA*
Item has Custom Field	Rule is only applied if the item has the custom field value you specify. You can only single-select, multi-select, and boolean for this criteria. You can use this criteria to specify if the approval rule should run if: • The custom field is present on the form with the value specified on the criteria.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Reopen Work Order Termination Timesheet Worker Profile Creation	The approval rule should run if a **Work Order Custom Field** with the specified value is present on the form. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Work Order Custom Field* • **Value**: *Specify the Value(s) that needs to be 'met' in order for the Rule to run*

Option	Description	Eligible Approval Types	Examples
	• The custom field on the form is going to be changed to the value specified on the criteria. • The custom field is present specifically on the contractor's profile with the value specified on the criteria. This is a very special scenario that can be used to trigger multiple approval rules. Refer to the second example for more information. Note: You can specify multiple custom field values for the criteria. However, we will evaluate it 'individually', meaning – the rule should run if any of the value you specified on the criteria is present.	Worker Profile Date Change Worker Profile Termination SOW Acceptance SOW Change Order SOW Payment SOW Adjust Approved Payment Scheduled Payments (Milestone)	The approval rule should run if a contractor has the custom field specified on their Contractor Profile. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Contractor Profile Custom Field* • **Value**: *Specify the Value(s) that needs to be 'met' in order for the Rule to run* • **Is Custom Field on Worker's Record?**: *Yes* For programs that have enabled the **Workday Integration**, the approval rule should run if a Workday Custom Field with the specified value is present on the form. You would select: • **Applies if Condition is**: *True* • **Custom Field**: *Select a Workday Custom Field* • **Value**: *Specify the Value(s) that needs to be 'met' in order for the Rule to run*
Item has Job Category	Rule is only applied if the item has the job category you specify. You can use this criteria to specify if the approval rule should run when the item has the job category specified.	Job Publish Job Change Offer Release Work Order Modification Work Order Termination	The approval rule should run if the item has the job category specified. You would select: • **Applies if Condition is**: *True*

Option	Description	Eligible Approval Types	Examples
		Work Order Reopen Timesheet Scheduled Payments (Milestone)	• **Job category**: *Specify a Job Category in the tenant*
Module	Rule is only applied if the item belongs to the module you specify. You can use this criteria to specify if the approval rule should run if the item submitted for approval belongs to a certain module.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Timesheet Worker Profile Creation Worker Profile Date Change Worker Profile Termination SOW Work Order End	The approval rule should run if the item submitted for approval belongs to the SOW Module. You would select: • **Applies if Condition is**: *True* • **Module**: *Statement of Work*
Submitted has a Specific Role or Role Tag	Rule is only applied if the user submitting the change has the role or role tag you specify assigned to their user profile. You can use this criteria to specify if the approval rule should run when the submitter has a specific role or role tag specified. Note that both role and role tag are optional parameters.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Expenses & Adjustments Worker Profile Creation Worker Profile Date Change Worker Profile Termination SOW Acceptance SOW Change Order	The approval rule should run if the submitter has an MSP Role on their user profile. You would select: • **Applies if Condition is**: *True* • **Role**: *MSP* • *Other parameters can be left blank* OR • **Applies if Condition is**: *True* • **Role Tag**: *Program Team* • *Other parameters can be left blank* The approval rule should run if the submitter has a *Time*

Option	Description	Eligible Approval Types	Examples
		SOW Closure SOW Work Order End SOW Reopen	*& Expense* approver role on their user profile, but for a different organization unit than the item. You would select: • **Applies if Condition is**: *True* • **Role**: *Time & Expense Approver* • Ignore Business Unit on Item?: *Yes*
Submitter is also Resource Manager	Rule is only applied if the user submitting the change is the resource manager of the item. You can use this criteria to specify if the approval rule should run when an item is submitted by the item's Resource Manager for approval or not.	Job Publish Job Change Offer Release Offer Acceptance Onboarding Work Order Modification Work Order Termination Work Order Reopen Timesheet Expenses & Adjustments Worker Profile Creation Worker Profile Date Change Worker Profile Termination	The approval rule should run if the submitter is the Resource Manager of the item. You would select: • **Applies if Condition is**: *True*
Work Order Bill Rate is Modified	Rule is only applied if the work order bill rate is modified. You can use this criteria to specify if the approval rule should run if: • The work order bill rate is modified (doesn't matter if it's an increase or decrease).	Offer Release Onboarding Work Order Modification Work Order Reopen	The approval rule should run if the work order bill rate is modified. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Any* The approval rule should run if the

Option	Description	Eligible Approval Types	Examples
	• The work order bill rate is specifically increased or decreased. • The work order bill rate is specifically increased or decreased by X amount.		work order bill rate is increased by at least $10. You would select: • **Applies if Condition is**: *True* • **Bill Rate Change Type**: *Increase* • **Change Amount**: *10*
Work Order Date is Extended	Rule is only applied if the work order end date is extended. You can use this criteria to specify if the approval rule should run when a work order end date is extended or not.	Offer Release Work Order Modification Work Order Termination Work Order Reopen Worker Profile Date Change	The approval rule should run if the work order end date is extended. You would select: • **Applies if Condition is**: *True*

Checklists

Add a New Checklist

Prerequisites

Have the *checklists.settings* permission.

Context

Checklists are an optional feature in Workday VNDLY. They enable you to configure checklists for Workday VNDLY to apply based on numerous criteria including:

- Country
- Subdivision
- Region
- Location
- Job Category
- Job Template
- Organization Unit
- Module
- Hire Type

Checklists automatically apply to jobs created after the checklist creation date based on the rules that you select. If you edit an existing checklist, it doesn't impact existing checklist actions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Checklists**.
3. Click **Create New Checklist**. As you fill out the New Checklist form, consider:

Option	Description
(Optional) **Add Criteria**	This option is only available for Per Worker and Per Contractor selections for **Must Complete** type. It instructs Workday VNDLY to predict which checklist items to apply to the job or SOW role based on the selected criteria. Adding criteria rules enables you to create different checklists for various geographic areas, job categories, job templates, organization unit, module, and hire types. If you don't select any criteria, Workday VNDLY applies this checklist to every job you create. Criteria are grouped into criteria families and you can only select 1 criteria from each criteria family. After selecting a criteria, select one or more of the appropriate options. When selecting a job category, organization unit or region criteria, Workday VNDLY applies the checklist to both the parent as well as the children categories. Example: You can create a checklist using criteria of Region for Alabama and Arkansas and Hire Type of Contractor and Job Category of Engineering. The checklist will only display for candidates applying to Engineering contractor jobs in those 2 states. Be aware that the checklist will also display for matching jobs that are in sub-org units within the Engineering parent job category.
Timing	Determines when this checklist action is due. • Pre-Onboarding - blocks the onboarding workflow if you don't complete or waive the checklist. • Post-Onboarding - requires you to specify the number of days for when the checklist is due after onboarding the contractor.
Action Required From	Determines the roles responsible for satisfying the action in Workday VNDLY. These roles will have open, related checklist actions. You can select more than 1 role. Roles include: • **Vendor**: For *Per Work Order* and *Per Contractor* checklists, VNDLY sends a notification to the vendor users associated with the work order or contractor. Vendor users will be able to take action on the checklist, as long as *Vendor* is selected in the **Action Required From** field and the users have the *checklist.admin* or the *checklist.update* permission. For *Per Vendor* checklists, VNDLY sends a notification to vendor users if they have been added to VNDLY. Note that you can't manually apply a checklist action to a vendor for *Per Vendor* checklists. Vendor users can take action on the checklist if they have the *checklist.admin*, the *checklist.update*, or the *vendor_company.activate* permission.

Option	Description
	• **Users with Program Team role tag in the Organization Unit**: For *Per Work Order* and *Per Contractor* checklists, VNDLY sends a notification to users who have the **Program Team** role tag on the security role attached to their organization unit. If these users have the *checklist.admin* or the *checklist.update* permission, they'll be able to take action on the checklist. For *Per Vendor* checklists, these users need the *checklist.admin*, the *checklist.update*, or the *vendor_company.activate* permission to take action. • **Resource Manager**: This option is only available for *Per Work Order* and *Per Contractor* checklists. For *Per Work Order* checklists, VNDLY sends a notification to the resource manager associated with the work order. For *Per Contractor* checklists, VNDLY sends a notification to the resource manager associated with any of the work orders the contractor is assigned to, including inactive work orders. Resource managers will be able to take action on the checklist, as long as *Resource Manager* is selected in the **Action Required From** field, they're listed as the resource manager on the particular work order, and they have the *checklist.admin* or the *checklist.update* permission. • **Admin**: For all checklist types, VNDLY sends a notification to all client admin roles. For *Per Worker* and *Per Contractor* checklists, these admin users will be able to take action if they have the *checklist.admin* or the *checklist.update* permission. For *Per Vendor* checklists, any client admin users with the *checklist.admin* or the *checklist.update* permission will be able to take action. • **Contractor**: This option is only available for *Per Work Order* and *Per Contractor* checklists with the **Timing** field set to *Post-Onboarding*. VNDLY sends a notification to the contractor. Contractors will be able to take action on the checklist, as long as *Contractor* is selected in the **Action Required From** field and they have the *checklist.admin* or the *checklist.update* permission. You also must enable the **Allow contractors to manage checklist actions** setting in your tenant (**More** > **Company Settings** > **Jobs & Work Orders** > **Checklists** > **Configuration**). This ensures that contractors can access the **Manage Checklist Actions** page and view the **Checklist** tab on work order. • **Program Team Users**: For *Per Work Order* and *Per Contractor* checklists, VNDLY sends a notification to users listed in the **Program Team Users** field on the job or work

Option	Description
	order. These users can take action on the checklist if they have the *checklist.admin* or the *checklist.update* permission. For *Per Vendor* checklists, VNDLY sends a notification to the users specified on the job. These users can take action on the checklist if they have the *checklist.admin*, the *checklist.update*, or the *vendor_company.activate* permission.
Hide From	Workday VNDLY will hide the checklist actions from the selected side of the application. You can select both check boxes, if required. Program team members, Administrators, and MSP users are able to see all checklist actions and aren't blocked by the **Client** selection.
(Optional) **Custom Field Setup**	Enables you to add custom fields to per-work order, per-contractor, and per-vendor checklists. Once added, the custom fields display on checklist actions for users who are prompted to complete them. See Add Custom Fields to Checklist Actions.
Expiration	Determines how long a checklist action is valid before you must update it. Select the appropriate option for the checklist action: • Never: Item will never expire. • Specific date of the year: Item will expire on a specific date every year. The renewal date for the related actions is based on the next occurrence of this date after the last completed date of action. • User-entered Expiration Date on Action: Item will force the Action owner to enter an expiration date. The expiration date isn't calculated and relies on the user-entered value.
(Optional) **Notify When Nearing Expiration**	Select this setting to configure single or multiple notifications that remind users when a checklist item is nearing expiration. You can configure reminder notifications by the number of days before expiration and the roles to notify. See Set Up Multiple Checklist Expiration Notifications.
(Optional) **Additional Details**	Add helpful information to display to users. This text can help users select the correct checklist. It displays on each checklist action in the checklist actions list pages and each job checklist requirements tab.

Example
When dealing with different regional requirements, you can create different checklists for specific work locations and job categories.

This example demonstrates how to create a compliance checklist required for each contractor for engineering jobs in California and Oregon. Selecting the **Per Contractor** option requires contractors in these work areas to only complete this checklist once.

Field	Value
Checklist Type	Compliance
Must Complete	Per Contractor
Criteria	Subdivisions: California and Oregon
Criteria	Job Categories: Engineering

If your Statement of Work stipulates that contractors must supply a specific valid credential for a specified job title in specific work regions, you can set the credentials as:

Field	Value
Checklist Type	Credentials
Must Complete	Per Contractor
Criteria	Subdivisions: Florida, Louisiana, Texas
Criteria	Job Template: [selected desired job title]
Criteria	Module: Statement of Work
Criteria	Hire Type: Contractor

Add Custom Fields to Checklist Actions

Prerequisites

- Have any of these permissions:
  - *checklists.admin*
  - *checklists.settings*
  - *checklists.settings.manage*
- Create the custom fields that you want to add to checklists. See Create Custom Fields in Settings in Workday VNDLY.
  - If your custom fields depend on custom data sources, you will also need to create those. See Create Custom Data Source Tables in Workday VNDLY.

Context

You have the option to add custom fields to per-work order, per-contractor, or per-vendor checklists. Once added, the custom fields display on checklist actions for users who are prompted to complete them. This enables your program to customize checklists based on your specific business needs.

Steps

1. From the header, select **More** > **Company Settings**
2. Under **Jobs & Work Orders**, select **Checklists**.
3. Select an existing checklist or add a new checklist.

   The checklist that you add or edit must have a **Complete Type** of *Per Work Order*, *Per Contractor*, or *Per Vendor*.
4. Under **Custom Field Setup**, select the custom fields you want to add.

   If you add multiple custom fields, you can click and drag them to re-order them as desired.
5. (Optional) If you want to configure additional settings, click **Configure Advanced Settings**. Consider:

Option	Description
Make Custom Field Required on this Form	Requires users to respond to the custom field when completing the checklist actions.
Do you want this field to be always visible or conditionally visible	If you select *Always Visible*, the custom field automatically displays on the checklist action.

Option	Description
	If you select *Make this field conditionally visible*, you can set conditions so that the custom field only displays depending on other custom fields that you've added to the checklist. You can set multiple conditions with *And* or *Or* operators, and you can also create condition groups for more complex conditions. Example: Your program has a **Laptop Required?** custom field with options of *Yes* and *No*, as well as a **Shipping Address** custom field with a text box. You only want to require users to provide a shipping address if a laptop is required for their role. So, you add both of these custom fields to your checklist and create this condition for **Shipping Address**: • **And** or **Or**: For this example, only 1 condition is added, so you can keep the default *And* operator. • **Custom Field**: *Laptop Required?* • **Condition**: *Equals* • **Value**: *Yes*

6. (Optional) Click **Save Advanced Settings**, if you added them.
7. (Optional) Click **Preview Form** to see how the selected custom fields will display on checklist actions.
8. Finish creating or editing the checklist and click **Save Checklist**.

Result

Recipients view the custom fields on checklist actions based on your configuration.

The custom fields are reportable in both the **Checklist Configuration** and **Checklist Action** datasets, and they're also supported on the Checklist Actions API and the Checklist Evidence Import file. You can see the checklists that a custom field is associated with by navigating to the **Custom Fields** page (**More** > **Company Settings** > **Custom Fields**). When you select a custom field on this page, the related checklist names display in the **Forms** section.

Note that any changes you make to custom fields on checklists will impact all associated checklist actions, including completed checklist actions. Example: You add a custom field to a checklist and make it required, so all previously completed checklist actions from that checklist have an incomplete required custom field.

Add New Checklist Items to Work Orders

Prerequisites

- Enable the **Allow Checklist Modifications on Job/Role Creation and Work Orders** setting.
- You must have the *checklistactions.add* permission.

Context

Checklist actions feed through from the job to the resulting work order. However, a client might need to add a checklist to a work order that supports their business processes. Example: Extended workforce management workers on active assignments might need to provide additional evidence to prove their continued eligibility to fill their current role. Adding checklist actions to an active work order ensures that these additional tasks get completed.

You can add checklists to work orders in the following statuses:

- Active
- Applied
- Interviewing
- Offer Approval Pending
- Offer Released
- Pending Offer Acceptance
- Pending Offer
- Verification in Progress

Steps

1. From the header, select **Work Orders**.
2. Open the appropriate work order.
3. Select the **Checklists** tab.
4. Click **Add Checklist**.
5. Select the appropriate checklist items using the search box.

Assign Checklist Items to Jobs

Prerequisites

Start the process of publishing a job.

Context

The **Add Checklists** window displays during the **Publish a Job** workflow. Adding a checklist item to a job during the job creation process ensures that any work orders created from the job are associated with the checklist action.

Steps

1. On the **Add Checklists** page, review the checklist items.

   You can select or clear checklist actions as needed. Some checklist actions are checked and can't be cleared.
2. Use the search box to locate and add the appropriate checklist item.

   Recently selected items display in the search box or you can enter other items as needed.

Next Steps

Add any preidentified candidates.

Edit Assigned Checklists on a Published Job

Prerequisites

Enable the **Allow Checklist Modifications on Job/Role Creation and Work Orders** setting.

Context

You can update checklist items on a published job if there are new requirements for a particular role. Example: You can add your updated IT Policy for the current year.

Note: Note: Criteria-based checklist suggestions only work at the time of job creation.

Steps

1. Navigate to the **Jobs** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Jobs** > **Job** drop-down menu.
2. Open the job that you wish to edit.
3. Click **Edit** and make your desired changes.
4. Click **Submit** to continue.
5. Indicate whether to notify vendors of your changes, then click **Proceed**.
6. Add or remove checklist items.

   These changes will update all open Applicants to the Job.

   Any checklist items marked with **Force Select when Criteria Matches** can't be removed manually from the job.
7. Click **Next** to publish your changes.

Manage Checklist Actions

Prerequisites

Have the *checklists.waive* to waive a checklist action.

Context

Checklists are an optional feature in VNDLY. You can configure checklists to set up tasks that selected roles must complete before or after onboarding a candidate. Checklist actions in VNDLY are commonly used for compliance tasks such as background checks and onboarding forms. Checklist actions automatically apply to jobs created after the checklist creation date if the criteria matches. You can also manually add them to an active work order.

You can search and filter checklist actions that are relevant to you. Example: You only want to complete missing checklist actions associated with a work order that already has an accepted offer.

Access to checklist actions isn't only based on security permissions. Users can access checklist actions based on who is the checklist owner and their relationship to the worker.

Steps

1. From the header, select **More** > **Manage Checklist Actions**.

   The **Contractor Checklists** tab displays checklist actions by due date.
2. (Optional) From the **Filters** sidebar, select the filters you'd like to use. As you select a filter, consider:

Option	Description
Completed	The checklist action is complete and requires no further action.
Expired	The expiry date of the checklist action has passed.

Option	Description
Expire Soon	The checklist action expires soon and the expiration notification setting was enabled on the checklist.
Failed	The checklist action requiring a pass or fail evaluation displays as a **Fail**.
Missing	The checklist action is incomplete and requires action.
Pending	The checklist action was submitted and requires approval.
Rejected	The approver rejected the checklist action.
Waived	The checklist action was waived.

3. Click the checklist that you wish to view or take action on.

   The pane on the right displays details of the checklist action. If the checklist action applies to multiple work orders, VNDLY lists each work order along with the status of the work order.
4. Click **View** or **Review** (for *Pending* status actions) to view the action details or take further action on the checklist action.
5. As you view the **Take Action** pane, consider:

If you want to ...	Then ...
Complete the checklist action.	a. Complete the fields. b. Click **Save** (or **Submit for Approval**).
Approve the pending checklist action.	Click **Approve**.
Reject the pending checklist action.	a. Click **Select Reason & Reject**. b. Select the appropriate reason. c. Click **Reject**.
Waive the checklist action.	a. Click **Waive**. b. Enter a reason for waiving the checklist action. c. Click **Save**. Note: When you waive a pre-onboarding checklist action, it blocks the onboarding workflow unless the following checklist settings are enabled in your tenant: • **Allow Waive Checklist Actions at Offer Release**. • **Allow Manager to Waive Checklist Action**. .

Example

Set Up Multiple Checklist Expiration Notifications

Prerequisites
You must have the *checklist.settings.manage* and *checklist.settings* permissions.

Context

You can set up multiple notifications to remind users when a checklist action is nearing expiration. This enables you to prompt users more than once to complete a required checklist item before it expires. You can configure notifications based on the number of days before the expiration and the roles you'd like to notify.

Example: You require one of your vendors to provide proof of citizenship as a checklist action. There's an existing configuration to notify the vendors at 10 days before the item expires, but they ignore the notification. For additional reinforcement, you can set up multiple notifications to send to the vendor at 7 days, and at 5 days to the vendor and the MSP (to escalate the issue).

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Checklists**.
3. Select an existing checklist or add a new checklist.
   See Add a New Checklist.
4. Under the Expiration section, select **Notify When Nearing Expiration**.
5. As you configure the notification, consider:

Field	Description
Days Before Expiration	Specify the number of days before expiration to send the notification. You can't send a notification on the same day as the expiration.
Roles to Notify	Select roles to notify from the drop down menu. You can enter multiple roles.

6. Click **Add Notification** to create another notification. If you delete a notification, this won't impact those that have already been sent.
7. Click **Save**.

Result

The notification setup applies immediately to both new and existing checklist actions.

Set Up Checklist Settings

Prerequisites

Have the *checklists.settings* permission.

Context

You can customize your checklist configuration.

The **Configuration** tab enables you to:

- Allow specific users to waive checklist actions.

- Allow contractors to manage checklist actions.
- Display checklists and allow checklist modifications on job creation.
- Allow managers to view checklist requirements before onboarding.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Miscellaneous Settings**, click **Checklists**.
3. Click the **Configuration** tab.
4. As you modify checklist configurations, consider:

Option	Description
Display Checklist to Manager During Job Creation	Allows Program Management to decide whether the **Add Checklists** pop-up displays with a list of required and suggested checklist items during job creation and when editing a job . Note: If this option isn't selected, VNDLY automatically adds required and suggested checklist items that match the job criteria to the job during job creation.
Allow Checklist Modifications on Job/Role Creation	When checked, users can remove checklists when publishing or editing a job, except for checklists set as **Force Select when Criteria Matches** (set when creating a checklist). Removed checklists remain applicable to existing candidates. Note: This option is only available for selection when **Display Checklist to Manager During Job Creation** is enabled.
Allow Managers to View Checklist Requirements Before Onboarding	When checked, client-users with the permission *checklist.read* can view checklist evidence from vendors before the candidate is in *Ready for Onboard* status.
Allow Waive Checklist Actions at Offer Release	When checked, users with the permission *checklist.waive* can waive pre-onboarding checklist actions at the time of offer release and on individual checklist actions. Waiving pre-onboarding actions allows users to onboard the candidate without having the items complete.
Allow Manager to Waive Checklist Actions	When checked, allows managers with the permission *checklist.waive* to waive pre-onboarding individual checklist actions. Waiving pre-onboarding actions allows the candidate to be onboarded without having those items complete.
Allow Contractors to Manage Checklist Actions	When checked, contractors can access and complete checklist actions.
Require Waived Checklist Actions to be Completed After Onboarding	When checked, checklist actions that were waived before onboarding must be completed

Option	Description
	post-onboarding. The due date will be the onboarding date plus the specified number of days after onboarding.
Waived Checklist Actions must be completed within X days After Onboarding	This field is required when **Require Waived Checklist Actions to be Completed After Onboarding** is checked. It requires input of the number of days checklist actions must be completed after onboarding to remain compliant.
Enable Checklist Actions Rejection Reason	When checked, VNDLY displays a list of custom rejection reasons when rejecting a checklist approval request.

Result

Example

Next Steps

Candidates

Create Candidates

Prerequisites

To create a candidate, you need the following permissions:

- *candidate.create*
- *candidate.read*
- *candidate.unique_id.read*
- *candidate.unique_id.write*
- *candidate.vendor.read*
- *candidate.vendor.write*
- *candidate.update*

If customization is made for required fields within **Candidate Profile Configuration** > **Candidate Profile Required Fields**, additional permissions may be needed to successfully create a candidate.

Context

You can create candidates who can be submitted as applicants to jobs or work orders. They're also referred to on jobs as applicants. When you have many candidates to create, you can bulk upload the candidate data. See Reference: Bulk Uploads .

Steps

1. Navigate to the **Candidates** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Candidates** drop-down menu.
2. Click **Add a Candidate** and complete the following fields.

   The fields displayed may differ based on role and configuration.

Option	Description
Resume	If you have Resume Parsing enabled (**More** > **Company Settings** > **People** > **Candidate Profile** > **Resume Settings**.), you can upload a resume to extract values and fill the candidate profile.
Set Candidate as Available	When checked, indicates the candidate can be applied to new jobs or assigned to new contracts.
First Name	Legal first name of the candidate to be used in the Candidate Unique ID.
Last Name	Legal last name of the candidate to be used in the Candidate Unique ID.
Contact Information	Indicates the email, phone number, and address of the candidate.
Residential Status	The candidate's resident status: • *Valid Visa Holder* • *Permanent Resident* • *Citizen*
Default Locale	Indicates the available languages for the candidate. You can configure the available locales by navigating to **More** > **Company Settings** > **Localization** > **Locale Configuration**.
Vendor	Indicates the vendor who owns the candidates data.
Vendor Manager	If applicable, indicates the vendor user who supports the candidate profile.
Contract to Hire	When checked, indicates the candidate is contract to hire.
Direct Hire	When checked, indicates the candidate is a direct hire.
Weekday Travel	When checked, indicates the candidate is expected to travel during the week.
Date of Birth - Month	Indicates the month the candidate was born.
Date of Birth - Day	Indicates the day the candidate was born.

Option	Description
Candidate Unique ID	Indicates the system-generated ID using the first name, last name, month, day, and configured 4 values of the candidate user.
Previous Experience at Client	Indicates the type of experience the candidate has with the client.
Skills	Enables you to indicate the skills associated with the candidate.
Hourly Pay?	When checked, indicates the candidate receives hourly pay. Enter the additional required fields.
Daily Pay?	When checked, indicates the candidate receives daily pay. Enter the additional required fields.
Weekly Pay?	When checked, indicates the candidate receives weekly pay. Enter the additional required fields.

3. Click **Save**.

   You see the **Profile** tab of the candidate you created.
4. Enter additional information on each of the tabs as needed.

Option	Description
Resume	Enables you to upload a resume for the candidate.
Experience Summary	Enables you to add work experience, education, and certifications for the candidate. • Amount of experience • Worker classification • Previous experience with the customer • Applicable skills.
Applied Jobs	Enables you to view all jobs that the candidate has been applied to.
Document Upload	Enables you to upload any additional documentation relevant to the candidate. Example: The candidate's accounting certificate.
Checklists	Enables you to complete, collect, and manage eligibility evidence related to the candidate, such as a background check.
Work History	Displays a list of all work orders created for the candidate across all vendors.

Related Information

Tasks

Create Custom Fields in Settings in Workday VNDLY

Bulk Upload Candidates

Context

Vendors can add multiple candidates to VNDLY in bulk by importing a file with the appropriate information.

Steps

1. Navigate to the **Candidates** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Candidates** drop-down menu.
2. Click **Bulk Add**.
3. Click **Select File** and locate the file.

   You can click **Download Format** to download the template for the bulk upload file.

Next Steps

Review the status of the upload by clicking **View Results**, or navigate to **Reports** > **File Transfer Reports**.

Related Information

Examples

Workday Community: Workday VNDLY File Import Specifications

Create Candidate Submission Rules in Settings

Prerequisites

You must have the *settings.admin* permission.

Context

Workday VNDLY administrators can create criteria rules to apply to a candidate submitted by a vendor. These rules enable you to have different candidate submission rules without needing to create a new tenant. There's no limit on the number of rules that you can create. However, it's best to create only the rules that you need, so that you don't end up with conflicts between rules.

The **Default** tab on the **Candidate Submission Rules** page displays the default rule applied to all candidate submissions. If you create new rules, they override this default rule, except for any **Candidate Limit** settings that you configure if you set **Select Vendor** criteria for the rule.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **People**, click **Candidate Submissions Rules**.
3. Click **New Criteria**.
4. As you add your criteria for the rule, consider:

   If you don’t set specific criteria for organization unit, job category, region, vendor, or module, VNDLY automatically defaults to *All* for these areas.

Option	Description
Strategy	If you select *All criteria must match to enforce override*, all of the criteria options you select must apply for the rule to be effective when a candidate is applied.

Option	Description
	If you select *Any criteria may match to enforce override*, any of the criteria options you select can apply for the rule to be effective when a candidate is applied. Not all criteria must be met.
Select Vendor	If you select a vendor, VNDLY limits the settings available for the rule. You can't edit the **Candidate Limit** section for your rule, and the rule will follow the active settings of the **Default** rule. You can edit all the other options for the rule.

5. Click **Save Criteria**.
6. Select the rule from the list.
7. As you complete the **Candidate Limit** section, consider:

   These fields aren't editable if you set **Select Vendor** criteria in step 4.

Option	Description
Candidate Submission Rules - Company Defaults	When checked, you can fine-tune settings related to candidate limits and override your tenant's default settings.
Candidate Limit	Enter the maximum number of candidates a vendor can submit for a given job.
Candidate Submission Limit Type	Select whether the candidate limit number is applicable per job or per position.
Allow rejected candidate substitution	Select if you wish to permit vendors to substitute a new candidate for a rejected candidate.
Allow withdrawn candidate substitution	Select if you wish to permit vendors to substitute a new candidate for a withdrawn candidate.

8. Select the **Require Candidate Resume** check box if you require vendors to upload a resume when applying candidates.
9. Select the **Candidate Withdrawal Reason** to set the format available for vendors indicating a reason for withdrawing a candidate.
10. As you complete the **Candidate Rejection Configuration** section, consider:

Option	Description
Allow rejected candidates to be resubmitted	Select if you wish to permit vendors to resubmit client-rejected applicants to a job. It won't be editable if you set a vendor as a criteria, it will follow the current **Default** rule settings.
Hide Candidate Rejection Comments from Vendors	Select if you wish to hide candidate rejection comments from vendors in notifications and on the candidate's profile page.
Candidate Rejection Reason	Set the format available for indicating the reason for rejecting a candidate.

11. Click **Save**.

Example

You require vendors to submit resumes for all candidates so that Hiring Managers can review the resumes as part of the hiring process. However, there's 1 department at the organization that doesn't require resumes to be attached to applicants as they do high-volume hiring with tight deadlines. They deem the candidate screening that the vendors complete to be sufficient. You can create a rule to require resumes for all jobs apart from those associated with this department.

Or you might want to hide the candidate rejection comments from a vendor that hasn't submitted quality candidates to you in the past. You can create a rule that hides the comments for that particular vendor.

Related Information

Concepts

Concept: Published Jobs

Create Candidate Notifications

Context

You can send a notification to vendor users when a new candidate has been created and associated to a vendor profile.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Communication**, select **Notifications**.
3. Open the **Candidate: Created by Client** notification.
4. On the **General** tab, click **Edit**.

Option	Description
Recipients	Select one or more delivery methods for vendor notifications.
Additional Recipients	Enter additional recipients who should receive this notification.
Recipients	If you added additional recipients, select one or more delivery methods for their notifications.

5. Click **Save Changes**.
6. Select the **Notification Content** tab.
7. Select the language you'd like to modify notification content for.
8. Click **Edit** and complete the required fields.

Option	Description
In App Notification Content	Configure what displays for the in-app notification. You can use the option to **Add System Variable** as needed to personalize the notification.
Email Subject	Configure what displays for the subject line of the email notification. You can use the option to **Add System Variable** as needed to personalize the notification.
Email Content	Configure what displays for the main body of the email notification. You can utilize the additional options to customize the text, as well

Option	Description
	as use the option to **Add System Variable** as needed to personalize the notification.

9. Click **Save Changes**.

Concept: Candidate List and Candidate Profile

The **Candidates** list and candidate profiles provide insight into current candidates in your tenant. To access the **Candidates** list page and candidate profiles, you need the *candidate.read* permission.

Depending on your permissions, you can access the **Candidates** list page directly from the VNDLY header or by selecting **People** > **Candidates** drop-down menu. By default, the candidates are sorted with the most recently created displaying first. You can utilize the filters, search bar, and sort options to control which candidates display and in what order. You can also click **Customize List Data** to select up to six data points to display for each candidate.

When you open a candidate, you see their candidate profile.

Each of the tabs enable you to view and modify various candidate information:

Profile	Displays candidate information such as contact email and phone numbers, employee IDs, skills, and pay rate.
Resume	Enables you to upload a resume for the candidate.
Experience Summary	Enables you to add work experience, education, and certifications for the candidate. • Amount of experience • Worker classification • Previous experience with the customer • Applicable skills.
Applied Jobs	Enables you to view all jobs that the candidate has been applied to.
Document Upload	Enables you to upload any additional documentation relevant to the candidate. Example: The candidate's accounting certificate.
Checklists	Enables you to complete, collect, and manage eligibility evidence related to the candidate, such as a background check.
Work History	Displays a list of all work orders created for the candidate across all vendors.

Concept: Masking Candidate Data

You can mask, or hide, some candidate data in VNDLY for specific scenarios. For example, you can mask candidate data when hiring for jobs in a country with specific anti-bias regulations. This feature can help your program reduce unintentional bias during the hiring process by enabling users to manage candidates without viewing their personal information.

Currently, you can mask these types of candidate data:

- Names

- Email addresses
- Physical addresses
- Residential statuses

Permissions for Masking Candidate Data

To view the types of candidate data listed above, users need view permissions for fields where the data displays. If you want to mask any of these types of candidate data, remove the permission from the user role:

Candidate Data Type	Fields	View Permission for Fields
Name	• **First Name** • **Middle Name** • **Last Name** • **Preferred First Name** • **Preferred Last Name**	*candidate.name.read*
Email address	• **Candidate Personal Email** • **Candidate Secondary Email**	*candidate.email.read*
Physical address	• **Address** • **Country**	*candidate.address.read*
Residential status	• **Residential Status**	*candidate.residential_status.read*

However, if you remove any of the above permissions from user roles that have the *candidate.read* permission, users can still view candidate data on the **Candidates** list page accessed from the VNDLY header and on candidate records.

See Reference: Candidate Permissions.

Impacts to the User Interface

If you remove the view permission for any of the fields listed in the table above, users will see a **Hidden** label and a lock icon next to the field instead of the candidate's data.

Additionally, if you remove the *candidate.name.read* permission, users see a system-generated ID in places where a candidate's full name typically displays. For example, *Candidate KZHRK* displays instead of *Joe Smith*. This enables users to track specific candidates during the sourcing process without viewing their names.

These impacts apply throughout the VNDLY user interface, except on the **Candidates** page and on candidate records for users with the *candidate.read* permission.

Example

You want to mask candidates' names from hiring managers during the job workflow to help reduce bias. However, you don't want to mask candidates' names from MSP users who oversee jobs but don't select specific candidates.

To do this, you make sure MSP user roles have the *candidate.name.read* permission, while hiring manager user roles don't have it.

As a result, hiring managers see a system-generated candidate ID in places where candidates' full names display, as well as a **Hidden** label and a lock icon next to specific candidate name fields. MSP users see candidates' full names and individual name fields.

Concept: Contractor List and Contractor Profile

The **Contractor** list and contractor profiles provide insight into current contractors in your tenant.

You can access the **Contractor** list by selecting **People** > **Contractors**. You can use the filters, search bar, and sort options to control which contractors display and in what order. You can also save your filters. See Save Filter Settings .

You can click **Customize List Data** to select up to 6 data points to display for each contractor.

When you open a contractor, VNDLY displays their contractor profile. The top part of the profile contains information about the contractor that you can view and edit. Example: Name, email, authentication.

Below are tabs where you can view and edit candidate information:

Tab	Displays
General	• Vendor information. • Worker ID and classification. • Time entry system. • Start and end dates. • Program team. • Tenure. • Previous experience at the client. • Rehire eligibility. • Custom fields.
Work Orders	All work orders.
Managers	All work order managers.
Timesheets	Current timesheets and their status.
Contact Info	• Personal email addresses. • Phone numbers. • Address.

The **Contractor Timekeeping Settings** section enables you to view:

- Timesheet type and classification.
- Start day of week.
- Time import validation settings.
- Premium rates.
- All schedule changes.

The **Attachments** section enables you to view and add documents. The eye icon indicates that vendors can view the attachment.

The right panel enables you to:

- Access links to the contractor’s:
    - Resume.
    - Timesheets.
    - Tenure status.
    - Checklist actions.
- Submit candidate feedback.
- View the contractor’s activity log.

Reference: Candidate Permissions

These permissions enable you to control who can view and edit various candidate details.

Permission	Description
candidate.address.read	Permission to view physical addresses for candidates, including **Address** and **Country** fields. You can mask this data for specific scenarios if desired. See Concept: Masking Candidate Data.
candidate.address.write	Permission to edit physical addresses for candidates, including **Address** and **Country** fields.
candidate.bulk.create	Permission to bulk create candidates.
candidate.bulk.update	Permission to bulk update candidates.
candidate.bulk.upload_apply.location	Permission to bulk upload and apply candidates with location override.
candidate.compensation.read	Permission to view sensitive candidate compensation information.
candidate.compensation.update	Permission to update sensitive compensation information, such as pay rate.
candidate.contact_number.read	Permission to view contact phone numbers for candidates.
candidate.contact_number.write	Permission to edit contact phone numbers for candidates.
candidate.contract_to_hire.read	Permission to view contract to hire for candidates.
candidate.contract_to_hire.write	Permission to edit contract to hire for candidates.
candidate.create	Permission to create new candidates.
candidate.direct_hire.read	Permission to view direct hire for candidates.
candidate.direct_hire.write	Permission to edit direct hire for candidates.
candidate.docs.upload	Permission to upload documents for candidates.
candidate.email.read	Permission to view email addresses for candidates, including **Candidate Personal Email** and **Candidate Secondary Email** fields. You can mask this data for specific scenarios if desired. See Concept: Masking Candidate Data.
candidate.email.write	Permission to edit email addresses for candidates, including Candidate Personal Emailand Candidate Secondary Email fields.
candidate.emergency_contact.read	Permission to view emergency contact information for candidates.
candidate.emergency_contact.write	Permission to edit emergency contact information for candidates.

Permission	Description
candidate.experience_summary.read	Permission to view the **Experience Summary** tab for candidates.
candidate.experience_summary.write	Permission to edit the **Experience Summary** tab for candidates.
candidate.experience.read	Permission to view experience for candidates.
candidate.experience.write	Permission to edit experience for candidates.
candidate.fedid.unmasked	Permission to view candidate company federal ID in clear text.
candidate.holiday_entitlement_days.read	Permission to view holiday entitlement days for candidates.
candidate.holiday_entitlement_days.write	Permission to edit holiday entitlement days for candidates.
candidate.locale.read	Permission to view the locale for candidates.
candidate.locale.write	Permission to edit the locale for candidates.
candidate.name.read	Permission to view a candidate’s full name, including **First Name**, **Middle Name**, **Last Name**, **Preferred First Name**, and **Preferred Last Name** fields. You can mask this data for specific scenarios if desired. See Concept: Masking Candidate Data.
candidate.name.write	Permission to edit a candidate’s full name, including **First Name**, **Middle Name**, **Last Name**, **Preferred First Name**, and **Preferred Last Name** fields.
candidate.preidentified.manage	Permission to update information on the **Pre-Identified Candidate** profiles and place the candidate with the necessary vendor.
candidate.rating.read	Permission to view the candidate's rating.
candidate.read	Permission to view candidates on the **Candidates** list page accessed from the VNDLY header and on candidates' records.
candidate.read.reporting	Permission to view candidates in reporting. Note: Reporting is linked to field level permissions. If a user does not have any other candidate field permission, they may not be able to view any candidate fields in reporting.
candidate.residential_status.read	Permission to view the **Residential Status** field for candidates. You can mask this data for specific scenarios if desired. See Concept: Masking Candidate Data.
candidate.residential_status.write	Permission to edit the **Residential Status** field for candidates.

Permission	Description
candidate.resume.read	Permission to view the **Resume** tab on the **Candidate Profile**.
candidate.resume.write	Permission to edit the **Resume** tab on the **Candidate Profile**.
candidate.skills.read	Permission to view skills for candidates.
candidate.skills.write	Permission to edit skills for candidates.
candidate.unique_id.read	Permission to view unique ID for candidates.
candidate.unique_id.write	Permission to edit unique ID for candidates.
candidate.update	Permission to edit candidates.
candidate.vendor_employee_id.read	Permission to view vendor employee ID for candidates.
candidate.vendor_employee_id.write	Permission to edit vendor employee ID for candidates.
candidate.vendor.read	Permission to view vendor for candidates.
candidate.vendor.write	Permission to edit vendor for candidates.
candidate.vendormanager.read	Permission to view the **Vendor Manager** field.
candidate.vendormanager.write	Permission to edit the **Vendor Manager** field.
candidate.weekday_travel.read	Permission to view the weekday travel details for candidates.
candidate.weekday_travel.write	Permission to edit the weekday travel details for candidates.
candidate.worker_classification.read	Permission to read worker classification for candidates.
candidate.worker_classification.write	Permission to edit worker classification for candidates.
field.rehire_eligibility.read	Permission to view the rehire eligibility status.
field.rehire_eligibility.write	Permission to edit and create the rehire eligibility status.
field.rehire_eligibility_date.read	Permission to view the rehire eligibility date.
field.rehire_eligibility_date.write	Permission to edit and create the rehire eligibility date.
field.rehire_eligibility_comments.read	Permission to view rehire evaluation comments.
field.rehire_eligibility_comments.write	Permission to edit and create rehire evaluation comments.
pre_id.apply	Vendor permission to apply pre-identified candidates to jobs that accept them.

Reference: Candidate Profile in Settings

If you have the role of Workday VNDLY Superuser, you can configure what information Workday VNDLY adds to the **Candidate Profile** within the **Candidate Profile Configuration** page. You can find this page under **More** > **Company Settings** > **People**.

These options are available to you:

Option	Description
Link Worker Profile to Master Candidate Record	When you create new worker tracking, Workday VNDLY notifies you when there might be a match for either a duplicate worker profile or a worker profile marked ineligible for rehire. Only applicable for Worker Tracker v1.
Capture and Append 4 Character Security ID in Worker Unique ID	Stores 4 digits of a security ID that a vendor would use to identify a contractor. Workday VNDLY adds this security ID to the end of the **Candidate Unique ID** (without being hashed). The security ID can be only numbers, such as the last four digits of a Social Security number, or an alphanumeric value. Any lowercase letters added to this field will be converted to uppercase letters when the **Candidate Unique ID** is created.
Fields used to calculate Worker Unique ID	If you're not using the **Capture and Append 4 Character Security ID in Worker Unique ID** setting, this information is used to determine the worker's unique ID. This is done when a vendor adds or edits the **Candidate Profile**, or when adding a worker tracker (if the **Link Worker Tracker Profile to Master Candidate Record** setting is enabled). Don't change the fields after loading workers; you could end up getting false duplicates or missing true duplicates. Also known as **Candidate Unique ID**. Only the last 4 values within the unique id are customizable. The first 6 digits are determined by first initial, last initial, and DOB.
Default authentication provider	If set, all contractors populate with this authentication provider. Otherwise, contractors are set to the authentication provider that best matches their domain name.
Candidate Profile Required Fields	Fields required when submitting a candidate. You can select multiple fields from the drop-down menu. Example: You might need to make a field required by the vendor to support integrations setup. Note: Additional permissions may be required to view all field options.
Candidate Profile Address Requirements	Determines which address fields are required when submitting a candidate.

Option	Description
	Note: Additional permissions may be required to view all field options.
Candidate Profile Field Visibility	Enables you to hide certain fields in the **Candidate Profile** that aren't applicable to your program. You can only hide fields from the client or both vendor and client, not vendor only. Note: Additional permissions may be required to view all field options.
Additional Fields Visibility	Enables you to display certain fields on the **Candidate Profile**, such as **MSP Contractor IDs**. With these fields displayed, you can search by the values in these fields to narrow your search for a particular candidate. Note: Additional permissions may be required to view all field options.
Pre-Identified Intake Fields	Each checked field is required when filling out the **Pre-Identified Candidate** form.
PDF Viewer	When checked, you can preview uploaded PDFs. If left unchecked, you must download the PDF to view.

Enable Resume Parsing	When checked, VNDLY parses the resumes uploaded to automatically populate the following fields on the candidate profile:
	• **First Name**
	• Middle Initials (This field isn't shown on the form, but is passed through as context on the page)
	• **Last Name**
	• **Skills**
	• **Total years of work experience**
	• **Email**
	• **Phone Number**
	• **Address**
	    ◦ **Line**
	    ◦ **City**
	    ◦ **Subdivision**
	    ◦ **Postal code**
	
	The current limitation on file size for resumes is 15MB for the file upload to be successful.

Denied Email Domains	Enter a list of domains that should not be allowed or candidate personal email and contractor email addresses. Example: yahoo.com.

Consolidated Candidate Records

Concept: Consolidated Candidate Records

The Consolidated Candidate Record acts as a centralized container for multiple candidate profiles belonging to the same individual. One person may accumulate duplicate profiles by applying through different vendors or over long periods.

VNDLY automatically groups these profiles using a matching algorithm to ensure a single, holistic view of a candidate's history, tenure, and rehire eligibility.

The system functions like an automated folder system:

- Automatic Grouping: The matching algorithm identifies potential duplicates and groups individual profiles under one consolidated candidate record.
- Primary Profile: Within a record, one profile is designated as the primary profile, which typically dictates the display name for the consolidated record.

While VNDLY handles most groupings automatically, the **Consolidated Candidate Records** page enables you to manage these consolidated profiles. You can review these groupings and correct them through 3 operations: Move, Merge, and Split.

- **Move**: Relocate one or more profiles from one consolidated record to another existing record.
- **Merge**: Combine two separate consolidated records into one.
- **Split**: Remove profiles from an existing record to create a brand-new consolidated record.

You can also bulk upload consolidated candidate records if needed. This enables you to add historical records without creating candidates in VNDLY.

Move a Consolidated Candidate Record

Prerequisites

You must have these permissions:

- *consolidatedcandidate.read*
- *consolidatedcandidate.update*

Context

VNDLY automatically sorts consolidated candidate groupings using a matching algorithm. You may need to move a candidate record if one or more profiles are grouped under the wrong person and need to be reassigned to a different, existing record.

Steps

1. From the header, **People** > **Consolidated Candidates**.
2. Open the consolidated candidate record that contains the candidate record you want to move.
3. Locate the candidate profile card you want to move and click **Move**.

   To move more than one candidate record, click the box next to each and click **Move Candidate(s)**.
4. In the **Search Consolidated Candidate Record To Move To** field, locate the consolidated candidate record you want to move these records to.
5. Click **Move**.

Result

The selected profiles are remapped to the new record. At least one profile must stay behind; the original record remains active.

Merge Two Consolidated Candidate Records

Prerequisites

You must have these permissions:

- *consolidatedcandidate.read*
- *consolidatedcandidate.update*

Context

VNDLY automatically sorts consolidated candidate groupings using a matching algorithm. You may find two separate consolidated candidate records that represent the same person and want to join them into a single record.

Steps

1. From the header, **People** > **Consolidated Candidates**.
2. Open the record you want to absorb.
3. Under **Candidate Records**, select all candidate records.

   If there is only one candidate record, click **Move**.

   If there are multiple candidate records, check the box for each candidate record or click **Select All [X] Candidate Records**. Then click **Move Candidate(s)**.
4. In the **Search Consolidated Candidate Record To Move To** field, locate the consolidated candidate record you want to move these records to.
5. Click **Move**.

Result

All profiles are moved to the destination. The empty source record is retired and all history is preserved in the destination record's activity log.

Example

Charlie Candidate has also been applied to roles under Charles. Because of this, a consolidated candidate record exists for both Charlie and Charles. You can use the **Move** action to move Charlie Candidate's record to the existing Charles Candidate record. The Charlie Candidate records will not exist once all individual records are moved.

Split a Consolidated Candidate Record

Prerequisites

You must have these permissions:

- *consolidatedcandidate.read*
- *consolidatedcandidate.update*

Context

VNDLY automatically sorts consolidated candidates groupings using a matching algorithm. If a record contains profiles belonging to different people, you may need to break them out into a brand-new record.

Steps

1. From the header, select **People** > **Consolidated Candidates**.
2. Open the consolidated candidate detail view.
3. Check the box for each profile that belongs to a different person that you want to move.
4. Click **Move**
5. In the **Search Consolidated Candidate Record To Move To** field, locate the consolidated candidate record you want to move these records to.
6. Click **Move**.

Result

A new consolidated candidate record is created for the split-out profiles. The original record retains any profiles that were not selected.

Bulk Upload Consolidated Candidate Records

Prerequisites

You must have the *consolidatedcandidate.bulkupload* permission.

Context

You can upload consolidated candidates in bulk. Example: You can add historical records without creating candidates in VNDLY.

Steps

1. From the header, select **People** > **Consolidated Candidates**.
2. Click **Bulk Add**.
3. Click **Download Format**.

   The bulk upload file template includes these fields:

   - Contractor First Name
   - Contractor Middle Name
   - Contractor Last Name
   - Contractor Birth MMDD
   - Contractor Last 4 SSN
   - Do Not Rehire
   - Rehire Eligibility Comments
   - Rehire Eligibility Date
4. Click **Select File** to upload the completed file.

Work Orders

Steps: Configure Work Order Settings

Prerequisites

You must have the *workorder.settings.write* permission.

Context

Work orders are critical for tracking details of a contractor's assignment. These settings enable you to customize the way you manage work orders to meet your business requirements.

Steps

1. Configure Work Order Defaults.
2. (Optional) Create Work Order Rules.
3. Configure Vendor Actions.
4. (Optional) Create Approval Fields.

Configure Work Order Defaults

Context

You can customize your work order default settings including various settings for onboarding, edit, modification, end, reopen, and imports. These settings enable you to customize the way you manage work orders to meet your business requirements.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Work Order**.
3. Under **Onboarding** on the **Work Order Defaults** tab, consider:

Option	Description
Allow Contractors to be onboarded to multiple Work Orders	Enables contractors to have more than one active work order.
Recalculate Budget Labor Amount	When enabled, and if budgets are enabled, the budget for the work order recalculates to reflect any changes to due dates or payments.
Work Order Maximum Duration in Days	Controls the duration between the candidate's start and end date set on the offer and onboarding form. When enabled, enter the number of days.

4. Under **Modification**, consider:

Vendor Approval Fields	Select the fields that you want to require vendor approval when changed on the work order. VNDLY sends an approval request to the vendor anytime that you make a change to the specified field when updating a work order. Note: If the vendor is a vendor lite vendor, the approval is skipped.
Change Notification Fields	Select the fields that you want to trigger a notification to users when changed on a work order.
Vendor Work Order Mod Rejection Reason	Set how the **Rejection Reason** displays: • *List* • *Free Form*

	• *Both*
Backdating Effective Date Tolerance in Weeks	Controls how far back an effective date can be selected when making bill rate changes that may impact existing timesheets. Example: If you enter *3*, users can select up to the first day in the workweek 3 weeks prior to the current week. If you enter *0*, VNDLY keeps existing effective date restrictions related to timesheet entries and the work order. Users need the necessary backdating permission for this setting to apply.
Allow Negative Budget Amounts	When enabled, budget amounts can be negative for work order updates.
Allow Work Type Profiles and Work Types to be effective dated/overridden	When enabled, work type profiles and work types can be managed from the **Work Order Update** screen. Users need the applicable permissions. See: Reference: Work Order Permissions. You cannot disabled this setting once overrides are being used. To see work type profiles and work types on offer releases, you must enable the **Work Type Profile** field to display in **Job Application Settings**.
Show the Resource manager field next to Organization Unit field	If enabled, the **Resource Manager** field displays if the **Organization Unit** field also displays when you modify a work order. This allows users to change the resource manager and organization unit at the same time when they update a work order.
Limit Length of Access to Work Order for Closed Approval Tasks	Number of days a user should have access to a work order after the approval task is closed, if the approval task is the only connection to the work order.
End Date Restriction	When enabled, the **End Date** field limits how far a future end date can be selected for updates, reopens, and bulk updates.
Date Restriction Type	Indicates the type of restriction: • *Submission Date*: Current date based on when the change request is submitted. • *Existing End Date*: Current work order end date.
Max Days to Extend (From Existing End Date)	Maximum number of days that can be extended from the current work order end date.
Display Additional Markups for Pay Rate Work Orders	When enabled, clients can enter values for *Overtime* and *Double Time* markup options in addition to the standard *Markup* option when

	creating or updating a pay rate-based work order. When disabled, the *Overtime* and *Double Time* markup options don't display on work orders. Instead, Workday VNDLY uses the value for the standard *Markup* option for all markup calculations.

5. Under **End**, consider:

Option	Description
End Time of Day	Indicates the time the work order ends on the end date. For manual ending, this indicates the default time suggested in the end form. For automatic ending, where VNDLY requires the end time, this is the default time suggested on the offer and onboard form.
End Timezone	Time zone used by the **End Time of Day** field.
Work Order End Type	Select whether work orders should end manually or automatically. If you select *Automatically End Work Orders*, additional options and the **Default End Reason** field displays.
Default End Reason	You can keep the default selection or select another reason if your tenant has additional custom reasons. The selected reason displays on the work order to explain why the work order automatically ended.
Auto-End Grace Period (Days)	The number of days following the end date that the work order automatically ends.
Contractors can login after Work Order End	When enabled, contractors can sign in after the work order ends.
Show "Do Not Rehire" option on Work Order End Form	When enabled, users see the **Do Not Rehire** fields when ending a work order. Note: If this is disabled, those fields can be updated directly on the contractor profile.
Show Upcoming End Date in X Days	Displays a banner on the work order indicating the number of days that remain until a work order's end date, starting with the number of days entered. Example: If you enter *14*, the banner displays 14 days before the work order's end date. Entering *0* disables the banner.
Recalculate Budget Labor Amounts	When enabled, and if budgets are enabled, the budget for the work order recalculates to reflect changes to due dates or payments.

6. Under **Reopen**, consider:

Option	Description
Skip Vendor Approval for Reopen	Select to enable users to reopen a work order without a vendor approval.
Reopen with X days of Work Order End	Indicates the number of days after the work order moves to *Ended* status that you can reopen it. If you enter *0* days, ended work orders cannot be reopened.
Allow Negative Budget Amounts	When enabled, budget amounts can be negative when reopening a work order.

7. Under **Imports**, indicate if imports should **Update primary work orders only**.
8. Click **Save**.

Create Work Order Rules

Context

Work order rules enable you to set criteria for when a configuration should be applied. All criteria must be met for the rule to apply. If no rules are set or if you only have one module, VNDLY uses the defaults configured on the **Work Order Defaults** tab. See: Configure Work Order Defaults.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Work Order**.
3. Select the **Rules** tab and click **Create**.
4. As you create a work order rule, consider:

Option	Description
Modules	Select the module or modules the rule should apply to.
Configuration	You can select from multiple areas to configure: • Onboarding • Edit • Modification • End • Reopen • Imports Each area has various options to configure. These correlate to the settings on the**Work Order Defaults** page.

5. Click **Save**.

Configure Vendor Actions

Context

You can define and control the permissions and capabilities granted to vendors regarding work orders and their associated comments.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Work Order**.
3. On the **Vendor Actions** tab, consider:

Vendors Can End Contingent Work Orders	When enabled, vendors can end work orders within the Extended Workforce Management module. Note: If a Vendor initiates a Work Order End, any applicable Workflow Approvals are triggered and require approval prior to the work order being moved to *Ended* status.
Vendors Can End Statement of Work Work Orders	When enabled, vendors can end work orders within the Statement of Work module.
Vendor can read Work Order comments	When enabled, vendors can read work order comments for all work order types (Extended Workforce Management, Worker Profile, and Statement of Work).
Vendor can create Work Order comments	When enabled, vendors can create work order comments for all work order types (Extended Workforce Management, Worker Profile, and Statement of Work).
Vendor can make comments visible to Client	When enabled, the **Allow Client Visibility** check box displays on the work order in the **Comments** section. Vendors can decide whether to make their comments visible to their clients.

4. Click **Submit**.

Create Approval Fields

Context

Field sets are lists of work order fields to use with workflow approvals using approval criteria. These named lists act as a way to limit when VNDLY generates work order modification approvals.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, select **Work Order**.
3. Select the **Approval Fields** tab and click **Create**.

4. As you create a field set, consider:

Fields	Select the fields that you want to add to the field set to use with workflow approvals using approval criteria.
Create an approval rules Criteria to match fields in this list?	When enabled, VNDLY creates a criteria for the fields selected. The criteria is available to use for a Contingent Work Order Modification workflow approval rule.
Create an inverse approval rules Criteria to match fields NOT in this list?	When enabled, VNDLY creates a criteria for all fields that aren't selected. The criteria is available to use for a Contingent Work Order Modification workflow approval rule.

Example

You want to create add criteria to an approval rule so that when a user modifies specific fields in a work order, VNDLY generates a workflow approval. Using the **Approval Fields** tab, you create a field set using **Pay Rate**, **Bill Rate**, **Fee Profile**, **End Date**, and **Budget** work order fields. You then add this field set as criteria to an approval rule. When a user modifies these fields in a work order, VNDLY generates a workflow approval.

Update Work Orders

Prerequisites

You must have the *workorder.update* or *workorder.owned.update* permissions.

Context

Work orders are records that are unique to each applicant for each assignment. A work order follows the contractor throughout the entire job workflow, from application to onboarding to completion of the job.

VNDLY populates the work order with initial configuration details from the job, when applicable, as well as specific vendor and candidate details. Once a work order is active, the job and contractor data may become out of sync with the work order; job data is no longer synced to the work order data.

Work orders are created for all modules: Extended Workforce Management (EWM), Statement of Work (SOW), Worker Profile Management (WPM). The fields that display differ for the work order based on module, pay type, and other configurations.

Steps

1. From the header, select **Work Orders**.
2. Locate and open the appropriate work order.
3. Click **Update Work Order**.
4. As you update the work order, consider:

Option	Description
Title	Populates from the related job's title or job template title for WPM. Updating the **Title** on the work order doesn't affect the job title that it populated from.

Option	Description
Rehire Eligible	This information defaults based on the value set on a previously ended work order. To edit this field, navigate to the worker's profile. See: Change Rehire Eligibility.
External ID	A unique ID that connects a VNDLY work order to a corresponding item in an external system. This field is used for Workday-connected tenants.
Reason for Hire	The reason for hire for the contingent worker. This field is set based on the **Job Reason or Hire** custom data source or within the default **Reasons** for Workday connected tenants. This is required if you're using the Workforce Connector. See: Reference: General Settings in the General Configuration Tab.
Name of Person Being Backfilled	Worker who previously held the job or work order being filled. This field only displays if you select a **Reason for Hire** of *Backfill*.
Source Type	Indicates how a worker is engaged, including the process, fees, and system behavior. This information populates from the job or work order. You can edit the source type on a work order only if it's one of these types: • *Directed* • *Payrolled* • *Supplier Sourced* For all other source types, such as *Direct Hire*, *Statement of Work*, and *Worker Profile*, you can't change the source type once you set them. See: Concept: Source Types.
Job Type	If your tenant has custom job types set up, you can include variations such as Junior or Senior. This field only displays if entered on the job template. See: Create Job Templates
Job Site	Indicates where the work will take place. This information populates from the job. References the **Job Project Site** custom data source.
Hours Per Week	Number of hours that the contingent worker is working regularly per week.

Option	Description
	This is required when using the Workforce Connector.
(Optional) Worker Classification	The classification of the contractor: • *W2* • *1099* • *Corp to Corp* If you update this field on a work order, the default candidate worker classification is not updated.
Expense Type	Indicates the expenditure type for the work order budget.

5. Under **Duration**, consider:

Option	Description
Start Date	The first day of the work order. If you adjust this field, VNDLY updates the **Budget** values accordingly.
End Date	The last day of the work order. If you adjust this field, VNDLY updates the **Budget** values accordingly.

6. Under **Payments**, consider:

   This section only displays for work orders with a **Pay Type** of *Milestone Payments*.

   You can click **Add New**. See: Add Milestone Payments.

7. Under **Rates**, consider:

Option	Description
Exempt	Indicates whether VNDLY should automatically apply overtime rules when calculating pay, if configured. This field also tracks whether a contractor is considered exempt or non-exempt. Example: If *Yes*, overtime rules are not applied for automatic timesheets.
Overtime Profile	Indicates the overtime threshold associated with the work order. See: Create Overtime Rates and Profiles.
Premium Rate	Enables you to set rates for workers that may be eligible for an additional premium on top of their base rate. Example: Workers on different shifts such as second or third shift.
Calendar Pay Profile	Calendars that can indicate holidays on a timesheet. Depending on the configuration, these may have different holiday premiums associated with them.

Option	Description
	See: Set Up Calendar-based Premium Pay.
Billing Cycle	Defines the period when provided services are recorded and invoiced. See: Create Billing Cycles.
Rate Schedule	Displays all rates, including dates, of the work order. You can edit each **Effective Date Range** unless the date has passed. You can also add new rate schedules.

8. Under **Fee Profile**, all fee profiles for the work order display.

   Fee profiles are used to add additional markup on types of transactions in VNDLY, where types are represented as service types in a fee profile.

   You can edit existing fee profiles or add new ones as needed. You can also edit the **Effective Date Rate** unless the date has passed.
9. Under **Organization Unit**, consider:

Option	Description
Organization Unit	Where the work order falls in the hierarchical subdivision of a larger organization. See: Change Organization on Work Orders for Workday-Integrated Tenants or Change Organization on Work Orders for Non-Workday Integrated Tenants.
Resource Manager	The resource manager for the work order. This field may display under the **Managers & Team** or **Organization Unit** section, depending on your configuration of the field **Show the Resource Manager field next to Organization Unit field** on the **Work Order Settings** page of **Company Settings**.

10. Under **Managers & Team**, consider:

Option	Description
Resource Manager	The resource manager for the work order. This field may display under the **Managers & Team** or **Organization Unit** section, depending on your configuration of the field **Show the Resource Manager field next to Organization Unit field** on the **Work Order Settings** page of **Company Settings**.
(Optional) Program Team Users	Populates from the job, if applicable. Represents program team or MSP users that are associated with this work order. Selecting a user allows them to show in filters and receive targeted notifications.
(Optional) Additional Managers	Populates from the job, if applicable.

Option	Description
	When added, this enables additional users to operate similarly to the assigned resource manager.
(Optional) Timesheet Approvers	Populates from the job, if applicable. Grants additional users access to approve timesheets related to the work order.
(Optional) Expense Approvers	Populates from the job if applicable. Grants additional users access to approve expense reports related to the work order.

11. Under **Location**, consider:

Option	Description
Default Location	Locations specify where a program wants to hire workers or where a job takes place.
Temporary Locations	Locations that can be entered with a set date range.

12. Under **Custom Fields**, any configured fields display.

    This section only displays if custom fields are set up.

    See: Create Custom Fields in Settings.
13. Under **Charge Codes**, consider:

    Charge codes are segmented cost codes used to precisely allocate time and expenses for project tracking and client invoicing.

    Configuration and field labels are dependent on individual client setups.

Option	Description
Type	A unique identifier for the charge code.
Project Code	Displays for charge codes configured with a 2-segment structure.
Task Code	Displays for charge codes configured with a 2-segment structure.
Cost Center Code	Displays for charge codes configured with a 1-segment structure.

14. Under **Work Type Information**, select the **Work Type Profile**.

    Work type profiles use the configured work types to enable you to configure and classify types of work when logging time on timesheets.
15. Under **Timekeeping**, review the contractor timekeeping settings.

    You can schedule changes for the worker's timekeeping settings by clicking **View Contractor Profile** and navigating to the **Contractor Timekeeping Settings** section of the page.
16. Under **Tax Overrides**, click **Add New Tax Override**.

    See: Add Tax Overrides to Work Orders.
17. Under **Budget**, check the box for **Revise Budget**.
18. Click **Review Changes**.
19. Enter the **Reason for Change**.
20. (Optional) Enter a note.

21. Click **Submit for Approval**.

Change Organizations on Work Orders for Workday-Integrated Tenants

Prerequisites

Have the following permissions:

- *field.organization_unit*. This is a field-level permission. Some tenant configurations may make the Organization Unit field non-editable, despite having this permission.
- *organization_unit.read*.
- *bulk_operations.workorder.update_organization*. Lets you bulk update work order organization unit.
- *workorder.modifications.create*.
- In addition, make sure that the work order is:
  - Provisioned in Workday.
  - Eligible for provisioning.
  - The primary work order.

Context

If you want to adjust the organization on a work order provisioned in Workday, you can do so with the **Make Organization Changes** action. Both vendor and client users can change the organization unit, although there are special considerations when changing the organization unit in a work order provisioned in Workday.

Steps

1. From the header, select **Work Orders**.
2. Open the appropriate work order and click **Make Organization Changes**.
3. Change the **Organization Unit**.

   If you're changing an organization unit with the following staffing models, you'll be prompted to select a position type:

   - Job Management to Position Management.
   - Position Management to another organization unit with Position Management.

   You'll be able to select organization units at or above your current organization level. Users may be prompted to select only resource managers that are associated with that organization unit if this has been already set up in the **Job Form Configuration** page. (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations** > **Resource Manager** > **Restrict Resource Manager to Organization Hierarchy mapping**).
4. Click **Review Changes** and review the change.
5. Click **Submit for Approval**.

Result

The change will sync with the work order provisioned in Workday. Be aware:

- This change may require approvals which will delay the sync with Workday.
- Even if there are no approvals for the change, there will be a slight delay with the sync with Workday.

Change Organizations on Work Orders for Non-Workday Integrated Tenants

Prerequisites

Have the following permissions:

- *field.organization_unit*. This is a field-level permission. Some tenant configurations may make the *Organization Unit* field non-editable, despite having this permission.
- *organization_unit.read*.
- *bulk_operations.workorder.update_organization*. Lets you bulk update work order organization unit.
- *workorder.modifications.create*.

Context

If you want to adjust the organization on a work order, you can do so with either the **Make Organization Changes**, **Change Dates and Rates (Modify Work Order)**, or **Edit Work Order** action.

Both vendor and client users can change the organization unit.

Steps

1. From the header, select **Work Orders.**
2. Open the appropriate work order and click one of the following: **Make Organization Changes**, **Change Dates and Rates (Modify Work Order) Order**. or **Edit Work Order**. Which option you choose depends upon how you need to edit the organization unit:

Option	Description
Make Organization Changes	Select this option if you're changing organization units at any level of the organization unit hierarchy. This option targets the organization unit specifically and you won't be able to edit other aspects of the work order. Example: A resource manager can request a change to the organization unit and resource manager outside of their current organization.
Change Dates and Rates (Modify Work Order) Order	Select this option if you're changing organization units at any level of the organization unit hierarchy and changing other aspects of the work order. Example: You need to change the organization unit on a work order, as well as backdating the work order.
Edit Work Order	Select this option if you're changing organization units that are at or below your current level in the organization unit hierarchy. Example: You want resource managers to only change work orders that are at or below their current level in the organization unit hierarchy. Direct them to use this option.

3. Change the **Organization Unit**. If it's been set up, you can also change the resource manager. To allow users to change the resource manager, select **Restrict Resource Manager to Organization**

Hierarchy mapping when configuring the job form (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations**).

4. Click **Review Changes** and review your change.
5. Click **Submit for Approval**.

End Work Orders Early

Context

You can schedule work orders to end on an earlier date than the original end date. This applies to work orders for **Extended Workforce Management (EWM)** and **Worker Profile Management (WPM)**.

Example: A current work order has an **End Date** of 10/15/2023. You can change the date to have the work order end early on 10/01/2023.

Consider these items when ending a work order early:

- You can't end work orders that have any pending approvals.
- If you have work approval rules configured, they will still trigger after you change the work order end date.
- To extend the work order to a future end date instead, use the **Change Dates and Rates (Modify Work Order)** action.

Steps

1. From the header, select **Work Orders**.
2. Select the work order and click **View Work Order**.
3. Click **End**.
4. As you complete the task, consider the following:

Option	Description
End Details	**End date:** • You can end work orders on the same day as the start date. • The end date can't be moved prior to dates with time submitted for the work order. Example: A work order is scheduled to end on 10/20/23. If there is time submitted through 10/18/23, the earliest date you could move the End Date to would be 10/18/23.
Additional Details	**Do Not Rehire**: • If selected, the contractor's **Rehire Eligibility** updates on their contractor profile. • Administrators can enable or disable this option from the **Work Order Settings** page.

5. Add any approvals, if necessary.

Result

- After you change the date, a banner displays in Workday VNDLY alerting you the number of days that remain until the work order ends. An administrator can configure when this banner displays in the **Work Order Settings** page.
- When you end a work order, it will remain ended even if there is a future modification pending.
- Canceled end requests are tracked in the **Revision History** section of the work order.

Backdate Work Orders with Previously Approved Timesheets

Prerequisites

- You must have the *workorder.modifications.billrate_backdate.create* permission.

Context

Administrators with the proper permissions can make updates to an already approved work order. Example: The rate on a work order might have a change in the bill rate after timesheets are submitted and approved.

Backdating a bill rate adjusts invoicing for previously submitted timesheets and creates additional invoice line items.

Any backdated change follows restrictions set in the **Backdating Effective Date Tolerance in Weeks** setting. You can find this setting by navigating to **More** > **Company Settings** and selecting **Work Orders** under **Jobs & Work Orders**. The backdating restrictions can be found in the**Modification** section. Example: If the value set is 6 weeks, the maximum time that you can backdate the bill rate is back 6 weeks from the current date, then to the beginning of that timekeeping week.

Steps

1. In the header, select **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Under **Rate Schedule**, click **Edit**.

   You see a banner that indicates the change is backdated.
4. As you enter rate information, consider:

Option	Description
Effective Date	Specify the effective date for the usage billing rate. The effective date enables you to price usage-based transactions based on that date, and report on usage billing rates based on that date.
In Effect Until	Indicates how you want to determine the length of the change: • *Specific Date*: You'll enter the date the change should be in effect until. • *End Date*: Indicates the change should be in effect until the end date of the work order.
End Date	The date the rate is effective through.
Pay Rate	The amount paid to the contractor for their services.

Option	Description
Bill Rate	The amount billed for the worker's services.
Formula Group	Controls how specific rate logic is applied to the work order. Only formula groups that match the pay type are available for selection.

5. Click **Save**.
6. Click **Review Changes**.
7. Select the **Reason for Change** and click **Submit for Approval**.

Result

When a backdated change is made, Workday VNDLY displays a yellow alert banner. After any configured internal or vendor approvals have taken place, any impacted timesheets are updated, and invoice line item are created for rate adjustments. These updated timesheets reflect in the work order's **Activity Log**.

Transfer an Employee

Context

Resource managers can perform employee transfers directly in Workday VNDLY. This feature is only available for primary work orders provisioned in Workday.

Steps

1. From the header, select **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Make Organization Changes**.
4. Make your adjustments to the **Organization Unit** and **Position Type** as you see fit.

Result

The **Connector Status** log updates and your changes flow through to Workday.

Adjust Work Week Start Time

Prerequisites

- Must have these permissions:
  - *workorder.update*
  - *workorder.timekeeping_settings.edit*

Context

A work week contains 168 consecutive hours within a timesheet. These hours might need to start at a different time of day, such as if there's a shift change. **Work Week Start Time** adjustments enable you to make these changes quickly and easily. Please note that these adjustments must start at the beginning of a work week. Example: given two timesheets, week 1 and week 2, the worker changes shifts permanently midweek of the week 1 timesheet. The **Effective Start Date** should be the first day of week 2.

Workday VNDLY doesn't current support work week start day adjustments.

Steps

1. In the header, select **Work Orders**.
2. Locate and open the appropriate work order.
3. Under **Timekeeping Settings**, click **+Add Override**.
4. Enter the new **Work Week Start Time**.
5. Enter the start date when the time change should be effective. This date must be the start of a new week.
6. Enter the end date if the work week start time is a temporary change.

Terminate a Contractor

Prerequisites

Security: Users require the necessary permissions to access the **End** button in a work order.

Permission	Consideration
workorder.owned.end	End work orders for a contingent worker where you're a manager.
workorder.end	End any contingent worker work order.
worker_tracking.owned.end	End work orders for a Worker Profile where you're a manager.
worker_tracking.end	End any Worker Profile work order.

Context

VNDLY offers 2 methods to end work orders, manual or automated. You can configure the settings for ending a work order from **More** > **Company Settings** > **Jobs & Work Orders** > **Work Orders**.

If you've set your environment to automatically end work orders, VNDLY ends the work order based on the timing settings.

Option	Description
Require Work Order End Time	VNDLY ends the work order on the work order end date at the specified time of day (usually 23:59).
Auto-End Grace Period	VNDLY ends the work order on the date calculated as [Work Order End Date + number of grace period days] at the specified time of day.

If an approval is configured for Approval Type: Work Order Termination, all required approvals must be completed for VNDLY to end the work order.

If your environment is set to manually end a work order, it will remain in active status until you complete the steps to end the work order. To terminate a contractor and complete the steps to end the work order, you'll need to provide details such as:

- End Reason
- Eligible for Rehire
- Approvals

Steps

1. From the header, select **Work Orders**.
2. Open the appropriate work order.
3. Click **End** and then **End Work Order**.

   If the worker has never entered a timesheet, then you have the option to **Cancel** or **End** the work order.
4. Complete the **End Details**, including the appropriate **End Reason**.
5. Click **Next**.
6. As you complete the **Do Not Rehire** check box consider:
   - This option might not display, based on the settings of your environment. Administrators can enable or disable this option from the **Work Order Settings** page.
   - If selected, the contractor's **Rehire Eligibility** updates on their contractor profile.
7. Click **Next**.
8. Review and click **Save**.
9. Request approvals if necessary.

Result

- When you end a work order and terminate the contractor, the work order:
  - Remains in active status until all approvals are completed.
  - Remains in ended status even if there’s a future modification pending.
- If the contractor is associated with 2 work orders and you end the primary work order, VNDLY automatically switches to the secondary work order.
- If the Workforce Connector is set up in your environment/tenant, then VNDLY sends the work order updates to Workday as well.

Reopen a Work Order

Prerequisites

- Configure reopen settings on the Work Order option in the **Work Order Settings** page of **Company Settings**.
- Security: *workorder.reopen* permission.

Context

You can reopen work orders closed within the number of days set in **Reopen within X days of Work Order End** on the **Work Order Settings** page in **Company Settings**. Example: You want to reopen a closed work order to fulfill a labor need.

Note: If the Extended Workforce Management Work Order Modification workflow approval is enabled, it will still be triggered after completing the **Reopen Work Order** pop-up window.

Steps

1. From the header, select **Work Orders**.
2. Select the work order that you want to reopen.

   You can use the **Filters** to limit the results to work orders in *Ended* status.
3. Click **Reopen**.

4. As you complete the task, consider:

Option	Description
End Date	Enter the new date that the work order should finish.
Reason for Reopen	Indicates why the work order was reopened.
Leave a Note (Optional)	Enter details on why you're reopening the work order.
Current Budget Amount **Budget Change Amount** **Modified Budget Amount** **Total Invoiced Amount** **Remaining Budget Amount**	Displays the available budget, including increases due to reopening the work order. You can't directly update these fields, but you can utilize the **Revise Budget** area to make changes in real time.
Revise Budget	When checked, enables you to enter a new: • **Expense Amount** • **Tax Amount** • **Program Fee** • **Other Amount**

Print Work Orders

Context

You can quickly generate a simple format for printing a work order.

Steps

1. From the header, select **Work Orders**.
2. Open the work order that you wish to print.
3. Click the **Print** icon to open a new tab in your browser along with the print menu.
4. Follow the browser wizard to print the work order.

Concept: Work Orders

A work order is a record that is unique to each applicant for each assignment. Workday VNDLY automatically creates the work order when a candidate is applied to a job. A work order follows the contractor throughout the entire job workflow, from application to onboarding to completion of the job.

Data from the job and details from the contractor populate the work order. Thereafter, job data is no longer synced to the work order data.

With work orders, you can:

- Have multiple work orders for a candidate.
- Edit the details of the contractor work order. Depending upon how you've configured your tenant, those edits might require approvals.
- View work order details on the profile of the applicant.
- Associate checklists to a work order.

- Bulk update information. Bulk update changes might also require approvals.
- Filter base reports using the work order dataset by status by status, for example to view only work orders for onboarded contractors.

You need to be aware of:

- If you edit a job after an associated work order is created, the job edits don't display on the work order. You'll need to go to the associated work order and edit it.
- You can edit the source type on a work order only if it's one of these types: Directed, Payrolled, and Supplier sourced.
- Previously Workday VNDLY made work orders active at time of onboarding a candidate. They are now created when the candidate is applied. If you have previously been referencing the **Created On** field, you might need to consider using **Pending Offer Release Date** field to reflect more accurately active work orders.

Concept: Source Types

The **Source Type** field on **Work Orders** determines how a candidate or worker is engaged. It helps define the process, fees, and system behavior related to a specific worker. You can edit the **Source Type** field on **Work Orders** only for these types:

- *Directed*
- *Payrolled*
- *Supplier Sourced*

For all other **Source Types** such as *Direct Hire*, *Statement of Work*, and *Worker Profile*, you can't change the work orders once you set them.

Source Type	Description	Hire Type	Module	WO Field
Directed	Candidates are pre-identified and directly placed with a vendor, rather than being sourced.	Contractor	Contingent Staffing	Editable
Payrolled	Candidates are placed with Employer of Record (EOR) vendors. Note: This Source Type is only used with the AOR/EOR Module. If you're using Contingent Staffing and hire a candidate through a vendor with the Contractor Payrolling/ Employer of Record authorized	Contractor	AOR/EOR	Editable

Source Type	Description	Hire Type	Module	WO Field
	service, the Source Type will be Supplier Sourced. If the client uses the Payrolled row of the Fee Profile to capture their payroll vendor's fees, they'll need to manually edit the Source Type on the Work Order from Supplier Sourced to Payrolled before the worker submits timesheets.			
Supplier Sourced	A job goes through a sourcing process where vendors/ suppliers apply their candidates.	Contractor	Contingent Staffing	Editable
Direct Hire	The client intends to hire the candidate as a permanent, full-time employee. The MSP acts as a headhunter, and a fee is received for the candidate placement.	Direct Hire	Contingent Staffing	Can't be changed on the work order.
Statement of Work	A work order is created for a candidate assigned to a Statement of Work.	Contractor	Statement of Work	Can't be changed on the work order.
Worker Profile	A work order created without a job that doesn't require time, expense, or invoicing.	Contractor	Worker Profile Management	Can't be changed on the work order.

To change the source type for existing work orders, you can:

- Edit the source type field directly on the work order.

- Use the bulk update for work orders.

Note:

You can't edit the **Source Type** if it's already set to *Direct Hire*,*Statement of Work*, or *Worker Profile* on a Work Order.

Troubleshooting: Source Types

Source Type for Pre-Identified Candidate Shows as Supplier Instead of Directed

After following the steps to create a job with a pre-identified candidate and completing onboarding, the work order displays Source Type as Supplier Sourced instead of Directed.

Cause: When a vendor uses the general Apply button to submit a pre-identified candidate to a job, the system automatically sets the candidate's status to Applied. The system interprets it as a direct application from the vendor's talent pool, defaulting the Source Type to Supplier Sourced.

Solution: To ensure the **Source Type** is correctly set to *Directed* for **Pre-Identified** candidates, the vendor must:

Steps

1. Use the **Apply Candidates** option.
2. Within the **Apply Candidates** workflow, select **Pre-Identified** when applying for the job.

   If the vendor selects a general Apply option without first opening the job and chooses the Pre-Identified path, the Source Type will be set to Supplier Sourced

Concept: Gaps and Overlaps When Adjusting Work Week Start Times

When adjusting work week start times, you may encounter situations where a change moves time forward and leaves a gap or where a change moves time backwards and there is an overlap.

Handling a Change That Moves Time Forward (The Gap)

This scenario describes how we handle a work week start time change that moves the time forward. An example might be moving a work week start time from 12am to 12pm. We call this handling the “gap”, where lining up two consecutive weeks with the change creates a gap in the work week for each timesheet. In this scenario, the Week 1 timesheet will allow the worker to clock in and out during this “gap”.

For example, given two timesheets (Mon-Sun) Week 1 and Week 2, the worker makes a permanent shift change in the middle of the Week 1 timesheet, resulting in a work week start time change from 12am to 12pm effective on the start date of the Week 2 timesheet. Week 1 timesheet will allow the worker to clock in and out during this gap.

A banner displays on the timesheet to indicate a schedule change.

Handling a Change That Moves Time Backwards (The Overlap)

This scenario describes how we handle a work week start time change that moves the time backward. An example might be moving a work week start time from 12pm to 12am. We call this handling the “overlap”, where lining up two consecutive weeks with the change creates an overlap in the work week for both timesheets. In this scenario, the Week 1 timesheet will NOT allow the worker to clock in or out during this “overlap”.

For example, given two timesheets Week 1 and Week 2, the worker makes a permanent shift change in the middle of the Week 1 timesheet, resulting in a work week start time change from 12pm to 12am effective on the start date of the Week 2 timesheet.

You will receive an error on the timesheet if the worker tries to clock in or out during this overlap - "Entry crosses work week which is not supported."

Reference: Work Order Permissions

These permissions enable you to control who can view and edit various work order details.

Permission	Description
contractor.classification.read	Permission to view the worker classification.
contractor.classification.write	Permission to edit the worker classification.
field.job_template.write	Permission to edit job templates.
field.calendar_pay_profile.read	Permission to view the **Calendar Pay Profile** field.
field.calendar_pay_profile.write	Permission to edit the **Calendar Pay Profile** field.
field.charge_codes.read	Permission to view charge codes.
field.charge.codes.write	Permission to edit charge codes.
field.exempt_status.read	Permission to view the **Exempt Status** field.
field.exempt_status.write	Permission to edit the **Exempt Status** field.
field.expense_approver.read	Permission to view the **Expense Approver** field.
field.expense_approver.write	Permission to edit the **Expense Approver** field.
field.location.read	Permission to view the location.
field.location.write	Permission to edit the location.
field.orientation_hours.read	Permission to view the **Orientation Hours** field.
field.orientation_hours.write	Permission to edit the **Orientation Hours** field.
field.overtime_profile.read	Permission to view the **Overtime Pay Profile** field.
field.overtime_profile.write	Permission to edit the **Overtime Pay Profile** field.
field.premium_rate.read	Permission to view the **Premium Rate** field.
field.premium_rate.write	Permission to edit the **Premium Rate** field.
field.program_team.read	Permission to view the program team.
field.program_team.write	Permission to edit the program team.
field.reason_for_hire.read	Permission to view the **Reason for Hire** field.
field.reason_for_hire.write	Permission to edit the **Reason for Hire** field.
field.resource_manager.read	Permission to view the **Resource Manager** field.
field.resource_manager.write	Permission to edit the **Resource Manager** field.
field.source_type.read	Permission to view the **Source Type** field.
field.source_type.write	Permission to edit the **Source Type** field.
field.timesheet_approver.read	Permission to view the **Timesheet Approver** field.

Permission	Description
field.timesheet_approver.write	Permission to edit the **Timesheet Approver** field.
field.work_week.read	Permission to view the **Hours Per Week** field.
field.work_week.write	Permission to edit the **Hours Per Week** field.
job.program_rate_type.edit	Permission to change the program rate on a job.
workorder.activity_log.read	Permission to see the **Activity Log** on a work order.
workorder.approve	Permission to approve work order modification and end processes waiting on client approvals.
workorder.attachment.read	Permission to view work order attachments.
workorder.attachment.write	Permission to add, edit, and delete work order attachments.
workorder.billing_cycle.read	Permission to view billing cycles on the work order.
workorder.billing_cycle.write	Permission to edit billing cycles on the work order.
workorder.cancel	Permission to cancel a work order.
workorder.comments.create	Permission to leave comments on a work order.
workorder.comments.read	Permission to view comments on a work order.
workorder.end	Permission to end any work order.
workorder.end_comments.read	Permission to read end comments on the work order reporting data source.
workorder.end_date.read	Permission to view the **End Date** field of the work order.
workorder.end_date.write	Permission to edit the **End Date** field of the work order.
workorder.expense_type.read	Permission to view the **Expense Type** field.
workorder.expense_type.write	Permission to edit the **Expense Type** field.
workorder.external_id.read	Permission to view the **External ID** field.
workorder.external_id.write	Permission to edit the **External ID** field.
workorder.fee_profile.read	Permission to view fee profiles on the work order.
workorder.fee_profile.write	Permission to edit fee profiles on the work order.
workorder.job_site.read	Permission to view the **Job Site** field.
workorder.job_site.write	Permission to edit the **Job Site** field.
workorder.max_duration.override	Permission to override a **Max Duration** set on a work order.
workorder.modifications.billrate_backdate.create	Permission to backdate bill rate changes, including bill rate, pay rate, and markup values, which generate invoice line item adjustments.

Permission	Description
workorder.modifications.create	Permission to make modifications to any work order. This permission isn't needed if you have the newer *workorder.update*.
workorder.modifications.delete	Permission to cancel or delete a pending work order modification.
workorder.modifications.fee_profile_backdate.create	Permission to backdate fee profile changes that generate invoice line item adjustments.
workorder.modifications.formula_group_backdate.create	Permission to backdate formula group changes which generate invoice line item adjustments.
workorder.modifications.minimumhourstoqualify_backdate.create	Permission to backdate minimum hours to qualify changes that generate invoice line item adjustments.
workorder.modifications.notqualifiedrate_backdate.create	Permission to backdate non-qualified rate changes which generate invoice line item adjustments.
workorder.modifications.reason.read	Permission to view or set other reason fields:**Reason for Change** and **Leave a Note (Optional)**.
workorder.modifications.reason.create	Permission to enter other reason fields:**Reason for Change** and **Leave a Note (Optional)**.
workorder.modifications.shift_differentials_backdate.create	Permission to backdate shift differential changes for a work order.
workorder.modifications.shifts_backdate.create	Permission to backdate shift and shift strategy changes for a work order.
workorder.modifications.standard_hours_per_day_backdate.create	Permission to backdate standard hours per day changes which generate invoice line item adjustments.
workorder.modifications.work_types_backdate.create	Permission to backdate work type changes which generate invoice line item adjustments.
workorder.payments.read	Permission to view payments on a work order.
workorder.payments.write	Permission to edit payments on a work order.
workorder.reopen	Permission to reopen a work order that has already ended.
workorder.start_date.read	Permission to view the **Start Date** field of the work order.
workorder.start_date.write	Permission to edit the **Start Date** field of the work order.
workorder.tax.read	Permission to view taxes on work orders.
workorder.tax.update	Permission to update taxes on work orders.
workorder.timekeeping_settings.edit	Permission to edit timekeeping details.
workorder.title.write	Permission to edit the work order title.

Permission	Description
workorder.update	Permission to make changes to any work order. This permission replaces the previous *workorder.modifications.create*.
workorder.vendor_approve	Permission to approve work order modifications waiting on vendor approvals.
workorder.worktypeprofile.update	Permission to edit work type information.
workorder.worktypes.write	Permission to update or override work types on a work order.

Pre-Identified Workflows

Pre-Identify Candidates During Job Publish

Prerequisites

- Make sure the **Enable Pre-Identified Job** check box is selected (**More** > **Company Settings** > **Jobs & Work Orders** > **Job Applications**). You can also select the status that pre-identified candidates will have once applied.
- Start the job form.
- Have the *job.pre_id.view* permission, which enables you to view the **Pre-Identified** tab once the job is published.

Context

With the pre-identify feature, you can invite candidates that match the requirements to apply to the new position. Pre-identifying candidates is optional and might not be relevant to your organization.

This topic explains how to pre-identify candidates during the job publish process. You can also pre-identify candidates after job publish. For more information, view Pre-Identify Job Candidates After Job Publish.

Steps

1. On the job form, select *Yes* for **Accept Pre-Identified Candidates**.

   After the job publish process, you can't change this setting from *Yes* to *No* on the job, in case pre-identified candidates have already been applied to the job.
2. Complete the job form and click **Submit**.
3. (Optional) Add checklists.
4. Select *Yes* for **Have you pre-identified a candidate?**
5. When determining **Is the Candidate Profile in VNDLY?**, consider:

Option	Description
Yes	Select this option if you know the candidate that you wish to pre-identify for the role has a profile in Workday VNDLY. Then you'll need to select the Vendor and one or more candidates to pre-identify for the job.

Option	Description
No	Select this option if you know the candidate that you wish to pre-identify for the role doesn't have a profile in Workday VNDLY. You'll be prompted to complete the Pre-Identified New Candidate Intake Request Form.
I don't know	Select this option if you aren't sure whether the candidate you wish to pre-identify for the role has a profile in Workday VNDLY. You'll be prompted to complete the Pre-Identified New Candidate Intake Request Form.

6. Add job distribution rules if necessary.

Result

The job is published, and the candidate displays on the **Pre-Identified** tab of the job.

Next Steps

If you pre-identified a candidate who already had a profile in VNDLY, they'll be applied to the job and added to the **Applicants** tab. If you completed a Pre-Identified New Candidate Intake Request Form, the applicable vendors will receive a notification and can apply the candidate to the job if desired.

Once applied, pre-identified candidates will have a **Source Type** of *Directed* on work orders, rather than *Supplier Sourced*.

Pre-Identify Candidates After Job Publish

Prerequisites

- Make sure the **Enable Pre-Identified Job** check box is selected (**More** > **Company Settings** > **Jobs & Work Orders** > **Job Applications**). You can also select the status that pre-identified candidates will have once applied.
- Make sure the **Accept Pre-Identified Candidates?** setting on the job is set to *Yes*.
  - You can change this setting from *No* to *Yes* after the job publish process via a job edit. However, you can't change it from *Yes* to *No*, in case pre-identified candidates are already applied to the job.
- Have the *job.pre_id.view* permission, which enables you to view the **Pre-Identified** tab on the job.

Context

With the pre-identify feature, you can invite candidates that match the requirements to apply to the new position. Note that pre-identifying candidates is optional and might not be relevant to your organization.

This topic explains how to pre-identify candidates after the job publish process. You can also pre-identify candidates during job publish, if you prefer. For more information, view Pre-Identify Candidates During Job Publish.

Steps

1. On the job, navigate to the **Pre-Identified** tab.

2. Apply an existing candidate or referral candidate. Consider:

Option	Description
Apply Existing Candidates	Use this option if you want to apply a candidate who has an existing profile in VNDLY. Click **Add**. Then, select the vendor and the candidate and click **Apply**.
Current Referral Candidates	Use this option if you want to apply a candidate who doesn't already have a profile in VNDLY. Click **Add Referral Candidate**, complete the form fields, then click **Add Candidate**.

Result

The candidates display on the **Pre-Identified** tab of the job.

Next Steps

If you pre-identified a candidate who already had a profile in VNDLY, they'll be applied to the job and added to the **Applicants** tab. If you added a referral candidate, the applicable vendors will receive a notification and can apply the candidate to the job if desired.

Once applied, pre-identified candidates will have a **Source Type** of *Directed* on work orders, rather than *Supplier Sourced*.

Bulk Updates and Uploads

Create Bulk Updates

Prerequisites

Have the *workorder.bulk.update* permission. See Reference: Bulk Updates Permissions .

Context

This topic explains how to initiate bulk updates using the **Bulk Update Wizard**.

Steps

1. From the header, select **More** > **Bulk Updates**.
2. Click **New Bulk Update**.
3. Select the module that you wish to update.
4. Use these filter options to select records for your bulk update:

Option	Description
Condition	When you use the **Any Of** condition, separate the values by pressing Enter.
Value	Can be auto-populated or free form.

5. Click **Next**.
6. From the **Select Update Action** prompt, select an action.

7. Click **Next**.
8. Add additional details to your bulk update.

   You can trigger workflow approvals for actions that have approvals configured. If approvals are triggered, each item associated with the bulk update will trigger approvals. Bulk updates don't trigger group approvals.

   If you selected *Add Checklists*, from the **Select Update Action** prompt, VNDLY automatically selects the **Adhere to Checklist Rules** check box. This ensures that VNDLY will only apply checklists to jobs or work orders that meet the criteria defined in the checklist rules. If you clear the check box, all selected checklists will be applied to all filtered jobs or work orders.
9. Click **Next**.
10. Preview your changes.
11. Click **Next**.
12. Click **Confirm Bulk Update**.
13. Click **Confirm**.

Result

When the wizard completes, you can view:

- A list of bulk updates.
- Details of the current bulk update.

Create Bulk Updates Using File Uploads

Prerequisites

Have these permissions.

- *workorder.update*
- *workorder.owned.update*
- *workorder.modifications.create*
- *workorder.owned.modifications.create*
- Any necessary field-level permissions. See Reference: Bulk Updates Permissions .

Context

You can update multiple fields across multiple work orders with 1 file upload. You select the fields to include and then VNDLY provides a dynamic file template to download.

You can add 1 work order per row of the file and can update 1 or more supported fields for each work order row. The only required field is the unique Work Order Identifier, which is always the first column of the template.

You can use this feature to bulk update these fields on work orders:

- **Additional Managers**
- **End Date**
- **Expense Approvers**
- **Location**
- **Organization Unit**
- **Program Team Users**
- **Resource Managers**
- **Start Date**
- **Timesheet Approvers**

The maximum file size is 10 MB.

Note: Note that you can only clear or delete specific fields. For more information, see the *D* option in the table below.

Steps

1. From the header, select **More** > **Bulk Updates**.
2. Click **New Bulk Update**.
3. Click **Bulk Update With File**.
4. (Optional) On the **Select Records** page, specify criteria for the records you want to update.
5. On the **Generate Template** page, select the fields you want to update.
6. Click **Generate Template** or **Export # records to file**.

   If you click **Generate Template**, VNDLY generates and downloads a comma-separated value (CSV) file where you can manually enter the work order IDs and field values for the work orders you want to update.

   If you click **Export # records to file**, VNDLY generates and downloads a CSV file that's automatically populated with work order IDs, fields, and field values based on the records you selected. Example: In step 4, you choose to update work orders in the *Active* status, and in step 5, you select **Start Date**. You have 111 work orders that meet this criteria, so the button displays as **Export 111 records to file**. When you click this button, VNDLY generates and downloads a template that includes the work order IDs and existing start date values for your 111 active work orders.
7. Enter your data into the CSV file.

   If you used the **Generate Template** button in step 6, row 2 of the file contains sample data in the correct format for each field. VNDLY doesn't process this row.

   For all fields that can have multiple values, the CSV file contains a corresponding update-type column. Valid values for update-type columns are:

Value	Description
A	Add the additional values to the work order.
R	Replace the values currently in the work order.
D	Delete or clear existing values for the fields. This option is only available for these fields: • **Timesheet Approvers** • **Expense Approvers** • **Program Team Users** • **Additional Managers**

   To find the values to enter into the supported fields on the CSV file:

Field	Source of Field Value
Any field that requires a user name	a. From the header, select **More** > **Users**. b. Click the user and copy the contents of the **Username** field.
Location	a. From the header, select **Company Settings** > **Organization** > **Locations**. b. From the **Code** column, copy the code for the location.

Field	Source of Field Value
Organization	a. From the header, select **More** > **Company Settings** > **Organization** > **Organization Hierarchy**. b. On the **Organization Hierarchy** tab, copy the code number for the organization unit.

8. Save the CSV file.
9. On the **Bulk Update With File** page, click **Next**.
10. Upload your CSV file.
11. Complete the task:

Option	Description
Require Approvals (if configured)	Select to require any configured approvals.
Disable Connectors	When disabled, your VNDLY bulk updates won't synchronize with Workday.

Note: These options are available to users who have the appropriate field-level permissions.

12. Click **Next**.
13. Review the information, and click **Next**.
14. Preview the first 100 rows for errors.

    If there are errors, correct the CSV file. Save and upload it again.

    In the preview, you can click any work order row to display the before and after values of all the fields that VNDLY will update.
15. Click **Confirm Bulk Update**.
16. Click **Confirm**.

Result

If any field updates fail, all changes for that worker order fail, but VNDLY continues to process the remaining work orders in the file.

Example

A company restructures an organization unit and moves a group of workers to a different organization unit. This impacts a work order that now needs multiple fields updated.

Next Steps

To access the bulk update results, from the header, select **More** > **Bulk Updates**. You can view details of each work order updated by clicking the bulk update. To access work orders, click the icon next to the number in the **Work Order ID** column.

Related Information
Examples
2025R1 Feature Release Note: Bulk Update Multiple Work Orders via File Upload

Concept: Bulk Updates

Bulk updates in Workday VNDLY enable you to modify multiple existing records simultaneously.

To access bulk updates, select **More** > **Bulk Updates**. Access to bulk updates is restricted by permissions, so check with your program team if the menu item is not available. See Reference: Bulk Updates Permissions .

You can initiate bulk updates using any of these methods:

Method	Description
Bulk Update Wizard	To modify a single field across multiple work orders. You select modules and records to update. You can also select a filter and preview records.
Work Order page	Select records to update.
File upload	To modify multiple fields with various values across multiple work orders. With this option, you can't delete a field value.

You can't perform bulk updates on canceled items as Workday VNDLY doesn't currently support editing fields on ended work orders.

Note: VNDLY disables approval requests when a tenant has Workday enabled to avoid impacting bulk actions.

Line Level Details

The **Bulk Updates** page displays the status of each update created in Workday VNDLY and whether the update triggered approvals. Information on each bulk update includes:

Option	Description
ID	The ID number associated with a bulk update.
Model	The type of bulk update. Example: Work Order.
Status	Options available: • Success • Failure • Partial Success This displays whether a bulk update worked, didn't work, or partially worked.
Description	Entered when bulk update is created.
Run Date	The time and date when a bulk update ran.
Completion Date	The time and date when a bulk update finished running.
Total Rows	The total amount of rows impacted by the bulk update.
Created By	The user in your tenant who initiated the bulk update.

Bulk Update Details

You can click any row on the **Bulk Updates** page to view more details about the update, including field values updated.

The **Updated Records** section displays information about the specific records in each update. In this section, you can:

- Use the **Show Errors Only?** toggle to only view records with errors.
- View the **Status** for individual records in the update. Statuses include:
    - *Pending*: The record is pending information before it can be updated. This can include awaiting necessary approvals or, for tenants integrated with Workday, needing details from the Workforce Connector.
    - *Ok*: The record was updated successfully.
    - *Error*: The record was unable to update.
- View the **Message** column for more details about the record's status, such as reasons for errors or changes requested for updates that need approval.

Bulk Update Custom Fields

You can bulk update VNDLY custom fields on work orders using CSV file upload. All types of custom fields are supported, such as drop-down, boolean, number. Workday custom fields are not currently supported using Bulk Update via File upload.

Users must have edit permissions for a custom field in order to bulk update it. To configure custom field permissions, navigate to **More** > **Company Settings**. Under **Foundational Data**, select **Custom Fields**. Locate the appropriate custom field, click **Edit**, and configure the client and vendor permissions.

When bulk updating custom fields, if a custom field is required on any work order form, you can replace but not delete a value. If conditional visibility is set on the work order form, then those conditions must be met in order for a user to bulk update the custom field.

If a custom field is configured to display on more than one form, only the value on the work order is updated by the bulk update.

Concept: Bulk Uploads

You can use bulk uploads to import or update large volumes of data, reducing time spent on data entry.

Workday VNDLY provides different types of downloadable templates. Use these templates to bulk create or update records, and then upload the files into VNDLY. Some bulk uploads are limited to record creation and replacement and don't update records.

To verify the success of a bulk upload and identify any errors, from the header, select **Reports** > **File Transfer Reports** .

Workday VNDLY File Import Specifications contains details about templates including:

- Locations.
- Field definitions.
- File formats.
- Required permissions.

Related Information
Examples
Workday Community: Workday VNDLY File Import Specifications

Reference: Bulk Update and Bulk Upload Comparison

Compare bulk updates and bulk uploads in Workday VNDLY.

	Bulk Update	Bulk Upload
Primary Purpose	To modify or update existing records, most commonly work order records.	To create new records in bulk or for initial data population.
Method	Initiate using 1 of these options: • **Bulk Update Wizard**. • **Work Orders** page. • File upload. With this option, you can't delete a field value.	Always requires uploading a file, typically in a preconfigured template format. Example: CSV.
Types of Data Modified or Created	• Work order fields. Example: **Organization Unit**. • Candidate custom fields. • Job fields. Example: **Reason for Hire**. • Worker profile fields. • Add checklist requirements to jobs and statement of work (SOW) roles. • Add checklist actions to contractors, work orders, and worker profiles. • Contractor work week start time and timekeeping settings. • Shifts. You can activate, deactivate, delete, and copy shifts in bulk.	• Candidates. • Vendors. • Locations. • Contractor work orders, which can be for new or existing contractors. • SOWs and related data. • Invoice payments. • Job templates. • Shift configurations. • Rate cards. • Organization hierarchy updates.
Track Results	From the header, select **More** > **Bulk Updates**.	From the header, select **More** > **File Transfer Reports**.
Approvals	You can configure bulk updates to trigger item-level workflow approvals but not group approvals.	Doesn’t trigger approvals.
Limitations	You can’t bulk update canceled items. Workday VNDLY doesn’t support editing fields on ended work orders.	Some bulk uploads are limited to record creation and replacement and may not update existing records.

Reference: Bulk Updates Permissions

The **Bulk Updates** task requires these permissions:

Permission	Required for
workorder.bulk.update	Access to the **Bulk Updates** task. To remove access to **Bulk Updates** for all, revoke this permission from all roles.

Permission	Required for
candidate.compensation.read	Data preview for the **Update Pay Rate** action.
workorder.read *worker_tracking.read*	Retrieving data to preview the records to be updated.
Any of these permissions: • *workorder.update* • *workorder.owned.update* • *workorder.modifications.create* • *workorder.owned.modifications.create*	Bulk updates using file uploads.

Granting Bulk Update Functionality to Non-Administrator Users

You can make bulk update work order functionality available to non-administrator users by granting those users the *workorder.update* or *workorder.modifications.create* (or less commonly, the *workorder.owned.update* or *workorder.owned.modifications.create*) permission. Use **Security Settings** on the **Company Settings** page to assign permissions to roles.

You must also grant users at least 1 field-level permission to perform specific bulk update actions. This gives you granular control over which bulk actions non-administrator users can perform.

Example: Users with the *workorder.update* permission and *workorder.end* permission only see the option to bulk end work orders instead of the full suite of bulk actions.

Required Field-Level Permissions for Bulk Update Actions

Users with any of the permissions that enable bulk updates using file uploads, must also have 1 or more of these field-level permissions to perform the corresponding bulk update actions:

Action	Bulk Action Permissions
Add Per Worker Profile and Worker Profile Work Order Checklist Actions	*worker_tracking.bulk.add_checklistactions*
Bulk Add Per Contractor and Per Work Order Checklist Requirements for Jobs/SOW Roles	*bulk_operations.jobs_roles.add_checklists*
Change Pay Rate/Markup/Bill Rate	*contractor.billrate.write*
End Work Order	*workorder.end*
Update Charge Codes	*field.charge_codes.write*
Update Custom Fields	Custom fields have individual security settings.
Update Default Location	*field.location.write*
Update End Date	*workorder.end_date.write*
Update Fee Profile	*workorder.fee_profile.write*
Update Organization	*field.organization_unit.write*
Update Program Team Users	*field.program_team_users.write*
Update Resource Manager	*field.resource_manager.write*
Update Shifts	*field.shifts.update*
Update Start Date	*workorder.start_date.write*

For instructions on adding permissions to user roles, see Add Permissions to a User Role in Settings.

Reference: Bulk Uploads

You can use the VNDLY downloadable templates to bulk create or replace these types of records:

Data	Access from Header	Permissions Required	Additional Details
Candidates	**People** > **Candidates**	• *candidate.bulk.create* To replace candidates where candidate replacement is supported. • *candidate.bulk.upload_apply.location* To enable vendors to assign location values when bulk applying candidates to a job.	
Contractors	**More** > **Company Settings** > **People** > **Bulk Upload Contractors**	• *budget.labor_amount.override* or *budget.write* • *checklistactions.add*	If you select the **Run Business Rules Validation for Active Work Orders** check box that displays on this bulk upload page, VNDLY validates fields for any *Active* work orders in the file once you click **Upload**. For example, VNDLY validates that each uploaded contractor has a resource manager with the correct security role. The results then display on the upload's **File Transfer Result** page (**Reports** > **File Transfer Reports** > **More Details**).
Invoice payments	**Invoices** > **Invoice Payments**		
Job categories	**More** > **Company Settings** > **Jobs & Work Orders** > **Job Categories**	*job_categories.bulk.create*	
Job templates	**Jobs** > **Job Dashboard**	*job_templates.bulk.create*	

Data	Access from Header	Permissions Required	Additional Details
Locations	**More** > **Company Settings** > **Organization section** > **Locations**	• *candidate.bulk.upload_apply.location* To enable vendors to assign location values when bulk applying candidates to a job. • *field.location.write* To bulk update locations.	
Organization hierarchies	**More** > **Company Settings** > **Organization** > **Organization Hierarchy**	• *field.organization_unit.write* To bulk upload the **Organization Unit** field on work orders • *organization_unit.create* To build the organization hierarchy.	
Rate cards	**More** > **Company Settings** > **Jobs & Work Orders** > **Rate Card**	*settings.admin*	
Shift configurations	**More** > **Company Settings** > **Timekeeping** > **Shifts**	• *shift.settings.edit* • *shift.settings.read*	
SOWs and related data	**More** > **Company Settings** > **Statement of Work** > **SOW Bulk Uploads**	None	
Vendors	**More** > **Vendors**	*vendor.bulk.upload* To bulk upload vendor users and companies.	

Related Information
Examples
Workday Community: Workday VNDLY File Import Specifications

Reference: Work Order Statuses for Bulk Updates

When you bulk update by uploading a .csv file, VNDLY only updates the work orders in supported statuses.

When you use the Bulk Update Wizard to initiate bulk updates, the wizard prompts you to select the work orders you want to update. VNDLY will only update work orders with a status supported for the bulk update action you choose. You can filter by status to display only work orders that you can update.

Bulk Update Actions	Supported Work Order Statuses	Updates to Workday when Connector is on	Field Level Permission for Bulk Update File Upload	Field Level Permission for Bulk Update Wizard
Add Checklist Actions	• Draft • Applied • Interviewing • Pending Offer Approvals • Client Offer Released • Pending Offer Acceptance • Verification in Progress • Active	No	• *checklistactions.add* • *checklists.read*	• *bulk_operations.jobs_roles.a* • *checklistactions.add*
Change Pay Rate/ Markup/Bill Rate	Active	Bill Rate only	*contractor.billrate.write*	• *bulk_operations.workorder.u* • *contractor.billrate.write*
End Work Order	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted • Client Rejected • Vendor Offer Declined • Vendor Withdrawn • Verification Failed You can update a work order while it is pending revision, provided it is in specific process states.	Yes	*workorder.end*	*workorder.end*
ReOpen	Ended	Yes	*workorder.reopen*	• *bulk_operations.workorder.r* • *workorder.reopen*
Update Additional Managers	All statuses	No	*field.resource_manager.write*	*bulk_operations.workorder.u* • *field.resource_manager.write*
Update Billing Cycle	All statuses except: • Ended	No	• *workorder.billing_cycle.write* • *workorder.billing_cycle.read*	• *bulk_operations.workorder.u* • *workorder.billing_cycle.write*

Bulk Update Actions	Supported Work Order Statuses	Updates to Workday when Connector is on	Field Level Permission for Bulk Update File Upload	Field Level Permission for Bulk Update Wizard
	• Cancelled • Job Closed • Draft Deleted			
Update Charge Codes	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	Yes	• *field.charge_codes.write* • *field.charge_codes.read*	• *bulk_operations.workorder.u* • *field.charge_codes.write*
Update Custom Fields	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	Worker Type only	Clients and vendors require .read and .write permissions when there are custom fields that are restricted.	*bulk_operations.workorder.update_*
Update Default Location	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	Yes	• *field.location.write* • *field.location.read*	• *bulk_operations.workorder.u* • *field.location.write*
Update End Date	Active	Yes	• *workorder.end_date.write* • *workorder.end_date.read*	• *bulk_operations.jobs.update_* • *workorder.end_date.write*
Update End Reason	Ended	Yes when using the Bulk Update Wizard No when updating by file upload.	None	*bulk_operations.workorder.update_*
Update Expense Approver	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.expense_approver.write* • *field.expense_approver.read*	• *bulk_operations.workorder.u* • *field.expense_approver.write*
Update Fee Profile	Either of: • Active • Accepted	No	• *workorder.fee_profile.write* • *workorder.fee_profile.read*	• *bulk_operations.workorder.u* • *workorder.fee_profile.write*

Bulk Update Actions	Supported Work Order Statuses	Updates to Workday when Connector is on	Field Level Permission for Bulk Update File Upload	Field Level Permission for Bulk Update Wizard
Update Formula Group	Active	No	• *field.formula_group.write* • *field.formula_group.read*	• *bulk_operations.jobs.update_* • *field.formula_group.write*
Update Organization	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	Yes	*field.organization_unit.write*	• *bulk_operations.workorder.u* • *field.organization_unit.write*
Update Overtime Profile	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.overtime_profile.write* • *field.overtime_profile.read*	• *bulk_operations.workorder.u* • *field.overtime_profile.write*
Update Premium Rate	Either of: • Active • Accepted	No	• *field.premium_rate.write* • *field.overtime_profile.read*	• *bulk_operations.workorder.u* • *field.premium_rate.write*
Update Program Team Users	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.program_team_users.write* • *field.program_team_users.read*	• *bulk_operations.workorder.u* • *field.program_team_users.wr*
Update Reason for Hire	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.reason_for_hire.write* • *field.reason_for_hire.read*	• *bulk_operations.workorder.u* • *field.reason_for_hire.write*
Update Resource Manager	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.resource_manager.write* • *field.resource_manager.read*	• *bulk_operations.workorder.u* • *field.resource_manager.write*
Update Select Fields	All statuses except:	Standard Hours only	None	*bulk_operations.workorder.update_*

Bulk Update Actions	Supported Work Order Statuses	Updates to Workday when Connector is on	Field Level Permission for Bulk Update File Upload	Field Level Permission for Bulk Update Wizard
	• Ended • Cancelled • Job Closed • Draft Deleted			
Update Shifts	Active	No	• *field.shifts.update* • *workorder.modifications.shifts_bulk.create*	• *bulk_operations.workorder.u* • *field.shifts.update*
Update Start Date	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *workorder.start_date.write* • *workorder.start_date.read*	• *bulk_operations.workorder.u* • *workorder.start_date.write*
Update Tax Override	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	*workorder.tax.update*	• *bulk_operations.workorder.u* • *workorder.tax.update*
Update Timesheet Approvers	All statuses except: • Ended • Cancelled • Job Closed • Draft Deleted	No	• *field.timesheet_approver.write* • *field.timesheet_approver.read*	• *bulk_operations.workorder.u* • *field.timesheet_approver.wri*
Update Work Type Profile	Active	No	*workorder.worktypeprofile.update*	• *bulk_operations.workorder.u* • *workorder.worktypeprofile.u*

Tenure

Create Tenure Policies

Prerequisites
Have the *admin.settings.tenure_policy.read* and *admin.settings.tenure_policy.write* permissions.

Context

Tenure policies are used for managing and complying with various federal and state rules. You can create 1 or more tenure policies as needed for different countries, job categories, and so on. Example: You can have 1 tenure policy for contractors working in the United States and another tenure policy for contractors working in the United Kingdom.

The first tenure policy that you create is the default policy that applies to all contractors unless they match on a created tenure rule.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Tenure Policy**.
3. Verify that the box for **Tenure Policy is applicable** is checked.
4. Click **Create Tenure Policy**.
5. Check the box for 1 or more **Monitored Tenure Types**, and enter the threshold for each selected.
6. Finish configuring details on break in service, violations, and hour calculations.
7. Click **Save**.

Result

A verification window displays with this message: *Tenure setting changes require up to 24 hours to take effect. This includes contractor tenure calculations*.

Create Tenure Rules

Prerequisites

- Have the *admin.settings.tenure_policy.read* and *admin.settings.tenure_policy.write* permissions.
- At least 2 tenure policies must exist.

Context

Tenure rules enable you to set pre-identified specifications for when a tenure policy should be applied to a contractor. You can create tenure rules for one or more of these criteria:

- Country
- Region
- Location
- Organizational Unit
- Job Category
- Job Title
- Vendor
- Module

Example: if you have different tenure requirements for contractors in the UK and the United States, you could create a tenure rule to assign contractors to a tenure policy based on their location.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Jobs & Work Orders**, click **Tenure Policy**.
3. Select the **Rules** tab and click **Create Tenure Rule**.
4. Enter the **Tenure rule name**.

5. Enter one or more **Criteria**.
6. Select the tenure policy that the rule should apply to.

Update Contractor Tenure Policies

Prerequisites

At least 2 tenure policies must exist.

Context

You might need to assign a different tenure policy to a contractor. Example: If you created a new tenure policy for a particular job category, such as Technology, you can assign this tenure policy to contractors as needed. You can use Tenure Rules to assign a tenure policy automatically during onboarding.

Tenure tracing is tied to an individual's **Master Worker Record**. If a worker has worked for multiple vendors and their **System Unique IDs** match and tie them to the same **Master Worker Record**, then tenure calculations are done across vendors.

Steps

1. Navigate to the **Contractors** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Contractors** drop-down menu.
2. Open the appropriate contractor.
3. Under **Quick Links**, click **View Tenure Status**.
4. Click **Edit**.
5. Select the appropriate **Tenure Policy** from the drop-down.
6. Enter a new **Tenure Start Date** if necessary.
7. Update the **Pre-VNDLY** and **Policy Allows** values as necessary.
8. Enter one or more **Revision Comments**.

   These display in the **Activity Log**.

Charge Codes

Concept: Charge Codes

Charge codes in Workday VNDLY provide detailed information about financial entries in time, expenses, adjustments, and Statements of Work (SOW). You can use a charge code to set up an accounting code structure to track and report on contingent labor spending. This ensures that funds are allocated to the correct areas for later identification during invoicing. Example: If your organization uses a cost center to track all expenses for a department, you can set up a charge code in VNDLY to manage the expenses tied to that cost center.

You can configure a charge code to display on:

- Jobs
- Work Orders (extended workforce management and work profile management)
- Statement of Work (settings)
- Statement of Work (roles and payments)
- Timesheets

- Expenses
- Miscellaneous adjustments

A worker can allocate time and expenses against different charge codes.

Accounting Codes

An accounting code in VNDLY refers to the financial structures used to track fees and invoice line items. It is an alphanumeric string or set of segments, such as cost center or GL accounts, that are used to allocate financial responsibility for contingent labor spend.

The term accounting code is often used interchangeably with the term charge code, but they are different. Charge code is a configurable feature in VNDLY while accounting code describes the output or the specific field in the user interface.

Accounting codes in VNDLY enable the separation of program fees from labor costs. If an invoicing program uses a strategy of splitting fees from the supplier amount, an administrator can configure the system to charge all fees to a different accounting code than the one used for a supplier's labor amount.

You can import accounting codes from an external system through an API or a bulk upload to ensure VNDLY aligns with your organization's financial system of record.

HCM Charge Codes

HCM charge codes are specific organization types that are imported from Workday HCM into VNDLY to function as charge codes for cost allocation. They specifically refer to standard and custom organizational structures synced from Workday to ensure financial and organizational alignment between the two systems.

When configuring the Workday Connector, you can map these standard HCM organization types to VNDLY charge codes:

- Cost Center
- Company
- Region
- Business Unit
- Project
- Program

You can also load custom organizations defined in Workday into VNDLY as charge codes.

HCM charge codes are often required when creating a position or contracting a contingent work to ensure the worker is tied to the correct organization, such a specific cost center or region that exists in Workday.

Concept: Charge Code Tables

A charge code consists of two tables:

- Charge code type which is an accounting table that combines values from each source table.
- Source table that stores data for each segment.

A customer might have an accounting code combination of cost center and GL codes. The cost center and GL codes are treated as individual source tables and their values are stored in the source tables section of the charge code. The charge code section combines the values together. A user can then select the data in different workflows such as jobs and work orders.

Examples of Charge Code Tables

VNDLY supports single-column or multiple-column charge code tables. You can use a name for the charge code table that that fits with the naming convention of your accounting structure.

A customer might have a charge code combination of cost center code and cost center name. There are two columns in the charge code table and there is a 1-to-1 mapping of each cost center code to each cost center name. The accounting table has a complete list of combinations of cost center code and cost center name. These appear in a Cost Center Code prompt that a user can select from when opening a new job.

Another example of charge code table can be structured around a project and a task that aren't related, which means there is no 1-to-1 mapping. There are 2 separate charge code tables: 1 for project and 1 for task. A worker can select a project and associate it to a timesheet for example. When a manager opens a job, they can select charge code values from 2 different prompts: 1 for project and 1 for task.

Charge Codes Setup

During your VNDLY implementation, consultants set up charge codes in your tenant based on your specific accounting structure and how it maps to these codes. Functional consultants use a requirements spreadsheet to gather requirements. They must know how your users need to interact with charge codes within VNDLY, particularly regarding invoices. This ensures the accurate and correct setup of the charge codes.

Implementers decide the appropriate method to load data into charge code tables:

- Ongoing uploads using the Upload button.
- Ongoing integration using sFTP.
- Manual maintenance through the UI.

The PMO team monitors and maintains charge codes after they are created.

Comparison of Source Table and Accounting Tables

To understand the composition and purpose of source tables and accounting tables, consider:

Source Table	Accounting or Workday Combination Table
The table holds data for a single costing segment such a Cost Center.	The table has data for all elements needed to describe a unique combination such as Cost Center and Company.
The data comes from an external source. Examples: Workday organizations, financial systems, or manually entered data in VNDLY.	The data comes from selecting individual source segments in VNDLY and combining them to form a unique combination on either Expense, Job, SOW, Timesheet, Work Order, or Worker Profile.
An existing value can be marked as inactive or ineligible in the UI or by a feed from a source system.	Combination values are always active.
A source table can hold combined or related data. Example: Cost Center and Company Data that helps in selection from the UI. Inactivating a row in this scenario only inactivates the specific relationship.	Combination values are always active. Inactivating a source value has no effect on a selected combination.
Names and descriptions of columns in the source table can be updated in the UI or through a feed from a source system.	Names and descriptions of columns are only set or refreshed when the combination is created or edited on an object such an Expense, Job, SOW, or Work Order.

Concept: Changing Charge Code Combinations

Changing the structure of a charge code or the underlying allocation system, such as Workday Financials, SAP, Oracle, Coupa, or Ariba can significantly impact VNDLY processes and data. Because of this, only VNDLY Professional Services can change the design or structure of a charge code. In addition, the sensitive nature of financial data and the complexity of migrating charge codes necessitates Professional Services engagement.

Requirements

Changing a charge code requires:

- Charge code migration of existing data from job, work order, SOW, time, and expenses.
- New invoicing requirements that might necessitate invoice file updates.
- Updates by development to custom developed invoices.
- Updates by development to custom reports that use charge codes for fields, filters, and parameters.

Impacts

To understand the impact of changing a charge code, consider:

Charge Code Touchpoint	Where Assigned or Used	Effect of Change
Jobs	Assigned at creation	Migration of existing data
Work Orders	Maintained on work order	Migration of existing data
Time entry	Logged against	Migration of existing data
Expenses	Logged against	Migration of existing data
Invoices	Flow to invoice	Changes to invoice structure from new requirements
Financial systems	Traced for cost allocation	Updates required
Resource managers	Can be linked to charge code	Updates required
Reporting (VNDLY)	Used to track spending	Custom reports that use charge codes need updates

Process

Charge code migration includes multiple phases, beginning with initial requirements and ending with production deployment.

To understand the phases in the migration process, consider:

Phase	Steps
Requirements Gathering and Analysis This phase determines the scope and complexity of the change.	• Determine Key Field Changes: Identify if the customer is adding or removing fields that relate to the uniqueness of a charge code combination (the key fields). • Identify Usage: Determine if the charge codes are used in timesheets and/or expenses, as these require specific migration steps. • Identify Customizations: Catalog all custom developed invoices and reports that reference existing charge code segments to ensure they are updated.
Configuration and Development This phase involves applying the new configuration and making required updates.	• Make Configuration Changes: Apply the new charge code configuration through the Workday Only Administration Tool (for VNDLY configuration). • Update Reports/Exports: Identify and update any reports or exports using the changed fields. • Update Invoice Display: Update the invoice line item display name if the field was used in the Charge Code display name. • Development Updates: Update custom developed invoices to accommodate the new structure.

Phase	Steps

Migration and Script Execution
 	
This phase involves migrating existing data to the new structure, often requiring the use of specific scripts and management commands.
 	
See the Decision Flow for details of the nature of the change.
	• Request Mapping Files: Request mapping files for the following instances as needed:
	  ◦ All but closed and canceled jobs.
	  ◦ Work orders.
	  ◦ Statement of work (settings and unit payments).
	  ◦ Time and expenses (if these are open assignment and not restricted by work order).
	• Work Orders and Jobs Migration: VNDLY migrates the identified jobs, work orders, and SOWs using migration commands and the provided data files.
	• Time and Expense Migration:
	
	These migrate based on the work orders and jobs when the charge codes for time and expenses are restricted based on the work order. Otherwise, these migrate separately,
	• Statement of Work Migration: The SOW migration is complex and requires assistance from Product & Technology.

Testing and Validation Thorough testing is crucial to ensure data integrity and system functionality.	• Unit Testing: Test the new charge Code Configuration and updated customizations. • Integration Testing: Verify data flow between VNDLY and the Financial System (such as Workday Financials or SAP) using the new Charge Code structure. • User Acceptance Testing (UAT): Business users must validate that existing data (migrated Jobs, work orders, time, expenses) functions correctly and that new Invoices and reports are accurate.

Decision Flow

The decision flow shows the steps of the migration based on the nature of the change.

Decision: Are you seeking to change Financial Systems or capture additional attribures for existing charge code combinations?

- Yes (System Change) Decision: Is you current invoice (if you are using VNDLY invoicing) a custom developed invoice?

  When the answer is Yes to any of these questions, a migration is required:

Are these additional attributes key fields?
Does this materially alter selection?
Are new tables being added?
Is an integration required to import these attributes?
Are there additional attributes that must be transmitted in downstream integrations?

- No (Additional Attributes) Decision: Is you current invoice (if you use VNDLY invoicing) a custom developed invoice?

  When the answer is No, then only new description columns are added to the charge code.

Role of Professional Services

You can expect Professional Services to perform these steps:

- Scripting and Data Migration: The migration of existing data in jobs, work orders, SOWs, timesheets, and expenses requires specialized scripts and management commands that only Workday VNDLY technical consultants can execute.
- Invoice and Report Development: Custom developed invoices and reports must be updated by development resources who know the VNDLY codebase and report structure.
- Risk Mitigation: Professional Services teams ensure a controlled, systematic migration process to minimize errors, especially those that could arise from key field changes in the charge code combination.
- P&T Engagement: Certain activities, such as migrating expenses (if no script is available), require direct engagement with the Product & Technology (P&T) team, and Professional Services typically coordinates this engagement.

Depending on the complexity of the change and the volume of data, the number of hours required of Professional Services can range from 40 to 60 hours for a simple charge code migration to 100 to 160+ hours for a complex charge code migration.

Reference: Flow of Charge Codes

The flow of charge codes in areas of VNDLY follows this order:

Area	Description
Jobs	The Job Form is the first form in VNDLY where a Resource Manager or PMO enters a new job and associates one or more charge codes to the job.
Work Orders	A charge code specified on a job automatically carries over to the work order. When a work order is created from a job, the default charge codes carry over from the job to the work order.
Timesheets	Timesheet configurations can vary from those on a job and work order. Depending on customer needs, there can be additional charge codes specified at the work order level. Customers have the option to not restrict the charge code values that users can select on a timesheet, based on the work order.
Expenses	The expense configuration is typically the same as the charge code configuration for job and work order. Customers have the option to not restrict the charge code values that users can select on expenses, based on the work order.
Miscellaneous Adjustments	Charge code can't appear on Miscellaneous Adjustments, particularly those that don't have a work order. See Create Miscellaneous Adjustments.
SOW and SOW Payments	The SOW configuration is typically the same as the charge code configuration for job and work order. For SOW payments, they are assigned to charge codes at the SOW level when you create the specific payment type: fixed price, milestone, or unit. See Allocate Statement of Work Budgets Using Charge Codes and Approve Unit Payment Request for Statement of Work.
Invoicing	When a timesheet or expense is approved, the associated charge code that's linked to the timesheet or expense is linked to the generated invoice line item. This means that the charge codes on a job or work order do not impact or link to the charge codes assigned to an invoice line item. When there are specific charge codes that appear on a work order but not on a timesheet, it's possible to carry these over to an invoice report outside of the invoice transaction. You can display charge codes in PDF and Excel invoice files.

Timesheets

Concept: Timesheets

You can access timesheets by selecting **Timesheets** > **Summary** from the header. The **Timesheets Summary** page houses active timesheets. Resource managers can view all timesheets submitted by contractors that report to them.

Timesheet Types

There are 3 main timesheet types:

- **Summary**
- **Time In/Out**
- **Clock & Assign**

You can configure one or more of these timesheets types within the same tenant. You can configure timekeeping settings from the header by selecting **More** > **Company Settings** > **Timekeeping** > **Timekeeping**.

For reporting, the **Timesheet dataset** includes the **timesheet type** assigned to a contractor. The **Timesheet Summary** dataset refreshes at 00:35 AM, 6:35 AM, 12:35 PM, and 6:35 PM EST. The processing times can vary.

Summary Timesheets

Summary timesheets enable contractors to enter the numbers of hours or days they worked. VNDLY allocates this time against the appropriate charge code. Exact clock in and clock out times are not required. With this timesheet type, hours or days and allocations remain as two distinct datasets. This timesheet allows entries for previous weeks. You can also:

- Enter hours in a decimal format, such as 8.5 hours.
- Enable the shift functionality with a manually-allocated timesheet.

For more information about entering time in hours or days on **Summary** timesheets, see Concept: Units of Time Entry for Summary Timesheets .

Time In/Out Timesheets

Time In/Out timesheets enable contractors to enter the specific times they clocked in and out for a work period. They can then assign the captured time against charge codes at a later point. Similar to **Summary** timesheets, hours and allocations remain as two distinct datasets. You can utilize the **Break** option for meal breaks. In Workday Mobile, time entry is limited to the current day.

Clock & Assign Timesheets

Clock & Assign timesheets enable users to capture exact time punches and pair them with allocations at the point of time entry. Users can split time across workweeks without moving between timesheets. With this timesheet type, hours and allocations are associated in one dataset.

Clock & Assign timesheets:

- Apply holiday premiums and other premiums to specific hours worked, even when the time is outside a full calendar day.
- Simplify the process of adjusting the workweek start time.
- Support complex compensation strategies, such as orientation hours.

- Support hour-based overtime start times.

Timesheets

The **Timesheets** page allows resource managers to view and manage timesheets submitted by contractors. You can access this page from the header by selecting **Timesheets** > **Summary**. On the **Timesheets** page, you can select these options:

Option	Description
Upload	Enables you to upload a timesheet
Upload Notes	Displays imported and exported files within the **File Transfer Reports** section for your review, including details like: • The outcome • File types • Transfer details
Pending Approvals	Displays weeks with timesheets pending approval. Displays all timesheets needing approval for the week you select.
Download	Downloads all filtered timesheets in any status except *Not Started*.

You can filter the timesheets that display in the list using these options:

Option	Description
Work Period	Indicates the 7-day time period for which you wish to view timesheets. Example: Monday - Sunday. The options available for selection depend on your configuration.
Date Range	Enables you to select the timesheet week you want to view.
Search	Enables you to narrow the timesheets that display by Contractor name, IDs, or Vendor name.
By Status	Enables you to narrow your search by the timesheet status: • Saved • Submitted • Approved • Rejected • Unsubmitted • I Can Approve

You can select the checkbox next to one or more timesheets to approve or reject them in bulk.

Timesheet Summary

The **Timesheet Summary** page allows users to view, enter, and manage time for specific work orders. You can access this page from the header by selecting **Timesheets** > **Summary** > **Go To Timesheet**. The top of the page provides action icons to manage the timesheet record. On the **Timesheet Summary** page, you can:

Option	Description
Print Timesheet	Enables you to print the timesheet if you need a hard copy.
Download Timesheet	Saves a copy of the timesheet to your computer as an .xls file.
Add Attachment	Enables you to attach any time-based evidence needed. Example: A paper timesheet loaded into the system.
Add/View Notes	Adds a note to the timesheet as a freeform field.
Adjust	Modifies a timesheet.
Reject	Rejects the timesheet and you must provide a reason for the rejection.
Approve	Approves the timesheet to go to invoicing.
Remind Approvers	This only displays if the status is Submitted. Enables you to remind the approvers to review the timesheet.
Copy Previous	Copies timesheet information from a previous week into the selected week.
Cancel	Cancels any changes made to the timesheet.
Save	Saves any edits to the timesheet.
Submit	Submits the timesheet for approval.

Mobile Timesheets

To enter time on their mobile devices, users can log in to VNDLY on their mobile browser. VNDLY automatically resizes the **Clock & Assign** and **Monthly** timesheet types. You must enable Mobile Timesheets to automatically resize the **Legacy** and **Time In/Out** types. To enable Mobile Timesheets, submit a product support case.

For **Clock & Assign** and **Time In/Out** in **More** > **Company Settings** > **Timekeeping** > **Contractor Timekeeping Settings**:

- Select the **Vendor time in/out must equal current time and cannot be edited** setting to restrict vendors from entering time outside the current day. Vendors can still allocate any time that has been entered.
- Select the **Contractor time in / out must equal current time and cannot be edited** setting to restrict contractors from entering time outside of the current day. Contractors can still allocate any time that has been entered.

Related Information
Examples
The Next Level: Feature Adoption Presentation on Timekeeping Settings

Set Up Timekeeping Setting Defaults

Prerequisites

You must have these permissions to view and edit timekeeping settings:

- *timekeeping.settings.read*
- *timekeeping.settings.write*

Context

Workday VNDLY administrators can set up default values for timekeeping settings that apply universally to all work orders within the tenant. These defaults ensure consistent settings when contractors submit their time. When a contractor is onboarded to a new work order, their timesheet inherits these defaults if there are no specific timekeeping setting rules for that work order.

Contractor Timekeeping Settings are stored on the contractor profile, and any changes you make are applied to future contractors. Settings in other sections apply automatically to existing and future work orders and timesheets.

Settings marked with a gray icon are eligible for use in new rules. Settings with a blue icon indicate that at least 1 active rule uses that setting.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. As you complete the **Contractor Timekeeping Settings** section, consider:

Option	Description
Timesheet Type	Indicate whether you wish to have contractors enter time for each day using: • *Summary* • *Time In/Out* • *Clock & Assign* Selecting *Time In/Out* or *Clock & Assign* displays additional options.
Timesheet Classification	If you select *Manual*, you can modify these additional timesheet fields: • **Show Premium Rates on Timesheet** • **Block Timesheet if Overtime Insufficient**
Week Starts at Time	The time that the contractor's work week should start.
Show Premium Rates on Timesheet	Indicate whether you wish to display the shift premium rates selection box on the timesheet. This field only displays if you selected a **Timesheet Classification** of *Manual*.
Block Timesheet if Overtime is insufficient	This field only displays if you selected a **Timesheet Classification** of *Manual*. Indicate whether you wish to prevent contractors from submitting timesheets with insufficient overtime logged. Example: A contractor has a profile that enables them to enter overtime after they work 40 hours in 1 week. If they try to enter 48 hours of regular or non-overtime hours,

Option	Description
	VNDLY requires the contractor to reallocate the additional 8 hours.
Disable Time import Validations	Indicate whether you wish to disable time validations. If you select this check box, imported time sheets become read-only and you can’t make changes. We recommend you use this setting if you’re capturing and classifying time outside of VNDLY.
Week Starts on Day	The day of the week that the contractor's work week should start.

4. As you complete the **Timesheets** section, consider:

Option	Description
Unit of Time Entry	This field only displays if you selected a **Timesheet Type** of *Summary* and a **Timesheet Classification** of *Manual*. Indicate if you want to enable workers with a *Daily* pay type to enter time in *Hours* or *Days*. For more information, view Concept: Units of Time Entry for Summary Timesheets.
Partial Day Entry	This field only displays if you selected a **Unit of Time Entry** of *Days*. Indicate the values that users with a *Daily* pay type can enter on their timesheets: • *Only Allow Whole Days*: Entries can include 0 or 1 days. • *Allow Half Days*: Entries can include 0, 0.5, or 1 days. • *Allow Quarter Days*: Entries can include 0, 0.25, 0.5, 0.75, or 1 days. For more information, view Concept: Units of Time Entry for Summary Timesheets.
Approval Strategy	Enables you to configure approvals for both work order and workflow approvals.
Manager is not a Time Approver	When checked, the resource manager from the work order isn't a time approver by default and must be added to a workflow approval rule as one if necessary.
Zero Hour Requires Approval	When checked, timesheets submitted with zero hours must be approved.
Allow Bulk Approvals	When checked, approvals can be completed for more than 1 timesheet at a time.
Message of the Day	Enter a freeform message to display on timesheets.

Option	Description
Allow Vendors to View Timesheets	When checked, vendors can view timesheets.
Allow Vendors to Upload Timesheets	When checked, vendors can upload timesheets.

5. As you complete the **Time Adjustment & Submission** section, consider:

Option	Description
Allow the Program Team to Adjust Timesheets	When checked, the program team is able to adjust timesheets.
Program Team Adjustment Tolerance in Weeks	This field only displays if the box for **Allow the Program Team to Adjust Timesheets** is checked. Indicates the number of weeks after the timesheet week that a submitted timesheet can be modified..
Program Team Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted.
Allow Contractors to Adjust Timesheets	When checked, contractors are able to adjust timesheets.
Contractor Adjustment Tolerance in Weeks	This field only displays if the box for **Allow Contractors to Adjust Timesheets** is checked. Indicates the number of weeks after the timesheet week that a submitted timesheet can be modified.
Contractor Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted. Example: If you enter 2, a contractor who works on the first week of the month will have until the end of the third week to submit their timesheet.
Allow Vendors to Adjust Timesheets	When checked, vendors are able to adjust timesheets.
Vendor Adjustment Tolerance in Weeks	This field only displays if the box for **Allow Vendors to Adjust Timesheets** is checked. indicates the number of weeks after the timesheet week that a submitted timesheet can be modified.
Vendor Submission Tolerance in Weeks	Indicates the number of weeks after the timesheet week that a timesheet can be submitted.

6. Configure the remaining sections: **Timesheet Reminder**, **Timesheet Notifications**, and **Timesheet Custom Fields.**

7. Configure **Lock Out Settings**.

   The **Global Lock Date** must be the date before the first date that workers can enter time, which ensures that no time is entered before the Go Live date. Example: Monday, January 3 is the go live date and no time should be allowed before. You would enter January 2.

Related Information
Examples
The Next Level: Feature Adoption Presentation on Timekeeping Settings

Create Timekeeping Settings Rules

Prerequisites

You must have these permissions to view and edit timekeeping settings:

- *timekeeping.settings.read*
- *timekeeping.settings.write*

Context

Workday VNDLY administrators can customize timekeeping settings by creating rules based on various work order criteria. Custom rules enable you to diversify timekeeping settings to match unique or complex business needs.

Example: You create a rule using the Location criteria, so any contractor on a work order in California must use the Timesheet Classification type of Time In/Time Out.

When multiple timekeeping setting rules apply to a work order, Workday VNDLY merges and applies all defined settings. If conflicting configurations exist, Workday VNDLY prioritizes the settings from the most specific setting value.

Custom timekeeping setting rules override default values. While there's no limit on the number of rules you can create, Workday VNDLY recommends creating only what's necessary to avoid conflicts between rules.

Any changes you make to rules won't retroactively impact existing or past work orders. Changes will only affect future work orders.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. On the **Rules** tab, click **Create**.
4. Click **Add Criteria** and select the eligible criteria that should trigger the rule.
   - You can only add 1 criteria from each criteria group.
   - Example: From the **Job** criteria group, you can select either **Job Category** or **Job Template** criteria.
5. For each criteria you add, select which values to use.
   - You can add multiple values for each criteria.
   - Example: You add the **Country** criteria and specify **Canada** and **United States** as criteria values.
6. Click **Add Configuration**. You can add multiple configurations.
7. For each configuration you add, specify which values to use.

   Example: You add a configuration for **Timesheet Type** and specify **Summary** in the **Timesheet Type** field.

Related Information

Examples

The Next Level: Feature Adoption Presentation on Timekeeping Settings

Change Contractor Timekeeping Settings

Prerequisites

You must have these permissions to view and edit timekeeping settings on contractor profiles:

- *contractor.timekeeping_settings.read*
- *contractor.timekeeping_settings.write*

Context

When a contractor is onboarded to a new work order, timekeeping setting values that apply to that work order are saved on the contractor profile. If there are no timekeeping setting rules for the work order, Workday VNDLY applies default settings.

The timekeeping setting values for the new work order must align with any existing settings on the contractor profile for that time period. If there are conflicts between the contractor profile values and the work order settings, Workday VNDLY displays an error message, preventing the contractor from being onboarded to the work order. To proceed, you must update the timekeeping settings on the contractor's profile to match the settings on the work order.

Changes to the contractor timekeeping settings will affect all work orders they're assigned to during that period.

Steps

1. Navigate to the **Contractors** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Contractors** drop-down menu.
2. To access the contractor profile, click the name of the contractor.
3. In the **Contractor Timekeeping Settings** section, click **Schedule Change**.

   To edit a scheduled change, click the square line icon in the appropriate row.
4. Select the **Effective Start Date** and **Effective End Date**.

   - The start date is restricted to the same start date of the week as the **Week Starts on Day**.
   - You can schedule changes for periods of time when the contractor has a work order in **Active** or **Ready to Onboard** status.
   - You can't schedule changes for periods of time when the contractor already has a timesheet in **Submitted** or **Saved** status. You must move these timesheets to a **Draft** state before you can save changes.
5. Make changes to the settings.

   The only setting that you can't change is the **Week Starts on Day**, which is set for a contractor during their initial work order.
6. Click **Schedule Change**.

Track Time on a Clock and Assign Timesheet

Context

The Clock and Assign timesheet type enables users to capture exact time punches and pair the time punches and allocations at the point of time entry. Contractors can also enter time across work-week boundaries with or without being aware of the exact work-week start and end times. Example: A contractor clocks in at 10pm on a Sunday evening and works until 4am on Monday morning; the hours are allotted to the appropriate work weeks automatically.

The clock and assign timesheet gives the ability to view all time punches at-a-glance over the entire workweek. Each time punch displays on the timesheet as a block on the appropriate work day and time.

Steps

1. Navigate to the **Timesheets** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Timesheets** > **Timesheets** drop-down menu.
2. Click **Go to Timesheet**.
3. Click **Clock In**.
4. As you assign time, consider:

Option	Description
Use Previous Assignment	We auto-populate fields from your last time assignment.
Work Order	Select the work order to associate the time punch with.
Work Type	We display options based on the configurations on the **Manage Work Type Profiles** page.
Shifts	Administrators configure the shift options for applicable roles.
Charge Codes	We display options based on the selected work order.

5. Click **Assign** to save the allocation.

   You can click **Assign Later** to complete the required fields at a later time. When you're ready to update, click **Assign** on the time punch.
6. As you track time, consider:

Option	Description
Switch Assignment	Ends the current **Working Timer** and starts a new **Working Timer**. Example: If a contractor was assigned to work on Work Order 1 for the first half of their shift and Work Order 2 for the second half of their shift, they would click **Switch Assignment** to begin tracking time on work order 2 and enter the appropriate details.
Break	Pauses the **Working Timer** and starts the **Break Timer**. You're prompted to enter the **Work Type**. When you click **End Break**, the **Working Timer** starts again.

7. Click **Clock Out**.
8. Click **Submit**.

   Submit your timesheet once you have tracked all time for the week.

Concept: Units of Time Entry for Summary Timesheets

In **Timekeeping Settings**, you can configure the **Unit of Time Entry** setting if your program uses manual *Summary* timesheets. With this setting, you can enable contractors with a *Daily* pay type to enter time in either *Hours* or *Days*. Contractors can only enter time in one of these units; they can't enter time in different units across timesheets. To use this setting, the **Timesheet Type** must be set to *Summary*, the **Timesheet Classification** must be set to *Manual*, and workers must have a **Pay Type** of *Daily*.

Entering Time in Hours

If the **Unit of Time Entry** setting is set to *Hours*, contractors can enter time in hourly units. For example, a contractor's timesheet for the week could include:

- Monday: *8 hours*
- Tuesday: *7.5 hours*
- Wednesday: *7 hours*
- Thursday: *8 hours*
- Friday: *5 hours*

Overtime and shifts are supported for contractors entering time in hours. Workers with a **Pay Type** other than *Daily*, such as *Weekly* or *Hourly*, also enter time in hours.

Entering Time in Days

If the **Unit of Time Entry** setting is set to *Days*, contractors can enter time in daily units. The available daily units depend on your **Partial Day Entry** setting configuration:

- *Only Allow Whole Days*: Entries can include 0 or 1 days.
- *Allow Half Days*: Entries can include 0, 0.5, or 1 days.
- *Allow Quarter Days*: Entries can include 0, 0.25, 0.5, 0.75, or 1 days.

For example, a contractor's timesheet for the week could include:

- Sunday: *0.00 days*
- Monday: *1 day*
- Tuesday: *0.75 days*
- Wednesday: *1 day*
- Thursday: *1 day*
- Friday: *0.25 days*
- Saturday: *0.00 days*

If your program configures time entry in days, VNDLY ensures that daily rate proration is calculated linearly. For example, if a worker's daily rate for 1 day is $700, then their daily rate for 0.5 day is $350.

Overtime and shifts are not supported for contractors entering time in days.

Set Up Calendar-based Premium Pay

Context

Calendar-based premium pay enables you to display holidays on a timesheet. You can also configure these dates to include a rate differential as needed. Example: If your contractors receive time and a half for holidays, you could add New Years Day to the US Holiday calendar and configure the **Calendar Pay Profile** to calculate the pay rate with a **Type** of* *Rate Differential* and a **Rate Differential** of *1.5*.

If you only want to display the holiday and not include a rate differential, you would select a **Type** of ** Rate Differential* and a **Rate Differential** of *1*.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the**Timekeeping** section, select **Calendar-based Premium Pay**.
3. On the **Create Calendars** tab, click **Add New**.
4. Enter the **Calendar Name** and check the box for **Show on Timesheet** if appropriate.
5. Click **Add New Row** and enter the details.
6. Click **Save**.
7. Select the **Calendar Pay Profiles** tab.
8. Click **Add New** and enter the **Profile Name**.
9. Click **Add New Row**. As you configure the calendar pay profile, consider:

Option	Description
Holiday Profile	Select the calendar to assign a rate differential.
Type	You can choose ** Rate Differential* or *+ Rate Differential*. Example: To assign time and a half for holiday pay, you could select ** Rate Differential* to indicate the worker's bill rate times the entered rate differential should equal the new pay. Bill Rate times 1.5 equals the new holiday rate.
Rate Differential	Enter the value to be used in the calculation. Example: To assign time and half for holiday pay, you would enter 1.5. If you only want to display the holiday and not include a rate differential, you would select a **Type** of ** Rate Differential* and a **Rate Differential** of *1*. Bill Rate times 1 gives no rate differential.

10. Click **Save**.
11. Select the **Assign Organization** tab and assign the calendar pay profile to each organization as necessary.

    This option sets the calendar pay profile as the default and all workers in the organization will have the configured calendar pay profile. The calendar pay profile can be overriden on the work order if necessary.

Enable Overtime Allocation Enforcement on Timesheets in Settings

Prerequisites

- You must select `Manual` for **Timesheet Classification**.
- An **Overtime Profile** must exist on the work order.

Context

You can enable overtime allocation enforcement on timesheets to prevent timesheet submission until overtime hours are allocated appropriately. If a contractor is using a manually classified timesheet and tries to allocate against their regular hours beyond what is allowed in their overtime profile, they receive an error until the changes are made. This feature assists program offices with accurate accounting and alleviates the burden of running additional reports and adjusting timesheets.

Example: A contractor has a profile that allows them to enter overtime after they work 40 hours in 1 week. If they try to enter 48 hours of regular or non-overtime hours type, Workday VNDLY displays an error message asking the contractor to reallocate the additional 8 hours.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Timekeeping Settings**.
3. Check the box next to **Block Timesheet if Overtime Insufficient**.

Upload Timesheets

Context

You can use the **Upload** feature on the **Timesheet** summary page to upload your time information, including mobile and custom data. VNDLY recommends you review any custom data once imported to verify the information is correct.

Refer to the **Timekeeping and Invoicing Files** section of the **Workday VNDLY File Import Specifications** Community page to download and complete the correct timesheet files for uploading. See Community: Workday VNDLY File Import Specifications.

Steps

1. Navigate to the **Timesheets** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Timesheets** > **Timesheets** drop-down menu.
2. Click **Upload** and locate the appropriate file.
3. From the **Reports** drop-down menu, click **File Transfer Reports** to review the upload and its outcome.
4. If the file was a Partial Success or Failure, click **Transfer Details** to see what went wrong and correct any errors.
5. Repeat the previous steps until you see a successful outcome.

Modify Timesheets

Context

Modifying timesheets enables you to correct any information entered in error. Once changes are made, the timesheet must be re-submitted and approved.

There's a configuration that limits the number of weeks program team, vendors, or contractors can go back into the timesheets to make modifications. Visibility of the **Submit** and **Adjust** buttons depend on these settings.

Steps

1. Navigate to the **Timesheets** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Timesheets** > **Timesheets** drop-down menu.
2. Open the submitted timesheet that you wish to modify.
3. Click **Adjust** and make the necessary changes.
4. Click **Submit**.

Download Multiple Timesheets

Context

You can download multiple timesheets. Example: You may want to print the timesheets of all employees for a particular week. You can download the timesheets from the **Timesheets** page.

To download or print a single timesheet, you can navigate to the appropriate timesheet. With Clock and Assign timesheets, you can print from the **More** menu. With Summary and Time In/Out timesheet, you can click **Print Timesheet** or **Download Timesheet**.

Steps

1. Navigate to the **Timesheets** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Timesheets** > **Timesheets** drop-down menu.
2. Use the fields to narrow the results.

   Example: Set the **Date Range** to download all timesheets in that range.
3. Click **Download**.

Create Work Types

Prerequisites

Have the *settings.admin* permission.

Context

Work types enable users to select a time type when filling out or modifying timesheets, which indicates how time is allocated. For example, you can create time types for overtime, non-working time, and more. Work types impact rate calculation, and you can use them in the Calculation Engine to build custom formulas in your tenant.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Timekeeping**, select **Work Hours Types & Rates**.
3. On the **Work Types** tab, click **Add New Row**.
4. Complete the task:

Option	Description
Name	This is the option that will display on timesheets when contractors select it, or when

Option	Description
	VNDLY automatically classifies it. Examples: *Regular* or *Overtime*
Rate Type	If you select: • *Multiplier*, the bill rate will be multiplied by the amount that you enter in the **Value** field. • *Flat Rate*, the bill rate will be added to the amount that you enter in the **Value** field.
Pay Rate Multiplier	This field enables you to modify pay rates. Note that we no longer recommend using this field and instead recommend using the **Calculation Engine** in **Company Settings**. For more information, see Steps: Calculation Engine.
Max Amount	This field is only necessary if you want to restrict the amount of units captured against a work type. If you enter *0*, there will be no max amount for the work type.
Taxable	Indicates whether or not time entered with this work type should be subject to taxes.
Break	Indicates whether the work type can be associated with a break. This field can be beneficial for reporting purposes, particularly for organizations that pay a different rate for break time or are located in areas with specific break laws, such as California. Note that: • Paid breaks will have a multiplier of *1*. Unpaid breaks will have a multiplier of *0*. • When a break is added to a timesheet, a row in the *Nonworking* section will be added to reflect the break hours.
Hours Classification	Required for the work type to be used on timesheets. This field is also beneficial for reporting purposes, and it can be used in the Calculation Engine to build conditional formulas based on a specific classification type. Options include: • *Nonworking*: This time won't be used to determine overtime. • *Automatic*: Indicates the *Standard* work type. Auto classification uses the overtime profile rules assigned on the work order to classify entered time into the common time types. • *Regular Time*: Indicates the *Regular* work type, used with manual time entry.

Option	Description
	• *Overtime*: Indicates the *Overtime* work type, used with manual time entry. • *Double Time*: Indicates the *Double Time* work type, used with manual time entry.
Enabled	This toggle must be turned on for the work type to be available for use on work type profiles.

Next Steps

If you want contractors to be able to select the work type on a timesheet, you must add the work type to a work type profile. See Create Work Type Profiles.

Create Work Type Profiles

Prerequisites

- Have the *settings.admin* permission.
- Create work types. See Create Work Types.

Context

Work type profiles enable you to create a group of work types to use for specific scenarios.

Example: You have contractors in California who need to track breaks and have a different overtime rate than contractors in other states. So, you create a work type profile that includes work types that reflect the California contractors' breaks and overtime calculation. You also create a separate work type profile for contractors in other states to reflect their different calculations.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Timekeeping**, select **Work Hours Types & Rates**.
3. On the **Work Type Profiles** tab, click **Add New Row**.
4. Complete the task:

Option	Description
Default	When enabled, indicates that the work type profile should be used as the default for newly created work orders. If desired, you can override this default on newly created work orders by modifying the work order individually or with a bulk update. Note that you are required to have 1 default work type profile in your tenant, but you can only have 1 default at a time.
Work Type	Select one or more work types to add to the work type profile.
Premium Rates	This field only displays if you have configured premium rates on the **Manage Premium Rates** page (**More** > **Company Settings** > **Timekeeping** > **Premium Rates**).

Option	Description
	A premium rate is extra pay for hours worked, such as for special occasions or weekends. Note that if you want to indicate extra pay related to shifts specifically, we recommend configuring shifts instead. Configuring shifts reduces the need to create additional work types, and it can provide your organization more clear reporting. For more information about shifts, see Setup Considerations: Shifts.

5. Click **Save**.

Result

VNDLY automatically assigns the **Default** work type profile to new work orders. However, you override it and choose any other created work type profiles on the new work order, or when bulk updating work orders.

Contractors can select the assigned work types when filling out their timesheets. You'll also be able to report on work type profiles by using the **Work Order** dataset, and you can use them in the Calculation Engine to build formulas or to be used as conditional criteria in formulas.

Create Overtime Rates and Profiles

Context

You can create overtime rates that align with your program's overtime pay, and then assign a rate to an overtime profile.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Overtime**.
3. From the **Overtime Rates** tab, click **Create**.
4. As you create the overtime rate, consider:

Option	Description
Set as Default	Check the box if you want the overtime rate you're creating to be the default rate selected on newly created Overtime Profiles. If another overtime rate was set as the default previously, you'll need to confirm the change on the pop-up.
Rate Name	Label the rate to easily identify it.
Overtime Frequency	You can toggle between Hourly, Daily, or Weekly to set the **Display Name** and **Rate** for each.
Display Name	For each Classification, verify or enter the correct display name.
Rate	For each Classification, verify or enter the correct rate multiplier.

5. Click **Save**.
6. Select the **Overtime Profiles** tab and click **Create**.
7. As you create the overtime profile, consider:

Option	Description
Set as Default	Check the box if you want the overtime rate you're creating to be the default Overtime Profile for your tenant. If another overtime profile had been set as the default previously, you'll need to confirm the change on the pop-up.
Overtime Rate	Select the overtime rate that should apply to this overtime profile.
Overtime Profile Name	Label the overtime profile to easily identify it.
Weekly Overtime Threshold (hours)	Indicates the number of hours in a week at which an overtime rate should begin to apply.
Daily Overtime Rules	When you check this box, the **Overtime Hour Thresholds** display.
Overtime Hour Thresholds	Set the range for each overtime type. Example: You could set these thresholds: • **Regular** time to *0 - 8* • **Overtime** to *8 - 16* • **Double Time** to *16 - 24*
Custom Daily Overrides	When checked, you can customize overtime hour thresholds for one or more days of the week. Example: You could select *Sunday* and set **Overtime** to *0 - 8*, and **Double Time** to *8 - 24*.
Consecutive Day Rules	When checked, you can customize overtime thresholds for consecutive start days. Example: You could enter *2* for the **Consecutive Day Start** and set these thresholds: • **Regular** time to *0 - 8* • **Overtime** to *8 - 16* • **Double Time** to *16 - 24*

Next Steps

Create overtime rules, if appropriate.

Create Overtime Rules

Prerequisites

At least 1 overtime profile and 1 overtime rate must exist.

Context

Overtime rules enable you to select criteria by which an overtime profile is automatically selected on a work order or job. Example: You could create a rule where new jobs located in California automatically select an overtime profile with unique, California overtime rates. When a new job or work order is created, Workday VNDLY selects the overtime profile based on which overtime rule is met. If it doesn't meet the criteria for any rules, the default overtime profile is applied.

Overtime rules aren't retroactively applied. Only work orders and jobs created after the criteria group exists will be automatically assigned the appropriate overtime profile. The overtime profile can still be overwritten on the job or work order if needed by users with appropriate permissions.

Sometimes a job or work order might meet the criteria for more than 1 overtime rule. In cases like this, the rule with the most specificity is applied. Example: If you create a rule for jobs located in Ohio, but create a second rule for jobs located in Ohio that are a part of the Human Resources Business Unit, the overtime profile from the second rule would be selected since that rule has more specific criteria.

Workday VNDLY's order of criteria specificity in order from least to most specific is as follows:

- Country
- Subdivision (State/Province)
- Business Unit
    - Sub-Business Unit
- Region (Parent)
    - Sub-Region
- Work Site
- Job Category
    - Sub-Job Category
- Job Template

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, select **Overtime**.
3. Select the **Rules** tab.
4. Click **Create**.
5. As you complete the criteria rules fields, consider:

Option	Description
Criteria Group Name	Enables you to label the rule you're creating.
Criteria	Enables you to configure when the overtime rule profile should apply. You can select one or more criteria, but only 1 option from each criteria family: Location, Job, Organization. Example: You could select *Work Site* and *Job Templates*, but not *Work Site* and *Country*.
Criteria Type	This field displays once you select a criteria. The name of the field is determined by the criteria that you selected. Example: If you selected a **Criteria** of *Work Site*, the criteria type field of **Work Sites** displays. You'll need to select one or more work sites that you want the rule to apply to. You can select multiple values for each criteria type.

Option	Description
Overtime Profile	The overtime profile that should be applied when the criteria are met.

6. Click **Create**.

Expenses

Concept: Expenses

As a Resource Manager, you can view all the expenses submitted by contractors reporting to you. From the header, select **More** > **Company Settings**. From the **Accounting** section, click **Expenses & Adjustments**.

You see all expenses and adjustments. To simplify your search, you can use the filters at the left of the page.

When you've located the appropriate expense report, you can click **View Expense** to open the expense report. From here, you can approve or reject the entire expense report if needed. You can also approve or reject by individual line items if configured in **Company Settings**.

In addition, you can print, email, or edit the expense report if needed.

Under **Expenses**, you can click the icon under **More** to view comments or rejection reasons.

You can view the approval chain, if needed. You can configure reminders to keep the approval process moving. If you want to add an approval comment, you can click **+Add Comment**.

Set Up Expenses

Steps: Set Up Expenses

Prerequisites

You must have the expenses.read or expenses.owned.read permissions. For vendor and contractor roles, they should have the expenses.read permission.

Context

You can set up expenses to manage employee expense reporting, reimbursement, and related processes efficiently. Setting up expenses reduces your workload, and allocating funds to the correct areas for later identification by invoicing.

Steps

1. Create Expense Categories .
2. Create Expense Report Types .
3. (Optional) Create Expense Mileage .
4. (Optional) Configure Expense & Adjustment Settings .

5. (Optional) Create Workflow Approvals
    - Select the *Expenses & Adjustments* approval type.
    - By default, the approval routes to the resource manager that's assigned to the work order that's associated with the expense report. You can create approval workflows to change who the approvers are.
    - Security: expenses.approve, and expenses.approvers.edit

    You can review and approve expenses on the **Approvals** page. Navigate to **More** > **Approvals** and select the *Expenses & Adjustments* approval type.

Result

Example

Next Steps

Create Expense Categories

Prerequisites

- To view expense reports, you must have the expenses.read or expenses.owned.read permission. For vendor and contractor roles, they should have the expenses.read permission.
- To configure expense reports, you must have the expenses.settings.create, expenses.settings.delete, expenses.settings.read, and expenses.settings.update permission.

Context

Categories are used to group expense types.

Expense categories enable you to configure settings for various types of expenses. You can also create expense types to associate with expense categories.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Expenses & Adjustments**.
3. Select the **Categories** tab.
4. Click **Add New Category** and consider:

Field	Description
Category Name	A unique name for the category. Example: *Miscellaneous Adjustment* or *Statement of Work Expense*.
Category Code	A unique identifier for the category. Example: *Misc. Adj* or *SOW Expense*.
Transaction Type	Determines if this expense item is treated as an expense, or as an adjustment to billed time. Defaults to *Expense*.
Fee Strategy	Determines how fees are determined for items using this category. Defaults to *Expense*.
Calculate Taxes	If enabled, reports using this category have taxes calculated using the work order tax rate.

Field	Description
	Miscellaneous Adjustments without a link to a Work Order must have the tax location defined on the report.
Allow entry of taxes on the expense	If enabled, reports using this category require manual entry of the tax amount.
Currency Selection	Indicates the currency used for the category.

5. Click **Add Expense Type**.

   Only expense types created in a category can be selected when a user is creating an expense to submit.

Field	Description
Type	Indicates the type of expense.
Expense Code	A unique identifier for the expense.
Require Receipt Over Amount	Indicates the amount at which an expense requires a receipt. If you leave the default of *0.00*, receipts are always required.
Maximum	The maximum amount allowed for the expense type.
Active	When enabled, indicates the expense type is active and available for selection.
Credit?	When enabled, indicates that the contractor or vendor is owed money. That amount decreases the amount they owe.
Allow Above Max	When enabled, indicates expenses can be submitted above the configured maximum amount.
Set Rate	When enabled, you can set the **Default Set Rate**. Enabling this field disables the **Maximum** field.
Default Set Rate	Indicates the default rate for the expense type.
Linked Records	Links the expense report to a Timesheet, Invoice, or Expense Report ID. You can use that ID when completing timesheets, invoices, or other expense reports.

6. Click **Save**.

Create Expense Report Types

Prerequisites

- To configure expense reports, you must have the expenses.settings.create, expenses.settings.delete, expenses.settings.read, and expenses.settings.update permission.
- Set up expense categories.

Context

Expense report types enable you to create types to associate with expense categories.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Expenses & Adjustments**.
3. Navigate to the **Report Types** tab.
4. Click **Add New Report Type**.
5. Complete the task:

Field	Description
Name	Enter a unique name.
Purpose	Choose between: *Expense* and *Misc. Adjustment*
Categories	You can configure these on the **Categories** tab.
Approval Strategy	Choose between: • *Use Work Order Approvers and Workflow Approvals* • *Use Workflow Approvals*
Available to Contractors	Only displays if you select the *Expense* purpose.
Available to Vendors	Toggle on to enable vendors to select the report type when completing an expense or miscellaneous adjustment.
Include Mileage?	Only displays when you select the *Expense* purpose. Enables users to add mileage expenses when submitting an expense with the report type. You can configure the rate calculation for mileage expenses on the **Mileage** tab.
Must Link to Work Order	Only displays if you selected the *Misc. Adjustment* purpose. When enabled, you must always submit a Misc. Adjustment with a linked work order. When disabled, you can submit the Misc. Adjustment without a linked work order.
Must Link to Charge Code	Read Only. Displays when you select the *Misc. Adjustment* purpose. Toggles on if you select **Must Link to Work Order**. You need to deselect **Must Link to Work Order** for this field to toggle off.
Custom Fields	Any custom fields you create on the **Custom Fields** page for the Expenses & Adjustments form display here. Select them to display them on the expense report.

6. Click **Save**.

Next Steps

You can create workflow approval criteria based on the expense report type.

Create Expense Mileage

Context

You can configure the rate calculation for mileage expenses. You can only add one Mileage Rate for the same Business Unit, Year and Currency Code.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Expense & Adjustment**.
3. On the **Mileage** tab, select the correct currency from the drop-down.
4. Click **Add New Mileage**.
5. Complete the task:

Field	Description
Currency	Specify the currency for the mileage rate. The mileage displays for users based on the currency of the expense.
Business Unit	Specify the organization unit that the mileage is assigned to. The mileage displays for users based on the organization unit of the expense.
Year	Specify the year the mileage is for. The mileage displays for users based on the date of the expense.
Maximum Miles/KMs Allowed	Specify the maximum amount of miles or kilometers a user is allowed to expense mileage for.
Rate per Mile/KM	Specify the amount the user can receive per mile or kilometer.

Result

Users can see the mileage based on the date and organization unit of the expense.

Configure Expense & Adjustment Settings

Prerequisites

- You must have the expenses.read or expenses.owned.read permission. For vendor and contractor roles, they should have the expenses.read permission.
- To configure expense reports, you must have the expenses.settings.create, expenses.settings.delete, expenses.settings.read, and expenses.settings.update permission.

Context

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Expenses & Adjustments**.
3. Select the **Configuration** tab.

4. Under the **Expense Form** heading, complete the fields.

Field	Description
Charge Codes Splitting	Select to enable users to split an expense across multiple charge codes, applying a percentage to each.
Restricted Charge Codes	Select to restrict charge codes to those on the work order.
Time Limit (in days)	The number of days that users can submit expenses within. Entering 0 indicates there is no limit.
Vendor Late Submission	Select whether or not you want to allow, deny, or warn a vendor when they submit an expense outside of the time limit.
Alert on Duplicate Entries	Select to display an alert when a duplicate expense entry by date and type is entered.
Edit Report Project	Select to enable expense projects to be modified.
Hide Receipt Override	Select to hide the **Receipt Unavailable** checkbox on expense entries.
Expense Item Approvals	Select to enable approvers to approve or reject expense items individually on the report. Rejected items do not invoice.
Allow Bulk Uploads	Select to enable privileged users to bulk upload expenses in a submitted status. Example: You want to load historical expenses.
Vendor Bulk Uploads	Select to enable vendors to bulk upload expenses in a submitted status.
Approver Cannot Modify Summary	Select to limit what expense approvers can modify. When selected, expense approvers can only modify cost allocation codes, custom fields, comments, and attachments.
Program Team Adjustment Tolerance in Days	Specify the number of days the program team can modify expenses and adjustments. If there's no limit, leave the field blank.
Contractor Adjustment Tolerance in Days	Specify the number of days contractors can modify expenses and adjustments. If there's no limit, leave the field blank.
Vendor Adjustment Tolerance in Days	Specify the number of days vendors can modify expenses and adjustments. If there's no limit, leave the field blank.
Global Lock Date	Enter the furthest back date which users can select when adding an expense or miscellaneous adjustment. If there's no limit, leave the field blank.

5. Under the **Access and Approval** heading, complete the fields.

Field	Description
Approver Strategy	Specify whether approvers on work sites are included in the list of expense approvers. Defaults to *Work Order*, which means that VNDLY adds Expense Approvers into the approval chain based on the Work Order. If you select *Work Site*, VNDLY adds Expense Approvers into the approval chan based on the Location associated with the expense report.
Site Override Notification	Displays when you select *Work Site* in the approver strategy. Enter the email address to notify when the selected expense Work Site doesn't match the Work Order Work Site.
Expense Report Visibility	Specify whether users with expense viewer permission are able to view all expense reports or if they can only expenses they're approvers on.
Allow Bulk Approvals	When enabled, approvals can be done en masse.
Rate Assignment Overrides	Displays when you select *Work Site* in the approver strategy. Assign fixed rates for Work Site. Set rates for selected Expense Types by Rate Assignment type in the **Rate Assignments** tab.

6. Click **Save**.

Create Expenses

Create Expenses

Prerequisites

- You must have the expenses.read or expenses.owned.read permissions. For vendor and contractor roles, they should have the expenses.read permission.
- For various actions, you must have the expenses.bulk.upload, expenses.create, expenses.delete, and expenses.summary.update permissions.
- Set up expenses and create an *Expense* report type.

Context

Users can easily create and submit expense reports from the **Expenses & Adjustments** page.

Steps

1. From the header, select **More** > **Expenses & Adjustments**.

2. Click **Add New** to create a new expense.
3. Complete the task:

Field	Description
Report Type	Indicate the type of expense report to be created. The report type needs to be configured as an expense on the **Manage Expenses & Adjustments** task.
Report Name	Enter the expense report name.
Work Order / Contractor Name	Select a work order or contractor to link the expense report to.

4. Click **Save**.
5. Select **Add Expense**.
6. As you complete the task, consider:

Field	Description
Category	Indicate the category of the expense.
Type	Select the expense type within the selected category.
From Date To Date	Enter the dates of the expense.
Amount	Specify the expense amount. A receipt must be attached for amounts over 0, unless you select **No Receipt**.
No Receipt	Select to override the receipt requirement.
Charge Code	Indicate the charge code for the expense.
Task Code	Indicate the task code within the project you selected.
Split Amount	Displays if you configured **Charge Codes Splitting** on the **Manage Expenses & Adjustments** task. Split expenses between different projects based on percentages.
Comment	Add a comment to explain the expense.
Attachments	Upload the receipt.

7. Click **Save**.
8. Click **Submit**.

Create Miscellaneous Adjustments

Prerequisites

- Security: You must have the expenses.read or expenses.owned.read permissions. For vendor and contractor roles, they should have the expenses.read permission.
- Set up expenses and create a Misc. Adjustment report type.

Context

You can set up miscellaneous adjustments to make ad-hoc corrections to VNDLY expense reports, financial records, or transactions that don't fall under standard predefined categories. These adjustments typically address errors, omissions, and other unclassified discrepancies.

You can have miscellaneous adjustments without work orders.

Steps

1. From the header, select **More** > **Expenses & Adjustments**.
2. Click **Add New** and complete the fields:

Field	Description
Report Type	Indicate the type of expense report to be created. The report type needs to be configured as a *Misc. Adjustment* on the **Manage Expenses & Adjustments** task.
Report Name	Enter the expense report name.
Link Work Order to this adjustment	Link a work order to the expense report.
Organization Unit	Select an organization unit for the expense report.
Vendor	Select a vendor to link the expense report to.
Currency	Select the expense currency.
Contractor	Select a contractor to link the expense report to.
Work Order / Contractor Name	Displays if you select the **Link Work Order to this adjustment** check box. Select a work order or contractor to link the expense report to.

3. Click **Save**.
4. Select **Add Expense**.
5. As you complete the task, consider:

Field	Description
Category	Select Misc Adjustment.
Type	Select the expense type within the selected category.
From Date To Date	Enter the dates of the expense.
Amount	Specify the expense amount. A receipt must be attached for amounts over 0, unless you select No Receipt.
No Receipt	Select to override the receipt requirement.
Tax Location	Select the location for tax calculation.
Charge Code	Indicate the charge code for the expense.

Field	Description
Task Code	Select the task code within the project you selected.
Split Amount	Displays if you configured Charge Codes Splitting on the Manage Expenses & Adjustments task. Split expenses between different projects based on percentages.
Linked Timesheet	Select a timesheet.
Comment	Add a comment to explain the expense.
Attachments	Upload the receipt.

6. Click **Save**.
7. Click **Submit**.

Result

Submit will trigger approvals. Once approved, the expense report will appear in invoicing transactions

Bulk Upload Expenses

Prerequisites

You must have the expenses.admin permission for the Expenses settings page to display.

Context

You can upload multiple expense records into VNDLY at once using bulk upload. Bulk upload simplifies the handling of large-scale expense reporting, ensuring both efficiency and compliance.

Steps

1. From the header, select **More** > **Expenses & Adjustments**.
2. Click **Bulk Upload**.
3. Click **Select File** and locate the file.

   You can click **Download Format** to download the template for the bulk upload file.

   The upload starts immediately.
4. Click **View Results**.
   You see the **File Transfer Reports** page, which displays the outcome of the bulk upload.

Event-Based Expenses

Create Event-Based Expenses

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** settings page to display.

Context

Event-based expenses are expense reports that are created by the system when triggered by a event. You can configure them to be time-based, where they're triggered by a timesheet submission, or scheduled, where they're triggered based on a set schedule. Automating these reoccurring expenses alleviates user overhead and ensures the funds are appropriately allocated to the correct areas for later identification by invoicing. Example: You could create an event-based expense for a reoccurring event, such as earning meal reimbursement after working a minimum of 10 hours per day. With criteria, you would indicate that when a timesheet is submitted with at least 10 hours per day, then the Daily Meal Stipend of $10 should apply.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. As you create the event, consider:

Option	Description
Event Type	Indicate whether the event is triggered by Timesheet or Scheduled. Selecting *Timesheet* ensures that the event-based expense is created when the timesheet is submitted. Selecting *Scheduled* ensures that the event-based expenses is created at the defined frequency.
Frequency	Indicate the frequency of the scheduled event.
Approval Strategy	Indicate how the expense should be approved: • Automatically approve • Use existing workflow approval • Approve with timesheet
Criteria	Select criteria to narrow the scenarios in which an expense should be automatically created. Example: You might want only expenses created for the United States to be automatically approved, so you could create a criteria for **Country** and include the *United States*.
Expense Report Type	Indicate the type of expense report to be created. You can click **I don't see the report type I need** to create the appropriate report type, if needed.
Expense Report Category	Indicates the expense category to be used for the expense. You can click **I don't see the report type I need** to create the appropriate category if needed.
Expense Type	The expense type within the selected category.

Option	Description
	You can click **I don't see the report type I need** to create the appropriate type if needed.
Expense Value	Indicates the amount of the expense.

Next Steps
Attach the event you created to the worker's work order. You can either:

- Create a new work order.
- Modify an existing work order and select the event you created.

Attach an Event-Based Expense to a Work Order

Prerequisites

- You must have these permissions:
  - *workorder.modifications.create* or *workorder.owned.modifications.create*
  - *field.event_based_expenses.write*
- An event-based expense must exist.

Context

Once you've created an event-based expense, you must attach both the event-based expense and the appropriate charge code value to the appropriate work order.

Steps

1. From the header, select **Work Orders**.
2. Open the appropriate work order and click **Update Work Order**.
3. Click **Change Dates and Rates (Modify Work Order)**.
4. In the **Event-Based Expenses** section, select the appropriate **Event-Based Expense**.
5. Select the appropriate **Charge Code**.
6. Click **Review Changes**.
7. Enter the **Reason for Change** and **Leave a Note (Optional)** if necessary.
8. Click **Submit for Approval**.

Example: Create a Scheduled Event-Based Expense

Example: This example illustrates how to create a scheduled event-based expense in Workday VNDLY.

Context

There's a new regulation that requires workers in the UK office to receive a 500 GBP monthly parking reimbursement to compensate for commuting to the office. Since your company has decided to generate the expense report on the last day of every month, you can schedule the event-based expense to run on the last day of each month. By scheduling the event-based expense, you are streamlining the process and ensuring the approval workflow is triggered as needed.

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** settings page to display.

- Create an expense type for *Parking (GBP)*.
- Create an expense report type and category for *Default Expense*.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. Enter these values:

Option	Description
Field	Enter
Event Name	*UK Parking - Reimbursement*
Event Type	*Scheduled*
Frequency	*Monthly*
Repeat Criteria	*Last day of the Month*
Scheduled Time	*12:00 PM*
Timezone	*GMT+0100 Europe/London*
Approval Strategy	*Use existing workflow approval*

5. In the **When** section, click **Add Criteria**.
6. Select *Country* and enter *United Kingdom*
7. In the **Then** section, select these values:

Field	Enter
Expense Report Type	Default Expense
Expense Report Category	Default Expense
Expense Type	Parking (GBP)
Expense Value	500.00

8. Click **Save**.

Example: Create a Timesheet Event-Based Expense

Example: This example illustrates how to create an event-based expense with an **Event Type** of *Timesheet*.

Context

You want to ensure workers with more than a 10 hour day receive a meal stipend. You configure a timesheet event-based expense that automatically triggers the meal stipend when a timesheet is submitted with more than 10 hours in one day.

Prerequisites

- Enable the **Expenses & Adjustments** module.
- You must have the *expenses.event_based_settings.admin* permission for the **Event-Based Expenses** to display.
- Create an expense type for Daily Meal Stipend.
- Create a work site for Columbus, OH, USA.
- Create a job template for Box Packer.

- Create an expense report type and category for Default Expense.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Accounting** section, select **Event-Based Expenses**.
3. Click **Create**.
4. Enter these values:

Option	Description
Field	Enter
Event Name	*Daily Meal Stipend*
Event Type	*Timesheet*
Approval Strategy	*Automatically approve*

5. In the **When** section, click **Add Criteria**.
6. Select *Timesheet Hours Per Day* and enter *10*.
7. Select *Work Site* and select *Columbus, OH, USA*.
8. Select *Job Template* and select *Box Packer*.
9. In the **Then** section, select these values:

Field	Enter
Expense Report Type	Default Expense
Expense Report Category	Default Expense
Expense Type	Daily Meal Stipend (USD)
Expense Value	10.00

10. Click **Save**.

Invoicing

Create Invoice Templates

Context

Invoice templates enable you to prefill some of the recurring fields and determine the viewable fields on invoices, giving you the ability to control and customize your own invoice PDFs. You can also select a Locale so that the PDF is generated in the language you selected.

You can toggle various sections on or off (for optional sections) and move them up and down using the options near the top of the header. Example: You could toggle off the **Remit To** section if you didn't want this section to display on your invoices, or you could move it to the bottom of the invoice. All changes made are reflected on the preview invoice on the right side of the page.

Steps

1. Navigate to the **Invoices** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Invoices** > **Invoices** drop-down menu.

2. Select the **Templates** tab, and click **Add Template**.
3. While completing the **Formatting** section, consider:

Option	Description
Vertical Layout/Horizontal Layout	Configure whether you'd like the invoice to display vertically or horizontally.
Invoice Number	Configure whether you wish the invoice number to display in the Header.
Workday VNDLY Logo	Configure whether you wish the Workday VNDLY Logo to display in the header.
Page Numbers	Configure whether the page numbers display in the footer. You can also configure the alignment: left, center, right.
Date Created	Configure whether the date created displays in the footer. You can also configure the alignment: left, center, right.

4. Consider these items while completing the **Template Titles** section:

Option	Description
Template Name	Identifies the template.
Report Title	Static text that displays on the invoice.

5. Consider these items while completing the **Payment Terms** section:

Option	Description
Entry Type	Select whether you prefer to enter the payment terms manually or to have the payment terms read from the vendor profile.
Display Options	Indicate whether you want payment terms and the due date to display on the invoice.
Payment Terms (in days)	Number of days after the invoice gets finalized when the bill-to entity can provide payment based to the remit-to entity without penalty. The number is generally contractual, and is only available if you selected an Entry Type of Manual.

6. Consider these items while completing the **Bill To** section:

Option	Description
Bill To	The entity responsible for paying the invoice amount.
Bill To Logo	Enables you to upload a file of the logo for the entity responsible for paying the invoice amount.

7. Consider these items while completing the **Remit To** section:

Option	Description
Entry Type	Select whether you prefer to enter the remit to details manually or to read the remit to details from the vendor profile. If you select **Read From Vendor Profile**, you can select the fields

Option	Description
	you want to include. Selecting to use the **Remit To Address** from the Vendor Profile will only apply to invoices containing a single vendor. Mixed-vendor invoices don't take advantage of this option.
Remit To	The entity to which the payment should be sent.
Remit To Logo	Enables you to upload a file of the logo for the entity where the payment should be sent.

8. Consider these items while completing the **Taxes - Header** section:

Option	Description
Show Tax Amount in Header	Select to display the tax amount on the invoice header.
Show Invoice Amount	Select to display the invoice amount on the invoice header.
Show Tax Registration Number	Select to display the tax registration number on the invoice header. When selected, you must select the entry type. If you select **Manual**, you must enter the tax registration number. If you select **Read from Vendor Profile**, the tax registration number is automatically pulled from the vendor profile.

9. Consider this item while completing the **Custom Fields** section:

Option	Description
Custom Fields	Only custom fields configured to display on invoices are available for selection. Each template can display different custom field configurations as needed for that invoice. To display on the Template, configure the Custom Field at the **Business Unit: All** level in Custom Field settings.

10. Consider this while completing the **Messages** section:

Option	Description
Message on Invoice	Enables you to enter a message that displays on the invoice.

11. Click **Edit** to the right of the **Invoice Details** section of the Template Preview. You can add another **Invoice Details** section by clicking the **Add Section** button at the bottom of the page. This enables you to add multiple reports to the invoice.
12. Consider these items while completing the **Invoice Details** section:

Option	Description
Report	Select the appropriate report, which determines the fields that are available for selection. Then check the box for each field that you want on the report. You can modify the field name and order of the fields if necessary.

Option	Description
Create Column	You'll need to enter the Group Name and then select the fields you want included in the group. Click **Add to list**.

13. Consider this while completing the **Subtotals** section:

Option	Description
Subtotal	Fields selected in the **Invoice Details** section that can be subtotaled display here. Check the box for each field that you wish to include subtotals for on the invoice.

14. Consider this while completing the **Invoice Details Grouping** section:

Option	Description
Invoice Details Grouping	Enables you to group fields containing the selected values together. Check the box for one or more fields that you wish to organize by.

15. Consider these while completing the **Table Formatting** section:

Option	Description
Table Row Stripes	Adds alternating gray rows to your invoice tables for easier viewing.
Table Cell Borders	Adds borders to each cell in the invoice tables for easier viewing.

16. Click **Edit** to the right of the **Totals** section of the Template Preview. You can add another **Totals** section by clicking the **Add Section** button at the bottom of the page.
17. Consider these while completing the **Taxes - Footer** section:

Option	Description
Show Client Totals	Select to display client totals on the invoice.
Show Vendor Totals	Select to display vendor totals on the invoice. When this option is selected, you can also choose to **Show Client Subtotal** or **Show Discounts**.
Display Currency Code on Totals	Select to display the totals with the local currency code. If you also select **Display Totals in Base Currency**, the totals display with the base currency code.
Display Totals in Base Currency	Select to convert the totals to the base currency amount.
Show Tax Amount in Footer	When selected, displays the total amount of taxes on the invoice footer. Select **Combined Taxes** to display the combined total of taxes, or **Split Taxes** to display a row for each tax type on the invoice.
Show Rate	Includes the tax rate percentage on the invoice footer.

18. Click **Add Section** to add another **Invoice Details** section, **Totals** section, or a page break.
19. Check the box for **Use as default** if you wish to make this template the default invoice template.

20. Click **Save** near the top right of the page.

Create Invoice Template Rules

Prerequisites

- At least 1 Invoice Template must exist.

Context

Invoice template rules enable you to set conditions to determine which invoice templates to use. Example: you could create a rule where if your invoice contains line items for work sites in the UK, then the template for UK work sites is used.

Steps

1. Select **More** > **Company Settings**.
2. From the **Accounting** section, click **Invoice Template Rules**.
3. Select a default template. When no other rules match, this template is used.
4. Click **Add Rule**.
5. While completing this task, consider:

Option	Description
Source	The dataset you want the invoice template rules to reference.
Field	The field within the source you want the invoice template rule to reference.
Condition	The constraints you want the rule to operate within.
Value	The value you want the condition to match against.

6. To add additional conditions to your rule, click **+Add Condition**.
7. Select the Template that you want to assign to the conditions you selected.
8. To add additional rules, click **Add Rule** and repeat the steps above.
9. When you're ready to save your rules, click **Save** in the upper right corner of the page.

Create an Invoice

Context

You build invoices manually with the Workday VNDLY invoice builder. Along with selecting the desired transactions, the Workday VNDLY invoice builder enables you to tailor the different invoice fields to meet your specific needs.

Steps

1. Navigate to the **Invoices** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Invoices** > **Invoices** drop-down menu.
2. Click **Create New invoice**.

3. Select an Invoice Template if necessary.

   If you select **Select for me**, VNDLY selects the template that best matches the line items and invoice template rules.
4. Complete the appropriate fields.
5. Click **Add transaction(s)**.
6. Check the box for one or more transactions and click **Add**.
7. Enter a message on invoice or short description if necessary.
8. Click **Save**.
9. If more than 1 billing cycle is available, select the appropriate billing cycle.
10. Add any attachments.

Create and Schedule Automated Invoice Jobs

Prerequisites

You must have the *settings.admin* security permission configured to access **Scheduled Invoice Settings**.

Context

Use the **Scheduled Invoice Settings** page to configure an automated invoice creation process.

You can configure VNDLY to:

- Apply invoice grouping rules and automatically generate invoice files and PDF templates when the scheduled invoicing job runs.
- Automatically select all transactions in a *Not Started* status for that billing cycle and create the invoice when the scheduled job runs.
- Designate a time and number of days after the close of the previous billing cycle to create an invoice.

Steps

1. Access the **Scheduled Invoice Settings** page (**More** > **Company Settings** > **Accounting** > **Invoice & Payments** > **Scheduled Invoice Settings** or search for **Scheduled Invoice Settings** in **More** > **Company Settings**).
2. Locate the relevant billing cycle where you want to schedule an invoice job to run. Billing cycles that display in **Scheduled Invoice Settings** are configured in **Manage Billing Cycles** (**More** > **Company Settings**). Newly-created billing cycles display in a *Suspended* status until you configure a scheduled invoicing job.
3. As you configure a scheduled invoice job, consider:

Option	Description
Run Day	Enter the number of days after the billing cycle's end date when you want the scheduled invoice job to run.
Run Time and **Timezone**	Indicate the time and time zone when you want the scheduled job to run.
(Optional) Schedule an override	You can override your scheduled invoice job for a specific billing period. Example: You normally schedule weekly invoice jobs for Monday, one day after the end of the billing period on Sunday. This week,

Option	Description
	there's a company holiday on Friday. You want to give managers additional time to approve and review their billing information, so you schedule an override job to run on Tuesday instead. To schedule an override: Select Add Override. a. Select the billing cycle and the run date when you want the scheduled invoicing override to run. b. Verify the run date for the override is after the run date for the previous billing cycle. Configuring an override doesn't interrupt the scheduled invoice job for other billing periods in the billing cycle. If an override exists, you can't delete the billing cycle.
Refresh	If you want to cancel your edits before you save, select **Refresh** to revert to the previous settings.
Resume	Enable the scheduled invoice job. The status changes from *Suspended* to *Active*.
Deactivate	Displays for active invoice jobs. Select to deactivate the current scheduled invoice job.

4. Select **Save** to keep your changes.

Related Information
Tasks
Create Billing Cycles

Create New Invoice Payments

Context

Creating new invoice payments enables you to track and house payment details. You can also add additional invoices or invoice line items to the payment.

Steps

1. Navigate to the **Invoice Payments** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Invoices** > **Invoice Payments** drop-down menu.
2. Click **Add Payment**.
3. Select the **Vendor Name** from the drop-down.

4. As you complete the payment details, consider these options:

Option	Description
Payment Name	Optional field to capture the vendor's name as it displays on the check.
Voucher Number	Optional field to capture the voucher number that displays with the payment.
Payment Method	Type of transaction for this payment and populated using the **Custom Data Source** *€œPayment Method*€. Default values are €œACH€, €œCash€, and €œCheck€.
Payment Number	Transaction number associated with this payment. Format varies depending upon **Payment Method**.

5. Select an invoice from the **Add Another Invoice** drop-down.
6. Click **All Transactions** to include all transactions or—if available—**Select transactions** to select line items individually.
7. Consider these fields as you review the payment form totals:

Option	Description
Amount Received	Should reflect the actual payment amount sent to the Vendor. Calculated as the sum of all payment amounts and all late charge amounts on the payment.
Original Balance	The original vendor amount with vendor-remitted taxes as seen on the invoice. Doesn’t include fees.
Remaining Balance	Remaining original balance for this invoice/ invoice line item across all finalized payments.
Discount Taken Amount	Optional field to capture any discount during payment. • Can’t be used with negative remaining balances. • Must be a positive number. • Remaining balance must be greater than or equal to the sum of the discount taken amount and the payment amount.
Late Charge Amount	Optional field to capture any late charges incurred on this payment. • Can’t be used with negative remaining balances. • Must be a positive number.
Payment	The amount to be paid against the invoice/ invoice line item. • Positive balances: Remaining balance must be greater than or equal to **Discount Taken Amount** plus **Payment** amount.

Option	Description
	• Negative balances: Remaining balance must be less than or equal to the **Payment** amount.
Amount to Apply	The amount that will be applied to the listed invoices/invoice line items. This amount is a sum of all listed payment amounts.

8. Click **Submit to Vendor**.

Result

The payment changes to a status of *Paid*, and locks the associated line items from further payment unless a balance remains. If this payment fully completes payment on the associated invoice, the invoice also changes to a status of *Paid*.

Decisioning a Miscellaneous Adjustment for Invoicing

Context

The Invoicing Admin needs to Approve or Reject the miscellaneous adjustment. Current State - notifications are sent to the MSP when there are miscellaneous adjustment submissions.

Steps

1. Select **More** > **Expenses & Adjustments**.
2. Locate the appropriate Misc. Adjustment and click **View Misc. Adjustment**.
3. Review and Approve or Reject each adjustment line item.

Submit Miscellaneous Adjustments for Invoicing

Context

Miscellaneous Adjustments within VNDLY enable you to submit an adjustment. Typically, you would use this type of adjustment for one-off purposes to make financial adjustments that don't fit into typical expenses.

Steps

1. From the header, select **More** > **Expenses & Adjustments**.
2. Click **+Add New**.
3. Enter the appropriate information and click **Save**.

   This action auto-opens the adjustment created.
4. Complete the appropriate fields.
5. Click **Save** and then click **Submit**.

Void Invoices

Prerequisites

You must have the permission *invoice.void*.

Context

You can void invoices in Workday VNDLY that you created in error. Voiding an invoice cancels the invoice without deleting it, preserving its historical records for future audits.

Use the **Voiding Invoice Generates Invoice File** setting to generate a file that details the transactions from a voided invoice. When this setting isn't enabled, Workday VNDLY won't generate a voided invoice file, which could impact your configurations and downstream systems and integrations, like SFTP.

Access the setting from **More** > **Company Settings** > **Accounting** > **Invoice & Payments** > **General**.

Example: You might void an invoice when:

- Taxes were calculated incorrectly.
- Line items were incorrectly created and must be deleted.
- Invoice grouping rules aren't grouping line items as expected.

When you void an invoice, Workday VNDLY:

- Locks the invoice and changes the status to **Voided**.
- Records who voided the invoice and when it was voided in the activity log.
- Updates related budgets to reflect actual invoiced amounts.
- Makes the associated line items available to be invoiced again.
- Generates a new invoice file showing the voided transaction items (if you enabled the **Voiding Invoice Generates Invoice File** setting).

For every voided invoice, Workday VNDLY automatically creates a credit invoice to offset the invoice amount in reporting. The credit invoice also ensures that accurate credit information flows through to any Workday integrations. Credit invoices have the same invoice number as the original invoice, with -VOID added to the end and a **Void Credit** status. Example: INV0000001-VOID.

Steps

1. Navigate to the **Invoices** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Invoices** > **Invoices** drop-down menu.
2. Select the invoice that you want to void.

   You can only void invoices in **Complete** status. If you need to void an invoice that has any active payments associated with it, you must void those payments first.
3. Click **Void**.
4. Click **Confirm**.

Create Billing Cycles

Prerequisites

Have these permissions:

- *billing_cycles.settings.read*
- *billing_cycles.settings.write*

Context

You can create billing cycles to define the periods when provided services are recorded and invoiced.

Steps

1. From the header, select **More** > **Company Settings**.
2. Navigate to **Accounting** > **Invoice & Payments**.
3. Click **View Billing Cycle**.
4. Next to **Billing Cycles**, click **Create**.
5. When completing the fields at the top of the page, consider:

Option	Description
Set as Default	Select this check box if you want the billing cycle to be the default for your program. If your program only has 1 billing cycle, VNDLY automatically sets it as the default.
Send Notifications When	VNDLY sends an **Alert: Running Low on Billing Cycles** notification when the selected number of billing periods remain in the billing cycle.

6. When completing the fields in the **Billing Periods** section, consider:

Option	Description
Start Date	Select the date when the billing period will start.
Billing Period Length	Select the number of days, weeks, or months that the billing period should last.
Recurring Billing Period	You can select this check box if you want the billing period to repeat. • If you select this check box, the **Repeat Until** field displays, and you can select the date that you want the billing period to repeat until. • If you don't select this check box, only a single billing period is created.

7. Click **Add Billing Periods**.

   If you selected the **Recurring Billing Period** check box, VNDLY automatically creates and displays billing periods up until your selected **Repeat Until** date.
8. Click **Save**.

Result

After creating billing cycles, you can create billing cycle rules to automatically apply billing cycles to work orders based on specific criteria. For more information about billing cycle rules, view our Create Billing Cycle Rules topic.

On the **Billing Cycle**s tab, you can also review these sections to see where the billing cycle is assigned in your tenant:

- **Configuration Impact**: Shows the number of work orders, SOW payments, and miscellaneous adjustments (without work orders) where the billing cycle is assigned.
- **Rules**: Shows the names of rules where the billing cycle is assigned.

Create Billing Cycle Rules

Prerequisites

Have these permissions, which are automatically granted if you have the *settings.admin* permission:

- *billing_cycles.settings.read*
- *billing_cycles.settings.write*

Also ensure that you have created the billing cycles you want to use. For more information, view the Create Billing Cycles topic.

Context

Global programs often need to consolidate invoice line items at different frequencies. For example, programs may need to consolidate them monthly for contingent workers located in India and weekly for contingent workers located in the United States and Canada. To achieve this flexibility, programs can create billing cycle rules with criteria based on workers' geographic locations.

Billing cycle rules only apply to workers that have work orders, including contingent and Statement of Work (SOW) work orders. Items without work orders, such as SOW payments or miscellaneous adjustments without them, continue to use the default billing cycle in your tenant, which has the **Set as Default** check box selected on the **Billing Cycles** tab.

Additionally, billing cycle rules only apply to new work orders, so existing work orders aren't impacted. If you need to override a billing cycle rule for existing work orders, you can edit the billing cycle on them individually or in bulk using the **Bulk Update Wizard**. To edit billing cycles on work orders, you need *workorder.billing_cycle.read* and *workorder.billing_cycle.write* permissions.

If you don't create billing cycle rules, your program can continue to use only 1 billing cycle for all of your workers.

Steps

1. From the header, select **More** > **Company Settings**.
2. Navigate to **Accounting** > **Invoice & Payments**.
3. Click **View Billing Cycle**.
4. On the **Work Order Rules** tab, click **Create**.
5. Click **Add Criteria**. When adding criteria, consider:

Option	Description
Organization	You can select specific **Org Units** for your criteria.
Geography	You can select from the following criteria types: • **Country** • **Subdivision** • **Region** • **Location** You can select multiple options for the same criteria type, such as selecting *India* and the *United Kingdom* for the **Country** criteria type. However, you can't select options for multiple geographic criteria types, such as the *United Kingdom* for the **Country** criteria type and *London Office* for the **Region** criteria type.

6. Select a **Billing Cycle**.
7. Click **Save**.

Result

After new work orders are created and onboarded, billing cycles are automatically assigned to them based on the billing cycle rules you created. If you don't create billing cycle rules, VNDLY automatically assigns the default billing cycle to work orders instead.

If your program uses automatic invoicing, VNDLY uses the billing cycle on the work order, or item with a work order, to determine which schedule to use for related line items.

Depending on where the billing cycle displays in your tenant, it's also reportable with the following datasets:

- **Work Order** dataset if it displays on work orders.
- **Expense Report** dataset if it displays on expense reports or miscellaneous adjustments.
- **Statement of Work - Milestone** dataset if it displays on SOW milestone payments.
- **Statement of Work - Fixed Price Payments** dataset if it displays on SOW fixed price payments.
- **Statement of work - Unit Payment Items** dataset if it displays on SOW unit price payments.

Set Up Scheduled Billing for Monthly Rates

Prerequisites

Security:

- *billing_mode.edit* to edit the billing mode before a work order is active.
- *billing_schedule.edit* to edit the billing schedule associated to a job or work order.

Context

You can generate scheduled bills and invoice line items automatically for your work orders based on a defined schedule.

You can also view time transactions for the entire month to approve for invoicing, and invoice monthly.

This feature suits programs that pay workers a flat monthly rate and don't require frequent adjustments to the monthly amount.

Example: You can use this feature for workers in India where a monthly salary is common.

Only use monthly scheduled billing for:

- Work orders (WOs) with a **Pay Type** of *Monthly*.
- Work orders (WOs) with a **Billing Mode** of *Scheduled*.
- *Contingent* Jobs/WOs (SOW is not supported).

Steps

1. From the header, select **More > Company Settings**.
2. Navigate to **Accounting > Invoice and Payments**.
3. Next to **Scheduled Billing**, click **Open**.
4. Click **Create**. Complete the task:

Option	Description
Name	Enter a clear name for the billing schedule. Example: Mumbai Monthly

Option	Description
Pay Type	Automatically populates to *Monthly*.
Generate Billing Information On	Select **Specific day of the month** to select a numeric date of the month when the scheduled billing process will run. Example: 1 for the 1st of the month or 15 for the 15th of the month. Select **Days Before Month End** to specify a number of days before the end of the month. Example: 3 would indicate 3 days before the last day of the month.
Time	Select the specific time of day the billing schedule should run.
Timezone	Select the timezone appropriate to workers to ensure accurate run times.
Schedule Overrides	You can define a list of override dates that will take precedence over the normal schedule. Example: You can override a normal scheduled billing that falls on a holiday.
Set as Default	You can set this as the default billing schedule. Users with access to these security domains can change this default schedule: • *billing_mode.edit* • *billing_schedule.edit*

Result

Workday VNDLY determines which active work orders require schedule bills and creates an upcoming scheduled bill each month.

VNDLY processes each relevant work order, handling validations, creating the bill, generating line items, and initiating any defined approval workflows.

Once the scheduled bill is created and (if applicable) approved, the line item is available as a transaction that can be invoiced, just like any other.

Example

Next Steps

1. When you create a new job, set the **Pay Type** to *Monthly*.

   Note: Jobs with scheduled billing require at least one designated charge code on the work order for accurate invoicing. The scheduled bill uses the first designated charge code.
2. You can set up approval workflows specifically for scheduled billing. If you do not set up an approval workflow, VNDLY automatically approves scheduled bills, making them ready for invoicing as soon as it generates them.
3. If you set up an approval workflow, approve the scheduled bill on the **Work Order** page or the **Approvals** page.
4. After onboarding a work order, the first scheduled bill will be the next full month, even if the trigger for the onboarding month hasn't happened yet. You'll have to do a manual adjustment for the onboarding month. Similarly, no scheduled bills happen after a work order ends, so you'll need to

do a miscellaneous adjustment as well, either on a scheduled bill that takes place before work order end or to replace a missing one with a miscellaneous adjustment.

Generate Invoice Files

Prerequisites

- A saved report must exist with the fields you want to utilize for the invoice files to be generated.
- You must have the *settings.admin* and *invoice.reportingintegration.manage* permissions.

Context

The Automated Invoice File is used to generate invoice files from a Saved Report in VNDLY. Any files generated through this process can be downloaded from the invoice in VNDLY by selecting the hyperlink.

The timing for this file generation corresponds to your **Scheduled Invoice** settings or whenever manually invoicing transactions. You can find the scheduled invoice settings by navigating to **More** > **Company Settings** > **Invoice & Payments** > **Scheduled Invoicing**.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Invoice & Payments**.
3. Under **Automated Invoice File Generator**, click **Open**.
4. Complete the following fields:

Option	Description
Saved Report	Select the report you want to create an automated invoice file for. Only reports with the report section **Invoices & Payments** display.
File Type	Select the appropriate file type for the file. To generate PDFs, see: Create Invoice Templates.
Auto Column Width	When checked, the width of columns is automatically adjusted.
Consolidate Invoice Numbers?	Indicate whether the invoice numbers should be consolidated into one file or if each invoice should get its own file.
Email	When the box for **Support Email Notifications** is checked, the **Invoice Management: File Generated** and **Invoice Management: File Size Exceeded** email notifications are supported.
SFTP	When checked, files can be transferred via SFTP. SFTP must be enabled for this feature to work. Submit a product support case to enable this in your tenant.
Description	Enter a description of the invoice file.

5. Click **Save Integration**.

Reference: Transaction Statuses

Transactions are the individual line items used to build an invoice. To view transactions, access the **Transactions** tab of the **Invoices** page.

Depending on your permissions, you can access this page directly from the VNDLY header or in the **Invoices** > **Invoices** drop-down menu.

Transactions can have any of these statuses, in this order:

Status	Description
Preview	The transaction needs approval in its related area (such as timesheets or expenses), and you can't add it to an invoice yet. The transaction won't display on the **Transactions** tab, but it can display in reports.
Not Started	The transaction has been approved in its related area, and you can now add it to an invoice. Or, it can be picked up by a scheduled invoice.
Hold	The transaction is on hold, and you can't add it to an invoice yet. It also can't be picked up by a scheduled invoice. To add or remove a hold, select the check box next to the transaction and click **Hold** or **Remove Hold**.
Draft	The transaction has been added to an invoice, and the invoice has been saved.
In Process	The transaction has been added to an invoice, and the invoice has been submitted for approval.
Approved	The transaction has been added to an invoice, and the invoice has been approved.
Invoiced	The transaction has been added to an invoice, and the invoice has been finalized.
Paid	The full transaction amount has been paid.
Paid Partially	Part of the transaction amount has been paid.
Voided	The transaction was voided. This occurs when the related invoice gets voided.
Void Credit	Credit has been received for the voided transaction.

Concepts: Invoicing

Concept: Manual and Scheduled Invoicing

VNDLY supports 2 methods of invoicing: manual and scheduled. Both methods use the invoice grouping rules, fee strategies, and invoice file generation that are configured in the tenant. There’s no difference between the invoices and associated invoice files that VNDLY creates with these methods.

Manual Invoicing

You can manually select invoice transactions individually or in bulk at any time to create invoices. Manual invoicing enables you to:

- Create individual off-cycle invoices.
- Put single-line items on hold while other items move through the invoicing process.

You must have the *invoicedata.create* permission to use this method.

Scheduled Invoicing

Scheduled invoicing enables you to automate the invoice creation process. You can configure VNDLY to generate invoices at both a specific:

- Time of day.
- Number of days after the close of the previous billing cycle.

When the scheduled job runs, VNDLY automatically:

- Selects all transactions in a *Not Started* status for that billing cycle.
- Creates the invoice.

Concept: Payments

You can add payments both individually and in bulk from the Invoice Payments page, as well as from a single or multi-vendor completed invoice.

To add a payment individually from the Invoice Payments page, see the article for Create New Invoice Payments.

You can use the Bulk Add option to upload multiple Invoice Payments at once. The file format containing all required columns can be found on the Invoice Payments Bulk Upload window. You can download this file and fill out the appropriate information. Then, select the file to bulk upload.

You can also add payments from a completed invoice. Next to the Invoice Total Amount, you can click Add Payment. If the invoice contains a single vendor, you can select one or more invoice line items to cover with the payment. Then you'll click Include on Payment Form.

If the invoice where you clicked Add Payment contains line items for multiple vendors, you can select which vendor you're providing payment information for. You can change the vendor using the drop-down list to update the line items available in the table. From here, you can select one or more line items to include in the payment.

If necessary, you can send files with payment details over SFTP. You'll need to contact your VNDLY contact to configure this.

Concept: Payment Forms

Payment forms enable you to group invoices for vendor payments. You can create a new invoice payment and complete various actions on the payment form as needed.

Delete Table Rows

You can remove invoices or invoice line items from the payment table by clicking the garbage icon that displays when hovering over the line. These changes aren't retained unless the payment form is saved or submitted.

Partial Payments

VNDLY supports the partial payment of invoices in 2 ways:

- Entire invoice

- Individual line items

Whichever method you use first on an invoice must be used to complete payment on that invoice.

Save Payment

You can save a payment in a Draft status for completion at a later date. Vendors are unable to see draft payments.

Delete Draft

If while managing payments you determine an existing draft is no longer needed, clicking the Delete button on the payment form presents the option to delete the draft. This action can't be undone.

Void Payment

If for any reason, you need to cancel a completed payment, you can void the payment from the Payment Form. Enter a Reason for Void, if needed. Once voided, all invoices and invoice line items associated with the payment are released and can be added to a new payment. This action can't be undone.

Voided payments are retained for historical purposes and display a banner when opened to indicate that the payment is no longer valid.

View Payments on the Invoice

Users with the ability to view payments are also able to access that information from the associated invoice. Clicking the amount next to the payment status takes the user directly to the payment page for review.

Concept: Scheduled Billing for Monthly Rates

You can create billing schedules on a monthly cadence to accommodate programs that pay workers a flat monthly rate and that don't require frequent adjustments to the monthly amount.

Rate Adjustments

If you need to make an occasional rate or amount adjustment:

- If you change the rate on a work order before a scheduled bill, the new rate is reflected when the bill is triggered.
- If an existing scheduled bill amount requires adjustment to reflect a different rate for that month, add a miscellaneous adjustment against an approved or rejected scheduled bill to reflect the difference.

Work Order Start Dates and End Dates

If scheduled billing line items still fall within the work order's updated end date, they will remain as scheduled. If they fall outside the new end date, those line items are cancelled. If the first or last scheduled bill needs to be adjusted to account for a partial month, a miscellaneous adjustment can be created to reflect the difference.

Activity Log

Changes made to billing schedules, billing modes, and the execution of the billing schedule orchestrator is logged for your review.

Work Order Data

The billing mode and billing schedule information are available on the Work Order dataset for reporting.

First Scheduled Bill

After onboarding a work order, the first scheduled bill will be the next full month, even if the trigger for the onboarding month hasn't happened yet. You'll have to do a manual adjustment for the onboarding month.

Similarly, no scheduled bills happen after a work order ends, so you'll need to do a miscellaneous adjustment as well, either on a scheduled bill that takes place before work order end or to replace a missing one with a miscellaneous adjustment.

Concept: Historical Miscellaneous Adjustments Improvements for Invoicing

To foster a better experience, we've updated the Historical Miscellaneous Adjustments page to enable easier navigation and searchability.

If you had adjustments in VNDLY before this update, you can view them by navigating to **Invoices** > **Historical Misc. Adjustments**.

To create a new misc. adjustment, click the link in the banner on the **Historical Misc. Adjustments** page or navigate to **More** > **Expenses and Adjustments**.

Concept: All Transactions vs. Select Transactions with Payments

When creating a new invoice payment, you can select the appropriate option based on how you're grouping invoices. Example: if a program is grouping invoices in a way that would only ever represent a single vendor per invoice, you're more likely to select All Transactions. If the invoice has more than 1 vendor on the invoice, you must always select Select Transactions. Each payment can only be made to a single vendor.

All Transactions

After selecting an invoice, if you click All Transactions, one of 2 things can happen:

- A single line displays in the table with the invoice listed and no invoice number.
- One or more lines display in the table with the invoice line items on separate lines.

If either of these statements are true, a single line displays in the table with the invoice listed and no invoice line number. This indicates that the user is applying the payment to the entire invoice.

- The selected vendor owns all line items on the selected invoice and those line items are all unpaid.
- The selected vendor owns all line items on the selected invoice and this invoice and there's already a partial payment recorded on this entire invoice.

If either of these statements are true, one or more lines display in the table with the invoice line items on separate lines. This indicates that the user is applying the payment to each line item.

- The selected invoice contains line items for more than 1 vendor.
- The selected invoice contains line items that were included in another completed payment, either partially or in full.

Select Transactions

After selecting an invoice, if you click Select Transactions, a new window opens to enable you to select the line items to include on the payment. After selecting one or more of the line items, clicking Include on Payment Form loads the selected line items into the payment form table. Each payment can be a mix of full invoices and invoice line items to fit the needs of your payment strategy.

Concept: Invoicing Strategy for Fees

We generally invoice vendor amounts and program fees together in a single-line item; however, you also have strategy options to split them into separate line items, and then invoice those fees and amounts individually.

This setting can be found by selecting **More** > **Company Settings**. From the **Accounting** section, click **Invoice & Payments**. Click **Edit**.

Under the **General** section, you can determine how VNDLY splits the supplier amount from the fees by selecting 1 of 5 available **Invoicing Strategy for Fees**:

Option	Description
Keep It All Together	The default option for all programs. Maintains how VNDLY works today where items contain both the supplier amount and fees and are invoiced together as a single-line line item.
Always Split and Standalone Fees	Always splits each invoice transaction into separate lines at the time of line item creation: fees and supplier amount. The fees each have their own line items that invoice as standalone line items. The amount line items and fee line items can be invoiced together on the same invoice.
Keep It Together Until Invoicing with Aggregated Fees (Auto-fee Invoicing)	Keeps the amounts and fees together on the line item until invoicing. Invoicing creates negative line items for the aggregated fees in the supplier amount invoice, and automatically creates separate invoices for the positive fees.
Keep It Together Until Invoicing with Split Fees (Auto-fee Invoicing)	Keeps the amounts and fees together on the line item until invoicing. Invoicing creates negative line items for each fee in the supplier amount invoice, and automatically creates separate invoices for the positive fees.
Keep It Together Until Unless Tax Country Differs	Line items contain both the supplier amount and fees and are invoiced together as a single-line item *except* where the tax country for the supplier amount is different from the tax country for the MSP fee. When there's a difference, the line item splits when approved.

Note: Changes to the **Invoicing Strategy for Fees** setting affect all invoice line items and invoices created after the change. Modifications to this strategy might impact external invoice integrations, and programs are advised to validate integrations after the change.

Charging Fees to Other Accounting Codes

If you've selected an **Invoicing Strategy For Fees** option that splits the fees, you can also charge all fees to a different accounting code than the accounting code used for the supplier amount. On the **Invoice & Payments** page, click **View Fees Accounting Code** under the **Program Fees** section to adjust these codes.

Shifts

Setup Considerations: Shifts

You can use this topic to help make decisions when planning your configuration and use of shifts. It explains:

- Why to set it up.
- How it fits into the rest of Workday VNDLY.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Shifts are defined blocks of time in Workday VNDLY that allow companies to ensure consistent staffing coverage. Companies can also use shifts to compensate hard-to-fill times differently to incentivize workers. You can configure and maintain shifts during job creation to offer release, and from work orders to invoicing.

Business Benefits

With shifts, you can:

- Track time against a data element, such as a work order.
- Allocate time against a data element that will also pay a premium.
- Collect the time data allocated against shifts and export it to a different system for calculation.
- Enable warnings that appear if shifts are entered outside of defined shift times.
- Use the **Shifts** dataset or the **Shift Differential** dataset to report on shift definitions in custom reports.

Use Cases

Create multiple shifts, or a shift with exceptions, by deploying the flexible shift strategy to accommodate a contractor's changing schedule.

Create shifts that have extra pay (shift differentials) attached to encourage contractors to take that particular shift.

Set the ability to have the shift differentials to calculate automatically in the client rate.

Modify work orders with the bulk update process to add shifts and differentials to the work orders your clients to update.

Questions to Consider

Questions	Considerations
What are shift strategies?	Shift strategies are different ways a client might manage their shift needs for each work order. VNDLY Workday supports 2 types of shift strategies:

Questions	Considerations
	Dedicated shift strategy. This strategy maintains a 1 to 1 relationship between a single shift and a work order. By selecting this strategy you are limited to only 1 shift for the assignment. We don't restrict contractors from being assigned to multiple work orders with a dedicated strategy, but we do restrict contractors from being assigned to 2 different strategies on work orders. You might use a dedicated strategy when you only need a contractor to cover a single shift or if you have an integration with an external system that restricts contractors to a single work order. Dedicated strategies default to the shift assignment on the timesheet so that the contractor doesn't have to select which shift their time should be allocated to. **Flexible shift strategy**. This strategy allows a contractor to be assigned to more than 1 shift on the same work order. You might use this shift strategy if you have a contractor who might be assigned to work multiple shifts and needs the flexibility to be able to punch in and out of their assigned shifts as needed. Flexible shift strategies require the time to be manually allocated on the timesheet so that the system knows which shift the hours were worked against.
How do you display shifts on jobs?	A toggle on the job templates allows you to apply shifts to the job and/or make it required on the job. This toggle helps ensure that shifts don't automatically apply to every job.
What timesheets and classification types can I use with shifts?	Shifts are supported on **Time In / Time Out** and **Summary** timesheet types. However, flexible shift strategies don't work with auto-classified timesheets.
What if a job fits the criteria for multiple criteria groups of different shift rules?	Workday VNDLY prevents users from creating duplicate rules, but doesn't prevent users from creating rules that could overrule another. You should compare any shift rules created to ensure that there isn't a conflict. For more information, see Concept: Shift Rules.
Can I include shifts on a time import?	You can include shift assignments if you have the add_shift_to_time_import feature flag enabled in your tenant. To enable, create a Product Support ticket with Workday VNDLY Support.
Can I remove a shift that I no longer need?	You can remove shifts by deleting or deactivating the shifts. You can only delete a shift if it hasn't been assigned to a job or work order. If the shift is already assigned to a job or work order, you can only make it unavailable by deactivating it.

Questions	Considerations
	Shifts can be deactivated if there's no time allocated against it. It will no longer be selectable on jobs, work orders, or timesheets, and you won't be able to save or submit time against it.
What timezone will my contractors' punches be collected in?	Existing timesheets honor the timezone that the contractor's computer is set to.
How does the shifts functionality affect my current jobs?	When you set up shifts, the shifts and any rules that you create only apply to new jobs going forward. This includes the **Are Shifts Required** setting. Existing jobs aren't impacted. However, you can modify a work order to add a newly created shift to it. Shifts aren't required on timesheets; a contractor can either allocate their time against a shift or not select a shift.

Recommendations

We recommend that light industrial clients implement shifts in their tenants.

If you have a contractor that is assigned to a shift, but also needs to allocate time outside of a shift, we recommend that you assign them a flexible shift strategy. This lets the contractor either select a shift or not select a shift to allocate their time.

Requirements

Clients using only:

- Extended Workforce Management.
- Manually allocated timesheets. (Shift allocation requires manual classification. Only dedicated strategy works with auto-classified timesheets at this time).
- Charge codes.
- Premium applied to the bill rate. (Pay rate premiums aren't included in shifts functionality).

Limitations

Shifts functionality:

- Is used as a tracking tool, not a scheduling tool.
- Applies the premium only to the bill rate.
- Doesn't support Worker Profile Management or Statement of Work.
- Only supports charge codes, not project codes.
- Doesn't support flexible shift strategies with auto-classified time.

Tenant Setup

Create a Product Support ticket with Workday VNDLY Support to enable shifts in your tenant.

Security

Administrators with the *settings.admin permission* can add the following permissions to roles to view and maintain shifts:

Module	Permission	Description
Job	*shift.differential.read*	Permission to view shift differential on a job page.
Settings	*shift.settings.read*	Permission to view shift settings.
Settings	*shift.settings.edit*	Permission to edit shift settings.
Job, Work Order	*field.shifts.update*	Permission to override shifts, shift strategy, and shift differentials on a job or work order.
Work Order	*workorder.modifications.shifts_backdate.create*	Permission to backdate shift, shift strategy, and shift differential changes for a work order.

Business Processes

You must have the correct permissions for each business process:

Business Process	Consideration
Publish a Job	Change the shift selection and the shift strategy when publishing a job.
Modify Work Order	Edit shifts on a work order, including backdating the shifts.
Release an Offer	Update the shifts, **Type of Rate Differential**, and **Rate Differential** (if already created for the shift) before releasing the offer.
Timesheet Summary	Submit a timesheet with shift information.
Work Orders	Filter for work orders with shifts.

Reporting

Datasets	Considerations
Shifts Shift Differential	Can report on shift definitions in custom reports.
Shifts joined with: Jobs Timesheets via Jobs Work Orders via Effective Dated Values	Can create full data reports.

Steps: Set Up Shifts

Prerequisites

Shifts enabled in your environment. To enable, create a Product Support Case with Workday VNDLY Support.

Context

You can define and maintain shift needs within Workday VNDLY. This ability allows companies to use defined blocks of time (shifts) to identify gaps in their schedule that need to be filled to avoid downtime. Companies can also compensate hard-to-fill times differently to incentivize workers.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Security** section, click **Security Settings**.
3. Add the *shift.settings.edit* and *shift.settings.read* permissions to security roles that require access to view and maintain shifts settings.

   These settings must be added by an administrator role that has the *settings.admin* permission.
4. Within **Security Settings**, add the following permissions to roles that require access to view, edit, and backdate shifts and shift differentials:
   - *shift.differential.read* to view shift differential on a job page.
   - *field.shifts.update* to override shifts, shift strategy, and shift differential on a job or work order.
   - Backdating shifts also require the *workorder.modification.shifts_backdate.create* permission.
5. Enable Shift Selection for Job Templates.
6. Create Shifts.

Result

Changes to **Shifts Settings** are captured in the **Activity Log**.

Next Steps

Assign shifts to relevant jobs and work orders.

Enable Shift Selection for Job Templates

Prerequisites

- Shifts enabled in your environment. To enable, create a product support case with Workday VNDLY Support.
- Ability to view and edit **Company Settings** (**More** > **Company Settings**).

Context

You can enable the ability to add shifts to a job template, so that newly created jobs let contractors allocate time against a shift.

Note: Shifts aren't required on timesheets; a contractor can either select to allocate their time against a shift or not select a shift.

Steps

1. From the header, go to **More** > **Company Settings**.
2. From the **Job & Work Orders** section, click **Job Templates**.
3. Select and edit the job template that you want to add the ability to use shifts. In the job template, select the **Apply Shifts** toggle and (optional) the **Are Shifts Required** toggle.

   Enabling or disabling the **Apply Shifts** and the **Are Shifts Required** setting on a job template will only apply to new jobs created after the setting is enabled. This setting won't impact existing jobs.

4. (Optional) If you're using the Workday VNDLY time import templates and you want to include shift assignments, download and use the updated **Time Import** templates to include shift assignments in the file.

Next Steps

Create Shifts.

Create Shifts

Prerequisites

Apply Shift Selection to Job Templates.

Context

You can create shifts to apply automatically or manually to a job or work order. With a shift, you can specify the days and times of the shift, as well as assign any shift differentials that you want to incentivize with a pay increase.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Definitions** tab, click **Create**.

   (Optional) You can also create a new shift by copying an existing shift.
4. As you create the shift, consider:

Option	Consideration
Internal Shift Name	Clear the **Use this name for all users** check box if you want to enter a different shift name that displays to all users. You might want to do this action if you have a shift name that is highly technical or long. This name wouldn't make sense to a resource manager or hiring manager who just needs the shift covered. Example: A shift is named Shift jh000023432. But the **Alternate Shift Name** is Weekend Swing Shift.
Start Time/End Time	Enter the times that shift begins and ends. If you enter a shift that is 12 hours or longer, Workday VNDLY warns you that the shift is over 12 hours long. Also, if you create a shift that crosses midnight (Example: 11:00pm to 6:00am), VNDLY warns you that the shift will end the following day. You won't be restricted in entering time. These warnings just give you the opportunity to check to make sure that you've entered the times that you want.

5. (Optional) On the **Shift Rules** tab, create rules that target the shifts to specific criteria.

   You can configure shift differentials here if you need them.

6. (Optional) On the **Shifts Settings** tab, enable the warnings that display if a contractor tries to save or submit their timesheet if their time falls outside the defined shift days or times.

   Enabling this setting doesn't prevent the contractor from saving a timesheet with time outside the defined shift days or times. The setting only lets contractors know about the discrepancy.

Create Shift Rules

Prerequisites

Create Shifts.

Context

You can create criteria and rules to ensure your shifts and shift settings apply in specific scenarios. Rules can limit the shifts that display to managers while creating and editing a job or work order. The configured rules can also determine how shift settings are applied and enforced.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Rules** tab, click **Create**.
4. As you create the shift rule, consider:

Option	Description
Criteria	Add criteria to define scenarios when your configuration should be applied. The criteria display from the least specific to most specific. Workday VNDLY evaluates and uses the most specific criteria for the rule. Example: You create 2 shift rules for an IT worker located in California: • Rule 1 Criteria: Subdivision: California, Shift = Shift A. • Rule 2 Criteria Job Template: IT Subdivision: California, Shift = Shift B. Workday VNDLY applies Rule #2 because it's the more specific rule.
Shift Strategy	• Select **Dedicated** to enable managers to assign a single shift to a contractor on a work order. • Select **Flexible** to enable managers to assign more than 1 shift on a work order.
Shift Differentials	Select the **Enable Shift Differentials** toggle to add shift differentials to the shift. Before you can **Enable Shift Differentials**, you need to select: • A currency for the **Currencies** criteria. • At least 1 shift.

Option	Description
	If you don't know what differential to apply yet, select **None** as the **Shift Differential Type**. This selection creates a placeholder for the **Shift Differential Type**, so you can enter the differential later.

Result

Shift rules automatically trigger and apply if there are criteria that match when you create a job from a template that has shift selection.

Note: All criteria must match before VNDLY applies the rule.

Example

Example: You want to have night shifts available for Bindery Operator jobs located in Charlotte, North Carolina and want to encourage contractors to take those shifts. You create a rule where the:

- **Location** is **Charlotte** for the **Criteria**.
- **Currencies** is **US Dollar (USD)**.
- **Shift Strategy** is **Dedicated**.
- **Shift** is **Night Shift**.
- **Shift Differentials** is enabled and **Shift Differential Type** is **Bill Rate + Rate Differential** with **Rate Differential** is 5.00 for a 5 dollar increase in the hourly rate.

You then select the Bindery Operator job template with shifts selection enabled and select Charlotte as the location. The **Shifts** fields now populate with the information that you specified in the rule.

Bulk Update Shifts

Prerequisites

You must have these permissions:

- *shift.settings.edit*
- *shift.settings.read*

Context

You can bulk update shifts. This action enables you to update several shifts at once, saving you time and allowing you to avoid mistakes.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Timekeeping** section, click **Shifts**.
3. From the **Shift Definitions** tab, select the shifts that you want to update.
4. As you update the shifts, consider:

Option	Consideration
Bulk Deactivate	You can't select deactivated shifts on a job or work order. If the deactivated shifts are assigned to a job or work order, the shift

Option	Consideration
	selection clears. You'll need to select a new shift on the job or work order.
Bulk Delete	You can only bulk delete shifts that aren't assigned to a job or work order.

Concept: Shift Rules

Shift rules give you the ability to target your shifts to specific criteria that you select. These configured rules enable your requesting managers to see and select only shifts that apply to them when creating and editing a job and or work order (if they have the proper permissions). The rules also determine how some of the shift settings are applied and enforced.

When you create a shift rule, you:

- Define the criteria that trigger the rule for the shift.
- Select the shift strategy to use.
- (Optional) Apply shift differentials to the shift.

  The currency criterion is required if you enable shift differentials.

Shift strategies are ways that a client might manage their shift needs per work order. You can select between 2 shift strategies:

Dedicated shift strategy. This strategy limits the contractor to only 1 shift for the assignment. Dedicated shift strategy is a great way to maintain a 1 to 1 relationship between a single shift and a work order. Workday VNDLY doesn't restrict contractors from being assigned to multiple work orders with a dedicated strategy, but does restrict contractors from being assigned to 2 different strategies on work orders.

- Dedicated shift strategy gives a simpler contractor timesheet experience. It allows for consistent scheduling with no variance for outside shift working.
- You might use a dedicated strategy when you only need a contractor to cover a single shift. Or if you have an integration with an external system that restricts contractors to a single work order. By default, the shift assignment displays on the timesheet so that the contractor doesn't have to select which shift to allocate their time.

Flexible shift strategy. This strategy enables you to assign a contractor to more than 1 shift on the same work order.

- Flexible shift strategies require you to allocate the time manually on the timesheet, so that Workday VNDLY knows which shifts the hours were worked against.
- You might use this shift strategy if you have a contractor that the client assigns to work multiple shifts. This contractor might need the flexibility to be able to punch in and out of their assigned shifts as needed.

When creating shift rules, consider:

- Rules only apply to job templates that have **Apply Shifts** enabled.
- Updates to existing shift rules will only apply to all future jobs and work orders with shifts.
- Workday VNDLY prevents the creation of duplicate rules, but won't prevent users from creating rules that overlap.
- Workday VNDLY evaluates and uses the most specific criteria for the rule.

  You create 2 shift rules for an IT worker located in California:

  - Rule 1 Criteria: Subdivision: California, Shift = Shift A.
  - Rule 2 Criteria Job Template: IT Subdivision: California, Shift = Shift B.

  Workday VNDLY applies Rule #2 because it's the more specific rule.

Concept: Shift Differentials

Shift differentials assign an additive or multiplier to the bill rate. They're used by companies to compensate hard-to-fill times differently to encourage workers to take those shifts.

You configure shift differentials in shift rules, where the differential automatically populates on a job template when that rule triggers. You can also assign or update a shift differential during offer release and during the modification of a work order.

Consider that shift differentials:

- Aren't required.
- Don't impact budget, or approvals based on budget, for jobs or work orders. This characteristic is because Workday VNDLY doesn't know how many hours a worker allocates against their assigned shifts. Also you can edit differentials at any time, making the differentials inconsistent to calculate. Because of these variables, shift differentials don't have an impact on approvals based on budgets.
- Won't take effect if premium rates are in use. Premium rates take precedent.
- Calculate in these special circumstances:
    - **Holidays**. Shift differentials that apply to a day with a holiday premium will calculate shift differential followed by the holiday premium.
        - First, the (Bill rate + shift differential) or (Bill rate × shift differential).
        - Then + (holiday premium) or × (holiday premium) is added to the bill rate modified by the shift differential.

          Example: You have a bill rate of $25/hr with a shift differential of an addition of $10/hr. Your holiday premium is time and a half. The formula to calculate this rate would be: (25 + 10) × 1.5 = $52.50/hr.
    - **Overtime**. Calculations made with shift differentials and overtime follow the same formula used by premium rates and OT formulas:
        - (Bill Rate + Shift Differential) × Overtime × Hours.
        - (Bill Rate × Shift Differential) × Overtime × Hours.

Concept: Backdate Shifts on Work Orders

You can backdate changes to assigned shift strategies, shifts, and shift differentials. This action enables you to adjust timesheets so they accurately reflect the contractor's time.

You backdate shifts through the Modify Work Order action. To backdate shifts, you must have the *workorder.modifications.shifts_backdate.create* permission. Contact your Workday VNDLY administrator to get this permission.

With this ability, consider:

- You can backdate shift strategy on work order modifications if the wrong shift strategy was applied. You can change the shift strategy from flexible to dedicated or dedicated to flexible. However, you can't assign workers to conflicting strategies on work orders.
- If you backdate the shift or shift strategy, the user is required to resubmit approved timesheets to reprocess.
- If you backdate only the shift differential:
    - Workday VNDLY doesn't require the user to resubmit approved timesheets for invoiced time. VNDLY automatically regenerates the invoice line items with the updated rate.
    - Line items on the timesheet update automatically for approved timesheets that aren't invoiced.

- If you select an effective date that predates where there are timesheet records, Workday VNDLY automatically updates, resubmits, and reapproves that change on the timesheet. This action automatically creates updated invoice line item records.
- When a shift on a work order is backdated, you'll receive a warning. This warning states that the change creates additional invoice line items for previously submitted timesheets once approved.

Calculation Engine

Concept: Calculation Engine Formulas

Calculation engine formulas enable you to determine how key billable amounts are calculated. With calculation engine formulas, you can:

- Choose the order by which billable amounts are calculated to support needs like rounding in different locations, placing premium rates on the pay rate, and PAYE (pay as you earn) calculations.
- Choose to calculate billable amounts differently for different types of work, like regular time and overtime.
- Define a formula as a formula group or as a nested formula.
- Target and manage different sets of calculations for different jobs and work orders, giving flexibility to support multiple needs in a single tenant.

Access the Calculation Engine from **More** > **Company Settings** > **Accounting** > **Calculation Engine**.

Things to Consider

When creating calculation engine formulas:

- All calculations follow order of operations (PEMDAS/BEDMAS).
- The formula builder supports numbers, operators (+, -, *, /), and parentheses.
- You must start a decimal value that's less than 1 with a 0 in the 1's place. Example: 0.25.
- You can't use parentheses-based multiplication. You must include an operator next to the parenthesis. Example: Use 2 * (4 + 3), not 2(4 + 3).
- Formula components with **Operator** in the name use the operator from the source. The operator components must be surrounded by numbers or formula components representing numbers. Example: If you've already configured differentials or premiums in Shifts, you could enter *(Shift Differential Operator)(Shift Differential)*.
- If you require rounding at different points in the calculation, you need to create a formula for each rounded part, then place that formula into another formula. Example: You may want to round your bill rate without overtime to the nearest whole number, but not round your bill rate with overtime. You would set a rounding rule for your base bill rate as *Round Half Up* and your overtime formula to *Do Not Round*.
- You can choose between a Simple or Conditional formula. A Conditional formula enables you to define the equation that the system should use based on meeting certain values or conditions. This enables you to override the value when certain conditions are met.
- Clicking the **Validate** button confirms that the entered formula can be calculated. However, it doesn't confirm the accuracy of the formula.
- Once a formula is saved and validated, you can utilize the **Simulate** button in the **Actions** menu to simulate the formula and see how it would calculate totals.
- Pay rate and markup are not used in bill rate-based calculations.
- For pay rate-based calculations, markup is a decimal value, and can be used to calculate the markup amount. Pay rate based programs must have at least 1 pay rate rate card configured.
- For complex equations, consider creating your equations on paper or in a spreadsheet before recreating it in VNDLY.

- If your program is using flat rate work types and multiplier work types, you may want to create conditional formulas to calculate these differently.

Use the **Calculation Breakdown** page (accessible by clicking on the hyperlink attached to each individual invoice line item) to get a complete picture of the billable amount.

New or Duplicate Formulas

To build your calculations using the Calculation Engine, you can:

- Create new, blank formulas.
- Modify or duplicate existing formulas.

For each method, consider:

	New Formula	Duplicate Formula
Pros	With new formulas, you can: • Include only elements you want to add, ensuring you only include the values your program uses in calculations. • Nest new formulas in other formulas. • Write all conditions, ensuring the logic is tailored specifically to your needs.	With duplicate formulas, you can: • Duplicate all system or custom formulas and select bill rate system formulas from the **Actions** menu. • Ensure main system configurations are covered by formulas. • Meet common use cases without having to know how to configure the conditions. • Replace just the pieces of the calculation that your program needs to customize.
Cons	If you create a new formula, it's possible to miss the formulas or logic needed for the less frequent calculations, like flat rates.	Duplicate formulas: • May include values that your program doesn't use. • May require additional clean up or review to ensure the formulas represent your desired calculations.

Calculation Engine and Timesheets

Consider these impacts to timesheets, based on the adjustments you make to formulas using the Calculation Engine:

Midweek Rate Changes	When you modify a bill rate in the middle of a timesheet week, VNDLY creates separate line items for the original rate and the new rate, enabling you to quickly reconcile the rate change.
Timesheet Adjustments	When you modify the time on a timesheet that was previously invoiced, VNDLY creates negative line items for the previous amounts and creates new invoice line items for the adjusted time, enabling you to quickly reconcile the changes to confirm the correct amount is billed.

Calendar-based Premiums as One Line	Calendar premiums for time entered on a holiday display as a consolidated invoice line item for the time worked on that day, enabling you to understand the calculation rate and increasing accuracy in the hour totals at the bottom of the table.
Always Split Fees in Invoicing	If you use the **Always Split** and **Standalone Fees** invoice strategies, fees created this way show the bill rate for those fees separated from the bill rate for the time. See Concept: Invoicing Strategy for Fees .
Flat Rates with Max Amount	VNDLY creates individual invoice line items each time a flat rate with a maximum amount earns the maximum amount in a single timesheet week. The split enables your program to confirm the maximums were successfully compensated.

Steps: Create Formulas Using Calculation Engine

Prerequisites

You must have the *calculation_engine.settings.update* permission.

Context

Use the Calculation Engine to manage and customize your formulas used for system calculations. VNDLY provides system formula components and system formulas, but you can build custom formulas as needed.

With the Calculation Engine you can:

- Automatically assign formulas to things like jobs, work orders, and statements of work (SOWs).
- Meet organization and region-specific requirements by determining the formulas used for key financial calculations.
- View calculation details.

Steps

1. Create Formula Components Using Calculation Engine .
2. Create Formulas Using Calculation Engine .
3. Create Formula Groups Using Calculation Engine .
4. Create Rules Using Calculation Engine .

Result

Calculation Engine uses the formulas you created to calculate invoicing amounts.

Create Formula Components Using Calculation Engine

Prerequisites

Have the *calculation_engine.settings.edit* permission.

Context

Formula components define common system values and allow you to create custom values that may be used to calculate billable amounts in formulas.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. On the **Formula Components** tab, click **Create New**.
4. Complete these fields.

Option	Description
Component Description	Enter a **Component Name** (required) and a description (optional).
Do you want this value of this component to be consistent or variable?	Select from: • Constant Value - the value remains true in all instances. • Variable Value - the value varies, based on different criteria.
Component Value	The numeric value that is used in formula calculations. This value can be negative.
Display Component Value in Calculation Breakdown As	How this value will be formatted in the **Calculation Breakdown**. The options are: • Number • Currency • Percent

5. Click **Save**.

Create Formulas Using Calculation Engine

Prerequisites

Have these permissions:

- *calculation_engine.settings.read*
- *calculation_engine.settings.edit*

Context

Formulas combine formula components and other formulas to indicate how to calculate billable amounts.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under the **Accounting** section, click **Calculation Engine**. Select the **Formulas** tab.
3. Click **Create New**.

   To duplicate an existing formula, click the formula that you want to duplicate, and select **Duplicate** from the **Actions** drop-down menu.
4. Complete the fields.

Option	Description
Formula Name	Enter a name.
Purpose of Formula	Select a purpose to determine how this formula should be used when calculating billable amounts.

Option	Description
	See: • 2025R1 Release Note: Custom Formula Builder for Advanced Rate Calculations. • 2025R2 Release Note: Purpose of Formula Field Description Update.
Display Formula Result in Calculation Breakdown As	How this value displays in the calculation breakdown. The value is stored as the numerical value in reporting regardless of your selection.
Rounding Preference	Determines the strategy to be used when rounding the result of the formula. • *Banker's Rounding with Currency Precision*: The system default rounding. Uses Round Half Even as the method up to the precision of the related currency. • *Round Half Up*: If the number after the desired rounding precision is 5 or more, round down. • *Round Half Down*: If the number after the desired rounding precision is 5 or less, round down. • *Round Half Even*: If the number after the desired rounding precision is 5, the precision number is rounded to the nearest even number. • *Do Not Round*: All decimal places are maintained.
Rounding Precision	Determines how many decimal places the result of this formula should be rounded. This option is available only if you selected one of the following **Rounding Preference** options: • *Round Half Up*. • *Round Half Down*. • *Round Half Even*.
Build a Simple Formula	The entered equation is always used during calculations when applied in another formula or formula group.
Build a Conditional Formula	The logic in a conditional formula enables you to define the equation that the system should used based on matching certain values or conditions. Multiple layers of conditions may be supported.

5. Click **Validate** to verify your calculations are correct.
6. Click **Save**.

Create Formula Groups Using Calculation Engine

Prerequisites

Create a custom formula or verify the one you want to associate to a formula group exists.

Context

Formula Groups contain sets of bill rate formulas that calculate billable amounts based on the work type. Formula Groups are assigned to jobs and work orders.

When your program needs billable values in VNDLY calculated differently from the default system configurations, you can create and manage formula groups to assign to jobs and work orders for timekeeping to use when running calculations.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Formula Groups** tab and click **Create New**.
4. Complete the fields.

Option	Description
Pay Type	The pay type that can use this formula group. Because the calculations and checks performed can vary by pay type, each type must have its own set of formulas. When selecting formula groups on jobs and work orders, only the formula groups matching the selected pay type will appear. This value cannot be changed after save.
Program Rate Type	Designates if this set of formulas is Bill Rate based or Pay Rate based. Pay Rate based formulas must align to a pay rate rate card. If using Bill Rate based, calculations start from the Work Order Bill Rate. If using Pay Rate based, calculations can start from the Work Order Pay Rate and Markup. This value cannot be changed after save. • *Bill Rate Based*: Calculations for billable amounts start from the bill rate. Pay Rate and Markup are collected and stored for reference purposes, but are not used in calculations for billing on entered time. • *Pay Rate Based*: Calculations for billable amounts start from the pay rate. These calculations must align to a Pay Rate Rate Card, and users are allowed to enter the pay rate and markup, and the bill rate is calculated. Values can be entered between the pay rate and the bill rate in any order.

Option	Description
Formula Selection	Select an existing formula to calculate the billable amounts for time billed against work orders using this formula group. If you enabled advanced editing, other non-bill rate formulas display.
Add Override Formula	You can utilize override formulas to create exceptions where a type of work should be calculated differently from the default.

5. Click **Save**.

Create Rules Using Calculation Engine

Context

Rules define a set of conditions that apply the specified formula configuration when the criteria has been met. Example: You can create a rule to automatically apply the formula group to the workers in Texas using the **Subdivisions** criteria.

Rules can be overridden on the job or work order by users with the correct permissions.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Rules** tab and click **Create.**
4. Complete the required fields:

Option	Description
Add Criteria	Criteria define the scenarios where you want to apply your configuration. All criteria must be met for the rule to apply. You may only add 1 option from each criteria family in a given rule. VNDLY requires you to add a pay type and program rate type, but other criteria are optional.
Pay Type	The pay type that can use this rule. Because the calculations and checks performed can vary by pay type, each type must have its own set of formulas.
Program Rate Type	Designates if this rule is Bill Rate based or Pay Rate based. Pay Rate based formulas must align to a pay rate rate card. If using Bill Rate based, calculations start from the Work Order Bill Rate. If using Pay Rate based, calculations can start from the Work Order Pay Rate and Markup. This value cannot be changed after save. • *Bill Rate Based*: Calculations for billable amounts start from the bill rate. Pay Rate and Markup are collected and

Option	Description
	stored for reference purposes, but are not used in calculations for billing on entered time. • *Pay Rate Based*: Calculations for billable amounts start from the pay rate. These calculations must align to a Pay Rate Rate Card, and users are allowed to enter the pay rate and markup and the bill rate is calculated. Values can be entered between the pay rate and the bill rate in any order.
Formula Group	The formula group that should default when the criteria match the fields completed on the job form.

Example: Create Pay Rate Based Formulas

This example illustrates how to create a pay rate based formula.

Context

You're operating a pay rate based program model and want to save time and manual effort. We'll build pay rate formulas to source the pay rate and markup values to calculate the bill rate and use criteria to determine when these formulas should be applied.

Prerequisites

You must have at least one pay rate-based rate card.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Accounting**, select **Calculation Engine**.
3. Select the **Formulas** tab, and locate the system formula for **Final Bill Rate (Hourly Pay)**.
4. Click **Actions** and select *Duplicate* from the drop-down menu.
5. Enter a **Formula Name** of *Pay Rate Calculation*.
6. Under **Formula Builder**, locate the **Define a New Equation for this Condition** field for **Condition Group 3**.

   The equation should display as: *([Bill Rate] [Work Order Premium Rate Operator][Work Order Premium Rate Modifier]) * [Work Type Rate Modifier]*
7. Replace *Bill Rate* with *Pay Rate* using **Add Formula Component**.
8. Enter *1 + [Markup]*.

   The equation should now display as: *(([Pay Rate]*(1+ [Markup])) [Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) * [Work Type Rate Modifier]*
9. Under **Condition Group 5**, locate the **Define a New Equation for this Condition** field.

   The equation should display as: *(((([Bill Rate] [Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) [Shift Differential Operator] [Shift Differential]) [Timesheet Premium Rate Operator] [Timesheet Premium Rate Modifier]) * [Work Type Rate Modifier]) [Calendar Pay Rate Operator] [Calendar Pay Rate Modifier]*
10. Replace *Bill Rate* with *Pay Rate* using **Add Formula Component**.

11. Enter *1 + [Markup]*.

    The equation should now display as *(((([Pay Rate] * (1+ [Markup])[Work Order Premium Rate Operator] [Work Order Premium Rate Modifier]) [Shift Differential Operator] [Shift Differential]) [Timesheet Premium Rate Operator] [Timesheet Premium Rate Modifier]) * [Work Type Rate Modifier]) [Calendar Pay Rate Operator] [Calendar Pay Rate Modifier]*
12. Click **Save**.
13. Select the **Formula Groups** tab and click **Create New**.
14. Enter the following information:

Option	Description
Formula Group Name	*Pay Rate Worker*
Pay Type	*Hourly*
Program Rate Type	*Pay Rate Based*
Default Formula	*Pay Rate Calculation*

15. Click **Save**.
16. Select the **Rules** tab and click **Create**.
17. Enter the following information:

Option	Description
Rule Name	*Pay Rate Rule*
Pay Type	*Hourly*
Program Rate Type	*Pay Rate Based*
Formula Group	*Pay Rate Worker*

18. Click **Save**.

Result

As you open new jobs, the new formula group is reflected in the **Formula Groups** field for jobs that meet your criteria that align with the rate card and settings configured above.

When sourcing a pay rate, the system uses the updated formula to calculate the bill rate by pulling the pay rate and markup values.

Taxes

Add Tax Overrides to Work Orders

Prerequisites

- Have the *workorder.tax.update* permission.
- Configure global tax settings in your tenant (**More** > **Company Settings** > **Accounting** > **Manage Taxes** > **cog icon**). For more information, see Manage Global Tax Settings.
    - Enable the **Manage program taxes in VNDLY** setting.
    - Enable the **Allow tax overrides on individual work orders** setting.
    - Configure additional tax settings as desired.

Context

Work orders use the current default location to determine which tax rate to use for timesheets and expenses. However, if you want to use a different tax rate, you can enable tax overrides on work orders. This can help ensure that accurate tax calculations are used based on your program's unique needs.

This guide explains how to add a tax override to existing work orders. You can also add them when onboarding workers to contingent jobs or Statement of Work (SOW) roles. If you add tax overrides during onboarding, you can select a past **Effective Start Date**. Example: Onboarding begins November 10, but a worker starts on November 1. You create a tax override with an **Effective Start Date** of November 1.

You can also change tax overrides on work orders in bulk with our Bulk Update Wizard. To do this, you need the *workorder.tax.update* and *bulk_operations.workorder.update_tax_override* permissions.

Note: The options above are only applicable if taxes are managed by the program team.

Steps

1. From the header, select **Work Orders**.
2. Open the work order.
3. Click **Update Work Order**.
4. Under the **Tax Overrides** section, click **Add New Tax Override**.
5. Select the **Effective Start Date** and **Effective End Date**.

   These fields indicate when your tax override takes effect.
6. When selecting a **Tax Behavior**, consider:

Option	Description
Don't tax this Work Order	Taxes aren't calculated for this work order.
Use a tax rate from another location, different than the work order's default	Taxes are calculated based on a specific location. Select a **Tax Location** from the drop-down list.
Set the tax rate manually	Taxes are calculated based on your specifications. Select the country for your tax rate and provide the information and tax percentages associated with that country.

7. Click **Create Tax Override**.

Result

VNDLY applies the tax override you created.

Note that VNDLY calculates taxes twice: when the invoice line item is initially created, and again when the invoice is finalized. This means that if you created the tax override after the invoice line items were created but before finalizing the invoice, VNDLY still applies the tax override. You don't need to adjust the invoice line items to ensure that taxes are recalculated correctly based on the tax override. Example: An invoice line item is created on November 12. You create a tax override on November 14, and you finalize the invoice on November 21. VNDLY applies the tax override to the invoice.

After invoicing is complete, you can report on tax override details such as the tax location, tax country, and tax rate in the **Invoice Details** dataset.

Add Tax Overrides to SOW Milestone and Fixed Price Payments

Prerequisites

Enable the **Allow tax overrides on milestone and scheduled payments** setting in your tenant (**More** > **Company Settings** > **Statement of Work** > **SOW Configuration** > **Payment Configuration**).

Context

You can specify tax overrides, including locations and rates, when creating Statement of Work (SOW) milestone and fixed price payment workflows.

This can help you ensure that accurate tax calculations are used on your SOW milestone and fixed price payments based on your program's unique needs. For example, this feature can benefit programs that:

- Employ international workers whose work benefits an entity outside of their physical location, such as workers in the United States of America benefitting a European entity.
- Employ international workers whose location is different from the location used for tax purposes.

This guide explains how to add tax overrides when you initially create a SOW milestone or fixed price payment. However, you can also edit tax overrides on SOW milestone and fixed price payments with a change order. See Create Change Order in Statement of Work.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open or create a SOW with a **Payment Type** of *Fixed Price* or *Milestone*.
3. If you're creating a fixed price payment, select the **Fixed Price Payments** tab and click **Schedule Payment**. If you're creating a milestone payment, select the **Milestones** tab and click **Add Milestone**.
4. In the **Taxation** section, make sure that **Is this SOW Payment Taxable?** is set to *Yes*.
5. Complete the **Tax Behavior** field to set your tax override. Consider:

Option	Description
Use payment location to calculate taxes	This option is selected by default. Taxes are calculated based on your selection in the **Location** field.
Use a tax rate from another location, different from the payment's location	Taxes are calculated based on a location that's different from the one in the **Location** field. Select your **Tax Location** from the drop-down list.
Set the tax rate manually	Taxes are calculated based on your specifications. Select the country for your tax rate and provide the information and tax percentages associated with that country.

6. Finish creating the payment and click **Save**.

Result

VNDLY applies the tax override you created.

Note that VNDLY calculates taxes twice: when the invoice line item is initially created, and again when the invoice is finalized. This means that if you created the tax override after the invoice line items were created but before finalizing the invoice, VNDLY still applies the tax override. You don't need to adjust the invoice line items to ensure that taxes are recalculated correctly based on the tax override. Example: An invoice line item is created on November 12. You create a tax override on November 14, and you finalize the invoice on November 21. VNDLY applies the tax override to the invoice.

After invoicing is complete, you can report on tax override details such as the tax location, tax country, and tax rate in the **Invoice Details** dataset.

Manage Global Tax Settings

Prerequisites

- Have tax management permissions.

Context

Your program team might want to enable and configure global taxes for a few reasons:

- To avoid the need for a separate tax solution to manage taxes after invoicing.
- To complete invoices.
- To see your total spend in reports.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Manage Taxes**.

   If you haven't configured taxes, you see a message indicating that *Taxes are not being managed in VNDLY*. Click **Go To Tax Configuration** to continue with this process.
3. Click the **Cog** icon near the top right of the page.
4. As you complete the **Tax Configuration** page, consider:

Option	Description
Tax rates will be managed by	Enables the program to decide who is responsible for managing tax rates on the supplier amount in VNDLY: • MSP Team/Program Team • Vendor The team selected is responsible for verifying that tax rates match their needs. If *Vendor* is selected to manage taxes, the MSP/Program team only sees **Tax Configuration**, except for programs that manage MSP fee taxes on individual work sites.
I want taxes on the MSP program fee	Determines how taxes are calculated on MSP program fees. You can select from these options: • *to not be taxed* - Taxes aren't calculated on the MSP program fee for any transactions in VNDLY. • *to be managed at each work site individually* - Enables the program team to enter tax rates directly on the work site in **Manage Taxes** settings. This option enables programs to configure MSP fee taxes

Option	Description
	on the work site even when the supplier amount taxes are managed by vendors. • *to be set by a default tax rate* - Enables the program to set a single, default tax rate for MSP fee taxes. You're prompted to select a **Country of default tax rate** to gain access and fill out the appropriate tax fields. • *to match the tax rate of the supplier amount* - The MSP fee taxes use the same rate used for the supplier amount on all taxable transactions.
Enable Canada Regulation 105 Tax	Reserves 15% automatically for work orders where the vendor is headquartered in the United States and the client work site is located in Canada.
Allow tax overrides on individual work orders	For the entity responsible for tax management, either program team or vendor, the ability to override taxes displays for that specific work order.

Change Work Site Tax Rates

Prerequisites

- Program taxes must be managed in Workday VNDLY.
- One or more work sites must be set up.

Context

You may want to edit a work site's tax rates for a variety of reasons, such as:

- Work site is eligible for a tax holiday.
- Default tax rates are not granular enough.
- Work site is tax exempt.

These steps can be completed by whichever group is managing taxes: MSP/Program team or vendors.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Accounting** section, click **Manage Taxes**.
3. From the **Manage Taxes** page, select the country of the desired work site.
4. Select the work site you wish to edit tax rates for.

   You can adjust tax rates for a country's entire subdivision by clicking three dots inline with that subdivision. Example: You could adjust the tax rates for the entire state, province, or country.
5. When completing the **Tax Rate**, consider:

Option	Description
Tax Rate Example: VAT	Fields where you can adjust the default percentage of tax rates from the country's or

Option	Description
	region's default. Depending on the country, this may be one field or split into several.
Exclude all [subdivision] work sites from taxes	Found only on the country's subdivision tax rate settings. Checking this box excludes all work sites associated to that region.
Don't tax vendor amount at this work site	Vendors are not taxed at the work site.
Apply tax rate to markup portion of bill rate only	To meet certain local laws, the application only calculates taxes on the markup portion of the bill rate.
MSP program fee - [Tax Rate]	Fields where you can adjust the default percentage of tax on the MSP program fee. Depending on the country, this may be one field or split into several. This field only displays for MSP/Program team and only if taxes on MSP program fees are managed on the individual work site level.
Schedule Change	**Start Date** and **End Date** for this tax rate change.
Reason for Change	The reason the tax rate is being modified. This list can be customized in **Custom Data Sources**.
Leave a Note	Optional field to provide any additional information at the time of making the change.

Set Up Custom Tax Identification Numbers for Countries

Context

You can create custom fields for tax identification numbers for countries so that you can display appropriate tax identification numbers throughout VNDLY. Example: In the Netherlands, you need a KVK number and a BTW number. VNDLY delivers these by default, but you can create custom tax identification numbers for other countries.

Steps

1. Access **Company Settings > Foundational Data > Custom Fields**.
2. On the **Custom Fields** tab, click **Create**.
3. Enter a **Field Name**. Example: KVK Number.
4. In the **Type of Field** field, select **Text Input**.
5. Select **Permissions**.
6. In the **Form Selection** section, select **Vendor Tax Information**.
7. In the **Vendor Tax Information** field, click **Advanced Conditions**.
8. Select **Make this field conditionally visible**.
9. Click **And**.

10. Enter these values:

Option	Description
Source	System Field
System Field	Country
Condition	Equals
Country	Country of your selection. Example: Netherlands

11. Click **Save Advanced Settings**.
12. As a Vendor user, access **Company Profile > Edit Profile > Taxes & Payments > Tax Details** .
13. Select an option from the custom fields you configured for the selected tax country. If you haven't configured any fields, this will automatically display as **Tax Identification Number.**

Result

Example

Next Steps

Concept: Tax Management

Tax management is consolidated into a single page, with everything you need readily available. Taxes can be managed by the MSP/Program Team, by the vendors, or you can choose not to manage them in Workday VNDLY at all. From the **Manage Taxes** page, you have the ability to:

- Add and edit tax percentages.
- Enable and set tax settings.
- Exempt entire countries from supplier tax calculations.
- Set how the MSP program fee taxes are managed - regardless of who manages the supplier tax rate.

Access to tax management is restricted by permissions, so check with your program team if the menu item is unavailable.

Work Sites, Changes, and Logging

All work sites in Workday VNDLY automatically appear on this page with default tax rates displayed. Each work site and sub-division (state, province, county, etc.) have tax configuration options using the parent country or province's specific sales tax structure. Default USA tax tables are retrieved from a third-party software, Avalara, and updated on a quarterly basis.

Note: You can pin a country you regularly interact with to the top of the list. Hover over the country name and click the pin icon in-line with the country name.

Workday VNDLY uses the most granular tax rate level defined for work orders. For example, if the tax rate is defined differently in the actual work order, that supersedes tax rates defined at the work site and sub-division level; tax rates defined for a work site supersede the sub-division tax rate, and so on. It's also important to point out that Workday VNDLY automatically groups invoices along two inherent rules: tax countries and currency (these rules don't need to be set up, and cannot be changed).

Changes can be scheduled for a future, known tax rate change or occur immediately for any invoices completed after the change. All changes made to tax rates on the work sites or sub-division are tracked in the related **Activity Log** for troubleshooting purposes. Additionally, scheduled and active overrides can be modified or removed when needed to ensure correct tax rates are represented. You can filter the work site list by work sites that have a scheduled change, work sites that have changed from the default rate, or work sites that haven't changed from the default rate.

Imports and Exports

Users responsible for managing taxes can download a copy of the work sites with any current overrides in the same format needed to upload back in again. Options are provided to download all work sites or just the filtered work sites the user is currently viewing.

Statement of Work (SOW)

SOW Configuration

Set Up Statement of Work Settings

Context

You can specify the options that are available when you create a new statement of work (SOW).

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Statement of Work** section, click **SOW Configuration**.
3. Complete the **SOW Configuration** section:

Option	Description
Enable Fast Path SOWs	Vendors are required to review and approve SOWs but aren’t able to make edits to the SOW content.
Default Fast Path for every SOW?	Enables Fast Path for all SOWs by default on the **SOW Settings** tab.
SOW Close Type	When you select *Manually Close*, SOW managers need to manually close SOWs. When you select *Automatically Close SOWs*, SOWs and any associated work orders automatically close on the **Planned End Date** of the SOW. We display a banner on SOWs to notify SOW participants that the SOW will automatically close soon, depending on your tenant’s **Upcoming SOW Planned End Date Notification** configuration in the **Notifications** setting of the **SOW Configuration** page. This helps ensure that SOW participants can take any remaining action needed before closure. When you select *Automatically Close SOWs*, you also need to enter these values: • **Close Time of Day** • **Close Timezone**: VNDLY uses the time zone for the **Close Time of Day**.

Option	Description
	• **Default SOW Close Reason** • **Default Work Order End Reason** • **Payment Submission Deadline**: The period of time (in days) after SOW closure when vendors can still request payment on outstanding items. Example: 5 days after SOW closure. Note for automatic closures: • It may take several minutes, especially if multiple SOWs close on the same day. • If your tenant has configured SOW closure workflow approvals, VNDLY creates the hierarchy approval chain and alerts approvers (**More** > **Company Settings** > **Organization** > **Workflow Approvals** > **Configuration** tab). Once the SOW closes, VNDLY ends any remaining *Active* or *Pending* work orders and closes *Active* roles. • If you enable the Workday integration in your tenant, any remaining unfilled position management IDs are either closed or left open based on your configuration of the **Close Position for all Workflows** fields (**More** > **Company Settings** > **Integrations** > **Workday** > **General Configuration**).
Allow Vendors to onboard candidates	Vendors can apply and onboard contractors to any SOW Role without Client or MSP involvement.
Can SOWs be reopened?	Enables SOW managers to move a closed SOW back to *Active* status.
Remove SOW Role Org Unit Restriction	When you enable this setting, you can assign different organization units on SOW roles than on the SOW itself. When creating or editing a role for a *Draft* SOW and you have the *organization_unit.update* and *field.organization_unit.write* permissions, you can select any active organization unit in your tenant. When you enable this setting: • We display an editable **Organization Unit** field on SOW role forms. When disabled, this field is read-only. • Workflow approvals related to roles, such as onboarding, use the organization unit selected on the role. SOW approvals unrelated to roles, such as payment approvals or SOW closures,

Option	Description
	continue to use the organization unit selected on the **Overview** tab of the SOW. • When your program uses the Workday integration and changes the organization unit on a role, and the role changes from a **Staffing Model** of *Position Management*, you have 1 of several options to manage unfilled Workday positions depending on your **Workday Settings** configurations. If you change the organization unit on the **Overview** tab of a SOW, VNDLY also changes the unit on roles that used the same previous unit. Example: If a SOW changes from organization unit A to B, any roles that used A also change to B. To ensure intentional changes aren't overridden, VNDLY doesn't update any roles where the organization unit has already been customized. • If you change the organization unit on an *Active* SOW role using a change order, active work orders won't change. However, pending work orders will change to use the new organization unit.
Program Team Users	Select whether VNDLY displays the program team on the SOW and whether or not the program team is required. You can also change the title of the program team users drop-down menu in the SOW by editing the **Label** field.
Enable SOW Budget Allocation	Once you enable this feature, newly created SOWs display a separate **Charge Code** tab. You must allocate 100 percent of their SOW total budget across the added charge codes. Note: When you enable this setting, it only applies to newly created SOWs. Previously created SOWs aren't impacted. When clients need to add, remove, or update allocations on charge codes, they must do so using a change order that is not sent to vendors. See Allocate Statement of Work Budgets Using Charge Codes.
Enable payment allocation between multiple charge codes for Fixed Price/ Milestone Payments	Enable users with permission to edit charge codes to allocate funds for individual fixed price and milestone payments across multiple charge codes.

Option	Description
	When you enable this feature, users with permission to edit charge codes can view options for *Single Charge Code* and *Multiple Charge Codes* in the **Charge Codes** section on fixed price and milestone payments when creating or editing them. When users select *Single Charge Code*, they can choose the 1 desired charge code for the payment. When they select *Multiple Charge Codes*, they can allocate the payment across multiple charge codes either by percentage or flat rate. Example: 20 percent to charge code A and 80 percent to charge code B, or $20 to charge code A and $80 to charge code B. When you enable this setting, note that: • Users can only add multiple charge codes to newly created fixed price or milestone payments. They can't add multiple charge codes to previously existing payments. • When you enable the **Enable SOW Budget Allocation** setting, users can only allocate payments across the specific multiple charge codes set on the **Charge Codes** tab of the SOW. Additionally, the charge codes can't exceed the budget allocation. Example: The SOW budget is $1,000, and the maximum budget for each charge code is $300 for Charge Code A, $400 for Charge Code B, and $300 for Charge Code C. When allocating fixed price or milestone payments, you can only select Charge Code A, Charge Code B, and Charge Code C, and you can't exceed the budget limits for each. • When bulk uploading fixed price or milestone payments, users can allocate each payment across multiple charge codes. See Concept: Bulk Uploading SOW Fixed Price and Milestone Payments with Multiple Charge Codes.
Secondary Label Display	Enables you to display additional information along with a user's display name in user-related SOW fields (such as **Client Manager**, **Default Time and Expense Approver**, and **Program Team Users**). This setting can help client users identify the correct users to select in SOWs, especially if multiple users have the same display name. You can select from:

Option	Description
	• *None*: With this default option, no secondary label shows. • *Username*: Includes the user's display name and username. • *Email*: Includes the user's display name and email address. • *Username and Email*: Includes the user's display name, username, and email address.

4. Complete the **Role Form Configuration** section:

Option	Description
Bill Rate	Specifies the type of field displayed on the SOW role form when there are no matching rate cards in the application. You can select: • Single • Min/Max • None
Rate Cards	Controls if rates for a role are enforced when a matching rate card is found. When you select to enforce rate cards, the **Use Rate Card** option is hidden from users. When unselected, this option enables a user to override the rate card values on the role.

5. Complete the **Change Order Configuration** section:

Option	Description
Vendors can create change orders	Vendors can start a new change order and propose SOW changes, which are sent to the client for review and approval.
Client/MSPs can create change orders	Clients and MSPs can create a new change order and propose SOW changes, which are sent to the vendor for acceptance.
Skip Vendor Review for Change Orders	Enables you to choose items that don't need vendor review when included in a change order. Example: You want to skip vendor review for vendors when the location changes on a change order. Select **Location** from the **Skip Vendor Review for Change Orders** menu. Note: This option is only available when you select the **Client/MSPs can create change orders** check box.

6. Complete the **Payment Configuration** section:

Option	Description
Vendors can create approved payments adjustments	Vendors can create an adjustment for an already approved payment to correct an inaccurate amount. VNDLY sends this adjustment to the client to review and approve.

Option	Description
Client/MSPs can create approved payments adjustments	Clients and MSPs can create an adjustment for an already approved payment to correct an inaccurate amount. VNDLY sends this adjustment to the vendor to review and approve.
Allow tax overrides on sow milestone and scheduled payments	Enables you to set tax overrides on SOW milestone and fixed price payments. This can help you ensure that accurate tax calculations are used on your SOW milestone and fixed price payments based on your program's unique needs. See Add Tax Overrides to SOW Milestone and Fixed Price Payments.

7. In the **Approval Configuration** section, select the **Enable approval workflow for scheduled payments** check box to make sure that scheduled payments go through the approval process.

Create Statement of Work Templates

Context

When creating a statement of work (SOW), you might want to include certain clauses, such as a schedule of delivery. You can create an SOW clause template that contains those clauses. This template enables you to add that text to the SOW, without needing to rewrite the clause.

Any edits to the SOW Clause Templates will only apply to future created SOWs, not already created SOWs.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Statement of Work** section, click **SOW Templates**.
3. Click **Add New SOW Clause Template**.
4. Add the appropriate text in the field and select the options to apply to the clause.

Option	Description
Default	Automatically selects the SOW clause template. You can utilize this option for SOW clauses that you use often.
Active	SOW clause templates currently used. Inactive templates remain, but not available to be used.
Lock Clause	Prevents users from editing SOW clauses. You might want to use this option to protect legal language of the clause. Locked clauses can still be edited in **SOW Clause Templates** in **Company Settings**.

5. (Optional) To add sections and subsections, click **Add Section** .

Configure Rate Cards for Statement of Work in Settings

Context

To use rate cards for statements of work (SOWs), your program must have both the Workday VNDLY Extended Workforce Management (Extended WFM) and Workday VNDLY Statement of Work modules turned on.

You can create a rate card for specific vendors, which you can reuse on SOWs without referencing the Master Services Agreements. This assists with accountability within Workday VNDLY by ensuring that the correct rates apply when creating SOW roles.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Rate Card**.
3. Click the **Configuration** tab.
4. Under the **SOW** section, make your selections.

Edit Rate Cards to Include Statement of Work in Settings

Context

To apply existing rate cards to statements of work (SOWs), your program must have both the Workday VNDLY Extended Workforce Management (Extended WFM) and Workday VNDLY Statement of Work modules enabled.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Jobs & Work Orders** section, click **Rate Card**.
3. Click **Edit** in-line with the rate card that you wish to add SOW to.
4. For the **Module** field, clear the current selection.
5. Leave the field with **All** selected to apply the rate card to both Extended WFM and SOW modules, or select **Statement of Work** to apply the rate card to only the SOW module.

Allocate Statement of Work Budgets Using Charge Codes

Prerequisites

Select the **Enable SOW Budget Allocation** check box in **Company Settings**. See Set Up Statement of Work Settings.

Context

Statement of work (SOW) managers can use the budget allocation feature to distribute a total SOW budget among specific charge codes. On a SOW's **Charge Codes** tab, you can set an allocated amount for each code. You must fully allocate the budget on this tab in order for the SOW to become active.

If you use this feature and have also selected the **Enable payment allocation between multiple charge codes for Fixed Price/Milestone Payments** check box in **Company Settings**, users will only be able to select the charge codes that you set on the SOW's **Charge Codes** tab when creating or editing a fixed price or milestone payment, and you can’t exceed the set budget. See Set Up Statement of Work Settings.

Note that the budget allocation feature only applies to SOWs that are created after you select the **Enable SOW Budget Calculation** check box in **Company Settings**. Previously created SOWs aren't impacted.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **New SOW** and complete the workflow to create a new SOW.
3. Select the **Charge Codes** tab on the newly created SOW.
4. Enter the charge code details.
5. (Optional) Click **Add Another** and enter the charge code details until all charge codes have been added.
6. Enter an **Allocated Amount** of the SOW budget to each **Line Item**.

Example

If the total budget for the SOW is $15,000, an SOW manager might choose to allocate the budget in this way:

- Charge Code A can have up to $7,000 approved against it.
- Charge Code B can have up to $5,000 approved against it.
- Charge Code C can have up to $3,000 approved against it.

Next Steps

When an SOW manager approves the payment, Workday VNDLY checks the remaining budget on the charge codes selected on the payment. If there are not enough funds left to cover the payment, the approver sees an error, and must either:

- Select different charge codes to assign to the payment.
- Create a change order to allocate more funds to the charge codes.

SOW Workflows

Create Statement of Work Drafts

Prerequisites

Create Statement of Work Templates.

Context

Drafts enable you to set up the scope, timeline, and budget of an SOW, which ensures you'll have all the correct people collaborating on the SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **New SOW**.
3. As you create the new SOW, consider:

Option	Description
Select Payment Type(s) for this SOW	Select 1 or more payment type options to determine how the SOW functions. Your selections affect which tabs display in the draft.
Select a Template for the SOW Clauses	Select a template or build your own and add the clauses manually. You can't change this selection after you click **Create SOW**.

4. Click **Create SOW**.
5. Complete the fields on the **Overview** tab. As you complete this tab, consider:

Option	Description
Planned Start Date **Planned End Date**	All payments and roles scheduled must occur within these dates.
Planned Total Budget	Enter the maximum invoiceable amount for the SOW across all payment types. You must enter a value to access the payment tabs.
Pre-VNDLY Invoiced Amount	Enter the total of items invoiced before you created the SOW.
Non-Billable Contractors	When you select *Track*, we display the **Teams** tab. Note that the **Teams** tab always displays for SOWs with a **Payment Type** of *Time and Materials*, regardless of your selection for this field.

6. Complete the fields on the **Settings** tab. As you complete this tab, consider:

Option	Description
Would you like checklist items to apply to all contractors on this SOW?	If a SOW has a **Payment Type** of *Time and Materials* or has **Non-Billable Contractors** set to *Track*, this setting impacts a SOW manager's ability to add checklist items when creating or editing SOW roles. If this setting is set to: • *Yes*, SOW managers can add checklist items to the SOW's roles, remove some checklist items from the roles, or publish the roles without any checklist items. • *No*, SOW managers can't add checklist items to the SOW's roles.

7. (Optional) Edit clauses on the the **Clauses** tab.

   This tab enables SOW admins and managers to add, modify, and delete sections and subsections of clauses in their SOWs. To start making changes, click **Edit**.
8. Complete the fields on the **Charge Codes** tab.

   This tab only displays if you have enabled SOW budget calculation in **Company Settings**. See Allocate Statement of Work Budgets Using Charge Codes.

Result
The SOW displays on the **Statement of Work** list page with a *Draft* status.

Next Steps
Add payment information to the draft SOW. See:

- Add Roles to Statement of Work
- Schedule Fixed Price Payments
- Add Milestone Payments
- Add Units

Duplicate Roles and Payments on Statements of Work

Context

If you're a client user or a vendor user with permission to edit a Statement of Work (SOW) and create change orders, you can duplicate roles, milestone payments, and fixed price payments on SOWs that are in *Draft*, *Awaiting Client Review*, or *Awaiting Vendor Review* statuses, as well as on change orders for *Active* SOWs. Duplicating roles and payments can help you expedite the process of creating SOWs and change orders, especially if you have multiple payments or roles with similar details on a SOW. Note that this feature isn't available for SOW unit price payments, since they are requested as needed by SOW vendors.

You can also duplicate entire SOWs. For more information, view Duplicate Statements of Work.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the SOW with the existing milestone payment, fixed price payment, or role you want to duplicate.
3. Select the **Milestones**, **Fixed Price Payments**, or **Team** tab on the SOW.
4. Next to the original payment or role, click **Actions**.
5. Select **Duplicate**.
6. In the form that opens, update any necessary information on the duplicated payment or role.
7. Click **Create**.

Result

The duplicated payment or role displays on the SOW's **Milestones**, **Fixed Price Payments**, or **Team** tab. Duplicated payments display with the initial payment's status, which is either *Scheduled* for fixed price payments or *Not Started* for milestone payments. Duplicated roles display with a *Draft* status and change to *Active* when the SOW or change order is approved.

Note that for payments, only the **Planned Total** amount is copied into the draft form. Actual total amounts from the original payment aren't copied. Additionally, if you use the Workday integration, note that VNDLY doesn't copy over unfilled Workday position IDs for roles assigned to an organization unit with a **Staffing Model** of *Position Management*.

Duplicate Statements of Work

Prerequisites

Client users must have the *sow.create* permission and can only duplicate Statements of Work (SOWs) that they have permission to view.

Context

If you're a client user with necessary permissions, you can duplicate existing SOWs in any status. This feature can help you save time while creating new SOWs, especially if your program:

- Uses recurring SOWs, such as annual service-level agreements (SLAs) with vendors.
- Uses standard SOWs for specific projects.
- Wants to preconfigure SOWs with certain settings, such as specific checklists or tracking for non-billable contractors.

You can also duplicate individual SOW roles, milestone payments, and fixed price payments. For more information, view Duplicate Roles and Payments on Statements of Work.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Locate the SOW you want to duplicate.
3. Click **Duplicate** next to the SOW's name. Or, open the SOW and click **Duplicate** in the actions drop-down menu at the top of the page.
4. Fill out the fields in the modal. Consider:

Field Name	Description
Statement of Work Name	By default, VNDLY uses the original SOW's name appended by " - Copy", but you can enter a new name.
Confirm Organization Unit	This field populates with the organization unit from the original SOW. You can edit the organization unit in the new SOW's settings, or save time by editing it here.
Select the Vendor for this SOW	This field populates with the vendor from the original SOW. Once the new SOW is in *Draft* status, you won't be able to change the vendor.

5. Click **Create New Statement of Work**.

Result

After duplicating, VNDLY immediately redirects you to the new *Draft* SOW's **Overview** tab. You can customize the fields on the duplicated version, like on any other SOW.

All SOW payments and roles on the new SOW are set to their initial status:

- Fixed price payments are set to *Scheduled*.
- Milestone payments are set to *Not Started*.
- Unit payments aren't copied over to the new SOW. However, unit types are copied over.
- SOW roles are set to *Draft*.

VNDLY doesn't copy inactive or invalid data, such as inactive resource managers or locations, over to the duplicated SOW. If an optional field contains inactive or invalid data, VNDLY removes that data on the new SOW and logs the removal on its activity log. If a required field contains inactive or invalid data, VNDLY displays a message on the new SOW notifying you to update the field.

VNDLY also doesn't copy over unique data from the original SOW, such as:

- Change orders
- Attachments that are manually added
- Contractors, work orders, and applicants
- Unit payments
- SOW participants
- Workday position IDs (for client users who use the Workday integration)

Add Participants to Statement Of Work

Context

Workday VNDLY enables you to collaborate effectively with your teammates by adding them as participants on the statement of work (SOW).

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the SOW where you want to add participants.
3. Click the icon with your initials in the top-right corner of the page.
4. Click **Add Participant**.
5. Enter the **SOW Participant** and select one or more roles.

Result

The added participant receives a notification that they're able to access the SOW.

Concept: Statement of Work Participant Role Types

Statement of work (SOW) is a collaboration between different business units. Examples:
Legal, finance, procurement, operations. You can add VNDLY users and give them permissions on the SOW level.

To be added as SOW participants, users must:

- Be assigned to a user role that has an SOW Participant role tag.
- Belong to the organization unit to which the SOW is assigned.

You can add an SOW Participant to the SOW by navigating to the SOW and clicking **Add Participant**. You can grant the participant one of these role types:

- *Manager* has full control over the SOW, including making edits, changing the SOW status, and approving SOW payments and contractors.
- *Editor* can edit the majority of the SOW and change order fields during the negotiation cycle, but can't manage the SOW status or finances.
- *Viewer* can only view SOW information.
- *Contributor* can't edit any fields, but can upload and attach documents and view SOW information.

You can grant Editors, Contributors, and Viewers additional roles to view financial or confidential SOW information. SOW Managers are automatically given permissions to view financial and confidential information, and these permissions can't be removed from the manager role.

SOW participant roles have these permissions by default. You can change these default permissions by navigating to **More** > **Company Settings** > **Security Settings** > **Roles**.

Permissions	SOW Manager	SOW Editor	SOW Contributor	SOW Viewer	SOW View Financials
Budget Read	X				
Contractor Bill Rate Read	X	X		X	X
Dashboards Read	X	X	X	X	
Vendor Co Read	X				
SOW Read	X	X	X	X	X
SOW Create	X				
SOW Edit	X	X			
SOW Manage	X				

Permissions	SOW Manager	SOW Editor	SOW Contributor	SOW Viewer	SOW View Financials
SOW Attachment Edit	X	X	X		
SOW Participant Edit	X	X			
SOW Change Request Edit	X	X			
SOW Field Financial Edit	X				
SOW Field Financial Read	X				X
SOW Accept	X				
Invoice Data Owned Read	X				

Add Roles to Statement of Work

Context

You can add a role to an statement of work (SOW) that a vendor can select to assign a candidate to.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Navigate to the Team section of the SOW.
3. Click **Add Role**.
4. Select a role template from the drop-down menu.
5. Fill out the rest of the form.
6. (Optional) Add an attachment.

   You can add a document by clicking the plus sign in the **Documents** window. From there, you can upload a file with these formats:

   - .pdf
   - .docx
   - .jpeg
   - .jpg
7. Click **Create Role**.

Schedule Fixed Price Payments

Prerequisites

- Create a draft statement of work (SOW) with a **Payment Type** of **Fixed Price**.
- Complete the required fields in the **Settings** tab of the SOW.

Context

A fixed price payment is a static payment amount determined by scheduled dates. You can schedule 1 or more fixed payments for an SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired, draft SOW.
3. Select the **Fixed Price Payments** tab.
4. Click **Schedule Payments**.
5. Enter the **Payment Details**. Consider:

Option	Description
Charge Codes	Select the charge codes for the payment. If the **Enable payment allocation between multiple charge codes for Fixed Price/ Milestone Payments** option is turned on in **Company Settings**, you can select *Multiple Charge Codes* and allocate the payment across more than 1 charge code using a percentage or flat rate allocation. If that option isn't turned on in **Company Settings**, you can select 1 charge code for the payment. Additionally, if **Enable SOW Budget Allocation** is turned on in **Company Settings** and used on the SOW, VNDLY only allows you to select from the SOW's available charge codes and you can't exceed the set budget. For more information about the **Enable payment allocation between multiple charge codes for Fixed Price/Milestone Payments** and **Enable SOW Budget Allocation** settings, see Set Up Statement of Work Settings.

6. Click **Save**.

Next Steps

Once all details are complete, send the SOW to the vendor for review and modifications by clicking **Send to Vendor**.

Add Milestone Payments

Prerequisites

- Create a *Draft* statement of work (SOW) with the **Payment Type** of **Milestone** selected.
- Complete required fields in the SOW's **Settings** tab.

Context

A milestone is a marker in a SOW project that signifies a change or stage in development. You can schedule 1 or more milestones for payments on a draft SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired SOW.
3. Select the **Milestones** tab.
4. Click **Add Milestone**.
5. Enter the **New Milestone** details. Consider:

Option	Description
Charge Codes	Select the charge codes for the payment. If the **Enable payment allocation between multiple charge codes for Fixed Price/ Milestone Payments** option is turned off in **Company Settings**, you can select 1 charge code. However, if that option is turned on in **Company Settings**, you can select *Multiple Charge Codes* and allocate the payment, including both labor and expenses, across more than 1 charge code using a percentage or flat rate allocation. Note: When entering the labor and expenses for each charge code allocation, VNDLY doesn't calculate taxes for the **Expense Amount**. This is because the **Expense Amount** can already include taxes, such as sales taxes and VAT taxes. VNDLY only calculates taxes for the **Labor Amount** in milestone payments. If you choose to allocate the milestone payment across multiple charge codes, the **Total Allocated Amount** must match the **Planned Total** from the milestone's budget. Example: A milestone has the following budget: • **Planned Labor**: 2,000 USD • **Planned Expenses**: 1,000 USD • **Planned Taxes**: 400 USD • **Planned Total**: 3,400 USD You choose to allocate the milestone across 2 charge codes by flat rate. You make the following selections: • For Charge Code A, you set a **Labor Amount** of 500 USD and an **Expense Amount** of 750 USD, with **Taxes** set to 100 USD. • For Charge Code B, you set a **Labor Amount** of 1,500 USD and an **Expense Amount** of 250 USD, with **Taxes** set to 300 USD.

Option	Description
	As a result, the **Total Allocated Amount** matches the budget's **Planned Total** of 3,400 USD. Additionally, if **Enable SOW Budget Allocation** is turned on in **Company Settings** and used on the SOW, VNDLY only allows you to select from the SOW's available charge codes and you can't exceed the set budget. For more information about the **Enable payment allocation between multiple charge codes for Fixed Price/Milestone Payments** and **Enable SOW Budget Allocation** settings, see Set Up Statement of Work Settings.

6. Click **Save**.

Next Steps

Once all details are complete, send to the vendor for review and modifications by clicking **Send to Vendor**.

Add Units

Prerequisites

- Create a draft statement of work (SOW) with the **Payment Type** of **Unit Price** selected.
- Complete required fields in the **Settings** tab of the SOW.

Context

Setting up units for an SOW involves defining the units along with the price per defined unit. You can create 1 or more unit payment types on a draft SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the desired, draft SOW.
3. Select the **Units** tab.
4. Click **Add Units**.

   You can upload a .csv file of units to be bulk uploaded by clicking **Bulk Add Units**. You can download the file format by clicking the related link.
5. Enter the **Define a unit** details.

Next Steps

Once all details are complete, send to the vendor for review and modifications by clicking **Send to Vendor**.

Concept: Bulk Uploading SOW Fixed Price and Milestone Payments with Multiple Charge Codes

If your organization has turned on the **Enable payment allocation between multiple charge codes for Fixed Price/Milestone Payments** setting in **Company Settings**, you can allocate statement of work (SOW) fixed price and milestone payments across multiple charge codes during the bulk upload process.

This enables you to easily import multiple fixed price and milestone payments that are split across charge codes into VNDLY simultaneously.

VNDLY provides a CSV file template that you can use during the bulk upload process. To download this template:

1. From the header, select **More** > **Company Settings**`.
2. Under **Statement of Work**, select **SOW Bulk Uploads**.
3. Click **Bulk Upload SOW Payment Data**.
4. Click **Bulk Add Milestones** or **Bulk Add Fixed Price**.
5. Click **Download Format**.

Charge Code Fields

When you download the template, the charge code fields include “1” in the name. Example: “Charge Code 1: Accounting Code: Project Code”. When allocating payments across multiple charge codes, you can manually duplicate the charge code fields to add additional numbered columns for each charge code. Example: “Charge Code 2: Accounting Code: Project Code” and “Charge Code 3: Accounting Code: Project Code”.

Allocation Fields

There are also allocation fields on the template. The fixed price payment template includes **Charge Code 1: Allocation Amount** and **Charge Code 1: Allocation Percentage** fields, and the milestone payment template includes **Charge Code 1: Allocation Labor Percentage**, **Charge Code 1: Allocation Labor Amount**, **Charge Code 1: Allocation Expense Percentage**, and **Charge Code 1: Allocation Expense Amount** fields. These fields enable you to indicate the allocation type for the payment and the value that will be allocated to each charge code.

For fixed price payments, you must manually add allocation amount or percentage columns for each additional charge code. Example: “Charge Code 2: Allocation Amount”. For milestone payments, you must manually add allocation amount or percentage columns for both labor and expenses for each additional charge code. Example: “Charge Code 2: Allocation Labor Amount” and “Charge Code 2: Allocation Expense Amount”.

When filling out allocation fields on the template, note that:

- If you only enter percentage values for a payment, VNDLY allocates it by percentage.
- If you only enter amount values for a payment, VNDLY allocates it by a flat amount.
- If you enter amount and percentage values for a payment, VNDLY allocates it by percentage and ignores the amount values.
- If any percentage fields exist for a payment, VNDLY allocates it by percentage.
- Each payment can have its own allocation type. Example: Payment A is allocated by percentage while Payment B is allocated by amount.

Bulk Upload Validation Checks

Once you upload the completed template, VNDLY checks to see if the charge code allocation values match the related payment’s total amount. VNDLY displays an error message on the upload’s **File Transfer Result** page if: The allocation totals don’t match the payment amount. The payment exceeds the overall SOW budget. The charge code allocation exceeds the charge code budget. The charge codes aren’t linked to the SOW. The charge codes weren’t found, or they’re invalid in VNDLY.

Manage Checklist Actions for Statement of Work Contractors

Context

When a statement of work (SOW) is in a status before *Active* in Workday VNDLY, vendors can no longer view or add checklist items to SOW roles. Checklist items can be added to SOW roles by client-side users when the SOW is sent back from the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select the **Team** tab.
4. Locate the contractor.
5. From the **Actions** drop-down menu, select **View Checklist**.

   If the checklist is still in draft mode, click Complete Check.
6. Click **View** or **Take Action**.

   In the checklist view, you can filter the checklists by status, assigned, or phase.

Concept: Spend Approval Authority on Statements of Work

Approval workflows rules for **Statement Of Work Acceptance** and **Statement Of Work Payments** should be set up to route the approval properly through the **Default Budget Approver** specified on the statement of work (SOW) **Settings**. You can set up this user's **Spend Approval Authority** limits within the individual user settings—found by selecting **More** > **Users**, and then opening the desired user—to define the maximum values that can be approved by that user. The workflow approval rule then follows their spend authority. Then, if the first budget approver's **Spend Approval Authority** isn't sufficient—or if the approval rule is set up to go to each user defined on the approval rule—then the approval gets sent to the designated users.

Schedule Statement of Work Closures

Context

You can schedule a statement of work (SOW) to close automatically on a date of your selecting.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the SOW and click **Close SOW**.
3. Enter the date that you want to have the SOW close.

   If you want to close the SOW immediately, select a past time on today's date.
4. Click **Next**.
5. At the **Pending SOW Actions** page, view any outstanding SOW approvals, such as open change orders or timesheet approvals.
6. Click **Initiate Closure**.

Result

When you start the closing process, a notification is sent to the SOW's vendor to inform them of the scheduled SOW end date and the deadlines for entering any remaining payment requests.

After the SOW has been scheduled, the SOW automatically closes on the **SOW Effective End Date**, and eligible work orders automatically end on the **Work Order End Date**.

Important: Once the closure process has been initiated, you can't revert it, and you can't create a new change order. You also can't edit the closure details in the Workday VNDLY application. If this process has been started in error, contact the Workday VNDLY Support team.

End Work Orders for Statement of Work Contractors

Context

If you have the permission to end a work order, you can end a work order from within a statement of work (SOW).

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Navigate to the **Team** section.
4. Locate the contractor.
5. From the **Actions** drop-down menu, select **End Work Order**.
6. Select the reason for ending the work order.
7. Click **End Work Order**.

Change Contractor Details in Statement of Work

Context

Once the contractor is active in the statement of work (SOW), the client / MSP has the access to modify certain details of the contractor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select the **Team** section of the SOW.
4. Click the **role** to see one or more contractors tagged to that position.
5. Click the contractor's name to access their profile.
6. Click **Edit** and update the details.
7. Upon completing the changes, click **Save**.

Concept: Editing Organization Units in Statement of Work

You can edit organization units on both *Draft* and *Active* Statements of Work (SOWs).

Editing Organization Units on Draft SOWs

To edit the **Organization Unit** on *Draft* SOWs, navigate directly to a specific SOW's **Overview** tab. Your edits immediately apply to the SOW and any of its roles. If contractors are applied to any of the SOW's roles, your edits also apply to their pending work orders.

Programs with the Workday Integration

If your program uses the Workday integration, you can only change the **Organization Unit** to a unit with a different staffing model if the **Prevent switching between staffing models on SOWs and SOW roles** setting is disabled in the **Workday Settings** section of your VNDLY **Company Settings**.

If an SOW's **Organization Unit** changes from a unit with a **Staffing Model** of *Position Management* and any of the SOW's roles are eligible for provisioning, VNDLY automatically removes any previous Workday position IDs from the roles. You can manually add new Workday position IDs to the roles, or you can wait for the Workday integration to assign Workday position IDs once the SOW is approved. If the SOW's **Organization Unit** changes to a unit with a **Staffing Model** of *Position Management*, you can choose to make all roles eligible for provisioning so that Workday position IDs can be added.

Editing Organization Units Active SOWs

To edit the **Organization Unit** on an *Active* SOW, create a change order. Once the change order is approved, the organization unit updates on the SOW and any of its roles. If contractors are applied to any of the SOW's roles, the organization unit also updates on their pending work orders, but active work orders aren't updated. You can skip the vendor review process for these change orders by selecting *Organization Unit* for the **Skip Vendor Review for Change Orders** field in your **SOW Configuration** settings. We also recommend selecting *Role Resource Manager* for this field, since changing organization units often requires changing resource managers.

Programs with the Workday Integration

If your program uses the Workday integration, you can only change the **Organization Unit** to a unit with a different staffing model if the **Prevent switching between staffing models on SOWs and SOW roles** setting is disabled in the **Workday Settings** section of your VNDLY **Company Settings**.

If an SOW's **Organization Unit** changes from a unit with a **Staffing Model** of *Position Management*, you'll have one of several options to manage any unfilled Workday positions on the SOW's roles The available option depends on your **Close Unfilled Positions on SOW Roles and Close Positions for all Workflows** setting configuration in your integrations settings (**More** > **Company Settings** > **Integrations** > **Configure Integrations** > **Workday** > **General Configuration**):

- If **Close Positions for all Workflows** is enabled, an alert notifies you that all unfilled positions will close automatically.
- If **Close Positions for all Workflows** is disabled and **Close Unfilled Positions on SOW Roles** is enabled, a check box displays for SOW managers to choose if they want to close unfilled positions automatically.
- If **Close Positions for all Workflows** is disabled and **Close Unfilled Positions on SOW Roles** is disabled, an alert notifies you that all unfilled positions will remain open.

If an SOW's **Organization Unit** changes to a unit with a **Staffing Model** of *Position Management*, you have the option to make all roles eligible for provisioning, which allows the Workday integration to add Workday position IDs.

Once the change order is approved internally, VNDLY sends the changes to Workday for approval, and the change order status displays as *Connector in Progress* in VNDLY. While in this status, VNDLY pauses onboarding for SOW roles to prevent onboarding contractors with position IDs that are closed in Workday. If the change order is approved in Workday, the organization unit updates on the SOW and its roles. Additionally, if contractors are applied to any of the SOW's roles, the organization unit updates on their pending work orders, but active work orders aren't updated. If Workday rejects the change order, the organization unit doesn't update in VNDLY.

Review Statements of Work

Context

When a client updates a statement of work (SOW) during review, the vendors can approve changes before accepting the SOW.

When a client sends back the SOW for approval, we disable the **Accept** button when a client saves a change.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.

2. Open and edit the SOW.
3. Click **Save**.
4. Click **Counter SOW** in the header.

Reject Statement of Work

Context

Upon review of the vendor's response to a draft statement of work (SOW), the client / MSP can select to reject the SOW.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW in *Draft-Client Pending* status.
3. Click **Reject** on the header section of the SOW.
4. Select the **Reason** and add comments.
5. Click **Submit**.

   The SOW moves into *Rejected* status.

Onboard Statement of Work Contractor

Context

When the worker is ready to onboard, the client or MSP can select to either onboard the contractor or reject the candidate.

If the**Offer Bill Rate** entered by the vendor for a candidate is greater than the bill rate specified by the client for that position, a field indicating this difference pops up when you try to onboard the worker onto the SOW. You must approve the higher rate before onboarding.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Select an active SOW.
3. On the **Team** tab, select a role.

   You may need to click **View Roles**.
4. Click **Onboard** to activate the contractor on the SOW.

Reject Statement of Work Contractors

Prerequisites

The statement of work (SOW) should be in an *Active* status.

Context

Once the contractor is ready to onboard, the client or MSP can select to reject the contractor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Navigate to the **Team** section of the SOW.

4. Click the role to see 1 or more contractors tagged in that position.
5. Click **Reject** to terminate the worker from the SOW.

Result

The contractor's name gets removed from the **Team** list.

Create Change Order in Statement of Work

Context

Statement of Work (SOW) managers and vendor users can use change orders to update *Active* SOWs, depending on your tenant settings. Each SOW can only have one change order in progress at a time.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the relevant SOW.
3. Click **Create Change Order**.
4. Enter a **Title** and select a **Reason for Change Order**, then click **Next**.
5. Locate the section of the SOW where you want to make changes, then click **Edit**. You can edit sections on any tabs in the SOW.
6. Make your changes and click **Save**.
7. Click **Review and Send** to review your changes.
8. Once you review your changes, click **Send to Vendor**.

   Depending on your **Skip Vendor Review for Change Orders** settings (**More** > **Company Settings** > **Statement of Work** > **SOW Configuration** > **Change Order Configuration**), you can skip the vendor review process for some fields. If you enable this setting and only edit fields that don't require vendor review, the **Send to Vendor** button displays as **Approve Change Order** instead.

Result

Once the change order is created and sent for review:

- VNDLY sends the **Review SOW Change Order (Vendor)** task to vendor recipients and the **Review SOW Change Order (Customer)** task to client recipients.
- The change order displays either the *Awaiting Client Review* or the *Awaiting Vendor Review* status.

Reviewers can't edit the change order. However, SOW managers can approve or reject it, and vendor reviewers can add comments to it. Once the change order goes through internal approvals, the changes will be made to the SOW.

You can view change orders directly from the specific SOW's **Change Order** tab or on the **Statement of Work** page (**Statement of Work** > **Statement of Work** > **Change Orders**). You can also use the **Statement of Work - Change Orders** dataset in reports.

Approve Change Order in Statement of Work

Context

Upon agreement of both parties, if the client / MSP wishes to approve the change order submitted by the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.

2. Open the appropriate SOW in *Awaiting Client Review* status.
3. Click **Accept SOW** once you've reviewed the changes.

   The change order will now move into *Active* status.

Reject Change Order in Statement of Work

Context

Upon review, if the client / MSP wishes to reject the change order submitted by the vendor.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW.
3. Select a line item from the **Change Orders** section that you would like to act upon.
4. Click **Review** to take an action.
5. Click **Reject** once the review is completed.
6. Enter the **Reason** for rejection.

   The change order moves into *Rejected* status.

Approve Milestone for Statement of Work

Context

After a milestone is created and the statement of work (SOW) is active, the vendor can request payment on each individual milestone. It works as follows:

1. Vendor requests payment for a milestone.
2. Client approval becomes necessary.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click the **Milestones** tab.
3. Click any milestones with **Pending Approval**.

   The **Approval Status**, on the right side of the page, is where you can accept or reject.
4. Before doing so, one must select to edit, and add the correct **Charge Code**.
   Assuming acceptance, an invoice line item is generated.

Approve Unit Payment Request for Statement of Work

Context

Client's workflow can decide to approve or reject the milestone.

1. Vendor requests payment for a unit.
2. Client approval becomes necessary.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Navigate to the **Units** tab and click **Payment Requests**.
3. Click the desired payment request.

4. Enter the correct charge codes in the designated areas, then approve or reject on the right. Assuming acceptance, an invoice line item is generated.

Reopen a Work Order

Prerequisites

- Configure reopen settings on the Work Order option in the **Work Order Settings** page of **Company Settings**.
- Security: *workorder.reopen* permission.

Context

You can reopen work orders closed within the number of days set in **Reopen within X days of Work Order End** on the **Work Order Settings** page in **Company Settings**. Example: You want to reopen a closed work order to fulfill a labor need.

Note: If the Extended Workforce Management Work Order Modification workflow approval is enabled, it will still be triggered after completing the **Reopen Work Order** pop-up window.

Steps

1. From the header, select **Work Orders**.
2. Select the work order that you want to reopen.

   You can use the **Filters** to limit the results to work orders in *Ended* status.
3. Click **Reopen**.
4. As you complete the task, consider:

Option	Description
End Date	Enter the new date that the work order should finish.
Reason for Reopen	Indicates why the work order was reopened.
Leave a Note (Optional)	Enter details on why you're reopening the work order.
Current Budget Amount **Budget Change Amount** **Modified Budget Amount** **Total Invoiced Amount** **Remaining Budget Amount**	Displays the available budget, including increases due to reopening the work order. You can't directly update these fields, but you can utilize the **Revise Budget** area to make changes in real time.
Revise Budget	When checked, enables you to enter a new: • **Expense Amount** • **Tax Amount** • **Program Fee** • **Other Amount**

Cancel Statement of Work

Context

The statement of work (SOW) can only be canceled when the SOW is in these statuses:

- *Draft*
- *Draft-Client Pending*
- *Draft-Vendor Pending*
- *Countered*

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click the **three dots** near the top-right of the page.
3. Select **Cancel SOW**.
4. Select the **Reason** and add **Comments**.
5. Click **Submit**.

   The SOW moves into *Cancelled* status.

Adjust Approved Statement of Work Payments

Prerequisites

- The ability to adjust statements of work (SOW) must be configured in your instance.
- A workflow approval rule must exist for the **Statement of Work Adjust Approved Payment**.
- Configure who can approve payment adjustments (**More** > **Company Settings** > **Statement of Work** > **SOW Configuration** > **Payment Configuration**).

Context

You can adjust an incorrect SOW payment for milestone, fixed price, and unit payments that has already been approved. This process enables you to make sure that payments are invoiced correctly and the final total is reflected on the SOW payment and your SOW remaining budget total is updated.

Timesheets should continue to be adjusted directly on the timesheet or through a work order adjustment. There's currently no limit on how many times you can adjust a payment.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Click **Adjust Payment**.
3. Edit the amount that you want to adjust and click **Save**.
4. Select the **Adjustment Reason** and click **Submit**.

Result

The adjustment is sent to both the client and the vendor where they must review and approve the adjustment before it can go into effect. Once approved by all parties, the adjustment amount is either refunded or deducted from your **SOW Remaining Budget** and **Committed Amounts** so that you have an accurate total of how much money is left to spend on your project. An audit trail is created in a new payment table on the **Payment** page.

At this point, a new invoice transaction is also created in the **Invoice** tab, showing either a debit or credit for the adjustment. If the original payment invoice line item is still **Not Started** when the adjustment is approved, that original invoice transaction is deleted and the new adjusted transaction is created. If the original transaction was already invoiced or is the process, it remains as is, and a new transaction is created with either a debit or credit amount.

Example

This example illustrates an instance where you would adjust an approved SOW payment.

A vendor realizes that they forgot to mark their milestone payment as taxable and you already approved the payment 2 weeks ago. You create an SOW payment adjustment and send it for review to the vendor and any program team members that need to approve it. Once approved, the taxable amount is added to the payment and an audit trail is created in a new payment table on the payment page.

Update the Budget Allocation on Statements of Work

Context

Once a statement of work (SOW) is active and if the SOW Budget Allocation feature is enabled for the instance, you must use a change order to modify details. Example: the **SOW Plan Total Budget** and **Charge Code Budget Allocation** can only be modified through a change order. Users see a banner on the **Charge Code** tab alerting them that a charge order must be created to make any edits.

Steps

1. From the header, select **Statement of Work** > **Statement of Work**.
2. Open the appropriate SOW and select the **Change Orders** tab.
3. Click **Create Change Order** and enter the **Title** and **Reason for Change Order**.
4. Click **Next**.
5. Select the **Charge Codes** tab and make the appropriate modifications.
6. Click **Save**.
7. When all appropriate changes have been made, click **Review and Send**.

   If you only made changes to the charge code budget allocation, you see a message indicating the change order only requires client review.
8. Click **Send to Vendor** or **Request Approvals** depending on what changes you made.

   The option for **Request Approvals** displays if you only made changes to the charge code budget allocation. Example: Updating amounts or moving allocated funds from one charge code to another.

   The option for **Send to Vendor** displays if you made any changes in addition to the charge code budget allocation. Example: Updating payment types or dates.

Result

Once the change order is approved by all required parties, the changes are reflected on the active SOW.

Worker Profile Management

Worker Profile Management v1

Create New Worker Profile

Prerequisites

- Worker profile must be enabled and configured in **Company Settings**.

Context

Worker profile management captures headcount and individual worker information—such as candidate details, onboarding checklists, assignments, and start and end dates—for those not tracking time or expenses within Workday VNDLY.

Steps

1. From the header, select **More** > **Worker Profile Management**.
2. Click **Add New Worker Profile**.
3. Check the box for **Is New Worker**, if appropriate.

   The required fields differ depending on if the worker is new or returning.
4. Once you've completed the appropriate fields, click **Create**.

   If enabled in the **Candidate Profile Configuration** settings, Workday VNDLY checks for duplicate worker profiles. If a potential match is found, a pop-up displays that either enables you to continue and **Create** the new profile—and each profile is marked as a *Duplicate* so you can check the match—or **Cancel** to erase the entered data and proceed to the found, matching profile.

   If no match is found, you see the **View Worker** page, which displays the worker tracking as *Pending Verification*.
5. Complete any necessary checklist actions.

   Upon completion, the status updates to *Ready to Onboard*.
6. Click **Onboard**.
7. Complete the fields for the email template. The template generates an email to notify the worker of their start and end dates and their resource manager.

Change Rehire Eligibility

Prerequisites

- Enable the setting **Link Worker Profile to Master Candidate Record** within **More** > **Company Settings** > **People** > **Candidate Profile**.

Context

If a worker, for whatever reason, is no longer eligible for rehire with your organization, you can unmark them as eligible for rehire when you end the worker profile. You can also edit the rehire eligibility within **Worker Profile Management**.

Steps

1. Navigate to the **Workers** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **People** > **Workers** drop-down menu.
2. Open the worker's profile.
3. Click **Edit**, and consider:

Option	Description
Rehire Eligible	Select or clear this check box determines whether an *Ineligible for Rehire* warning displays when a user tries to enter a worker that matches this profile.
Rehire Eligible Date (If Specified)	An informational field where you can specify a certain date the worker can be rehired after.

Option	Description
Rehire Eligible Comments	This field becomes required when **Rehire Eligible** is unchecked.

Result

If the worker is marked ineligible for rehiring, and a similar worker profile is entered under **Worker Profile**, a warning displays noting a match and giving the user the option to proceed or cancel.

Worker Profile Management v2

Concept: Unified Worker Profile Management

The Worker Profile Management (WPM) module in Workday VNDLY provides transparency into: contingent worker records, their core data, and vendor and compliance information. For contractors entered into VNDLY as a worker profile, time, expenses, and invoicing are managed outside of the tenant. Worker profile records are typically used for headcount or resource tracking purposes.

Example: Your company hires an external vendor to supply janitorial staff to clean the building after hours. The WPM module enables you to create work order records for these workers who aren't full-time equivalent employees (FTE). You can use WPM work orders to provision access and equipment to include these workers in the company's headcount.

With WPM v2, we have created an enhanced experience that provides new capabilities for customers. Both client and vendor users can create WPM work orders.

Note: Existing WPM v1 users will need to migrate to WPM v2. Submit a product support case to understand your migration schedule.

When vendors or clients initiate a new WPM work order, they can invite resource managers and other user types as collaborators to complete information. Collaborators can:

- Track historical activity from the **Activity Log**.
- View recent updates by each collaborator in the **Contribution Status** section.
- Communicate updates and tag other collaborators in the **Comments** section based on permissions.
- Receive new and existing work order notifications as applicable, such as:
  - Work Order: Draft Created
  - Work Order: Draft Created (RM)
  - Work Order: Draft Deleted
  - Work Order: Draft Updated
  - Work Order: Ready to Onboard
  - Work Order: Rework Request
- Administrator roles can customize the WPM work order form to meet their program needs. They can:
  - Add custom fields from the Custom Fields page.
  - Create conditional values to restrict who can view or edit certain fields.
  - Assign permissions to control who can view, add, or delete comments.
  - Create WPM job templates from the **Job Templates** page and restrict job titles to WPM, if necessary.
  - Set up approvals on the **Workflow Approvals** page and restrict them to WPM if necessary.
  - Modify general settings for all work orders or for work orders for a specific module on the **Work Orders Settings** page.
  - Set up security policies to control module level permissions.

- VNDLY integrates WPM records with the Statement of Work (SOW) and Extended Workforce Management (EWM) modules on these pages:
  - The **Work Orders** page, which lists WPM work orders with all other types of work orders.
  - The **Vendors** page, which enables you to add and invite WPM vendors into VNDLY.
  - The **Candidates** page, which enables you to create, view, and bulk add WPM candidates along with EWM candidates. Note: Candidates are not built to a specific module.
  - The **Bulk Upload Contractors** page, which enables you to upload WPM workers along with EWM workers. Below is a list of fields required on the upload for all tenants and the additional required fields needed for tenants connected to Workday HCM via the Workforce Connector.
- To bulk upload new worker profiles, program administrators should use the **Contractor Bulk Upload**. The **Source Type** field should be set to worker profile management. The following field types are not required for a WPM worker:
  - Contractor Preferred names or email
  - Pay Rates and Bill Rates
  - Tenure Questions
  - Timekeeping or Expense related approvers
  - Budget
  - Tax Overrides
  - Shifts
  - Job Category or Job Type
  - Currency Code
  - Exempt/Non-exempt
  - OT Profile or Work Type Profile
  - Fee Profiles
  - Hours to Qualify and Not Qualified Hours
  - Milestone or their like fields
  - Rehire Fields
  - Comments

These combined records enabled you to generate consolidated reports for all worker types in the **Reporting** module.

Steps: Set Up Worker Profile Management

Prerequisites

Context

The Worker Profile Management (WPM) module in Workday VNDLY provides transparency into: contingent worker records, their core data, and vendor and compliance information.

Steps

1. Concept: Unified Worker Profile Management.
2. Create Worker Profile Management Work Orders.
3. (Optional) Create Custom Fields.

   Example: Create Custom Fields for WPM Work Orders.

4. (Optional) Create Workflow Approvals for WPM.

   Create a new criteria with the following selections:

   - **Criteria Type**:*Module*
   - **Applies if Condition**: *True*
   - **Module**: *Worker Profile Management*

   See: Steps: Set Up Workflow Approvals.

Create Worker Profile Management Work Orders

Prerequisites

- You must have the *workorder.create.wpm* permission.
- Vendors must have*Worker Profile Management* added under the **Authorized Service** section of the vendor profile.

Context

Users can create Worker Profile Management (WPM) work orders or convert existing candidates into WPM work orders. All WPM work orders display on the **Work Orders** page, where you can narrow the results by applying the **Source Type** filter for **Worker Profile**.

Steps

1. From the header, select **Work Orders**.

   Users can select **Create Worker Profile** from the quick actions menu on the home page.
2. Click **Create Worker Profile**.
3. On the **Worker Profile Details** page, consider:

Option	Description
Vendor	This field is only editable for non-vendor users. A vendor must be entered before a candidate can be selected.
Worker	Select from an existing candidate to pre-populate some of the profile details.
Create New Candidates	See: Create Candidates.
Job Title	Job titles available for selection are pulled from the **Job Templates** page. Job templates must have WPM as the module.
Job Type	If your tenant has custom job types set up, you can select variations such as Junior or Senior.
Reason for Hire	The reason for hire for the contingent worker. The reason for hire is set based on the **Default Contract Worker Reason** setting. You must have the *field.reason_for_hire.read* or *field.reason_for_hire.write* permissions. This is required if you're using the Workforce Connector.
Standard Hours/Week	Number of hours that the contingent worker is working regularly per week. You must have

Option	Description
	the *field.work_week.write* or *field.work_week.read* permissions. This is required if you're using the Workforce Connector.
Provisioning Eligible	This is required if you're using the Workforce Connector. You must have the *field.provisioning_eligible.read* or *field.provisioning_eligible.write* permissions.
Provisioning Types	This is required if you're using the Workforce Connector. You must have the *field.provisioning_eligible.read* or *field.provisioning_eligible.write* permissions.
Start Date	Enter the work order start date. You must have the *workorder.start_date.write* permission.
End Date	Enter the work order end date. You must have the *workorder.end_date.write* permission.
Organization Unit	Select the appropriate level of the organization hierarchy that aligns with this WPM work order. You must have the *field.organization_unit.write* permission.
Resource Manager	Enter the resource manager that the WPM work order links to. The resource manager receives a notification and task to collaborate on the WPM work order after the vendor creates the draft. You must have the *field.resource_manager.write* permission.
Program Team Users	Select the program team users for the work order. You must have the *field.program_team_users.read* or *field.program_team_users.write* permissions.
Default Location	Enter the address where the worker provides their services. You must have the *field.location.read* and *field.location.write* permissions to edit this field.
Charge Codes	Enter the charge codes for the WPM work order. You must have the *field.charge_codes.write* permission.

4. Click **Save**.
5. On the **Save Worker Profile** page, consider:

Option	Description
Comment	Tag contributors and add comments. This section is controlled by the vendor settings found by navigating to **More** > **Company Settings** > **Work Order** > **Vendor Actions**.

Option	Description
	Deleting a comment requires the following permissions: • *comments.delete* • *workorder.comments.create* • *workorder.comments.read*
Allow Vendor Visibility	When checked, vendors can view the comment.

6. Choose the save option:

Option	Description
Mark Done	You see the **Edit Worker Profile** page, where the worker profile is in *Draft* status. The form auto-validates and automatically moves to the next status as appropriate: • *Verification in Progress* • *Ready to Onboard* The **Contribution Status** displays as *Done*. Notifications trigger to other contributors.
Save Only	You see the **Edit Worker Profile** page, where the worker profile is in *Draft* status. Not notifications are sent to contributors and the form does not auto-validate to progress to the next status.

7. (Optional) Under **Attachments**, click **Add Attachments** to add files related to the WPM work order.

   You must have the *workorder.attachment.read* and *workorder.attachment.write* permissions to add attachments.
8. Click **Save Worker Profile**.

Result

If the WPM work order has incomplete fields, the status displays *Draft*.

If all required fields are complete and a user selects **Mark as Done**, the status changes to *Ready to Onboard*.

Example: Create Custom Fields for WPM Work Orders

This example illustrates how to create custom fields for Worker Profile Management work orders.

Context

You can add custom fields on work order forms to collect additional information from collaborators and meet program needs. If your tenant has the Workforce Connector enabled, some custom fields might be required to ensure data loads correctly between VNDLY and Workday.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Foundational Data**, click **Custom Fields**.
3. Click **Create a Custom Field**.

4. Input the required fields.

   See: Create Custom Fields in Settings in Workday VNDLY.
5. Under **Form Selection**, select *Work Order* for the custom field to be added to the work order once it is active.

   Select **Create** if you would like the custom field to be visible during WPM work order creation.
6. Click **Configure Advanced Settings** to create conditional rules that restrict who can view or edit the field.
7. Select the **Visibility Conditions** tab and select *Make this field conditionally visible*.
8. Enter the following values:

Option	Description
And/or	And
Source	System Field
System Field	Module
Condition	Equals
Value	Worker Profile Management

9. Click **Save**.
10. Click **Create**.

Reporting

Manage Reports

Prerequisites

Have these permissions:

- *custom.reports.settings.admin* to edit a report.
- *custom.reports.create.full* to edit a report.
- *custom.reports.create.limited* to sort and download a report.

Context

Use this page to edit the fields of your report or change how the data displays using filters and sorting.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. To edit a report, click the name of the report you want to edit from the list.
3. Click **Fields** to modify the fields of the report or to add more fields. Consider:

Option	Description
Fields	• Click **Add Fields** to select from a list of available fields, or create custom values and calculated fields. • To re-order fields, click into the field item to drag and drop it into the desired position.

Option	Description
	• To remove or rename fields, click the three dots on each field item and click **Rename** or **Remove**. • You can also rename fields directly on the report by double clicking the column header and entering the desired field name after you add the field.

4. Click **Filters** to manage the filters within your report. When you click **Save** the filters remain in place after you close the report.

   You can quickly filter content by clicking the 3 dots in the column header and entering the **Filter Value**. These filters don't remain after closing the report.
5. Click **Sorts** to manages the order of how VNDLY returns data in your report. When you click **Save** the sorting order remains in place after you close the report.

   You can quickly sort content by clicking the 3 dots in the column header. The sorting order doesn't remain after closing the report.

   Note: When you add sorts from the report editor they can be exported. You can't export sorts that you add from the column header.
6. Click **Save Report**.

Result

We update all changes in real time on the report.

Next Steps

When you download the report, you can change the export format by selecting **More** > **Download As**.

Manage Report Settings

Prerequisites

Have these permissions:

- *custom.reports.schedule.admin* to see and modify other users' report schedules.
- *custom.reports.settings.admin* to modify Report Settings in all reports.

You must be the Report Owner or have shared access.

Context

Use the **Settings** tab to manage details of reports, schedule the delivery of a report or share the report with others.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report that you want to manage.
3. On the **Settings** tab, in the **Report Details** section, click **Edit**.

4. Complete the **Report Details** section:

Option	Description
Report Description	You could use this space to document the types of data the report covers or why you created the report. This displays on the **Reports** page.
Report Owner	You can assign the Report Owner by user, role tag, or role. Assigning by role tag or role enables group ownership.
Report Section	Enables you to categorize similar reports.
Report Config Export	You can enable users to share the report with others using a configuration export.
Report Type	Select *Saved Report* to restrict access to the Report Owner and select users. Select *Base Report* to enable global access to all users with access to the underlying data.
Hyperlinks in Excel	You can enable the report to automatically convert URLs into hyperlinks when you export it.
Reporting API Dependency	If you select *Yes*, the system displays a warning when a user tries to edit the report configuration. The warning shows the API or integration affected.

5. Schedule Reports.
6. Complete the **Report Sharing** section:

Option	Description
Vendor Companies	Select specific vendor companies from the list to share the report with. This is a multi-select list.
Share with all vendor companies	Select the checkbox to share the report with all vendor companies.

   The report displays on the **Reports Home** page for the Role Tags, Users, or Vendor Companies you selected.
7. Click **Save** to save the changes for the **Report Sharing** section.
8. (Optional) Under **API Parameter Fields**, click **New Parameter Field**.

   You can configure parameter fields to pull data from a report without having to manually filter it. Example: You need a specific Invoice Number.

Option	Description
Parameter Name	The exact ID or label the external system users to request data.
(Optional) Description	Enables you to add additional details about the parameter.
Data Type	The format of the data.
Default Value	The fallback value used if the field contains null or missing data.

9. Click **Done**.

Add Calculated Fields

Prerequisites

- You must be the report owner or have shared access to the report.
- You must have the *custom.reports.create.full* permission.

Context

You can create calculated fields when adding or editing fields on a report. Calculated fields enable you to:

- Perform a calculation on database
- Create a value that isn't directly stored in VNDLY.
- Filter or aggregate data.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report that you want to edit.
3. Click into the search bar to display available fields.
4. Click **Create a Calculated Field**.
5. Enter a **Calculated Field Name**.

   This displays as the column title on the report.
6. From the **Formula** and **Data Type** prompts, make your selections.
7. In the **Source Data** section, specify the base datasets and values to apply the calculation.
8. Click **Save and Add to Report**.

Example

You want to track how many days it takes for new invoices to get approval. You create a new custom report. For the **Dataset**, you select **Invoice Details**. You add the **Approved Date** and **Creation Date** fields to the report. To display the number of days that each invoice takes to get approval, you create a new calculated field:

Calculated Field Name	*Dates to Approval*
Formula	*Date Diff*
Data Type	*Date*

For **Source Data**, you add these values:

Section	Value
Invoice Details	*Creation Date*
Invoice Details	*Approved Date*

You save and add the calculated field to the report. The report displays a new column for **Days to Approval** with the calculated result for each row.

Next Steps

To edit a calculated field, click **Add Fields**, click the 3 dots next to the field, then click **Edit Calculated Field**.

Add Fields to Your Reports

Prerequisites

- You must be the Report Owner or have shared access to the report.
- You must have the *custom.reports.create.full* permission.

Context

You can add, remove, and modify fields on base reports and custom reports. You can also create custom values and calculated fields for your organization's specific needs.

Note: We continue to support existing reports with multiple joined datasets but you can't add new fields that are outside of the join relationship. If you need to add new fields to your report containing multiple datasets, submit a brainstorm and we'll review your request.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report you want to edit.
3. Click **Fields**.
4. Click **Add Fields**.
5. Click **Add** for each field you wish to add to your report.

   From the list of available fields, click the down arrow next to the Dataset column header to filter the list of fields or click **Browse All Fields**.

   As you search for available fields to add to your report, consider:

Option	Description
Dataset Fields	If you haven't added any fields to the report, we display all available fields and their corresponding datasets within the selected report area. After you add the first field, we display a filtered list of all fields that are available in the starting dataset.
Calculated Fields	Select from calculated fields previously created for this report.
Parameter Fields	Select from the custom parameters to pass a value into the report when executing from the Custom Report API. See Manage Report Settings to set up APIs.
Values	Select from custom values created for this report.
System Variables	Select from fields related to system and report data.

Option	Description
Browse All Fields	View all available fields with descriptions in a full page view.
Create a Value	Add a custom field to the report.
Create a Calculated Field	Add a calculation on report fields.

6. Click **Add to report**.
7. (Optional): You can re-order the fields by dragging them to a new position in the **Report Editor** pane.
8. Click **Save Report**.

Result

We update all changes in real time on the report.

Add Filters to Your Reports

Context

You can add filters to reports.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Click the report that you wish to add filters to.
3. Click **Filters** and click **Add Filter**.
4. Select your **Dataset**, **Field Name**, **Condition**, **Use Parameter** (if applicable), and **Value** (if applicable).
5. Click **Save** to see your filters in your report.
6. Click **Save Report** if you'd like these filters to permanently stay on your report.

Set Up Sort Criteria for Your Reports

Context

You can configure sort criteria for reports as needed.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Click the report that you wish to add sort criteria to.
3. Click **Sorts** and click **Add Sort**.
4. Select your **Dataset**, **Field Name**, and **Sort Direction**.
5. (Optional) Reorder the sort criteria rows by dragging each row to a new position in the list of sorts.
6. Click **Save** to see your sort criteria in your report.

7. Click **Save Report** if you'd like your sort criteria to stay in your report.

Copy Existing Reports

Prerequisites

- You must be the Report Owner or have shared access to the report.

Context

You can make copies of existing reports instead of creating new reports from scratch. Report copies contain the same data as original reports. We only reset the **Scheduling** and **Report Sharing** sections.

Example: You're recruiting team manages a Global Candidate Report, which tracks information from candidates in all regions. Hiring managers want region-specific versions of the same report that they can edit. You make these copies of the original report to share with the hiring managers:

- AMER Candidate Tracking
- EMEA Candidate Tracking
- JAPAC Candidate Tracking

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report you want to copy.
3. Click **More** > **Save as New**.
4. Enter a **Report Name** and click **Save**.

Next Steps

Modify any fields as necessary. See Manage Reports .

Create Custom Reports

Prerequisites

- You must have the *custom.reports.create.full* permission.

Context

Custom reports enable you to select only the required fields and filters you need in a report. This can be helpful when you know exactly what data you're looking for and may be more efficient than starting with a generic base report.

Example: A program team wants to create a quick report that lists all jobs for a certain resource manager. Instead of starting with a base report and removing unneeded fields, they create a custom report that pulls in only the necessary fields such as *Job Title*, *Job ID*, *Dates*, and a filter for the resource manager.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.

2. Click **Create Custom Report** and select the **Starting Dataset**.
3. Click **Continue**.
4. Search for fields to add to your report.

   Click the down arrow next to the column name to filter the list of fields.

   As you search for available fields to add to your report, consider:

Option	Description
Dataset Fields	If you haven't added any fields to the report, we display all available fields and their corresponding datasets within the selected report domain. After you add the first field, we display a filtered list of all fields that are available in the starting dataset.
Calculated Fields	Select from calculated fields previously created for this report.
Parameter Fields	Select from the custom parameters to pass a value into the report when executing from the Custom Report API. See Manage Report Settings to set up APIs.
Values	Select from custom values created for this report.
System Variables	Select from fields related to system and report data.
All Fields	Select from fields that are available from all datasets in the report domain.
Browse All Fields	View all available fields with descriptions in a full page view.
Create a Value	Add a custom field to the report.
Create a Calculated Field	Add a calculation on report fields.

5. Click **Save Report**.

Next Steps

When you download the report, you can change the export format by selecting **More** > **Download As**.

Sync Reports Across Tenants

Prerequisites

Have the:

- *custom.reports.report_definition.import_export* permission to perform the sync transaction.
- *custom.reports.create.full* permission to import the report definitions file.

Context

You can sync your reports between Test and Production tenants. You can sync your reports by exporting and importing report definitions and transfer the reports between your tenants.

Steps

1. Navigate to the tenant with the report definitions you want to export.

2. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
3. Select the reports that you want to transfer.
4. Click **Export Report Definition**.
5. Click **Download**.
   The .json format file downloads.
6. Navigate to the tenant that you want to import the report definitions.
7. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
8. Click **Actions** > **Import Report Definition**.
9. Select the .json file you downloaded from the other tenant.
10. Click **Import**.

    You're now the report owner.

    VNDLY automatically adds the report as a saved report.
11. To view the list of your reports select **Saved Report** filter option.
    VNDLY displays the imported reports at the top of the list.

Create Reports from Templates

Prerequisites

- You must have the *custom.reports.base.report.manage* permission.

Context

VNDLY has many prebuilt, base reports that you can use as templates for different reporting needs. Base reports can save you time, since they already contain the relevant fields, which might include calculated fields, sorts, and filters. Example: The **Contractor Daily Hours** base report has 18 fields already added and sorted on the report, including a pre-made calculated field for **Contractor Name**.

You can use base reports as-is, or modify them into a new custom report. Modified base reports save as a copy, not as a new template. You can keep the report as a saved report, or change the report type to convert it into a base report template.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Click **Create from Report Template**.
3. Enter a **Report Name**.
4. In the **Choose Base Report** section, search or select from the list of base reports.
5. Click **Create New Report**.
6. Click **Save Report**.

Next Steps

Modify any fields as necessary. See Manage Reports .

Change Report Types

Prerequisites

- You must be the Report Owner or have permissions to access and edit the report.
- You must have the *custom.reports.create.full* permission.

Context

You can change report types to allow or restrict global access to reports.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report you want to change.
3. On the **Settings** tab, in the **Report Details** section, click **Edit**.
4. As you select a **Report Type**, consider:

Option	Description
Saved Report	• Only accessible to the Report Owner and users with shared access to the report. • Example: You create a Custom Work Order Report that enables you and some of your team members to view data specific to the vendors that you manage. Save it as a **Saved Report**.
Base Report	• Globally accessible to all users in a tenant who have permission to access the underlying data. • Example: You create a Global Expense Report template that can be used by anyone in your company. Save it as a **Base Report**.

5. Click **Save**.

Result

In the **Reports** tab of the **Reports** page, you can filter the reports that display by **Report Type**.

Manage Report Versions

Prerequisites

- Set up **Version History** in your environment.
- To manage versions for a specific report, you must be the Report Owner.
- To manage versions for all reports, you must have the *custom.reports.settings.admin* permission.

Context

The **Version History** section of a report enables you to:

- View the history of a report.
- Track changes every time a user saves the report.
- View or revert to earlier versions of reports.
- Export an earlier version of a report.
- Create a new report using an earlier version as a template.

Note: Version history displays earlier versions of the report with current data. Older versions don't show older data.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Select the report with versions you want to manage.
3. Click **More** > **Version History**.
4. When you click on a version of the report, you can view updates for that report in the **Changes** section.
5. When you select **View Version**, consider:

Option	Description
Back to current version	There are no changes to the selected version. Return to the most recent version of the report.
Make this the current version	Replace the current version of the report with the selected version.

6. To save the selected version of the report, consider:

Option	Description
Download	Export the selected version of the report as a spreadsheet.
More > **Save As New**	Create a copy of the selected version as a new report.

Example

The Payroll team uses an Invoicing report and modifies it a few times throughout the year due to process changes. As part of an audit, you want to compare how the report was structured in the beginning of the year to how the report is structured now. You access the report's **Version History** to find an earlier version and export it for comparison with the current version.

Download Report Builder Schema

Context

You can download and export a list of each dataset available in **Custom Reports**. These downloads include a list of fields and their descriptions for each dataset.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.

2. Click **Actions** and click **Reports Schema**.
3. View the datasets or fields and their related information.

   You can use the filters, search bar, or page navigation arrows as needed.
4. Select an export option.

Option	Description
Export Report Schema Datasets	This option displays on the **Datasets** tab. Download a spreadsheet with all report datasets and related information. The format of the exported file depends on the configurations for your environment.
Export Report Schema Fields	This option displays on the **Fields** tab. Download a spreadsheet with all report fields and related information. The format of the exported file depends on the configurations for your environment.

Configure Reports

Context

Reports Settings is where administrator users can manage preferred date formats, shareable role tags, and export results for their reports. The **Activity Log** displays any recent changes to this page.

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Foundational Data** section, click **Reports**.
3. Make your adjustments and click **Save**.

Steps: Scheduled Reports

Prerequisites

The report you want to schedule must exist.

Context

Scheduled reports can remove the need for regular, manual processing of reports.

Steps

1. Schedule Reports.

2. (Optional) Change the **Schedule Owner** of a scheduled report.

   Permissions: *custom.reports.schedle.admin*

   The **Schedule Owner** field defaults to the name of the user scheduling the report. If you need to edit the schedule owner, the report must be saved.

   a) From the header, select **Reports** > **Reports**.
   b) Open the scheduled report.
   c) Select the **Settings** tab.
   d) In the **Scheduling** section, click the 3 dots and select **Edit**.
   e) Select the **Schedule Owner** from the drop-down list.

      For users to be available for selection in the drop-down menu, they must have the *custom.reports.execute* permission and either the *custom.email.schedule* or the *custom.sftp.schedule* permission.
3. (Optional) Run a scheduled report now.

   In the **Settings** tab, in the **Scheduling** section, click the 3 dots and select **Run Now**.

   A message confirms that the schedule has been successfully triggered. A record of the *Run Now* action is available in the report history for tracking. Using the *Run Now* option won't change a scheduled run of that report.
4. View Scheduled Report Data.

   Permissions: At least one of the following must be true:

   - You have the *report_files.read* permission.
   - You are the schedule owner or a recipient when the report file is generated.
   - You manually triggered an export.

   The **Files** tab displays all files generated by the selected scheduled report. Any files form manual exports also display.

   a) From the header, select **Reports** > **Reports**.
   b) Open the scheduled report you want to view.
   c) Select the **Files** tab.
5. View Legacy Report Data

   To retrieve legacy report data, complete these steps:

   a) From the header, select **Reports** > **Reports**.
   b) From the **Actions** menu, select **Legacy Reports Files**.
   c) View and download your historical scheduled reports from the provided list.

Schedule Reports

Prerequisites

Have these permissions:

- *custom.reports.schedule.admin* to update report schedules owned by other users.
- *custom.reports.settings.admin* to modify Report Settings in all reports.
- *custom.reports.admin* to see and modify report schedules saved by other users.

Context

Scheduling reports enables you to generate reports on a set schedule. Example: Every Monday morning, the finance team needs to review the total spend of all contractors for the previous week. Instead of manually running the Master Spend Report every Monday at 8:00 am, they set up and automated schedule.

When scheduling reports, you can have them delivered by email or SFTP. To have a scheduled report delivered by SFTP, contact the VNDLY Support team to have the SFTP location configured in VNDLY. Currently, SFTP endpoints are only available to administrator and MSP users.

VNDLY can only schedule a report that is saved.

After scheduling a report, you can choose to run the report now for ad-hoc reporting between the scheduled dates. Only the Schedule Owners can perform this task.

Steps

1. Navigate to the **Reports** page.

   Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
2. Open the report that you want to schedule.
3. On the **Settings** tab, in the **Scheduling** section, click **Add Schedule**.
4. Under **Schedule Details**, consider:

Option	Description
Schedule Owner	Defaults to the name of the person creating the schedule. Users that are available for selection in the drop-down must have *custom.email.schedule* and either the *custom.email.schedule* or *custom.sftp.schedule* permission.
Frequency	Interval at which the schedule report should run.
Start Date	The first day the scheduled report frequency should run.
End Date	The last day the scheduled report frequency should run.
Scheduled Time	Time of day the scheduled report should run.
Timezone	Timezone for the schedule.

5. Under **File Options**, consider:

Option	Description
Send report even if there is no data	When checked, the scheduled report is run and delivered even if the report returns no data.
Include report creation details in report heading	When checked, the report heading displays report creation details.
Include column headers	When checked, the generated report includes headers.
Export Format	File type of the generated report.
File Extension	Defaults based on the selected **Export Format**.
Remote File Name	Name used for SFTP uploads, email, and report history.

6. Under **Report Delivery**, consider:

Option	Description
Email	When checked, the generated report is delivered by email on the scheduled date. Recipients receive a link to view the generated report in VNDLY.
Include report as an attachment	When checked, generated reports are delivered by secure link, as well as an attachment to the email.
Email Recipients	Enter the names of the recipients who should receive the scheduled report email.
SFTP	When checked, the files are delivered to the configured SFTP destination. To select the SFTP delivery method, you must have SFTP endpoints configured on VNDLY. To configured endpoints, contact the VNDLY Support team.
SFTP Destination	The location where the files are delivered.
Remote Folder Path	The folder path where the file is stored in the server.

7. Click **Create Schedule**.

Result
All newly scheduled or Run Now reports are logged under the **Report History** tab on the **Reports** page. Click **Download** to access your files.

Concept: Activity Log for Reports

In VNDLY, every workflow action is captured and tracked in the **Activity Log**.

You'll see our **Activity Log** feature for units, such as:

- Jobs
- Timesheets
- Work Orders
- Expenses, Invoices.

VNDLY also captures changes for every edit or change, such as:

- Field Name
- Change From
- Change To
- Changed By
- Changed On

You can create a custom report to export **Activity Logs** using the **Create Custom Report** task. Select the **Activity Log** dataset and add the fields you want to export. Click **Download**.

Note: The file size available for downloading reports VNDLY is limited by Microsoft Excel's specifications. The maximum worksheet size is 1,048,576 rows by 16,384 columns. Some reports may be larger than this and can't be downloaded.

Concept: Reporting Permissions

You can grant and be given varying levels of access to different capabilities and data within reporting and the report builder. Typically, users have multiple permissions working together to enable functionality. The least privileged user has only *custom.reports.execute* and the most privileged user has all permissions. Find the full list of VNDLY permissions and their descriptions by selecting **More** > **Company Settings**, clicking **Security Settings** under the **Security** section, and then selecting the **Permissions** tab.

Vendor and Contractor Users

While users such as resource managers can have reporting permissions added and removed from their **Roles** under **Security Settings**, vendor users get these reporting permissions by default:

- *custom.reports.execute*
- *custom.reports.export*
- *custom.email.schedule*
- *custom.reports.create.limited*
- *custom.reports.create.full*
- *custom.reports.share*
- *custom.sftp.schedule*

If you need to revoke any of these permissions for your VNDLY environment, please contact the VNDLY Support team.

Contractors have no access to reporting.

Dataset, Field, and Record Level Access

Having permissions to create, execute, and manage reports enables you to perform those actions, and to see the resulting data within the reports. You must also have the permissions related to the relevant area of VNDLY. This access is controlled in 3 levels or access: by dataset, by field, and by record.

Dataset and Field Access

You need permissions for a specific dataset or field, such as work orders or the budget field, to see the data in the report builder. Example: To see information around the work orders dataset, you'd need either the *workorder.owned.read* or *workorder.read* permission. To see information around the **Budget** field, you'd need the *budget.read* permission.

To view the required permissions for reporting datasets and fields, navigate to the **Reports** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu. Click **Actions** > **Report Schema**. On the **Datasets** tab, these permissions are in the **Access Permissions** column, and in the **Fields** tab, you can find them in the **Field Permissions** and **Dataset Permissions** columns.

Manage permissions for custom fields through the **Permissions** section of the **Custom Fields** page. See Create Custom Fields in Settings in Workday VNDLY for more information.

Record Access - Full Read Versus Owned

For many datasets, there's an option to limit records based on users who have some ownership of—or association to—the records. Otherwise, you can give them access to all records in a dataset that have data, not just the ones they're associated to.

Full-read permissions use a naming convention that doesn't include owned in the permission name. Example: *checklists.read*. When assigned a role that contains a full-read permission, you acquire read access to the data based on the **Organization Unit** where the role was assigned to you, giving you access to any **Organization Unit** that's a descendant of yours.

Owned permissions use a naming convention that includes owned in the permission name. Example: *checklists.owned.read*. When assigned a role that contains an owned read permission, read access to the data is based on 2 criteria:

- The **Organization Unit** where the role is assigned.
- Ownership of the records in the dataset reported.

This access does generate for the descendants of the related **Organization Unit**, but both criteria must be satisfied. Examples of ownership (though not a comprehensive list):

- Resource managers are considered owners of jobs and work orders.
- A user who created a job is also considered an owner of that job and any work orders under it.
- Expense approvers are considered owners of an expense report record.

You can further enable **Reporting Hierarchy Access** on owned-read permissions, by going to **More** > **Company Settings**, selecting **Security Settings** under the **Security** section, and navigating to the **Configuration** tab. When you check the boxes in-line with each module, anyone with an owned-read permission passes that permission up their reporting line, according to the field **Report to User** in the user profile.

Reference: Calculated Fields in Reports

Calculated fields use dataset fields to create additional points from your existing data.

A calculated field can either:

- Perform a calculation on database fields to create a value that isn't directly stored in VNDLY.
- Select values in database fields based on customized criteria.

A few of the reasons why you might want to use calculated fields include:

- The metrics you need aren't directly stored in VNDLY.
- You want to examine data across multiple dataset fields in your report.
- You want to filter or aggregate data.

These formulas are available in VNDLY for calculated fields:

Formula	Description	Example Use Case
Add	Add up multiple numeric fields. Displays total of fields combined into column format. You can add up to 5 numeric fields.	You need to display a combined value of the Client VMS Amount and Client Amount fields.
Age	Number of days since a date. Note that only 1 age value can be used per calculated field.	Display the number of calendar days since an approved value was logged. Example: Age of current date - approved date = 18 days.
Array To String	Formats an array into a string of comma-separated values.	
Avg	Averages the values.	You need the average bill rate for a resource manager. Average *client rate*.
Case	Transform values based on conditional statements.	If the hiring manager equals Ashley Smith, you want the value marked as "Case Testing",

Formula	Description	Example Use Case
	Operates as an if/and statement. Typically used to populate values if a client needs something specific for a business unit, hiring manager, and so on. You can use additional if/then statements within case statements.	if it doesn't equal Ashley Smith, leave blank.
Coalesce	Returns from a group of fields the value of the first field that isn't null.	
Concatenate	Concatenate, or combine, multiple string-type fields into 1 field. This option can be used up to 7 times in 1 formula. Defaults to adding a space as the separator.	You need to combine invoice number with the vendor name, this calculated field would display both values combined into a single field.
Count	Count occurrences of the selected field value in a selected group of fields.	You need a count of how many system IDs there are in each source type.
Date Diff	Date difference in days.	Displays the different between invoice creation date and approved date.
Date Trunc	Truncate a date field to a specified level of precision.	You only need the month from the date field.
Divide	Divide 2 numeric fields. This operates similarly to Sum.	You need to obtain the value of the client amount divided by the MSP tax amount.
Min	Minimum value in the group of values.	You want to display the earliest date of timesheet values, so the min calculated field removes the timesheets that aren't the smallest values.
Max	Maximum value in a group of values.	You want to display the latest date of timesheet values, so the max calculated field removes the timesheets that aren't the largest values.
Multiply	Multiply values of selected fields. This option operates opposite of Divide.	Display an increased bill rate comparison by creating a separate **Value** field with the suggested increase. Example: a 20% increase, so the **Value** would be an integer of 1.5. Then use this formula to multiple the source of the created value

Formula	Description	Example Use Case
		against the source of the bill rate.
Pad Text	Add padding to the text of the values selected. Operates like SubString formulas.	
Round	Rounds a value to its nearest integer or number with closest number of decimal places. Precision can also be a negative.	You need the number to round by 1 precision, which then displays the rounded number after decimal.
Subtract	Subtracts 2 numeric fields. Displays total of fields subtracted in a single column format. You can subtract up to 5 numeric fields.	You need to display a subtracted value of the Client Amount from the Client VMS Amount field.
SubString	Sequence of characters in a string extracted from the left, middle, or right of a specified value.	You need the first 3 letters of the **Approved By** person.
Sum	Aggregate function to sum values of a field in the group.	
Date To String	Formats the input expression as a string, converting a value into text.	
Un Nest	Splits multiple values in a field into multiple rows.	

These data types are available in VNDLY:

Data Type	Description
Integer	Returns a whole number, no decimals.
Number	Returns a number, including decimals.
String	Returns a series of characters.
Date	Returns a date. Example: 15 Jun 2021
Date and Time	Returns a date and time. Example: 15 Jun 2021 05:38:07 PM

Reference: Reports Page

Navigate to the **Reports** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu. From the **Reports** page, you can:

- Select an existing base or custom report to view, modify, or export.
- Create a report from a report template.

- Create a custom report.
- View report settings.

After selecting a report, you see several tabs and buttons. The options used to adjust report primary settings and results are:

- Table tab:
    - Fields
    - Filters
    - Sorts
- Settings tab

Fields Button

The **Fields** button manages the base dataset, calculated fields, parameter fields, values, and system variables for your report. You can rearrange, rename, add, and remove fields on your report from this button.

Options available to you on the **Fields** button include:

Field	Description
Dataset Fields	The base dataset used for this report. You can rearrange, rename, add, and remove fields on your report.
Calculated Fields	Displays calculated fields applied to your report. You can also add additional calculated fields here.
Parameter Fields	Displays API parameter fields available as well as ones already added to the base dataset.
Values	Displays datasets that you might find valuable in addition to your base dataset.
System Variables	Displays field names that can be used to customize the report. Example: You could insert *The report run date* system variable to customize the report to include the report date automatically.

Filters Button

The **Filters** button manages the filters within your report. When you use filters, you can further control what data returns when you run your report.

Options available to you on the **Filters** button include:

Field	Description
Dataset	Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The filter will only pull information from this dataset.
Field Name	The name of the data that displays as a field name.
Condition	Triggers for including specific data in a report. You can use relative dates in this field as well.

Field	Description
Use Parameter	Enables you to use custom parameters to pass a value into the report when executing from the Custom Report API.
Value	Further defines filter in relation to condition. Depending on the **Condition** you select, this field can be unavailable.

Sorts Button

The **Sorts** button manages the order of how VNDLY returns data in your report.

Options available to you on the **Sorts** button include:

Field	Description
Dataset	Defines where the field's information lives in VNDLY; whether it's a dataset, calculated field, or value. The sort criteria will only pull information from this dataset
Field Name	The name of the data that displays as a field name
Sort Direction	The criteria that determines which direction the data returns in your report (ascending or descending).

Settings Tab

The **Settings** tab manages the information that your report displays on the Reports Home page. Options available to you on the **Settings** tab include:

Field	Description
Report Name	The name of the report that displays on the **Reports** page.
Report Description	Although this box is optional, you could use this space to document the types of data the report covers or why you created the report. This displays on the **Reports** page.
Report Owner	This option enables you to change the user with ownership of the report.
Report Section	This prompt aids with filtering on the **Reports** page. Depending on the selection you make, the report displays when you select the corresponding type under the **Report Section** filtering options. Example: If you select **Contractors** for the **Report Section** field, and then click **Contractors** under the **Report Section** filter, the report displays in the list
Report Type	This option enables you to change the report type between **Saved Report** and **Base Report**. A

Field	Description
	Base Report is globally visible to users who have access to the underlying data.
Hyperlinks in Excel	This option enables you to include or exclude hyperlinks in downloaded Excel files.
API Parameter Fields	This option enables you to manage API Parameter fields.

Reference: Filter Conditions

You can add filters with conditions on VNDLY reports. To do so, navigate to the **Reports** page. Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu. Select a report and click **Filters**. Select **Add Filter**.

As you create filters, consider that:

- You're not required to enter a value for dynamic conditions.
- Text matching filter conditions such as *Contains* and *Starts With* are case-insensitive.
- Date ranges are based on your local timezone and include the full intended window. *Today*, *Yesterday*, and *Tomorrow* cover the entire calendar day.
- Many filter values support a supplied drop down list of values. The values display based on your security permissions.

Review these types of filter conditions and how they work:

- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions
- Reference: Filter Conditions

Value Conditions for Text, Dates, and Drop Down Lists

Condition	Value Required?	Multi-value?	Description
Equal To	Yes	No	Field equals the value. Supports multiple values when it's a drop down list.
Not Equal To	Yes	No	Field doesn't equal the value. Supports multiple values when it's a drop down list.
Contains	Yes	No	Field contains the substring (case-insensitive). Example: *Contains = smith* matches *John Smith*.

Condition	Value Required?	Multi-value?	Description
Does Not Contain	Yes	No	Field does not contain the substring (case-insensitive).
Starts With	Yes	No	Field begins with the value (case-insensitive).
Does Not Start With	Yes	No	Field doesn't begin with the value (case-insensitive).
Any Of	Yes	Yes	Field equals any selected value.
Not Any Of	Yes	Yes	Field equals none of the selected values.

Number and Date Comparison Conditions

Condition	Value Required?	Multi-value?	Description
Greater Than	Yes	No	Field is greater than the value.
Greater / Equal To	Yes	No	Field is greater than or equal to the value.
Less Than	Yes	No	Field is less than the value.
Less / Equal To	Yes	No	Field is less than or equal to the value.

Relative Date Conditions

Condition	Dynamic?	Description
Today	Yes	Records on today’s date.
Yesterday	Yes	Records on yesterday’s date.
Tomorrow	Yes	Records on tomorrow’s date.
Last 7 days	Yes	Last 7 days up to now.
Next 7 days	Yes	From now through the next 7 days.
Last 2 weeks	Yes	Last 14 days up to now.
Next 2 weeks	Yes	From now through the next 14 days.
Last 30 days	Yes	Last 30 days up to now.
Next 30 days	Yes	From now through the next 30 days.
Last Month	Yes	Previous calendar month.

Condition	Dynamic?	Description
This Month	Yes	Current calendar month.
Next Month	Yes	Next calendar month.
Last 6 Months	Yes	Previous 6 full months.
Next 6 Months	Yes	Next 6 full months.
Last 12 Months	Yes	Previous 12 full months.
Next 12 Months	Yes	Next 12 full months.

Billing Cycle Conditions

You can only view and select these conditions on filters for reports with billing cycle fields.

Condition	Value Required?	Dynamic?	Description
Equal BC	Yes	No	Billing cycle equals the selected cycle.
Not Equal BC	Yes	No	Billing cycle isn't the selected cycle.
After Billing Cycle	Yes	No	Billing cycles after the selected cycle.
After / Equal To Billing Cycle	Yes	No	Selected cycle and those after it.
Before Billing Cycle	Yes	No	Billing cycles before the selected cycle.
Before / Equal To Billing Cycle	Yes	No	Selected cycle and those before it.
Previous BC	No	Yes	The billing cycle or cycles immediately before the current one. Previous BC auto-selects the appropriate cycles.
Current BC	No	Yes	The billing cycles active today. Current BC auto-selects the appropriate cycles.

Array Field Conditions

Condition	Value Required?	Multi-value?	Description
Includes	Yes	Yes	Array contains all selected values.
Includes Any Of	Yes	Yes	Array contains at least one selected value.

Condition	Value Required?	Multi-value?	Description
Does Not Include	Yes	Yes	Array contains none of the selected values.

JSON Array Field Conditions

Condition	Value Required?	Multi-value?	Dynamic?	Description
Includes	Yes (JSON array)	No		Field's JSON array contains all elements of the provided array. Example: A value of *["red", "blue"]* matches records whose JSON array contains both *red* and *blue*.
Does Not Include	Yes (JSON array)	No		Field's JSON array doesn't contain the entire provided set. Records that contain only some elements may still match.
Is Empty	No		Yes	Field's JSON array is empty.
Is Not Empty	No		Yes	Field's JSON array is not empty.

Organization Unit Hierarchy Conditions

You can only view and select these conditions on filters for reports with organization unit fields. You need to select *Organization Unit* in **Field Name**, and then you can select the condition. Once you select the condition, you can select the organization unit in the **Value** column.

Condition	Value Required?	Multi-value?	Description
Within Hierarchy	Yes (Organizational Unit)	Yes	Includes records within the selected organization units and all their descendants.
Not Within Hierarchy	Yes (Organizational Unit)	Yes	Excludes records within the selected organization units and all their descendants.

Null Checks

Condition	Dynamic	Description?
Is Null	Yes	Field is empty.
Is Not Null	Yes	Field has a value.

Troubleshooting: Custom Reports Via APIs

The API call times out.

If the API call isn't processed under 60 seconds, the call times out and you'll receive an error.

Cause	Solution
You have too many joins across datasets.	Limit the number of joins used across datasets.
You're retrieving a report with more than 20 fields.	Restrict the number of fields in a report to 10 to 20 fields maximum. If the field count is more than 20, use SFTP to retrieve the report.
You have an irregular data shape. Example: You have a large number of nested organizations.	Avoid retrieving abnormally large datasets.
You have a report without a filter	Use appropriate filters to contain growth in data size. Example: Retrieve data modified with a filter defining a smaller time frame, such as **Yesterday** or **Today**.
You've made a request within minutes of a prior request. This is especially true for reports that return large volumes of data or have multiple joins.	Avoid making multiple API request within a short timespan.
You're retrieving reports with multiple pages of data.	The reporting APIs are intentionally designed to return paged datasets. This is a standard constraint for all VNDLY HTTP based APIs. To avoid this issues: • Use limit (number of rows to return) and offset (starting row count) to retrieve a single page of data. • Limit the number of fields included in the report. • Use SFTP instead of the reporting API to retrieve large reports without the need for paging.

Cause: Performance issues may not be apparent in Test tenants because the data load will be less in a Test tenant than a Production tenant.

You're getting performance issues retrieving data from your Production tenants, but not your Test tenants.

Solutions:

- Verify report performance after production go-live to verify the results are similar to Test tenants.
- Load the Test tenant with test data with a size representative of production load.
- Plan for scaling in production. Factor in the anticipated load size and complexity of a report with production data. Reports that execute near the threshold will likely exceed that as the program matures or after going live.

Solution:

Dashboards

Concept: VNDLY Dashboards

You access VNDLY dashboards from the global navigation bar.

The dashboards enable you to view VNDLY data represented in charts. For each chart, you can click:

- **Download Chart** to download a chart image.
- **How did we calculate this data?** to view the report we use to generate the chart.

Dashboards include filters in the left panel that enable you to further refine the data. The filter options vary by dashboard.

You can't modify these VNDLY-provided dashboards or create your own custom dashboards.

Reference: VNDLY Dashboards

VNDLY delivers these dashboards that give you greater insight into your data:

Dashboard	Tiles	Charts	Filters
Summary	• **Headcount** • **Jobs** • **Work Orders** • **Vendors** • **Active Users** • **Total Spend**	• **Work Orders By Source Type** • **Work Order By Country** (where relevant) • **Work Orders By State** (where relevant) • **Jobs By Category** • **Positions** • **Spend By Line Type** • **Spend By Month**	none
Spend	none	• **Spend By Country** (where relevant) • **Spend By State** (where relevant) • **Spend By Vendor** • **Spend By Location** • **Spend By Resource Manager** • **Spend By Line Type** • **Spend By Month**	• *Status* • *Organization Unit* • *Location* • *Resource Manager* • *Vendor* • *Billing Cycle End Date*

Dashboard	Tiles	Charts	Filters
Headcount	none	• **Headcount By Vendor** • **Headcount By Rating**	• *Status* • *Vendor*
Jobs	• **Applied** • **Interviewed** • **Offers Released** • **Offers Accepted** • **Onboarded**	• **Jobs By Country** (where relevant) • **Jobs By State** (where relevant) • **Jobs By Resource Manager** • **Positions** • **Jobs By Category**	• *Status* • *Category* • *Title* • *Organization Unit* • *Resource Manager* • *Location* • *Program Teams* • *Module*
Work Orders	none	• **Work Orders By Country** (where relevant) • **Work Orders By State** (where relevant) • **Work Orders By Location** • **Work Orders By Vendor** • **Work Orders By Resource Manager** • **Work Orders By Source Type**	• *Current Status* • *Location* • *Resource Manager* • *Vendor* • *Program Teams* • *Organization Unit*
Vendors	• **Applications Submitted** • **Candidates Shortlisted** • **Candidates Interviewed** • **Offers Sent** • **Onboarded Candidates** • **Candidates Rejected**	• **Average Time To Present By Vendor** • **Average Time To Fill By Vendor** • **Shortlisted To Interview Ratio** • **Submittal To Offer Ratio** • **Submittals To Onboarded Ratio** • **Spend By Vendor**	• *Invoice Status* • *Organization Unit* • *Location* • *Resource Manager* • *Vendor* • *Billing Cycle End Date* • *Date Range* You can use the **Save current filters** button to save your filters.

Request for Proposal

Add a Request for Proposal

Context

You can create a new request for proposal (RFP) to send to vendors for bidding.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Click **New RFP**.
3. Complete the required fields to fill out basic information for the RFP.
4. Click **Save**.
5. Select **Add Requirements** from the **Next Steps** section.
6. Click **Add a New Section**. As you complete the section, consider:

Option	Description
Knockout Requirement	When selected, the requirement is included in the knockout criteria of the RFP.
Add Another Requirement	Include another requirement within this section.
Mark as Confidential	When selected, all responses in this section are visible only to RFP managers.
Response Required	When selected, the vendor must respond to all requirements in the section.

7. Select **Add Vendors** from the **Next Steps** section on the **Overview** tab.
8. Select the vendors who can bid on the RFP.
9. Click **Save**.
10. (Optional) Add and review documents.
11. (Optional) Review the Vendor RFP experience.

    See Request for Proposal – Vendor Guide.
12. Click **Send to Vendors** from the **Next Steps** section.

    You can't unsend the RFP to vendors.

Result

Workday VNDLY changes the RFP status to *Sourcing* and sends an invite notification to each vendor. You can see whether the vendors accept or reject the invitation in the **Vendors** section.

The RFP will remain in *Sourcing* status until either:

- The **Vendor Proposals Due** date.
- All vendors who RSVP-ed yes have submitted their proposal.

Add Vendors to an Active Request for Proposal

Context

You can add vendors to a request for proposal (RFP) after you've already distributed it to other vendors.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Open the RFP.
3. Under **Next Steps**, click **Add Vendors**.
4. Click the **Send to New Vendors** button.

Result

Workday VNDLY sends the RFP request to the new vendors that you selected and adds them to the **Vendors** section on the RFP.

Creating Vendor Groups for Request for Proposal

Context

You can create vendor groups to be available for selection within a request for proposal (RFP).

Steps

1. From the header, select **More** > **Company Settings**.
2. From the **Vendors** section, select **Vendor Distribution & Groups**.
3. Click **New Group**.
4. Complete the task:

Option	Description
Group Assignment	**Jobs** is enabled for the vendor if you've set up the **Contingent Staffing** authorized service. **RFP** is enabled for the vendor if you've set up the **RFP/SOW** authorized service.
Add Vendor	When you select vendors without authorized services for the **Group Assignments** selected, Workday VNDLY displays an alert with instructions on how to resolve it. You can ignore the alert and create the group. However, when you use the distribution group, Workday VNDLY won't send the RFP to vendors without authorized services for RFP.

Duplicate a Request for Proposal

Prerequisites

You have *rfp.create* security permissions.

Context

You can duplicate an existing request for proposal (RFP). The status of the RFP does not affect the ability to duplicate it.

Steps

1. From the header, select **Statement of Work** > **Requests for Proposal**.
2. Select the **Actions** drop-down menu for the appropriate RFP.
3. Select **Duplicate RFP**.

Result

- Workday VNDLY will duplicate the **Organization Unit**, **Contacts**, and **Requirements**.
- Workday VNDLY won't duplicate the **Participants**, and any **Documents**.

Concept: Responding to Requests for Proposal

Once vendors have submitted their proposals to your request for proposal (RFP), there are several actions available.

You must have *rfp.edit* security permissions.

Responding to a Single Proposal

Select a single proposal by:

- Using the Actions drop-down menu on the proposal.
- Selecting the check box next to the proposal.
- Opening the proposal and accessing the Actions drop-down menu directly from the proposal.

Action	Description
Review & Score	Only available through the **Actions** drop-down menu on the **Proposals** tab of the RFP. Enables you to review and score the individual responses.
Award	Enables you to select the vendor who wins the work outlined in the RFP. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.
Reject	Enables you to reject the vendor proposal. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.
Shortlist	Enables you to add the vendor proposal to a shortlist. Workday VNDLY sends an email notification with an optional message to the primary vendor contact on the proposal. You can't undo this action.

Responding to Multiple Proposals

On the **Proposals** tab for the RFP, you can select multiple proposals using the check boxes.

You can respond to multiple proposals.

Action	Description
Award	Enables you to select multiple vendor proposals. Those vendors win the work outlined in the RFP. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.
Reject	Enables you to reject multiple vendor proposals. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.
Shortlist	Enables you to add multiple vendor proposals to a shortlist so that you can evaluate them. Workday VNDLY sends an email notification with an optional message to the primary vendor contacts on the proposals. You can't undo this action.

Proposal Status

You can view the status of the proposals on the **Proposals** tab of the RFP.

Status	Description
Award	The vendor has won the work based on their proposal. You can't undo this action, and the proposal can't be rejected or shortlisted.
Reject	You rejected the proposal from the vendor. You can't undo this action, and the proposal can't be awarded or shortlisted.
Shortlist	The vendor proposal has succeeded in an initial round of selection. You can reject or award the proposal.

Integrations

Procure-to-Pay

Concept: Procure-to-Pay Integration

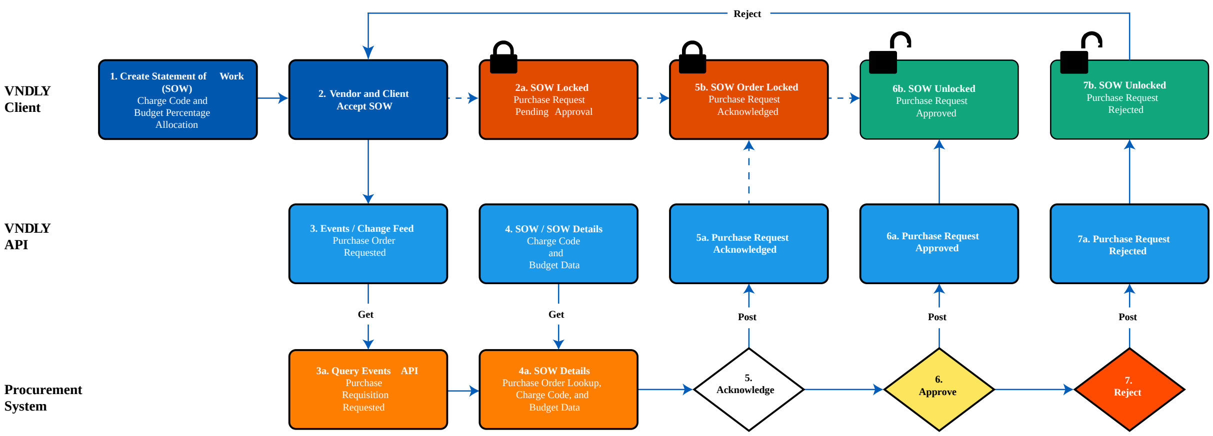
This topic provides an overview and usage guidance on the Procure-to-Pay REST APIs.

Overview

The Procure-to-Pay integration provides visibility and reporting on your company’s extended-workforce spend to external procurement systems that co-exist with Workday VNDLY. The exchange of budget, SOW, and work order data occurs through procurement system-agnostic APIs that exchange data and information between VNDLY and procurement systems. These APIs are designed for data sharing, rather than for a direct system-to-system API connection.

The system-agnostic APIs rely on a lightweight middleware process that ensures the data exchanged between VNDLY and the procurement system is accurately formatted and compatible. This middleware provides consistent integration, facilitating procurement operations and maintaining data across any procurement system.

Procure-to-Pay Component	Integration Capability
Purchase Requisition (PR) Request	You can submit a purchase requisition (PR) request in the procurement system, as soon as an offer is accepted by the supplier.
Purchase Order Lookup	You can check the status of a PR in the procurement system and return the purchase order (PO) number once the PR has been approved. Once a worker is onboarded in VNDLY, the PO is retrieved from the procurement system. VNDLY doesn’t complete onboarding until the PR is approved and a PO is issued.
Purchase Order Change	You can submit a PO change request when the budgeted PO amount changes, due to a change in bill rate or assignment dates. Work order modifications that change the budget amount initiate a PO change in the procurement system. The modification does not take effect in VNDLY until the PO change has been approved in the procurement system.
Goods Receipt (GR)	You can send time and expense transactions to the procurement system for reconciliation. Timesheets and expenses are sent as a Goods Receipt to the procurement system once invoicing is processed in VNDLY.
Cost Objects	You can import accurate cost objects (charge codes) into VNDLY so that time and expenses are allocated to the correct accounts.



Before you can use the API, you must configure company settings. See: Steps: Configure Company Settings for the Procure-to-Pay Integration .

Usage

See these sections for more detailed information on each step of the process:

- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration
- Concept: Procure-to-Pay Integration

Importing Cost Objects or Using Existing Cost Objects

To streamline the integration process, you can use existing imported cost objects or import charge code tables. Using existing imported objects or tables enables charge code fields and configurations to be imported to VNDLY and mapped directly to those in the procurement system. Once uploaded, the charge code fields are available on the job and work order forms.

To access the Charge Code Definition import, access: **More > Company Settings > Timekeeping & Invoicing > Charge Codes**.

Note: No API call is necessary at this step. Charge code definition file uploads must be in JSON file format.

Creating Jobs or Statements of Work (SOW)

When creating a job or SOW, resource managers can select from the imported charge codes in **Charge Code Cost Allocation** on the **Job Form** in VNDLY, ensuring that all associated work orders can use the corresponding charge codes when workers are onboarded.

When a resource manager creates a job or SOW in VNDLY, they can add multiple charge codes to the job or SOW. If multiple charge codes are allocated to a single job or SOW, managers can set the distribution percentage on the **Job Form** or currency amount on the SOW for each charge code. The manager can enter the number of positions and the duration of the job, and they can revise the budget if enabled.

When the job is active, vendors can apply candidates and applicants can be interviewed. At this point, the SOW or work order is locked from further edits until approved or rejected. The **Revision Status** revision status notification on the job candidate page and the work order page in VNDLY displays **Purchase Request Requested, waiting for approval**.

Using APIs to Onboard Workers and Request Purchase Requisition

Once a job is published, a worker approved, and an offer released, the work order status is set to **Ready to Onboard**. At this stage, an API event is available on the Events / Change Feed API. These events can be used to indicate to the procurement system that a purchase requisition can now be created.

The status of the purchase requisition from the procurement system can be viewed in the Activity log, indicating that the procurement requisition has been requested so that you can track the status throughout the procurement process.

Get a List of Purchase Requisition Requests

Trigger Event/Scenario	API Name	API
When a worker is approved and an offer is accepted. Returns a list of work orders with a status of `purchase_order.requested` pending approval	Events / Change Feed	GET `~/services/program/events/v2/change_feed/` Category: `purchase_order.requested`

The Events API returns the `id` of the work order associated with the purchase requisition request. Use the `id` to query the Worker Order Details API, which returns the budget and charge code details associated with the work order.

Get Work Order Details

Trigger Event/Scenario	API Name	API
Uses the work order `id` from the Events / Change Feed API	Work Orders / Work Order Details	GET `~/services/program/work_orders/v2/work_orders/{id}/`

Trigger Event/Scenario	API Name	API
to return details required to approve the work order.		

Get SOW Details

Trigger Event/Scenario	API Name	API
Uses the SOW `id` from the Events / Change Feed API to return details required to approve the SOW.	Statement of Work / Statement of Work Details	GET `~/services/program/sows/v2/sows/{id}/`

Note: Work order updates are disabled until the purchase requisition request is approved or rejected by the procurement system.

Submitting Timesheets and Invoices

You can submit timesheets and invoices against charge codes on work orders. This process ensures accurate tracking of labor and expenses, facilitating efficient billing and payment workflows. See: Example: Create Custom Invoice Report for Procurement System .

The VNDLY Custom Reports API is used to allow the procurement system to query invoice details needed to acknowledge and approve invoices. Charge code information is automatically populated on the **Timesheet Summary** for workers when entering and submitting time.

Using APIs to Get Invoice Data, Acknowledge, and Approve

You can use APIs to get a list of invoice requests pending approval. Then you can use APIs for capturing the invoice status from the procurement system as acknowledged or approved. These actions update the invoice Activity log, informing users of the invoice status provided by the procurement system.

You can track and sync invoices with the procurement system using a reference ID: `invoice_request_ref_id`

Invoice Request List and Invoice Request Details

Trigger Event/Scenario	API Name	API
Get Invoice Request List When an invoice has been submitted in VNDLY pending for approval.	Invoices / Invoice Request List	GET `~/services/program/invoices/v2/invoice_requests/` Request Body `limit`: Number of results to return per page. `offset`: The initial index from which to return the results. Returns IDs used to query work orders: `invoice_request_ref_number` Used to query the custom reports API to receive the budget and charge code details associated with the invoice.

Trigger Event/Scenario	API Name	API
		`invoice_request_ref_id` Used to acknowledge and approve the invoice request.
Get Invoice Request Details When an invoice has been submitted in VNDLY pending for approval.	Invoices / Invoice Request Details	GET `~/services/program/invoices/v2/invoice_requests/{id}` Request Body: `id`: Invoice request reference Id

Get Invoice Details Using the Custom Report API

The current implementation uses the VNDLY custom reports API to get the invoice details. See: Example: Create Custom Invoice Report for Procurement System .

Trigger Event/Scenario	API Name	API
Using the custom report `id` and custom report parameters, get the details for the invoices.	Custom Reports / Run custom report	GET `~/services/program/custom_reports/v2/custom_reports/` Use the correct parameter name for the custom report. Parameters are predefined in the Saved Report and passed through the parameters query parameter. The parameter string must contain the parameter name and the value applied to the Saved Report Parameter.

Invoice Acknowledge and Approve

Trigger Event/Scenario	API Name	API
Acknowledge: Procurement system has successfully received invoice details. The procurement system can send an acknowledgement of receiving the request to VNDLY. Updates Activity log indicating the invoice has successfully been received by the procurement system.	Invoices / Invoice Request Acknowledge	POST: `~/services/program/invoices/v2/invoicerequests/acknowledge/`
Approve: Procurement system approves the invoice.	Invoices / Invoice Request Approve	POST: `~/services/program/invoices/v2/invoicerequests/approve/`

Voiding or Rejecting Invoices

The standard invoice void process is compatible with Procure-to-Pay integrations, but it remains a manual process rather than an automated one. To ensure invoice status remains in sync, invoices must first be voided in VNDLY before rejecting in the procurement system.

You can void an invoice through the VNDLY user interface. Once an invoice is void, it can be queried using the custom reports API using the Invoice > Invoice Details dataset and Status field. This enables invoice status to update the procurement system accordingly and keep both systems in sync.

Updating Work Orders and Requesting Approval

Updates to work orders may affect charge code budgets. Any revisions to a work order must be approved or rejected by the procurement system to ensure budget alignment. The work order change request status (*Pending Approval, Acknowledged, Approved, or Rejected*) is reflected in the work order Activity log.

The list of purchase order change requests is available using the Events / Change Feed API.

Get Work Order Change Requests

Trigger Event/Scenario	API Name	API
Returns a list of modified work orders.	Events / Change Feed	GET `~/services/program/events/v2/change_feed/` Category: `purchase_order_change.requested`

When a work order revision request is made, the work order is locked from further revisions until the procurement system approves or rejects the request. This ensures synchronization between our system and the procurement system. API endpoints are available for acknowledging, approving, and rejecting work order updates.

Acknowledge, Approve, or Reject Work Order Update Request

Trigger Event/Scenario	API Name	API
Acknowledge: Procurement system has received a change order. The procurement system can send an Acknowledgement of receiving the request to VNDLY. Updates Activity log indicating the work order change request has successfully been received by the procurement system.	Purchase Order Change Acknowledge	POST `~/services/program/purchase_orders/v2/purchase_order_changes/acknowledge/`
Approve: Updates the work order Activity log indicating the work order change request has been approved. Changes are reflected on the work order. The work order is unlocked.	Purchase Order Change Approve	POST `~/services/program/purchase_orders/v2/purchase_order_changes/approve/`
Reject: Updates the work order Activity log indicating the work order change request has been rejected. No changes are made to the work order. The work order is unlocked.	Purchase Order Change Reject	POST `~/services/program/purchase_orders/v2/purchase_order_changes/reject/`

Related Information

Examples

Feature Release Note: Procure to Pay

Steps: Configure Company Settings for the Procure-to-Pay Integration

Prerequisites

- Submit a product support case to enable the integration.
- See: Concept: Procure-to-Pay Integration .

Context

To use the Procure-to-Pay integration, you must configure options on the **Company Settings** page.

Steps

1. Enable the Procurement APIs.
   a) From the header, select **More > Company Settings**.
   b) Under **Integrations**, click **Configure Integrations**.
   c) Select **Allow Procurement API Usage**.
   d) Click **Submit**.
2. Enable and Configure Charge Codes on Job Forms.
   a) From the header, select **More > Company Settings**.
   b) Under **Jobs & Work Orders**, click **Job Form Configurations**.
   c) In the **Charge Codes** section, select these check boxes:

Option	Value
Display	• Job Form • Work Order
Required	• Job Form • Work Order
Allow Multiple	• Job Form • Work Order This is optional. Only required if your procurement process uses multiple charge codes on a single Job Form or Work Order. Enabling this will allow multiple charge codes to be added when creating a job. Otherwise, you can only add a single change code.
Budget Allocation	• Budget Allocation

3. Enable Use Budgets on Jobs and Work Orders.
   a) From the header, select **More > Company Settings**.
   b) Under **Jobs & Work Orders**, click **Job Compensation**.
   c) In the **Budget** section, select **Use Budget**.
   d) Click **Submit**.
4. Enable Budget Allocation on SOW .
   a) From the header, select **More > Company Settings**.
   b) Under **Statement of Work**, select **SOW Configuration**.
   c) In the **Charge Codes** section, select **Enable SOW Budget Allocation**.

5. Enable SOW Budget Allocation.
    a) From the header, select **More > Company Settings**.
    b) Under **Statement of Work**, select **SOW Configuration**.
    c) Under **Charge Codes**, select **Enable SOW Budget Allocation**.
    d) Click **Save**.

Example: Create Custom Invoice Report for Procurement System

Context

This example illustrates how to create a custom invoice for running the Procure-to-Pay integration.

Steps

1. Create a Custom Report and Returned Data Fields.
    a) Navigate to the **Reports** page.

       Depending on your permissions, you can access this page directly from the VNDLY header or in the **Reports** > **Reports** drop-down menu.
    b) Click **Create Custom Report**.
    c) From the **Starting Dataset** prompt, select **Invoice**.

       If you need additional invoice details, you can join to other related datasets.
    d) Click **Continue**.
2. Add Invoice Data Fields to the Custom Report.
    a) Click Add Fields.

       The **Add Fields** page lists data fields available on the Invoice dataset. These fields are returned using the custom report API and used by the procurement system for approval.
    b) Add invoice data fields as required by the procurement system.

       We recommend you add the PO Number and Total Amount fields on the invoice. You can add more fields based on your specific API.
    c) Select **Add to report**.
    d) On the **Table** tab, preview the report and select **Save Report**.
3. (Optional) Create Custom Report API Query Parameter.

    Create API query parameter fields used to pass a value into the report when executing from the Custom Report API.
    a) Create a Custom Report API Parameter: API Parameters can be used in report fields or filter values.
    b) Navigate to the **Reports** page.
    c) Select the custom report to view the **Custom Report Builder** page.
    d) Select the **Settings** tab on the **Custom Report Builder** page .
    e) In the **API Parameter Fields** section, select **New Parameter Field**.
    f) Add a parameter field:

Field	Value
Parameter Name	The name used as the Custom Reports API query parameter.
Description	Optional description for future reference.
Data Type	*String*: Alphanumeric characters *Date*: Date string in ISO 8601 format (YYYY-MM-DD)

Field	Value
	Number: Integer or floating-point (decimal) value
Default Value	Alphanumeric string returned when a field contains null or missing data.

4. Map Filter to Custom Report API Parameter.

   Bind a specific report field to the API parameter to enable dynamic querying. Example: Map the filter to Invoice Number to query a specific invoice.

   a) On the **Filter** tab, enter these values:

Field	Value
Dataset	*Invoice*
Field Name	*Invoice Number* The Field Name is used as an API parameter to pass the invoice number on the Custom Reports API.
Condition	*Equal To*
User Parameter	On - Enables the use of the defined **Custom Report API Parameter**.
Value	Select the **Parameter Name** you previously defined.

Concept: Testing the Procure-to-Pay Integration

You can access the API Events page in VNDLY to simulate API calls and responses with a procurement system, enabling you to view data and test end-to-end flows before establishing a real connection.

The API Events page is available at: `YOUR_VNDLY_DOMAIN/events/list?categories`

VNDLY API Key	My Profile > API Token
API Events Categories	Pending work orders and invoices that can be acknowledged, approved or rejected. • **purchase_order_request.requested** Lists all work orders that have been submitted and ready to be acknowledged or approved from the procurement system. • **purchase_order_change_request.requested** Lists of work orders with change requests and require approval for the change from the procurement system. • **invoice_request.requested** List all invoices submitted and ready to be acknowledged or approved.
Events	List of selectable work orders or invoices that can be acknowledged or approved.
API Data	Data available via the respective API call.
Acknowledge, Approve, or Reject	Initiates the Acknowledge, Approve or Reject API Call view.

Workday VNDLY Workforce Connector

Steps: Set Up Workday VNDLY Workforce Connector

Prerequisites

Administrator access for both the Workday and Workday VNDLY environments. Review the security configuration documents of Workday VNDLY.

Context

The Workforce Connector enables both foundational and transactional data to flow between Workday VNDLY and Workday HCM.

The Workday VNDLY Workforce Connector (Workforce Connector) is set up when your Workday VNDLY environment is first deployed or when there's a new Workforce Connector deployment to your environment. Consult with Workday VNDLY Professional Services before attempting any changes to the Workforce Connector.

Steps

1. Create Integration System User Account for Workday VNDLY.
2. Create Integration System Security Groups.

   We recommend using an **Unconstrained** security group for the type of **Tenanted Security Group**. If you need to create a **Constrained** security group, contact your integration team to ensure that constrained security groups are supported for your integration.
3. (Optional) Register API Clients for Integrations.

   You must register an API Client to:

   - Use *OAuth* instead of *Basic* as the authentication method to connect to the Workforce Connector.
   - To use Workday Query Language for user import, this must be configured. See: Reference: General Settings in the General Configuration Tab.

   When registering an API Client, select the following functional areas:

   - Common Financial Management
   - Contact Information
   - Integration
   - Jobs & Positions
   - Organizations and Roles
   - Pre-Hire Process
   - Staffing
   - Suppliers
   - System
   - Tenant Non-Configurable
   - Worktags
4. Edit Domain Security Policies.

   See: Reference: Workday VNDLY Workforce Connector Domain Security

   Security: *Security Configuration* and *Security Activation* domains in the System functional area.

5. Edit Business Process Security Policies

   Access the **Edit Business Process Security Policy** task for each business process required by this integration. Select the business process to edit and add the security group to the actions in the business process. This grants the users in the security group access to the business process.

   See Reference: Workday VNDLY Workforce Connector Business Process Security.

   Security: *Security Configuration* domain in the System functional area.
6. In VNDLY, set up Workday integrations by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**.

   Check the **Workday Integration** check box.
7. Set up the Connector Configuration Tab in Workday VNDLY Settings.
8. Set up the Scheduling Configuration Tab in Workday VNDLY Settings.
9. Set Up the General Configuration Tab in Workday VNDLY Settings .

Steps: Set Up the VNDLY Contingent Worker Team

Prerequisites
Configure the Manager Insights Hub in Workday. See: Steps: Set Up Manager Insights Hub.

Context

The **Contingent Worker Team** section of the **Manager Insights Hub** is a centralized workspace in Workday HCM, designed for managers to access key information about their contingent workforce. The hub serves as a single point of entry for hiring managers to navigate between Workday HCM and Workday VNDLY platforms, enhancing their ability to manage their contingent workforce.

Note: Proxy is not yet supported in either Workday or Workday VNDLY. You must log in as the user directly when viewing data within the hub.

Steps

1. (Optional) Configure the Contingent Worker Team Section in the Manager Insights Hub.

   The **Contingent Worker Team** section displays by default in the **Manager Insights Hub** for:

   - All tenants who have not customized their hub navigation.
   - All users who have contingent workers reporting to them in Workday HCM. Users who don't have contingent workers reporting to them in HCM are not able to view this.
2. In Workday, access the **Create x509 Private Key Pair** task.

   Security: *Security Administration* in the System functional area.
3. In Workday, access the **VNDLY Setup** task.

   Enter the **https://tenant_name.vndly.com/services/program/{resource}/{version}/{operation}** for your VNDLY tenant and the x509 Private Key Pair you created in step 2.

   If you need to make corrections, repeat this step to override the previous task.

   Security: *Security Administration* in the System functional area.
4. In Workday, search for *Domain*: VNDLY Contingent Workers.
   a) From the related actions menu of the domain, select **Domain** > **Create Security Policy**.
   b) In the **Report/Task Permissions** grid, add the Manager security group with view and modify permissions.

   Security: *Security Administration* in the System functional area.
5. Activate Pending Security Policy Changes.

6. In VNDLY, enter the **Workday Tenant Environment** and **Workday Public Key**.

   The Workday Public Key is the key created in step 2.

   For more details see: Set Up the Connector Configuration Tab in Workday VNDLY Settings.
7. In Workday, add the Manager Insights Hub for quick access.

   From the Workday Homepage, click **Menu** and select **Add Apps**. Select the **Manager Insights Hub** app.

Result

The **VNDLY Contingent Worker Overview** page displays in the **Contingent Worker Team** section of the **Manager Insights Hub** in Workday. The cards display contingent worker data from Workday VNDLY.

Create Integration System User Account for Workday VNDLY

Prerequisites

Administrator access to the Workday environment.

Context

You can create an integration system user (ISU) in Workday for Workday VNDLY. An ISU is needed to use the Workday VNDLY Workforce Connector. Assign the ISU to a security group with permissions to access all tasks and reports that the Workforce Connector requires.

Steps

1. Access the **Create Integration System User** task

   Security: *Integration Security* domain in the Integration functional area.
2. Enter a username and password for the new user.
3. Leave **Require New Password at Next Sign In** check box cleared, as this user will sign on programmatically.
4. Select the **Do Not Allow UI Sessions** option.

   This option is an additional security layer, since integration system users should not be accessing the Workday user interface.

Next Steps

Continue with the step 2 of the Steps: Set Up Workday VNDLY Workforce Connector topic.

Set Up the Connector Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Select the **Workday Integration** check box.

Context

You can enter the environment details about your Workday environment in the **Connector Configuration** tab for the Workday VNDLY Workforce Connector. You need these details for Workday VNDLY to be able to connect to the Workday environment.

In order to send non-effective dated custom objects from VNDLY to Workday via the Connector, you must select an **Authentication Method** of*OAuth*. If you select *Basic*, you are only able to send effective-dated custom objects.

Steps

1. From the header, select **More** > **Company Settings**.
2. Under **Integrations**, select **Workday**.
3. As you complete the **Connection Configuration** tab form, consider:

Workday Host Name	The host name for the Workday service URL for your environment. Find the location URL by following the instructions in the Workday Community Getting Started documentation. Example: An example URL might be *https://wd2-impl-services1.workday.com/ccx/service/vndly_dpt1/Human_Resources/v34.0* where the host name is *wd2-impl-services1.workday.com*.
Workday Tenant Name	Your Workday organization ID. Find this ID by selecting your profile in the upper right corner in the Workday environment, and going to **My Account** > **Organization ID**.
(Optional) Workday Tenant Environment	Indicates the category of tenant. Enables you to connect to the **Manager Insights Hub** in Workday. To locate the value for your tenant: a. Search: Tenant Setup b. On the Business Processes and Integrations tab locate the Current Environment.
Authentication Method	Before selecting the authentication method, you must create an integration systems user (ISU) and set up the integration security group to set up the appropriate security permissions. You have these options to authenticate: • Basic: Enter the ISU username and password. • OAuth: Enter the Client ID, Client Secret, and token. For more information, see: Register API Clients for Integrations.
(Optional) Workday Public Key	Enables you to connect to the **Manager Insights Hub** in Workday. Enter the key created in the **Create x509 Private Key Pair** task in Workday.

Set Up the Scheduling Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to: **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Enable the Workday Integration toggle.

Context

You can schedule different integrations for the Workday VNDLY Workforce Connector. Scheduling integrations enables Workday VNDLY to import foundational data and certain contingent worker data from Workday. Some integrations are mandatory, while others are optional.

Steps

1. Go to the **Scheduling Configuration** tab by navigating to **More** > **Company Settings** > **Integrations** > **Workday**.
2. Set up the schedules for the integrations that you want to enable. As you select the type of schedule that you want, consider:

Option	Description
Daily Schedule	Select a specific time to schedule the integration from various 5 minute intervals.
Fixed Interval	Select either hours, minutes, or seconds and specify the interval length. **Example: Interval: Hours** and **Interval Length: 8** if you want the integration to trigger every 8 hours.
Custom Cron	Enter a specific cron expression to schedule the integration as a cron job. Example: **Cron Expression: 0 00 06 ? * MON-FRI** if you want the integration to trigger at 6 am on Monday through Friday.

3. As you complete the tab form, consider:

Option	Description
Load Custom Data Sources	Required.
Load Organization Unit	Required.
Load Charge Codes	Optional. Charge codes might be needed if specific organizations (such as cost center, company, region, or custom HCM organization types) are required when creating a position or contracting the contingent worker. Consult a Workday VNDLY Technical Consultant.
Load Employee Users	Optional, but recommended.
Load Work Sites	Required.
End Contracts from Workday	Optional, but recommended.
Load Open Positions	Optional, but recommended when position management is being used as a staffing model in a customer's Workday environment.
Create Jobs From Job Requisitions	Required when hiring managers are creating job requisitions in Workday to be imported as draft jobs into VNDLY.
Close Jobs From Job Requisitions	Optional. Recommended for jobs to be closed in Workday VNDLY when the corresponding Job Requisitions are closed in Workday.
Load Contractor Changes	Optional, but recommended.

Option	Description
Load Custom Objects Definition	Required when sending custom fields to Workday. The definition is retrieved from a WSDL file which contains the schema information of custom objects defined in Workday.

Set Up the General Configuration Tab in Workday VNDLY Settings

Prerequisites

Enable Workday integrations by going to **More** > **Company Settings** > **Integrations** > **Configure Integrations**. Select the Workday Integration check box.

Context

You can specify more settings for the Workday VNDLY Workforce Connector in the General Configuration tab. For more information about this tab, see:

- Reference: General Settings in the General Configuration Tab.
- Reference: Contingent and Worker Profile Management Settings in the General Configuration Tab.

Bulk Update Work Orders with Workday Position Management

Prerequisites

Administrator or superuser permissions.

Context

For tenants that have the Workday integration enabled, you can bulk update the organization unit, regardless of the staffing model. This means you can bulk update the organization unit and change it from:

- A job management organization unit to a position management organization unit.
- A position management organization unit to a job management organization unit.
- One position management organization unit to another position management unit.
- One job management organization unit to another job management organization unit.

We've placed multiple validation checks when the bulk update of this field is submitted to ensure they're permitted by tenant level Workday configurations. You control those validation checks by tenant-level settings in the **General Configuration** tab of the **Workday** settings page in Workday VNDLY. Bulk updates on the staffing model field work orders that don't have the proper settings will fail.

When a job or SOW role is created, there are two staffing models:

- **Job Management Staffing Model** - No Workday position IDs are created or assigned for this model, and work orders created with this model aren't assigned Workday position IDs.
- **Position Management Staffing Model** - Workday position IDs are added to the job or role based on the number of positions that the job or role has, and as work orders are created on the job or role, they're assigned one of the Workday position IDs.
    - **Eligible for Provisioning** must be marked **Yes** in the job or role.
    - Position IDs may be manually selected at the time of job/role creation or may be added via the Workday Connector after the job/role creation
    - You can't bulk update a work order to position management if the work order has a start date set in the future.

Steps

1. From the header, go to **More** > **Company Settings**. From the **Integrations** section, select **Workday**.
2. On the **General Configuration** tab, locate the **Prevent switching between staffing models on provisioned work orders for Employers** checkbox under the **Position Management** section. If you want work orders to be able to be moved to organization units with different staffing models, make sure that checkbox is cleared.
3. Depending on which staffing model you want to change, consider:

Changing Supervisory Organization section	Action
Position Management To Position Management	Select any or both of the following: • **Use Current Position** - This lets Workday VNDLY move the existing Workday Position ID to the newly selected organization unit. • **Create a new position (Workday generated)** - This lets Workday VNDLY assign a new Workday Position ID from the newly selected organization unit for the work order. Note: With bulk update, you can't select from available positions in Workday VNDLY. To select from available positions in Workday, you must complete a manual work order modification for each work order.
Job Management To Position Management	Select the following: • **Create a new position (Workday generated)** - This lets Workday VNDLY move the existing Workday Position ID to the newly selected organization unit.

4. Create Bulk Updates. For the action in the **Bulk Update Wizard**, select **Update Organization**.
5. Select the **Allow Staffing Model Changes** checkbox. If not checked, any work orders that are moving staffing models will fail.
6. As you choose the staffing position to update, consider:

Option	Action
Position Type	For changing to position management, select the position type. Depending on how your tenant is set up determines whether you can choose to use the current position or create a new position. Note: If you're changing to an organization unit using job management, this option won't appear because job management doesn't require Workday position IDs.
Close Old Position	This option is selected by default, to ensure that old unused Workday position IDs don't linger in the system. If you want to clear this checkbox, you must have the **Close Position for all Workflows** checkbox cleared

Option	Action
	in the **Workday** settings page (**General Configuration** tab)
Disable Connectors	If this is selected, the organization unit change is only updated in Workday VNDLY, and is not sent to Workday. You may want to use this option if Workday organization units are current and you need to update Workday VNDLY to align with Workday.
Resource Manager	This menu only appears if **Restrict Resource Manager to Organization Hierarchy mapping** is selected in the**Job Form Config**page. (**More** > **Company Settings** > **Job Workflows** > **Job Form Configurations**).

Steps: Send VNDLY Custom Fields to Workday

Prerequisites

- The *Edit Worker Additional Data* business process definition must include an **Edit Additional Data** step for each effective-dated custom object which needs to be sent to Workday.
- These security domains must be set up in Workday:
    - On the *Edit Worker Additional Data* business process, give the VNDLY security group **Initiate** access.
    - For each object's security domain, give the VNDLY security group **Get** and **Put** access.
    - Configure the **Custom Object Management** security domain and give **Get Only** access.
- If you are using *OAuth* as the **Authentication Method**, you must:
    - Grant permission to API Clients for the functional area of the security domain of each custom object.
    - Add the functional area system of the security domain to the API Client's Scope.
- Define the custom objects and custom fields in Workday.
    - See: Steps: Set Up Custom Objects.

Context

You can now send VNDLY custom fields related to the worker to Workday via the Workforce Connector. This change minimizes the need to employ custom integrations catering to unique provisioning requirements related to contingent workers.

Customers can take the following actions:

- Import effective-dated or non-effective dated custom object definitions related to the worker object from Workday to VNDLY (via a WSDL).
- Create new custom fields in VNDLY corresponding to these imported object definitions or map existing custom fields in VNDLY with these Workday objects.
- Configure in which forms (Candidate, Contractor, Work Order, Worker, Worker Profile) these fields show up in VNDLY and other options available in the standard custom field settings user interface.
- Send custom field data from VNDLY to Workday via the connector in the following scenarios:
-
    - Contractor or Worker is onboarded.
    - Work order or Worker Profile is updated.
    - Candidate, Contractor, or Worker data is updated on their profiles.
    - Work Order or Worker Profile is ended.

Steps

1. Set Up the Scheduling Configuration Tab in Workday VNDLY Settings.
2. Configure Custom Objects Settings.

Configure Custom Objects Settings

Context

You can configure the settings for sending custom objects to Workday. You can map VNDLY custom fields to Workday custom objects for both Worker Profile Management and Contingent.

Steps

1. From the header, select **Menu** > **Company Settings**.
2. Under **Integrations**, select **Workday**.
3. Select the **General Configuration** tab.
4. Under the **Contingent** or **Worker Profile Management** module, go to **Custom Objects Configuration**.
5. Click **Add** to configure the mapping settings for a custom object and consider:

Option	Description
Custom Object	Indicates the custom field name in Workday that you want to map to a VNDLY custom field.
Mapping Category	You can indicate how to map VNDLY custom fields to Workday custom objects.
Associated With	For every custom object, associate the object with a candidate, contractor, or work order if the module is Extended Workforce Management (EWM) or with a worker or worker profile if the module is Worker Profile Management.

6. Configure the custom field definitions corresponding to the custom objects imported from Workday by navigating to **More** > **Company Settings** > **Job Workflows** > **Custom Fields**.

Configure the Contingent Worker Team Section

Context

The **Contingent Worker Team** section in the **Manager Insights Hub** of Workday must be configured if you've customized your hub navigation.

Steps

1. In Workday, access the **Maintain Hubs** report.
2. Locate the **Manager Insights Hub** and select *Customize Hub Navigation* from the **Action** menu for the action item types.
3. Click **Edit**.
4. In the **Configure** grid, select *Navigation Item Group (Workday Owned)* and then select *Contingent Worker Team*.
5. Click **Ok**.

Result

The **Contingent Worker Team** section displays in the **Manager Insights Hub**.

Concept: Workday VNDLY Workforce Connector

The Workday VNDLY Workforce Connector enables you to manage your organization's contingent workforce and process new talent. The Workforce Connector enables data to flow between Workday VNDLY and Workday HCM. Connecting the two system provides customers of both products the ability to manage their unified workforce, saving them time and increasing workforce visibility. By bringing the contingent workforce data into Workday, you can lay the foundation for total talent management with access to both full-time employee and contingent worker data in a single place.

The Workforce Connector is for organizations using:

- Workday VNDLY to manage their extended workforce including:
    - Workday VNDLY Extended Workforce Management
    - Workday VNDLY Statement of Work
    - Workday VNDLY Worker Profile Management
- Workday Human Capital Management (HCM) to manager their FTE population.

The Workday-native Application Programmable Interfaces (APIs) allow for automated communication between the two platforms for a seamless management experience. Note: Not all changes can be synced fro one platform to the other. Some fields that are specific to VNDLY, such as custom fields, cannot be synced to Workday unless there is an SFTP export in place.

By using all of the configuration capabilities of the Workforce Connector, you can establish a technology ecosystem where all departments involved in extended workforce management can work together, whether the majority of functions originate in Workday or VNDLY.

The Workforce Connector is built with specific capabilities to successfully support your company's extended workforce management program. We've made sure you can:

- Import foundational and reference data on a scheduled basis to query from Workday and update VNDLY.
- Keep Workday up to date, in real-time, with contingent worker data as worker related changes happen in VNDLY.
- Keep tabs on integration activity through VNDLY's audit log.

Example: A hiring manager has opened a new job in VNDLY to source for a contractor and their organization uses the Workforce Connector and the Position Management staffing model in Workday HCM. When the new job is approved in VNDLY, it triggers the Create Position API and there is a real-time Connector Status visual on the job in VNDLY. Once the connector has successfully run and Workday has created the position, the **Position ID** is logged on the job in VNDLY. There is also an **Activity Log** entry on the job to document the Workday event.

There are two main types of data related to the Workday VNDLY Workforce Connector: Foundational and Transactional.

Foundational: Foundational data includes all basic contingent worker data in Workday. The Workforce Connector integrates foundational data from Workday into the related modules in VNDLY. You can enable and schedule when these integrations are required to use transactional data integrations. You can view Foundational Data Integration details in the **Reference: Workday VNDLY Workforce Connector Integrations** topic.

Transactional: Transactional data consists of event-driven contingent worker data. Most of these integrations are triggered by data changes in VNDLY. These changes load in Workday and initiate the related business process to update the related data source in Workday. Some of the integrations can also work the other way around, from Workday to VNDLY. You can view Transactional Data Integration details in the **Reference: Workday VNDLY Workforce Connector Integrations** topic.

Concept: Override Workforce Connector Errors

Users with the *connectorerror.override* permission in Workday VNDLY have the ability to override all VNDLY errors related to the Workforce Connector. This permission provides designated users with greater control to clear common Workforce Connector errors without the need to create support tickets each time.

VNDLY super users have this permission by default. Otherwise, this permission is restricted to client roles and must be manually assigned. When you assign this permission to client roles, VNDLY recommends the following:

- Assign this permission to program administrators only, as overriding errors incorrectly might result in unintended consequences.
- Ensure that the user understands the downstream impacts of overriding Workforce Connector errors.
  - Example 1: When you override a Workforce Connector error during the *Job Publish* workflow by selecting **Assume this task will never succeed**, VNDLY closes the job.
  - Example 2: When you override a Workforce Connector error when extending the work order date by selecting **Assume this task has already been completed manually**, VNDLY won't send the date extension to Workday.

Consider the following scenarios and the downstream impacts of overriding errors.

Scenario 1: Create Position API fails when publishing a job, Statement of Work (SOW) role, or worker profile.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this option, the Workforce Connector won't proceed with the required *Create Position* actions in Workday. In addition, VNDLY automatically completes these transitions: • The *Publish Job* workflow transitions to *Active* status. • The SOW role transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Create the required number of positions in Workday. • Update the corresponding VNDLY job, SOW role, or worker profile with the Workday Position IDs. Depending on the data that needs to be updated, you can use the Bulk Update Jobs workflow or Bulk Update Wizard in VNDLY. If the error persists, create a VNDLY support ticket.
Assume the task will never succeed	If you select this option, the Workforce Connector won't proceed with the required *Create Position* actions in Workday. In addition, VNDLY automatically completes these transitions:

Override Option	Downstream Impacts
	• The *Publish Job* workflow transitions to *Closed* status. • The SOW role reverts to *Awaiting Client Review* status. • The worker profile transitions to *Approval Denied* status.

Scenario 2: Contract Contingent Worker API fails when onboarding a worker.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the required *Contract Contingent Worker* actions in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Contract the contingent worker with rectified data in Workday, referencing an existing pre-hire ID or creating a new pre-hire record. • Perform required updates in VNDLY to reflect the Workday contract details and IDs, such as the pre-hire ID, contingent worker ID, or position ID on the corresponding work order, worker profile, or contractor profile.
Assume task will never succeed	If you select this override option, the Workforce Connector won't proceed with the required *Contract Contingent Worker* actions in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Rejected* status. • The worker profile transitions to *Ready to Onboard* or *Approval Denied* status.

Scenario 3: Change Job API fails when updating the worker profile or work order data.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the *Change Job*

Override Option	Downstream Impacts
	action in Workday. VNDLY saves the changes, and automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Update the Workday contingent worker record using the *Change Job* business process. • Perform required updates in VNDLY to align the work order or worker profile to the updated contingent worker details in Workday. Depending on the data that needs to be updated, you can use the Bulk Update Jobs workflow or Bulk Update Wizard in VNDLY. If the error persists, create a VNDLY support ticket.
Assume task will never succeed	If you select this override option, the Workforce Connector won't proceed with the *Change Job* action in Workday. In addition, VNDLY won't save the changes, and automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. To re-submit a VNDLY work order or worker profile update with rectified data, you must first correct any erroneous data or configuration in Workday or VNDLY.

Scenario 4: End Contingent Worker Contract API fails when ending a worker order or worker profile.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with the *End Contingent Worker Contract* action in Workday. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Ended* status. • The worker profile transitions to *Ended* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY.

Override Option	Downstream Impacts
	• Correct any erroneous data or configuration in Workday. • Perform the required *End Contingent Worker Contract* action in Workday.
Assume task will never succeed	If you select this override option, the work order or worker profile remains in *Active* status in VNDLY, and the Workforce Connector won't proceed with the *End Contingent Worker Contract* action in Workday.

Scenario 5: Rescind action fails when canceling a worker order.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't rescind the *Contract Contingent Worker* event in Workday for a cancel action in VNDLY. In addition, VNDLY automatically transitions the work order to *Canceled* status. You must manually complete these tasks: • Identify the root causes of the error in Workday and VNDLY. • Correct any erroneous data or configuration in Workday. • Rescind the *Contract Contingent Worker* event for a cancel action.
Assume task will never succeed	If you select this override option, the work order remains in *Active* status in VNDLY, and the Workforce Connector won't rescind the *Contract Contingent Worker* event for a cancel action.

Scenario 6: Change Job API or Rescind action fails when reopening a work order or worker profile.

Override Option	Downstream Impacts
Assume task has been completed manually	If you select this override option, the Workforce Connector won't proceed with these actions: • Rescind the *End Contingent Worker Contract* event. • *Change Job* to update the contingent worker with details to reopen the work order or worker profile. In addition, VNDLY automatically completes these transitions: • The work order transitions to *Active* status. • The worker profile transitions to *Active* status. You must manually complete these tasks:

Override Option	Downstream Impacts

	• Identify the root causes of the error in Workday and VNDLY.
	• Correct any erroneous data or configuration in Workday.
	• Perform the following actions in Workday:
	  ◦ Rescind the *End Contingent Worker Contract* event.
	  ◦ *Change Job* to update the contract details with the details that match the reopened work order or worker profile in VNDLY (Example: New End Date).

Assume task will never succeed	If you select this override option, the work order or worker profile remains in *Ended* status in VNDLY, and the Workforce Connector won't proceed with these actions: • Rescind the *End Contingent Worker Contract* event. • *Change Job* to update the contingent worker record with details to reopen the work order or worker profile.

Reference: Workday VNDLY Workforce Connector Business Process Security

To configure transactional data integrations, add these permissions to the Integration System User account:

Functional Area	Business Process	Permissions	Description
Contact Information	*Contact Change*	• **Maintain Contact Information (Web Service)** • **View All**	• **Maintain Contact Information (Web Service)** provides access to create or update the contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the contact change event, such as the email address, phone number, and physical address.
Contact Information	*Work Contact Change*	• **Change Work Contact Information (Web Service)** • **View All**	• **Change Work Contact Information (Web Service)** provides access to create or update work contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the work contact change event, such as the work

Functional Area	Business Process	Permissions	Description
			email address and work physical address.
Contact Information	*Home Contact Change*	• **Change Home Contact Information (Web Service)** • **View All**	• **Change Home Contact Information (Web Service)** provides access to create or update home contact information for workers in Workday if it changes in VNDLY. • **View All** provides access to view information related to the home contact change event, such as the home phone number and home physical address.
Contact Information	*Legal Name Change*	• **Change Legal Name (Web Service)** • **View All**	• **Change Legal Name (Web Service)** provides access to change a worker's legal name in Workday if it changes in VNDLY. • **View All** provides access to view information related to the name change event, such as the worker's legal name.
Contact Information	*Preferred Name Change*	• **Change Preferred Name (Web Service)** • **View All**	• **Change Preferred Name (Web Service)** provides access to change a worker's preferred name in Workday if it changes in VNDLY. • **View All** provides access to view information related to the name change event.
Staffing	*Change Job*	• **Change Job (Web Service)** • **Rescind (Web Service)** • **View All**	• **Change Job (Web Service)** provides access to perform job changes for workers in Workday, such as contract extensions or transfers, if this information changes in VNDLY. Can also be initiated from Workday to VNDLY. • **Rescind (Web Service)** provides access to revert changes when a job change workflow fails. • **View All** provides access to view information related

Functional Area	Business Process	Permissions	Description
			to job change events, such as the Position ID.
Staffing	*Contract Contingent Worker*	• **Contract Contingent Worker (Web Service)** • **Rescind (Web Service)** • **View All**	• **Contract Contingent Worker (Web Service)** provides access to contract an existing pre-hire into a contingent worker position or job in Workday if this information changes in VNDLY. • **Rescind (Web Service)** provides access to rescind the contracting event for the worker. • **View All** provides access to view information related to the contract worker event, such as the Pre-Hire ID.
Staffing	*Create Position*	• **Create Position (Web Service)** • **View All** • **Rescind (Web Service)**	• **Create Position (Web Service)** provides access to create a position in a supervisory organization in Workday when a worker is hired in VNDLY. • **View All** provides access to view information related to the create position event, such as the Position ID. • **Rescind (Web Service)** provides access to revert changes when a create position workflow fails.
Staffing	*End Contingent Worker Contract*	• **End Contingent Worker Contract (Web Service)** • Rescind (Web Service) • **View All**	• **End Contingent Worker Contract (Web Service)** provides access to end a contingent worker contract in Workday when the worker is terminated in Workday VNDLY. Can also load from Workday to VNDLY. • **Rescind (Web Service)** provides access to rescind the end contract event. • **View All** provides access to view information related to the end contract event, such as the Contract End Date.

Functional Area	Business Process	Permissions	Description
Staffing	*Close Position*	• **Close Position (Web Service)** • **View All** • **Rescind (Web Service)**	• **Close Position (Web Service)** provides access to close a position for a supervisory organization in Workday when using the position management staffing model. • **View All** provides access to view information related to the close position event, such as the Position ID. • **Rescind (Web Service)** provides access to revert changes when a close position workflow fails.

Reference: Workday VNDLY Workforce Connector Domain Security

Domain Security for Foundational Data Integrations

To configure foundational data integrations, add these permissions to the Integration System User account:

Functional Area	Domain	Operation	Description	Example
Contact Information	*Person Data: Work Address*	**Get**	Provides access to work addresses.	
Contact Information	*Person Data: Work Phone*	**Get**	Provides access to work phone numbers.	
Integration	*Integration Build*	**Get**	Provides access to load Workday business process events as Workday VNDLY Connector Events.	*Event ID* from Workday as *Event Workday ID* in Workday VNDLY.
Jobs and Positions	*Job Information*	**Get**	Provides access to load Workday job profile data as Workday VNDLY Job Profile data.	*Job Family Name* from Workday as *Job Family Name* in Workday VNDLY.
Organizations and Roles	*Create: Cost Center*	**Get**	Provides access to load Workday cost center data as Workday VNDLY Cost Centers data.	*Cost Center - Name* from Workday as *Cost Center - Name* in Workday VNDLY.
Organizations and Roles	*Manage: Location*	**Get**	Provides access to load Workday location data as Workday VNDLY Location data. *Workday Location Usage Ref ID* must be set to **BUSINESS SITE** to load the data into Workday VNDLY.	*Location Reference ID* from Workday as *Location Code* in Workday VNDLY.
Organizations and Roles	*Manage: Organization Integration*	**Get**	Provides access to load Workday organizations	*Supervisory Organization* from Workday

Functional Area	Domain	Operation	Description	Example
			data as Workday VNDLY Organizations data.	as *Business Units/ Organizations* in Workday VNDLY. Also loads *Company, Cost Center* and *Organizations* from Workday as *Charge Code* information in Workday VNDLY.
Organization and Roles	*Manage: Organization Roles*	**Get**	Provides access to load Workday organization roles as Workday VNDLY	
Pre-Hire Process	*Job Requisition Data*	**Get**	Provides access to load Workday job requisition data as Workday VNDLY Jobs data.	*Job Requisition Primary Location* from Workday as *Job Location* in Workday VNDLY.
Staffing	*Worker Data: Active and Terminated Workers*	**Get**	Provides access for reporting fields and data sources that include terminated workers.	
Staffing	*Worker Data: All Positions*	**Get**	Provides access to load Workday position management data as Workday VNDLY Positions data.	*Position Location* from Workday as *Position Location* in Workday VNDLY.
Staffing	*Worker Data: Business Title on Worker Profile*	**Get**	Provides access to view a worker's business title in the context of the worker profile.	
Staffing	*Worker Data: Current Staffing Information*	**Get**	Provides access to load Workday worker data as Workday VNDLY Workers data.	*Worker's Position ID* from Workday as *Worker's Position ID* in Workday VNDLY.
Staffing	*Worker Data: Public Worker Reports*	**Get**	Provides access to load Workday worker data as Workday VNDLY Workers data.	*Contingent Worker Contract - Contingent Worker ID* from Workday as *Contractor - Client Contractor ID* in Workday VNDLY.
Staffing	*Worker Data: Workers*	**Get**	Provides access to apply contextual security to load Workday worker data as Workday VNDLY Worker data.	
Suppliers	*Reports: Supplier*	**Get**	Provides access to load Workday data on fully	*Supplier ID* from Workday as *Worker*

Functional Area	Domain	Operation	Description	Example
			defined suppliers as Workday VNDLY Worker Profile Management data.	*Profile Management Workday ID* in Workday VNDLY.
System	*Workday Accounts*	**Get**	Provides access to the management of Workday Accounts.	
System	*Workday Query Language: View and Modify*	**Get**	Provides access to the Workday Query Language (WQL). Users can execute REST calls using the WQL API to extract data from Workday data sources and view associated performance log information.	
Worktags, Common Financial Management	*Set Up: Basic Supplier Worktag*	**Get**	Provides access to load Workday data on basic suppliers as Workday VNDLY Worker Profile Management data.	*Supplier ID* from Workday as *Worker Profile Management Workday ID* in Workday VNDLY.

Domain Security for Transactional Data Integrations

Functional Area	Domain	Operation	Description	Example
Pre-Hire Process	*Manage Pre-Hire Process: Manage Pre-hires*	**Get** and **Put**	**Get** permission provides access to load Workday pre-hire profile data as Workday VNDLY Pre-Hire data. **Put** permission provides access to create or update pre-hire data in Workday with data from Workday VNDLY.	Get: *Pre-Hire ID* from Workday as *Pre-Hire ID* in VNDLY.
Staffing	*Staffing Actions: Correct Contract Contingent Worker and Hire*	**Get** and **Put**	**Get** permission provides access to load Workday start dates as Workday VNDLY Start Dates. **Put** permission provides access to change Workday start dates with any changes to the Workday VNDLY	

Functional Area	Domain	Operation	Description	Example
			Start Dates. For this integration to work, the Workday API version must be V39.2 or above.	

Reference: Workday VNDLY Workforce Connector Integration

The Workday VNDLY Workforce Connector consists of 37 prebuilt APIs that exchange data between Workday and Workday VNDLY. These APIs are classified as either Foundational or Transactional Data.

Foundational Data APIs

Foundational data APIs load these basic organizational data from Workday to VNDLY:

API Name	Description
Supervisory Organizations	Loads supervisory organizations from Workday into VNDLY Organizations.
Locations	Loads business sites from Workday into VNDLY Work Sites.
Company, Cost Center, Region, Business Unit, Project, Program	Loads standard organization types from Workday into VNDLY Charge Codes. This action is optional, and you can configure which organization types are imported on a per-type basis from VNDLY. You might need charge codes if specific organization types (such as cost center, company, region, or custom HCM organization types) are requirements when creating a position or contracting a contingent worker. For more information, consult with a VNDLY Technical Consultant.
Custom Organization Types	Loads custom organization types from Workday into VNDLY Charge Codes. This action is optional, and you can configure which organization types are imported on a per-type basis from VNDLY. Charge codes might be required if specific organization types (such as cost center, company, region, or custom HCM organization types) are requirements when creating a position or contracting a contingent worker. For more information, consult with a VNDLY Technical Consultant.
Employees	Loads employees from Workday into VNDLY Users Profiles.
Job Profiles	Loads job profiles from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, Statement of Work (SOW)

API Name	Description
	roles, work orders, and Worker Profile Management.
Contingent Worker Types	Loads contingent worker types from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.
Time Types	Loads time types from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.
Frequency	Loads pay frequencies from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions, SOW roles, work orders, and Worker Profile Management.
Create Position Reasons	Loads Create Position Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY job requisitions and SOW roles.
Contract Worker Reasons	Loads Contract Worker Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to Workday VNDLY job requisitions and SOW roles.
Change Job Reasons	Loads Change Job Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY work orders and Worker Profile Management.
End Contract Reasons	Loads End Contract Reasons from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY work orders and Worker Profile Management.
Phone Device Type	Loads phone device types from Workday into a VNDLY Custom Data Source. This information can then be linked to phone device types for contingent workers in VNDLY.
Suppliers	Loads supplier names and reference IDs from Workday into a VNDLY Custom Data Source. This information can then be linked to VNDLY Worker Profile Management.
Close Position Reasons	Loads Close Position Reasons from Workday into a Workday VNDLY Custom

API Name	Description
	Data Source. This information can then be linked to Workday VNDLY jobs.

Transactional Data APIs

Transactional data APIs typically load event-driven data between Workday VNDLY and Workday. APIs that load data from VNDLY to Workday occur in real time, while APIs that load data from Workday to VNDLY don't. Enable transactional data for these APIs to work as intended. Some integrations from Workday to VNDLY are dependent on your tenant's requirements.

API Name	Description
Create Position	Creates open positions in Workday when objects are approved in VNDLY Extended Workforce Management, Statement of Work (SOW), and Worker Profile Management. This API is required when using the Position Management staffing model in Workday.
Create Position - Assign Organizations Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management.
Create or Update Applicant (Pre-Hire)	Creates or updates pre-hire records in Workday when workers are onboarded in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management.
Contract Contingent Worker	Contracts workers in Workday when they're onboarded in VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
Contract Contingent Worker - Assign Organizations Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in Workday VNDLY. This API is optional.
Change Job	Changes information about workers' contract details in Workday when work order information changes in Workday VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
Change Job - Assign Organization Sub Process	Sends a contingent worker's organization assignments to Workday when work order information changes in VNDLY. This is optional.
Change Legal Name	Changes a worker's legal name in Workday when their legal name changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.

API Name	Description
Change Preferred Name	Changes a worker's preferred name in Workday when their name changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.
Maintain Contact Information	Changes a worker's home and work contact information in Workday when this information changes in VNDLY. Applies to VNDLY Extended Workforce Management and Worker Profile Management.
Job Requisitions	Loads job requisitions created in Workday as a draft job in VNDLY. Also closes jobs in VNDLY when the corresponding job requisitions close in Workday. This integration doesn't occur in real time from Workday to VNDLY.
Load Open Positions	Loads open positions from Workday into VNDLY. When you use this integration, you must still create a job, SOW role, or Worker Profile Management record to link the position in VNDLY. This integration doesn't occur in real time from Workday to VNDLY.
Contractor Organization Change Import (from Workday)	Loads any changes to a worker's supervisory organization and updates the work order in VNDLY when a worker moves to a different supervisory organization in Workday. Also loads other worker data changes in Workday into VNDLY work orders and Worker Profile Management. This integration doesn't occur in real time from Workday to VNDLY.
End Contingent Worker (from Workday VNDLY)	Ends the contract for a contingent worker in Workday when a work order ends in Workday VNDLY. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. You can rescind this transaction if necessary.
End Contingent Worker (from Workday)	Loads the termination event and closes the related work order in VNDLY when a contingent worker contract ends in Workday. Applies to VNDLY Extended Workforce Management, SOW, and Worker Profile Management. This integration doesn't occur in real time from Workday to VNDLY.
Close Position	Closes unfilled positions with the *Close Position* business process in Workday when a job closes in VNDLY.

Reference: General Settings in the General Configuration Tab

Navigate to the General Configuration settings in Workday VNDLY from **More** > **Company Settings** > **Integrations** > **Workday** > **General Configuration**. You can manage tenant-wide settings for the Workday VNDLY Workforce Connector in these areas:

- Reference: General Settings in the General Configuration Tab
- Reference: General Settings in the General Configuration Tab
- Reference: General Settings in the General Configuration Tab
- Reference: General Settings in the General Configuration Tab
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    - Reference: General Settings in the General Configuration Tab
    - Reference: General Settings in the General Configuration Tab
    - Reference: General Settings in the General Configuration Tab

API Settings

Field	Description
Version	The minimum API version must be 34.0 or 39.2. We recommend always using the most up-to-date version. Manually update this field each time you adopt a new API version.

Position Management

Field	Description
Create New Position in Workday	Creates a new position in Workday when a job requisition is published in VNDLY.
Select from Available Positions in VNDLY	Displays available positions from Workday when creating a job in VNDLY. When enabled, you must also select the **Load Open Positions** setting in the **Scheduling Configurations** tab.
Staffing Models	Prevents specific users from changing the staffing model for a supervisory organization on a VNDLY work order. • *Prevent switching between staffing models on provisioned work orders for Employers* prevents employers from switching the staffing model. • *Prevent switching between staffing models on provisioned work orders for Vendors* prevents vendors from switching the staffing model.
Close Position for all Workflows	Enforces the *Close Position* business process event in Workday for these workflows in VNDLY: • *End Work Order* on an active work order or worker profile. • *Make Organization Changes* for the work order or worker profile. • *Change Primary* on an active work order. • *Select New Primary* while ending the work order. • *Select New Primary* while canceling the work order.

Field	Description
	• *Close SOW* on SOWS created after 2025-06-27, when you also check the **Close Unfilled Positions on SOW Roles** check box. When checked, the **Close Position** check box grays out for these workflows and users can't make changes.
Close Unfilled Positions on Job	Enables users to close all unfilled positions in Workday when ending a job in VNDLY.
Close Unfilled Positions on SOW Roles	Only applies to SOWs created after 2025-06-27. Enables users to automatically close unfilled Workday positions and their associated SOW roles when an SOW closes. When checked, Workday displays the: • **Close Unfilled Positions on All Roles** check box. It's automatically selected and view-only if you've also checked the **Close Position for all Workflows** check box. • Message with the number of Workday positions that will close across all of the SOW's roles. You need to manually close Workday positions for SOWs created prior to 2025-06-27.
Changing Supervisory Organization	When changing a supervisory organization on a worker order or worker profile, permissioned users can take certain actions on the contingent worker's position. This section lists all available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a supervisory organization using position management changes to another supervisory organization using position management: • *Use Current Position* • *Create a new position (Workday generated)* • *Select from Available Positions in VNDLY* **Job Management to Position Management** You can enable the following actions if a supervisory organization using job management changes to another supervisory organization using position management: • *Create a new position (Workday generated)* • *Select from Available Positions in VNDLY* To enable the **Select from Available Positions in VNDLY** option, you must select the

Field	Description
	Load Positions setting in the **Scheduling Configurations** tab.
Changing Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on the primary work order uses position management, and the worker changes to a new primary work order that also uses position management: • *Transfer Position from existing Primary Work Order* • *Create a new position (Workday generated)* • *Choose existing position from the new work order* **Job Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on a primary work order uses job management, and the worker changes to a new primary work order that uses position management: • *Create a new position (Workday generated)* • *Choose existing position from the new work order* Example: A resource manager changes a contingent worker's primary work order from WO123 to WO456. If they select *Transfer Position from Existing Primary Work Order*, then VNDLY applies the existing position from WO123 to the contingent worker's position on WO456 and Workday.
Ending Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order ends and changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on an ending work order uses position management, and the the

Field	Description
	worker changes to a new primary work order that also uses position management: • *Transfer Position from existing Primary Work Order* • *Create a new position (Workday generated)* • *Choose existing position from the new work order* **Job Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on an ending work order uses job management, and the worker changes to a new primary work order that uses position management: • *Create a new position (Workday generated)* • *Choose existing position from the new work order* Example: A resource manager closes a contingent worker's primary work order WO123 and selects a new work order, WO456. If they select *Create a New Position (Workday generated)*, then VNDLY doesn't use the positions from WO123 or WO456. Instead, VNDLY generates a new position and applies it to WO456 and Workday.
Canceling Primary Work Order for Contractor with Multiple Work Orders	Each contingent worker has 1 primary work order that links their position from VNDLY to Workday. When this primary work order is canceled and changes to a new one, permissioned users can take certain actions on the contingent worker's position. This section lists all the available actions that they can select from, and enables you to configure them. **Position Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on a canceled work order uses position management, and the worker changes to a new primary work order that also uses position management: • *Transfer Position from existing Primary Work Order* • *Create a new position (Workday generated)* • *Choose existing position from the new work order* **Job Management to Position Management** You can enable the following actions to apply if a worker's supervisory organization on a canceled work order uses job management, and the worker changes to a new primary work order that uses position management:

Field	Description
	• *Create a new position (Workday generated)* • *Choose existing position from the new work order* Example: A resource manager cancels a contingent worker's primary work order WO123 and selects a new primary work order, WO456. If they select *Choose existing position from the new work order*, then VNDLY will apply the existing position from WO456 to the contingent worker's position in WO456 and Workday.

Data Mapping

Field	Description
Event States	Configures Workday event state IDs. VNDLY requires these IDs to determine when an event completes in Workday and to identify the state of completion. Workday automatically generates these IDs. Don't modify these fields.
Worker Types	Configures Workday reference IDs for employees (EE) and contingent workers (CW). These IDs are set by default. Don't modify these fields.
Pay Type to Frequency	Maps VNDLY **Pay Types** to Workday **Pay Frequencies**. The field values are for VNDLY. You can configure them as: • Hourly: *Hourly* • Daily: *Daily* • Weekly: *Weekly* • Monthly: *Monthly* • Salaried: *Annual* Note: VNDLY doesn't support fixed pay frequencies. Any values other than the default configuration requires testing in the tenant to verify functionality.
Organization Roles	Indicates the role name that VNDLY uses to identify managers in Workday. This information is used together with the **Security Roles** settings.
Security Roles	Assigns VNDLY security roles to 3 types of worker roles in Workday. • **Managers**: Employees that are managers in Workday can be mapped to the selected roles that are configured in VNDLY. • **Non-Managers**: Employees that are not managers in Workday can be mapped to the selected roles that are configured in VNDLY. • **Everyone**: All employees that load into VNDLY from Workday can be mapped to

Field	Description
	the selected roles that are configured in VNDLY. You can assign multiple security roles to a worker type. Example: **Managers** can have a Hiring Manager and Resource Manager role. You can also use the roles in combination. Example: A user that is a manager will include roles from both **Manager** and **Everyone**.
Reasons	Indicates the default reasons that display in VNDLY when these events occur in Workday: • *Change Job (Edit, Modify, Transfer)* • *Close Position* • *End Contract* • *Create Contingent Worker (Contract Worker)* VNDLY automatically loads these reason codes from Workday to a custom data source table. Then, you must configure the reason codes in the **Custom Data Sources** section in the **General Configurations** tab.

Modules

The sections under **Modules** enable you to configure the data types that loads between Workday and Workday VNDLY at a more granular level.

Organization Hierarchy

This section configures how Workday supervisory organizations load into VNDLY Organizations.

Field	Description
Include Inactive	Includes inactive organizations to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.
Exclude Missing Reference IDs	Excludes any supervisory organizations with missing reference IDs. Each supervisory organization has a reference ID in Workday. When this setting is enabled, any supervisory organization with a missing reference ID won't load into VNDLY. You must enable this setting to prevent integration errors.
Organization Type Reference ID	Indicates the reference ID to map Workday supervisory organizations to VNDLY organizations. This field must always be *SUPERVISORY*.
Minimum Organization Level	Indicates the minimum organization level that should load from Workday to VNDLY. • You can locate the level of organization in VNDLY from **Company Settings** >

Field	Description
	Organization > **Organization Hierarchy** > **Organization Levels**. • Enter numeric values only. • When contingent worker integrations are enabled, this value must be zero. Example: You enter the value 3 in the field. VNDLY only loads supervisory organizations from Workday that are organization level 3, organization level 4, and above.
Filter Regex	Filters specific organizations to load from Workday to VNDLY. These filter rules match patterns by comparing to the supervisory organization by Reference ID or Name. These filter rules apply to every organization in the supervisory organization hierarchy: • **Filter Regex by Reference ID** • **Filter Regex by Name** These filter rules apply to the parent supervisory organization and all child organizations: • **Filter Regex by Reference ID or is a child organization of a match** • **Filter Regex by Name or is a child organization of a match**

Work Sites

This section configures how Workday locations load into VNDLY Work Sites.

Fields	Description
Match Location Usage Reference ID	Indicates the reference ID to map Workday business sites to VNDLY Work Sites. This field must always be *BUSINESS SITE*.
Include Inactive	Includes inactive locations to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.
Filter Regex	Filters specific locations to load from Workday to VNDLY. These filter rules match patterns by comparing the location by Reference ID or Name. These filter rules apply to every location that loads from Workday: • **Filter Regex by Reference ID** • **Filter Regex by Name**
Filter by Country Codes	Filters locations that load from Workday to VNDLY by country.

Charge Codes

This section enables you to configure these organization types to load into VNDLY Charge Codes:

- Cost Center (HCM)
- Cost Center For Company (Finance)
- Company (HCM)
- Region (HCM)
- Business Unit (HCM)
- Project (HCM)
- Program (HCM)
- Custom HCM Organization Types

Field	Description
Enabled	Loads Workday organization types to VNDLY Charge Codes. Select this check box if the **Load Charge Codes** setting is enabled in the **Scheduling Configuration** tab.
Exclude Missing Reference Ids	Excludes any charge codes with missing reference IDs. Each charge code has a reference ID in Workday. When this setting is enabled, any charge code with a missing reference ID won't be loaded into VNDLY. You must enable this setting to prevent integration errors.
Send charge codes as organization assignment	Loads charge codes from VNDLY as organization data in Workday. When this setting is enabled, you must also select the **Enabled** field for each module and subprocess module under Contingent settings and Worker Profile Management settings.

Each organization type has these configuration options:

Field	Description
Enabled	Loads the related organization data from Workday to the VNDLY charge code table.
Include Inactive	Includes inactive organization data to load from Workday to VNDLY. We recommend leaving this option unchecked to prevent downstream impacts.
Organization Type Reference ID	Indicates the reference ID to use when mapping the organization type from Workday to VNDLY. This field is required if the **Enabled** check box is selected for the organization type.
Name	Indicates the name of the organization type to use in VNDLY. Displays as the title of the related charge code table. This field is required if the **Enabled** check box is selected for the organization type.
Filter Regex	Filters specific organization types that load from Workday to VNDLY using the Reference ID or Name. You can configure these rules for each of the organization types in this section except for **Cost Center For Company (Finance)**: • **Filter Regex by Reference ID** • **Filter Regex by Name**

Field	Description
Requires Visibility IDs	Indicates the Workday IDs used to filter the data load results.

Employee Users

This section configures how Workday employee data loads into VNDLY. The settings in this section only apply to employees and don't apply to contractors and contingent workers.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Assign user to the organization</td><td>Indicates which organization you want to assign the employee to when their data loads into VNDLY:
They are a member of assigns the employee to the supervisory organization they're a member of in Workday.
They are a manager of assigns the employee to the highest level of supervisory organization that they help manage in Workday. If they manage multiple supervisory organizations with the same hierarchy level, VNDLY assigns them to the first organization they manage, sorted by alphabetical order. If they manage multiple supervisory organizations with different hierarchy levels, VNDLY assigns them to the highest level.</td></tr>
<tr><td>Filter by organization role assignment</td><td>Filters employees that load into VNDLY based on their organization assignment. This setting is only applicable if employees have a specified role configured in the Filter by Roles setting.
If you select All, employees with assigned or inherited organizations will load into VNDLY.
If you select Assigned, only employees with explicitly assigned organizations in Workday will load into VNDLY.</td></tr>
<tr><td>Exclude Private Contact Information</td><td>Excludes employee data marked as Private in Workday. Private information might include phone numbers and email.</td></tr>
<tr><td>Use user email address as username</td><td>Uses the employee's primary work email address in Workday as their username in VNDLY. You can enable this setting when users want to use their primary work email for Single Sign-On purposes. Example: When enabled, users can use their Workday email address to sign in to Workday, VNDLY, and other identity providers like Okta or Microsoft directory.

Note: If the Exclude Private Contact Information settings is also enabled, Workday will exclude any primary work email address marked</td></tr>
</table>

Field	Description
	as **Private**. This might result in a blank email address for the employee in VNDLY.
Import All Supervisory Organizations Assigned to Managers as Security Roles	Enables multiple security roles to load for managers in VNDLY, based on the supervisory organizations they're assigned to in Workday. The organizations assigned for the security role might differ based on the **Filter by organization role assignment** setting. This setting works together with the **Security Roles** setting in the **Data Mapping** section in the **General Configuration** tab.
Use Workday Query Language (WQL)	When checked, this increases the performance of the connector for large datasets. In order to use this functionality, you must use an **Authentication Method** of *OAuth* and the **API Client for Integrations** in Workday must have a functional area of *System*. See: Register API Clients for Integrations.
Incremental Load Data	Incrementally loads user data into VNDLY for user profile creation and profile updates. You can enable this setting to decrease load times when there are a large number of users. Enabling this setting also improves import efficiency by excluding nonessential transactions from Workday. For example, benefits changes in Workday won't sync to VNDLY, since VNDLY doesn't track benefits. For more information on nonessential transactions, view the Related Information section of this topic. This field is disabled when **Use Workday Query Language (WQL)** is enabled.
Location type filter	Enables you to limit the employees that are imported by entering the ID of the **Location Type** in Workday. To locate this ID in Workday, access the **View Location** report. From the **Related Actions** menu of the **Location Type** field, select **Integration IDs** > **View IDs**. You'll need the **Workday ID** value. This field is enabled when **Use Workday Query Language (WQL)** is enabled.
Include employees who were terminated in the last X days	Enables you to limit the employees that are imported by a specified number of days since termination. This field is enabled when **Use Workday Query Language (WQL)** is enabled.
Filter by Work Site Country Codes	Filters employees that load into VNDLY by country. When enabled, VNDLY sends the

Field	Description
	Country_Reference request criteria to the *Get_Workers* web service in Workday. To use this filter, the **Incremental Load Data** setting must be unchecked.
Filter by Roles	Filters employees that load into VNDLY based on their Organization_Role_ID in their supervisory organization in Workday. Example: Manager.
Filter Regex by Email	Filters employees that load into VNDLY based on their email addresses and domains.

Custom Data Sources

This section enables you to configure how these custom data sources load into VNDLY:

- Worker Profile Vendor/Suppliers
- End Contingent Contractor Reason
- Worker Profile End Contingent Contractor Reason
- Frequency
- Time Type
- Work Shift
- Worker Profile Contract Contingent Reason
- Contract Contingent Reason
- Worker Type
- Job Family & Profile
- Change Job Reasons
- Phone Device Type
- Close Position Reason
- Contingent Worker Type
- Create Position Reason

If contingent worker integrations are enabled for VNDLY Worker Profile Management and Statement of Work, you must enable all data sources in this section. Each custom data source has these configuration options:

Field	Description
Enabled	Loads the related data source from Workday to the VNDLY custom data source table.
Sourced from Workday	Applies if the **Enabled** check box is selected. Loads the data source from Workday to VNDLY.
Allow manual changes	Enables manual edits to the custom data source table in VNDLY.
Show extra Vendor Fields	Applies to the **Worker Profile Vendor/Suppliers** section only. Displays the vendor email and phone number as additional fields on the *Worker Profile - Workday - Vendors* table.
Filter Regex	Filters specific data source values to load from Workday to VNDLY using the Reference ID and Descriptor: • **Filter Regex by Reference ID**

Field	Description
	• **Filter Regex by Descriptor**
API used to source suppliers	Applies to the **Worker Profile Vendor/Suppliers** section only. Indicates the API that VNDLY uses to source the supplier data. • Select *Advanced* if you have Workday Financial Management. • Select *Basic* if you don't have Workday Financial Management. • The *Reference* option pulls data from the general references API if the integration can't pull data using *Basic* or *Advanced*. This option might be used to test functionality when the other options fail.
Reference ID type for suppliers	Applies to the **Worker Profile Vendor/Suppliers** section only. Indicates the reference ID used in Workday to identify suppliers.

Rescind

Field	Description
Suppress Notifications	Suppresses Workday notifications during the rescind process. This field isn't required. The Workforce Connector automatically completes the rescind process in Workday, so Workday doesn't send any rescind notifications to VNDLY.

Related Information
Examples
2025-04-04 Feature Release Note: Exclude Nonessential Transactions on Workday Incremental User Imports

Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab

Navigate to the General Configuration settings from **More > Company Settings > Integrations > Workday > General Configuration**. You can manage settings for the Contingent module and Worker Profile Management module for the Workday VNDLY Workforce Connector in these areas:

- Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab
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These settings apply to both the Contingent and Worker Profile Management modules unless otherwise specified.

General Settings

Field	Description
Enabled	Enables the Contingent or Worker Profile Management module for the Workforce Connector. When this setting is unchecked, the Workforce Connector deactivates the Contingent or Worker Profile Management module.
Contract Contingent Worker after Approval	For the Contingent module, this setting initiates the *Contract Contingent Worker* business process in Workday when the worker accepts the job offer. For the Worker Profile Management module, this setting initiates the *Contract Contingent Worker* business process in Workday when the worker profile is created in VNDLY.
Use Vendor as supplier reference	This setting only applies to the Worker Profile Management module. Enables the Vendor External ID in VNDLY when creating a contingent worker. This allows contingent workers to be linked to suppliers in Workday. You should only enable this when the same list of suppliers are configured in both VNDLY and Workday. When you select this setting, entering any value other than the valid Workday ID will cause the transaction to fail.
Workflow Enabled	Enables API transactions in the Contingent or Worker Profile Management module for the Workforce Connector. This setting is required to load transactional data. Similar to the **Enabled** setting, when this setting is unchecked, the Workforce Connector can't load any transactional data between Workday and VNDLY and deactivates the Contingent or Worker Profile Management module.
Make Pre-Hire ID editable	Enables permissioned users to edit the pre-hire ID for candidates and contractors in VNDLY. By default, you can't edit the pre-hire IDs in VNDLY.
Allow editing of protected integration fields	Allows you to edit a contingent work's Job Profile, Worker Type, and Time Type in VNDLY. When you make changes to these protected integration fields, it triggers the Change Job API to update the associated fields in Workday.

Field	Description
Send bill rate as pay rate	This setting only applies to the Contingent module. Loads the contingent worker's bill rate from VNDLY as the pay rate in Workday.
Map Vendor external ID to Workday supplier reference	Enables the Vendor External ID in VNDLY to load into Workday as the Supplier Reference ID. This should only be enabled when the same list of suppliers are configured in both VNDLY and Workday. This is a required setting to ensure that vendors exist in both systems. You can reference vendors by using the *Supplier_ID* or *Supplier_Reference_ID*.

Change Legal Name

Field	Description
Autocomplete	Automatically processes the *Change Legal Name* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.

Change Preferred Name

Field	Description
Autocomplete	Automatically processes the *Change Preferred Name* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Contact Information Web Service	Indicates which contact web service to use to load workers' contact information between VNDLY and Workday. We recommend selecting the *Change Home/Work Contact Information* option, which uses individual web services for contact information changes, over the *Maintain Contact Info* option, which uses a single web service.
Default Fallback Email Address	This setting only applies to the Contingent module.

Field	Description
	Workday requires an email address to create the pre-hire record. This field can be used to indicate the primary vendor's email address to create the worker's pre-hire record in Workday when the worker's contact information is missing.

Maintain Contact Information

Field	Description
Autocomplete	Automatically processes the *Maintain Contact Information* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed. If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Send Home Address to Workday	This setting only applies to the Contingent module. Loads the worker's home address in VNDLY to Workday (**Contingent Worker > Home Contact Information > Addresses section**).
Communication Usage (Email)	Loads the worker's home or work email from their candidate profile in VNDLY to the contractor's contact information in Workday. This email is used on both pre-hire records and worker records in Workday.
Communication Usage (Phone)	Loads the worker's home or work phone number from their candidate profile in VNDLY to the contractor's contact information in Workday. This phone number is used on both pre-hire records and on the worker record.
Phone Type	Indicates the worker's phone device type in Workday.

Position Configuration

This section configures settings related to the *Create Position* business process in Workday when it's triggered by VNDLY.

Note: VNDLY only pulls position data from the worker's primary work order in VNDLY. If a worker has multiple work orders, only the primary work order in VNDLY will be connected to Workday.

Field	Description
Autocomplete	Automatically processes the *Create Position* business process in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically

Field	Description
	bypassed, and all notifications are automatically suppressed. I If you don't select this setting, the business process can't complete until you complete any required approvals or tasks that are configured in Workday.
Use Workday VNDLY to generate position IDs	Enables you to configure a sequence number in VNDLY to generate the Workday Position ID. The VNDLY sequence number replaces the sequence defined in Workday for newly created positions. This setting enables you to use different numbering conventions that are specific to VNDLY Position IDs so you can easily identify them in Workday. We recommend leaving this setting unchecked unless there is a specific need. Example: In VNDLY, you might have a work order displayed as WO00083. In Workday, a newly created position ID might display as P-10494. When this setting is enabled, the VNDLY ID loads into Workday to replace the position ID, so the position ID would display WO00083.
Restrict Job Profile **Restrict Job Profile Family** **Restrict Worker Type** **Restrict Worker Subtype** **Restrict Location** **Restrict Time Type**	Restricts position attributes that load from VNDLY to Workday when a new position is created from the Create Position API. When you enable these settings, the new position in Workday is restricted to the specific position values pulled from the corresponding fields on the VNDLY Job, SOW role, or Worker Profile. Example: If the **Restrict Job Profile** setting is enabled, then the VNDLY Job Profile ID loads into Workday when creating a position. Note: You must enable the **Restrict Location** setting to ensure that you can only hire workers in the indicated location.

Subprocess Configuration for Position Configuration

This section configures which action VNDLY should take when each of the following *Create Position* subprocesses run in Workday:

- Assign Pay Group.
- Edit Assign Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Edit Assign Organization - Send charge codes as organization assignment (must also be enabled in the charge code module).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Assign Costing Allocation.
- Request Default Compensation.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won't change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Close Position

This section only applies to the Contingent module.

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Close Position* business process. If you don't select this setting, VNDLY can't close out positions until the business process completes in Workday.

Contract Worker Config

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Contract Contingent Worker* business process. If you don't select this setting, VNDLY can't contract workers until the business process completes in Workday.
Use job title as position title	Uses the Job Title in VNDLY as the Position Title in Workday.
Use job title as business title	Uses the Job Title in VNDLY as the Business Title in Workday.

Subprocess Configuration for Contract Worker Config

This section configures which action VNDLY should take when each of the following *Contract Contingent Worker* subprocesses run in Workday:

- Edit License.
- Edit Custom IDs.
- Onboarding Setup.
- Edit Service Dates.
- Edit Government IDs.
- Remove Retiree Status.
- Update ID Information.

- Create Workday Account.
- Edit Assign Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Edit Assign Organization - Send charge codes as organization assignment (must also be enabled in the charge code module).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Edit Passports and Visas.
- Assign Matrix Organization.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won’t change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Job Change Configuration

Field	Description
Autocomplete	Automatically skips any steps before the completion step for the *Change Job* business process. When this setting is unchecked, VNDLY can’t process any job changes until the business process completes in Workday.
Use job title as position title	Uses the Job Title in VNDLY as the Position Title in Workday. We recommend enabling this setting if the **Use Job Title as Position Title** setting is enabled in the **Contract Worker Configuration** section.
Use job title as business title	Uses the Job Title in VNDLY as the Business Title in Workday. We recommend enabling this setting if the **Use Job Title as Business Title** setting is enabled in the **Contract Worker Configuration** section.

Subprocess Configuration for Job Change

This section configures which action VNDLY should take when each of the following Change Job subprocesses run in Workday:

- Assign Roles.
- Assign Pay Group.
- Onboarding Setup.

- Switch Primary Job.
- Change Organization.

  Note: We recommend selecting the *Auto Complete* option for this setting.
- Change Organization - Send charge codes as organization assignment (must also be enabled in the charge code modules).

  Note: We recommend enabling this setting. When unchecked, VNDLY won't send charge codes to the position in Workday.
- Edit Notice Period.
- Request Stock Grant.
- Propose Compensation.
- Check Position Budget.
- Check Job Requisition.
- Manage Union Membership.
- Request One Time Payment.
- Assign Costing Allocation.
- Assign Organization Roles.
- Assign Matrix Organizations.
- Maintain Employee Contracts.
- Update Academic Appointment.
- Assign Superior Organization.
- Student Employment Eligibility.
- Manage Employee Probation Period.
- Assign Employee Collective Agreement.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won't change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess in Workday. This means that all approvals are automatically approved in Workday, all reviews and to-do's are automatically bypassed, and all notifications are automatically suppressed.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

End Worker Contract Configuration

Field	Description
Autocomplete	Automatically completes the *End Contingent Worker* business process. If you select this setting, VNDLY skips the subprocesses and ends the worker's contract. If you don't select this setting, VNDLY can't close out the worker contract until the business process completes in Workday.
Check for Position Closure in Workday	Checks if the position related to the *End Worker Contract* business process is closed in Workday. This setting works together with the

Field	Description
	End Contacts from Workday option on the **Scheduling Configurations** tab.
Check for Position Upon Auto-End	Indicates if the position should be closed in Workday. When this option is unchecked, the position will be left open in Workday, and enables you to select the position when a new job is created in VNDLY.

Subprocess Configuration for End Worker Contract

This section configures which action VNDLY should take when each of the following *End Worker Contract* subprocesses run in Workday:

- **Create Job Requisition**.
- **Assign Organizational Roles**.

For each subprocess, you must select from 3 available actions: *None*, *Auto Complete*, or *Skip*.

Action	Description
None	VNDLY won’t change the way the subprocess runs in Workday.
Auto Complete	VNDLY automatically processes the subprocess. This means that all approvals will be automatically approved, all reviews and to-do's will be automatically bypassed, and all notifications will be automatically suppressed in Workday.
Skip	VNDLY automatically skips the subprocess (if it's defined as skippable in the business process definition).

Job Import

Field	Description
Import Charge Codes from Workday	Loads cost center changes in Workday to job requisitions in VNDLY (charge code data).

Contractor Import

Field	Description
Import Charge Codes from Workday	Loads contractor organization changes from Workday to VNDLY work orders or worker profiles. You must enable this setting and also configure the **Segment Mappings** settings to ensure that changes load correctly. Changes will only apply to the contractor's primary work order, unless the **Update primary work orders** value under Work Order Settings in VNDLY is set to *False*.

Field	Description
Charge Code Table	Indicates the charge code table fields that should load from Workday to VNDLY as configured in the **Segment Mappings** settings.
Import Supervisor/Manager from Workday	Indicates if data for the contractor's manager should load into VNDLY when the contractor data loads into Workday.

Segment Mappings

Field	Description
Segment Table	Indicates the name of the charge code table. This field is required if you have segment mapping enabled.
Segment Field	Indicates the property name of the charge code field on the segment code table. This field is required if you have segment mapping enabled. To obtain the VNDLY Segment Field, submit a support case in Community.
Charge Code Field	Indicates the name of the charge code field on the accounting code table. This field is required if you have segment mapping enabled. To obtain the VNDLY Charge Code Field, submit a support case in Community.

Reference: Workday to VNDLY Foundational Field Mapping

The Workforce Connector integrates foundational data from Workday into the related modules in Workday VNDLY. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

See Foundational Workday Connector API Requests for API information.

Supervisory Organization

This table identifies fields on the Workday Supervisory Organization and how they map to the fields on the VNDLY Organization.

Workday	VNDLY	Description
Reference ID	Code	
Name	Name	
Superior	Parent	Refers to the parent supervisory organization in VNDLY.
Inactive	Active	This information is inverted from Workday.
Staffing Model	Generic Fields - Staffing Model	
Resource Manager	Name (Resource Manager)	Displays the name of the resource manager next to

Workday	VNDLY	Description
		the name of the supervisory organization.

Locations

This table identifies fields on the Workday Location and how they map to the fields on the VNDLY Work Site object.

Workday	VNDLY	Description
Reference ID	Code	
Name	Name	
Address Line 1	Address Line 1	
Address Line 2	Address Line 2	
Address Line 3	Address Line 3	Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivision One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivision One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Additional address fields may be sent through the Connector. For these additional address fields, the field name in VNDLY is dependent on the country of the address. Examples: • For Japan, the Address Line One Local field would display Address Line One - Kanji. • For Serbia, the Address Line One Local field would display Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	City	
County	County	Contact VNDLY to configure this setting.
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
Subdivision Code	State	
Country Code	Country Code	
Postal Code	Zip	

Company, Cost Center, Region, Business Unit, Project, Program

This table identifies fields on the Workday Organizations and how they map to the fields on the VNDLY Charge Codes.

Workday	VNDLY
Reference ID	Code
Name	Name

Custom Organization Types

This table identifies fields on the Workday Custom Organization and how they map to the fields on the VNDLY Charge Codes.

Workday	VNDLY
Reference ID	Code
Name	Name

Workers (Employees)

This table identifies fields on the Workday Workers (Employees) and how they map to the fields on the VNDLY Users object.

Workday	VNDLY	Description
Employee ID	User External ID	
Business Title	User Position Title	The Business Title associated with the contract.
User Account	User Username	
Work Email	User Email	
First Name	User First Name	
Middle Name	User Middle Name	
Last Name	User Last Name	
Preferred First Name	Preferred First Name	
Preferred Last Name	Preferred Last Name	
Work Phone Country Code	User Phone Country Code	
Work Phone Number	User Phone Number	
Work Phone Extension	User Phone Extension	
Location	User Work Site	
Supervisory Organization	User Organization	The supervisory organization in Workday in which the position is created.
Manager	Report to User	Indicates the manager of the employee user.
Organization Custom Organizations	Charge Codes	Organization and Custom Organizations are imported to help drive what information is auto-populated when a resource manager is selected on the Job

Workday	VNDLY	Description
		form in VNDLY. These fields aren't visible in the UI.
Worker Status	Is Active	Inactive when the Worker status is terminated.

Job Families and Job Profiles

This table identifies fields on the Workday Job Families and Job Profiles and how they map to the fields on the VNDLY Custom Data Source - Workday - Job Profiles object.

Workday	VNDLY
Job Family Name	Job Family Name
Job Profile Title	Job Profile Title
Job Family ID	Job Family ID
Job Profile ID	Job Profile ID
Reference ID Type	Workday Type

Worker Type

The table identifies fields on the Workday Worker Type and how they map to the fields on the VNDLY Custom Data Source - Workday - Worker Type object.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Contingent Worker Type

This table identifies fields on the Workday Contingent Worker Type and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Contingent Worker Type.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Time Types

This table identifies fields on the Workday Time Type and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Time Type.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID

Workday	VNDLY
Reference ID Type	Workday Type

Frequency

This table identifies fields on the Workday Frequency and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Frequency.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Phone Device Type

This table identifies fields on the Workday Phone Device Type and how they map to the VNDLY Object - Custom Data Source - Workday - Phone Device Type.

Workday	VNDLY
ID	Workday ID
Reference ID Type	Workday Type
Referenced Object Descriptor	Workday Name

Suppliers

This table identifies fields on the Workday Suppliers and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Vendors. This information is only used in the VNDLY Worker Profile Management module.

Workday	VNDLY
Referenced Object Descriptor	Workday Name
ID	Workday ID
Reference ID Type	Workday Type

Create Position Reasons

This table identifies fields on the Workday General Event Subcategory - Create Position Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Create Position Reasons.

Workday	VNDLY
Reference Object Descriptor - Prefix	Group
Reference Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Contract Worker Reasons

This table identifies fields on the Workday Contract Worker Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Job Reason for Hire.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Worker Profile Reason for Hire

This table identifies fields on the Workday Worker Profile Reason for Hire and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracker Reason for Hire.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Change Job Reasons

This table identifies fields on the Workday Change Job Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Change Job Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Close Position Reasons

This table identifies fields on the Workday Close Position Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Workday - Close Position Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Contingent Worker Termination Reasons

This table identifies fields on the Workday Contingent Worker Termination Reasons and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Terminate Contingent Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Worker Profile End Reason

This table identifies fields on the Workday Worker Profile End Reason and how they map to the fields on the VNDLY Object - Custom Data Source - Worker Tracking - Workday - Terminate Contingent Reasons.

Workday	VNDLY
Referenced Object Descriptor - Prefix	Group
Referenced Object Descriptor - Suffix	Reason
ID	Workday ID
Reference ID Type	Workday Type

Reference: Workday to VNDLY Transactional Field Mapping

In the Connector, some changes initiate data transfer from Workday to VNDLY. All transactional data from Workday is imported to VNDLY based on a schedule. To review schedules, see Set Up the Scheduling Configuration Tab in Workday VNDLY settings. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

See Transactional Workday Connector API Requests for API information.

Load Contractor Changes

This table identifies fields related to the contingent worker in Workday and how they map to the fields on the **Work Order** or **Worker Profile** in VNDLY. It's recommended that you make changes in VNDLY as opposed to Workday to avoid confusion on which changes should be made in which system.

Workday	VNDLY	Description
Supervisor Employee Number	External ID	External ID of the **Resource Manager**.
Supervisor Username	Username	Username of the **Resource Manager**.
Organization Code	Organization Unit	User-defined code of the organization unit associated with the work order.
Workday Position ID	Position ID	The ID of the related position used in Workday, if Position Management is used. This should be blank if the

Workday	VNDLY	Description
		organization of the work order or worker profile isn't using Position Management within the **File Transfer** report in VNDLY.
Workday Title	Position Title	The Job Title of the contingent worker, which can be found on the contract record in Workday. This change updates the position title on both the work order and worker profile in Workday VNDLY.
Workday Contingent Worker Type	Worker Type	This information is sent whenever there's a change to the Workday Contingent Worker Type.
Workday Time Type	Time Type	The ID of the time type used for the contingent worker in Workday. This information is sent whenever there's a change to the Workday Time Type field.
Job Family	Job Family	The job family is populated based on the job profile selected. This can be blank or populated.
Job Profile	Job Profile	This information is sent whenever there's a change to the Job Profile.
Workday Location	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within Workday VNDLY.
Company Cost Center Region Business Unit Project Program Custom Organizations	Company Cost Center Region Business Unit Project Program Custom Organizations	

End Contractors from Workday

This table identifies fields on the Workday End Contingent Worker Contractor task and how they map to the fields on the VNDLY Work Order End modal. This process is necessary when full-time employee conversions need to be made in Workday, and the worker's work order must be closed in VNDLY.

Workday	VNDLY	Description
Reference ID	Client Contractor ID	The ID of the contingent worker that is being terminated in Workday.
Termination Date	End Date	The date the contract is being terminated.
Termination Reason Subcategory	End Reason	The termination reason for the contract.
Position ID	Position ID	Indicates whether the associated position is to be closed on contract termination.

Create Jobs from Job Requisitions

This table identifies fields on the Create Job Requisition task and how they map to the fields on the VNDLY job. When job requisitions are imported to VNDLY, the job in VNDLY is created in a draft status.

Workday	VNDLY	Description
Organization Code	Organization Unit	User-defined code of the organization unit associated with the work order.
Number of Positions	Number of Positions	Defines the number of positions for a job.
Reason for Hire	Reason for Hire	The reason for hire for the contingent worker. The reason for hire is set based on the **Default Contract Worker Reason** setting.
Start Date	Start Date	The date the contractor is being hired.
End Date	End Date	The date the contract is being terminated.
Workday Title	Position Title	The job title of the contingent worker, which can be found on the contractor record in Workday.
Category	Job Category	The job category for the VNDLY job. When the jobs are drafted in VNDLY, the job category is set to *Default*.
Summary	Job Summary	Workday job profile summary. The job summary can be displayed in VNDLY when configured in **More** > **Company Settings** > **Job Form Configurations**.
Description	Job Description	Workday job profile description.

Workday	VNDLY	Description
Location Code	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within VNDLY.
Standard Hours per Week	Standard Hours per Week	Number of hours that the contingent worker is working regularly per week.
Resource Manager	Resource Manager	Manager of the supervisory organization.
External ID	External ID	Job requisition reference ID from Workday.
Currency Code	Currency	Three letter currency code that defines the VNDLY job currency. The three letter currency code is defined based on the setting indicated in **More** > **Company Settings** > **Currency**.
Workday Positions	Position	The ID of the related position used in Workday, if Position Management is used. This should be blank if the organization of the work order or worker profile isn't using Position Management within the File Transfer report in VNDLY.
Publishing Source	Publishing Source	Indicates the system in which the data was published. Publishing source gets set as Workday when job requisitions are created in Workday.
Worker Type	Worker Type	The ID of the workday contingent worker type used for the contingent worker in Workday.
Time Type	Time Type	The ID of the time type used for the contingent worker in Workday.
Job Family Reference ID	Job Profile	The ID of the job family used for the contingent worker in Workday.
Job Profile Reference ID	Job Profile	The ID of the job profile used for the contingent worker in Workday.
Company Cost Center	Company Cost Center	

Workday	VNDLY	Description
Region Business Unit Project Program Custom Organizations	Region Business Unit Project Program Custom Organizations	

Close Jobs from Job Requisitions

This table indicates fields use to identify the VNDLY job that should be closed when the job requisition is closed in Workday.

Workday	VNDLY	Description
External ID	External ID	Workday job requisition reference ID.
Publishing Source	Publishing Source	Indicates the system in which the data was published. Publishing source gets set as Workday when job requisitions are closed in Workday.

Load Open Positions

This table identifies fields on the Workday Position and how they are mapped to the VNDLY Position. Once positions are imported from Workday, a list of available positions is selectable when creating the job in VNDLY. The **Select from Available Positions** setting must be configured to view the list of available positions when creating the job. You can view Reference: General Settings in the General Configuration Tab for more details.

Workday	VNDLY	Description
Reference ID	Position	The ID of the related position used in Workday, if Position Management is used. This should be blank if the organization of the work order or worker profile isn't using Position Management within the **File Transfer** report in VNDLY.
Workday Title Title	Position Title	The job title of the contingent worker, which can be found on the contractor record in Workday.
Organization	Organization Unit	User-defined code of the organization unit associated with the work order.
Worker Type		The worker type gets set as a contingent worker for workers in VNDLY.

Workday	VNDLY	Description
Worker Subtype	Worker Type	The ID of the workday contingent worker type used for the contingent worker in Workday.
Time Type	Time Type	The ID of the time type used for the contingent worker in Workday.
Job Profiles	Job Profile	The ID of the job profile used for the contingent worker in Workday.
Locations	Location	The primary location of this contractor in Workday. This code should reference a code loaded in the Location data within VNDLY.

Reference: VNDLY to Workday Transactional Field Mapping

This information applies to both the Worker Profile Management and Extended Workforce Management modules. For details on configuring this information, see the Reference: Contingent and Worker Profile Management Settings in the General Configurations Tab topic.

See Transactional Workday Connector API Requests for API information.

Create Position

This table identifies fields on the VNDLY Job form and how they map to fields on the Workday Create Position task.

VNDLY	Workday	Description
Organization	Supervisory Organization	Represents the supervisory organization in Workday in which the position is created.
Create Position Reason	Position Request Reason	The reason specified for opening the position in Workday.
Title	Job Posting Title	The job posting title on the Position.
Start Date Current Date	Availability Date	The earliest start date of a worker in the position. The Start Date or Current Date may be used, whichever is earlier.
Start Date Current Date	Earliest Hire Date	The earliest date a worker can be hired. this is different from the Start Date which can be the same or later. The Start Date or Current Date may be used, whichever is earlier.

VNDLY	Workday	Description
Worker Type	Worker Sub-Type	Only worker types associated with contingent workers are mapped. This is typically used to segment contingent workers by role, access, etc.
Location	Location	This is the business site assigned to the worker.
Time Type	Time Type	Identifies full-time or part-time.
Job Family	Job Family	This is the job family assigned to the worker.
Job Profile	Job Profile	This is the job profile of the worker.
List of Position IDs	Position ID	When a job is sent to Workday, Workday creates a position and the Position ID is retrieved from Workday and sent back to VNDLY to be reflected on the job.

Create / Update Pre-Hire

This table identifies fields on the VNDLY Add a Candidate form and how they map to the Create Pre-Hire task in Workday.

VNDLY	Workday	Description
First Name	First Name	Legal First Name of pre-hire in Workday.
Middle Name	Middle Name	Legal Middle Name of pre-hire in Workday.
Last Name	Last Name	Legal Last Name of pre-hire in Workday.
Email	Email Address	Candidate Personal Email maps to either Home or Work Contact Email based on the **Maintain Contact Information** configuration. The visibility of this field is set to private.
Phone (Country Code + Phone Number)	Country Phone Code Phone Number	Candidate Phone Number maps to either Home or Work based on configuration. Phone Device Type is set based on configuration. The visibility of this field is set to private.
Address Line 1	Home - Address Line 1	Address Line 1 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.

VNDLY	Workday	Description
Address Line 2	Home - Address Line 2	Address Line 2 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 3	Home - Address Line 3	Address Line 3 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private. Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Additional address fields may be sent through the connector. For these additional address fields, the field name in VNDLYis dependent on the country of the address. Examples: • For Japan, the Address Line One Local field displays as Address Line One - Kanji. • For Serbia, the Address Line One Local field displays as Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	Home - City	City of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
County	County	Contact VNDLY to configure this setting.
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
State	Home - State	State of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Zip Code	Home - Postal Code	Postal Code of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Country	Country	Country of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.

VNDLY	Workday	Description
Prehire ID	Pre-Hire Id	Pre-Hire/Applicant Id retrieved after the creation of the pre-hire in Workday or pre-populated in VNDLY prior to onboarding.

Contract Contingent Worker

This table identifies fields on the VNDLY Work Order and how they map to the Contract Contingent Worker task in Workday.

VNDLY	Workday	Description
Organization	Supervisory Organization	Represents the supervisory organization in Workday in which the position is created.
Start Date	Start Date	The Contractor Start Date of the contract or job in Workday.
Contract Contingent Reason	Reason	The reason associated with the specific worker and contract. Note: This is different than the Create Position Reason.
Position ID	Position ID	The Position ID from the Job that is being used to staff the worker. Note: Positions only apply to Supervisory Organizations with a Position Management Staffing Model.
Worker Type	Worker Type	Maps to the Contingent Worker Type.
Job Profile ID	Job Profile ID	Maps to the Workday Job Profile assigned to the contract.
Time Type	Time Type	Identifies full-time or part-time.
Location	Location	This is the business site assigned to the worker.
Supplier	Supplier	This is optional and identifies the Supplier that the worker is contracted through.
End Date	Contract End Date	The Contract End Date of the worker.
Title	Job Title	The Job title associated with the contract.
Title	Business Title	The Business Title associated with the contract.
Scheduled Weekly Hours	Scheduled Weekly Hours	Populates the Scheduled Weekly Hours on the contract.
Prehire ID	Prehire ID	The Prehire Id that identifies the applicant that is being

VNDLY	Workday	Description
		contracted and is reflected on the Contractor Profile in VNDLY.
Bill Rate	Pay Rate	Optionally populates the Contract Pay Rate of the worker.
Pay Type	Pay Frequency	Optionally populates the Frequency of the Pay of the worker.
Currency	Pay Currency	Optionally populates the currency of the pay of the worker in Workday.
Client Contractor ID	Contingent Worker Id	The Contingent Worker ID that is created in Workday is retrieved via API using the Event Id and reflected on the Contractor Profile as well as displayed on the Work Order in VNDLY.

Maintain Contact Information - Email

This table identifies the field on the VNDLY Edit Contractor Profile and how it maps to the Maintain Contact Information API task in Workday.

VNDLY	Workday	Description
Email	Email Address	Candidate Personal Email maps to either Home or Work Contract Email based on configuration. The visibility of this field is set to private.

Maintain Contact Information

This table identifies fields on the VNDLY Edit Candidate and how they map to the Maintain Contact Information API task in Workday. Note: If there are home address and phone number updates, two Maintain Contact Information API calls are made to Workday.

VNDLY	Workday	Description
Phone (Country Code + Phone Number)	Country Phone Code Phone Number	Candidate phone number maps to either home or work based on configuration. Phone Device Type is set based on configuration. The visibility of this field is set to private.
Address Line 1	Home - Address Line 1	Address Line 1 of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Address Line 2	Home - Address Line 2	Address Line 2 of the Home Address of the pre-hire in

VNDLY	Workday	Description
		Workday. The visibility of this field is set to private.
Address Line 3	Home - Address Line 3	Address Line 3 of the Home Address of the pre-hire in Workday. Contact VNDLY to configure this setting.
Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Region Subdivision Two Address Line One Local Address Line Two Local Address Line Three Local Address Line Four Local City City Subdivsion One Address Line Four Address Line Five Address Line Six Address Line Seven Address Line Eight Address Line Nine	Additional address fields may be sent through the connector. For these additional address fields, the field name in VNDLYis dependent on the country of the address. Examples: • For Japan, the Address Line One Local field displays as Address Line One - Kanji. • For Serbia, the Address Line One Local field displays as Address Line One - Cyrillic. Contact VNDLY to configure this setting.
City	Home - City	City of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
County	County	Contact VNDLY to configure this setting.
Neighborhood	Neighborhood	Contact VNDLY to configure this setting.
State	Home - State	State of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Zip Code	Home - Postal Code	Postal Code of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.
Country	Country	Country of the Home Address of the pre-hire in Workday. The visibility of this field is set to private.

Change Job

This table identifies fields on the VNDLY Work Order Edit form and how they map to the Change Job task in Workday.

VNDLY	Workday	Description
Start Date Current Date	Effective Date	Represents the effective date on which the change takes effect in Workday. Contact VNDLY to configure this setting. The Start Date is sent via the Correct Contract contingent Worker and Hire process.
Title	Job Posting Title	Updates on the Job Posting Title on the Position.
Title	Business Title	Updates on the Business Title on the Position.
VNDLY Workday Settings	Change Job Reason	This is the default Change Job Reason configured in Settings that is sent via the API.
Location	Location	Updates the Business Site assigned to the worker.
Standard Hours/Week	Schedule Hours	Updates the scheduled weekly hours on the contract.
End Date	Contract End Date	Updates the Contract End Date of the worker.
Bill Rate	Contract Pay Rate	Updates the Contract Pay Rate of the worker.
Company Cost Center Region Business Unit Project Program Custom Organizations	Charge Codes	
Job Profile	Job Profile	
Worker Type	Worker Type	
Time Type	Time Type	

End Contingent Worker

This table identifies fields on the Work Order End modal and how they map to the End Contingent Worker Contract task in Workday.

VNDLY	Workday	Description
Client Contractor ID	Contingent Worker ID	Identifies the contract that is being terminated in Workday.
End Date	Contract End Date	Identifies the date the contract is being terminated.
End Reason	Reason	Identifies the termination reason for the contract.
End Date	Notify Worker By	Identifies the date by which to notify the worker. It is always mapped to the End Date.
End Date	Last Day of Work	Identifies the last day of work for the contract. It is always mapped to the End Date.
Close Position	Close Position	Indicates whether the associated position is to be closed on contract termination.

Close Position

This table identifies fields on the End Job in VNDLY for Contingent Labor and how they map to the Close Position task in Workday. These fields are only set to Workday when you end a job with unfilled positions.

VNDLY	Workday	Description
Current Date	Close Date	Close Date is always set to the current date.
Default Close Position Reason	Close Reason	

Correct Start Date

This table identifies fields on the VNDLY Work Order and how they map to the Correct Start Date in Workday.

VNDLY	Workday	Description
Start Date	Start Date	This task is trigged only when the Workday Version is V39.2. Contact VNDLY to assist with configuration.
Correction Reason	Leave a Note	(Optional) If the **Leave a Note** field is populated while modifying the work order, then it is populated else Workday adds the Default Comment to the correction.