



## Overview:

This Job Aid covers common Workday features for Managers to access and view information related to direct reports. It also covers Workday functionality designed to assist Managers in day-to-day work.

Your screens and available options may differ depending on your role and security profile.

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## Workday Terminology

Here are some common terms that you will hear and see throughout Workday:

- **Supervisory Organization:** A team of employees reporting to the same manager. Supervisory Orgs are typically named after the manager. For example, if the manager's name is Jane Doe, then the supervisory org is Jane Doe Supervisory Org.
- **Inherited Supervisory Org:** An 'inherited' supervisory org means the former manager of that supervisory org is no longer in the position tied to that supervisory org, so the next leader above has inherited the supervisory org.
- **Position Management:** Position Management is used to organize a company's workforce. Position Management is the relationship between employees, the job they hold, and the interactions that they have with the organizational structure.
- **Position:** A role on a specified team with an assigned job code and specific job attributes: every employee must have a position and each position can only be occupied by one employee at a time.
- **Business Process:** A transaction with specific steps, defined notifications, and defined authorized initiator, reviewers, and approvers.

# Workday Basic Navigation for Managers

## Audience: Managers

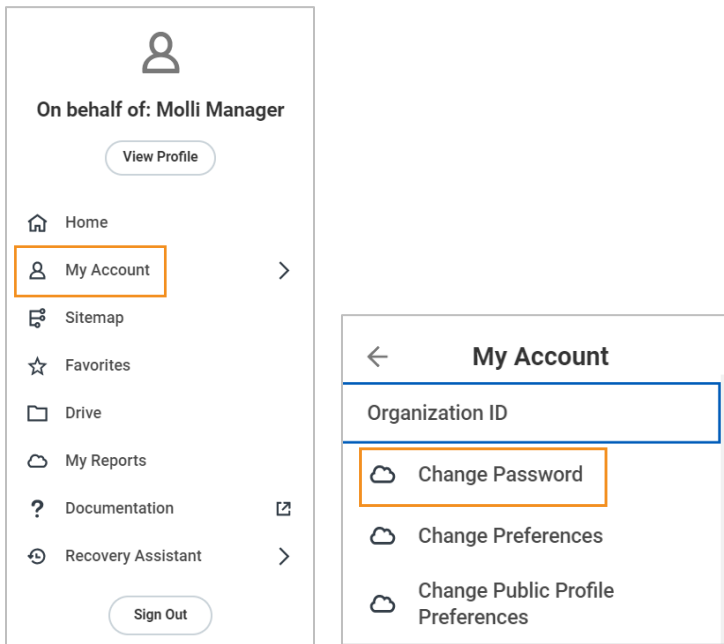


### The Profile Icon

The **Profile** icon in the upper right corner of your Workday screen contains links to your homepage, favorites, and your Workday account. Click the **Profile** icon.



1. To change your password, select **My Account** and then select **Change Password**.



Enter the required password information and click **OK**.

### Change Password

Changing your password will end all other Workday sessions. Please ensure you have no unsaved work before proceeding.

**Password Rules**

Your new password must not be the same as your current password or user name. Minimum number of characters required: 8. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9, special characters !"#%&'()\*+,-./:;>?@\|'.\_()~. The password must not have been used within the following number of last passwords: 4.

Current Password\*

New Password\*

Verify New Password\*

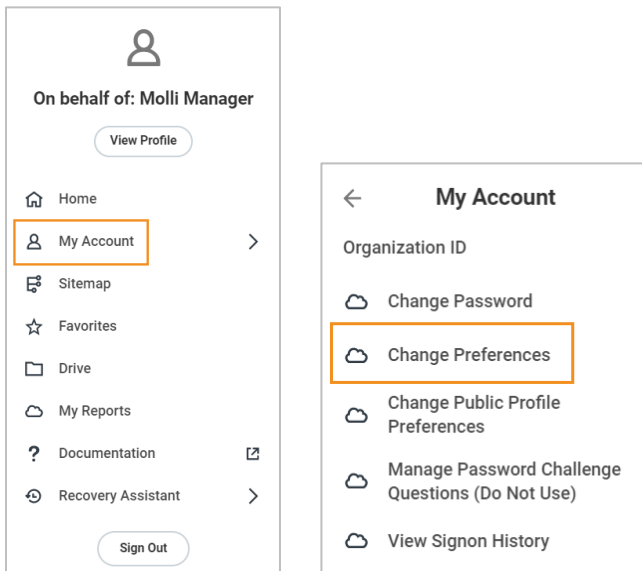
**OK** Cancel

# Workday Basic Navigation for Managers

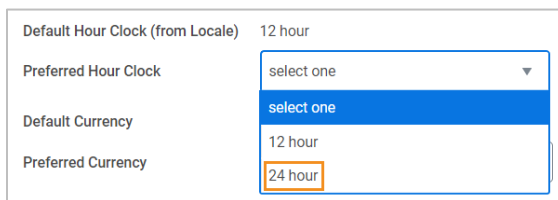
## Audience: Managers



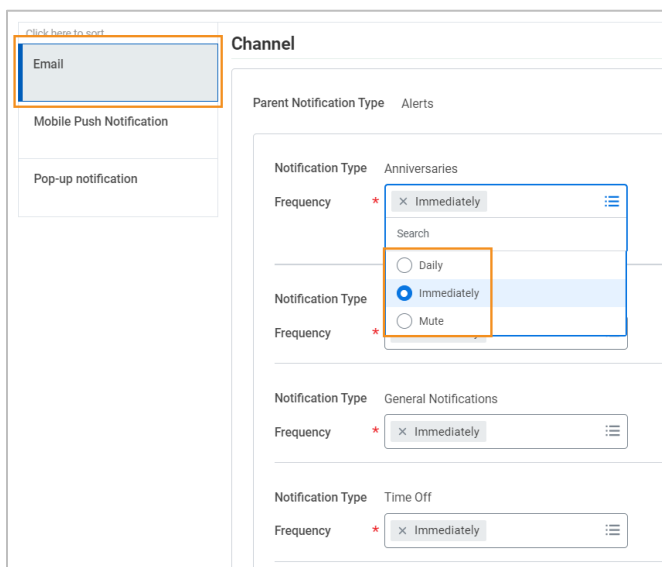
2. To update preferences, select **My Account**, then select **Change Preferences**.



- You can update your **Preferred Hour Clock**, if you prefer a 24-hour clock. 12-hour clock is set as the default option.



- You can also update you notification preferences for **Email** and **Mobile Push** (Mobile app). Frequency options for **Email** include **Daily**, **Immediately** and **Mute**.

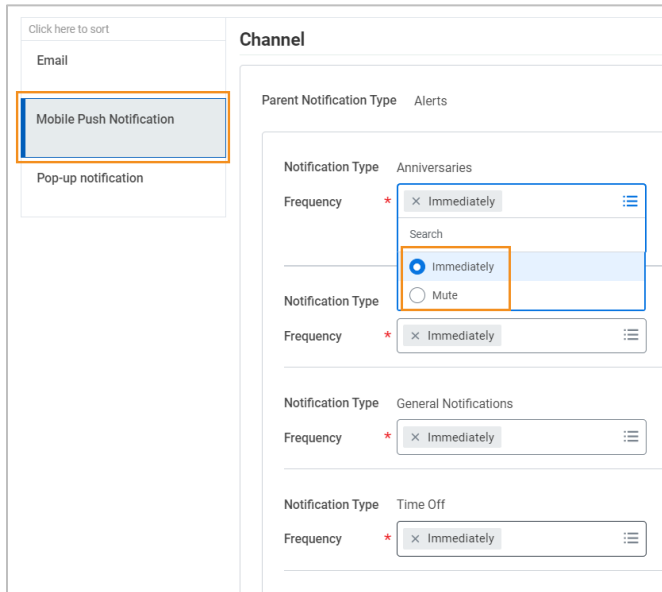


# Workday Basic Navigation for Managers

## Audience: Managers



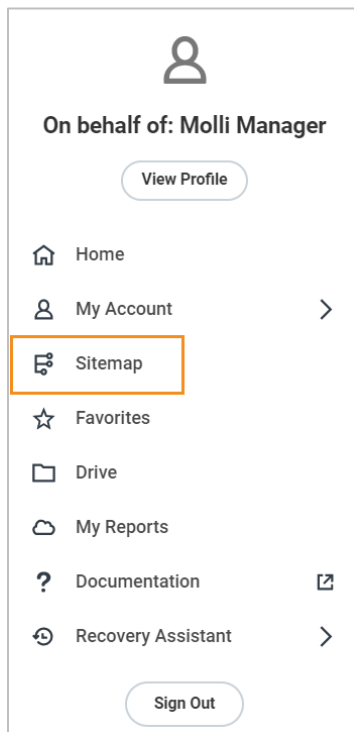
- **Mobile Push Notification** Frequency options include **Immediately** or **Mute**.



- Click **OK** when you have made your preference selections.



3. Select **Sitemap** to see the **Reports** and **Tasks** in a list format, which are available to you.

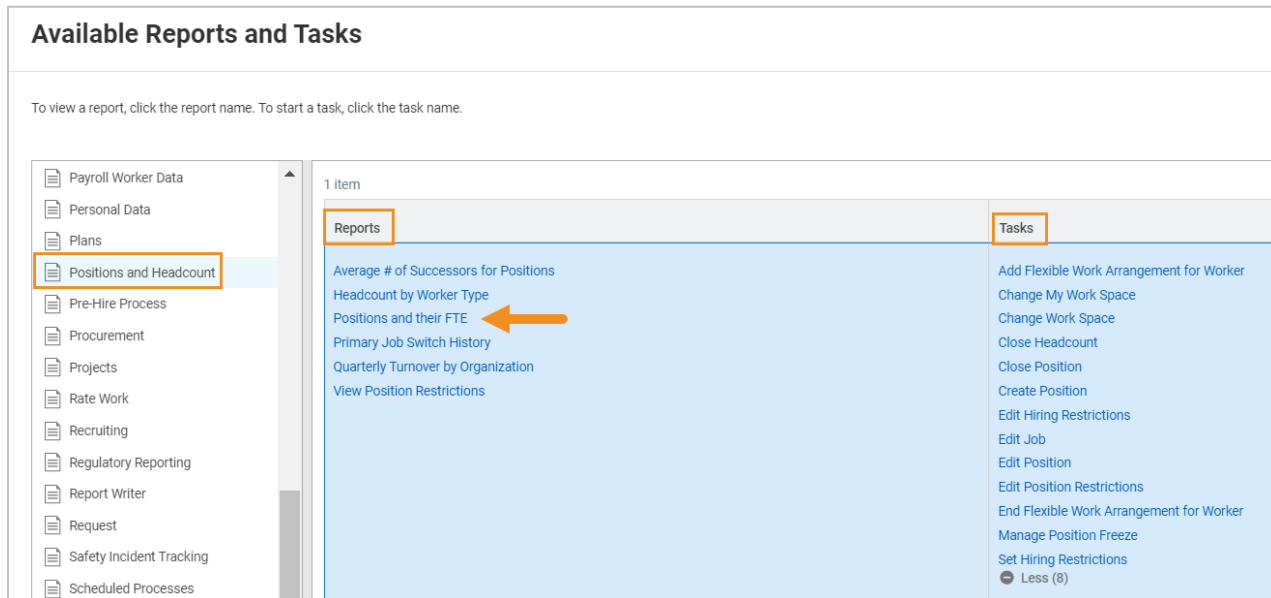


# Workday Basic Navigation for Managers

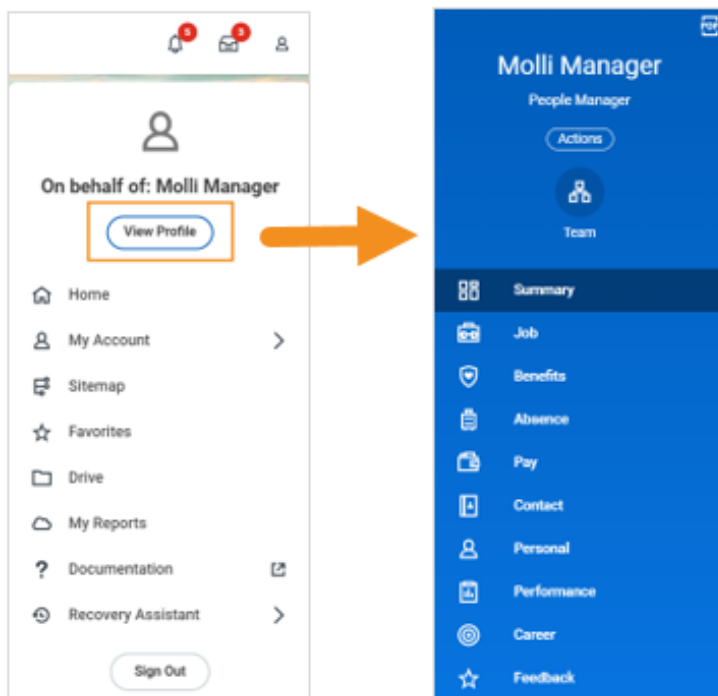
## Audience: Managers



The list of categories is on the left side of the screen, click on a selection and a list of hyperlinks that will take you to the *Reports/Tasks* appears. In the example below, **Positions and Headcount** was selected, resulting in a list of hyperlinks to the right that includes your **Reports** and **Tasks** option. Click on the desired *Report* or *Task* link to start the process.



4. From the **Profile** icon, you can also access your profile information, such as your job and compensation details, your contact information, and more, by clicking **View Profile**, below your name.

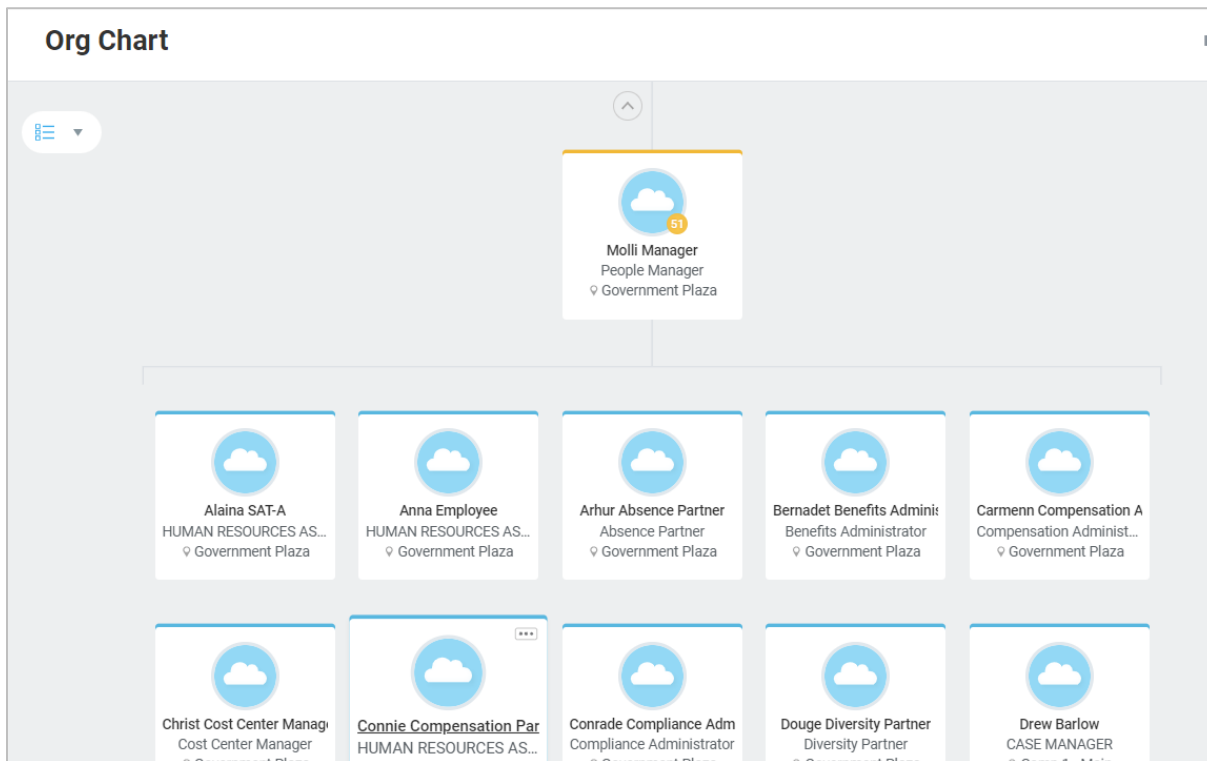
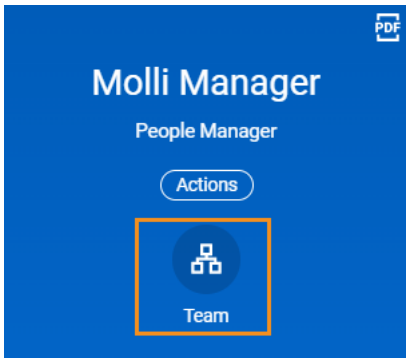




## Organizational Chart

Your Workday **Profile** also gives you quick access to your **organizational chart**. Workday displays the reporting structure of your team. This allows you to see where your organization fits within the company and drill down into the structure of your supervisory organization.

Click the **Team** icon to view the organizational chart.



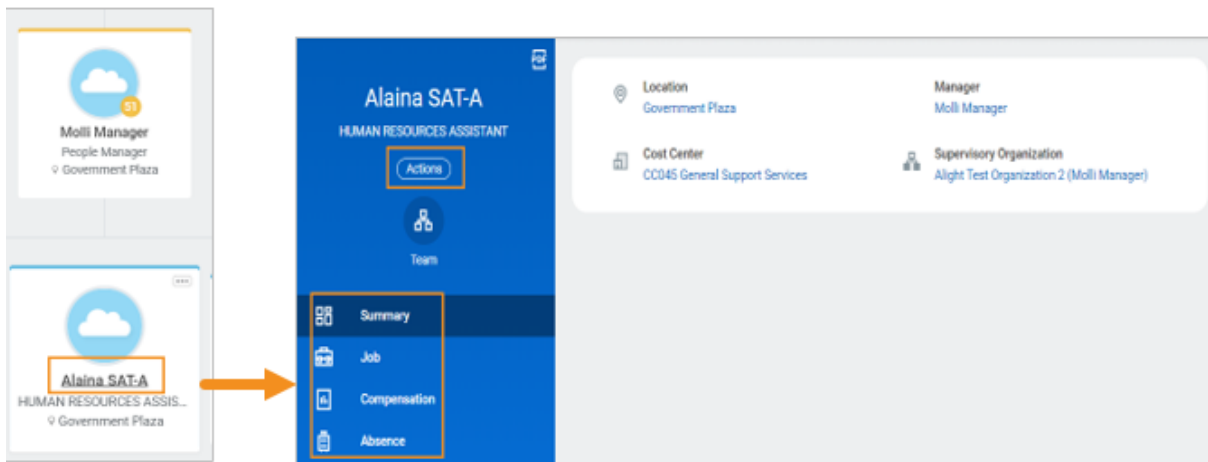
Within your org chart, you can scroll up the hierarchy to see higher levels of the organization. You can also click on members within your organization to view their job details/profiles.



## View Employee Profile

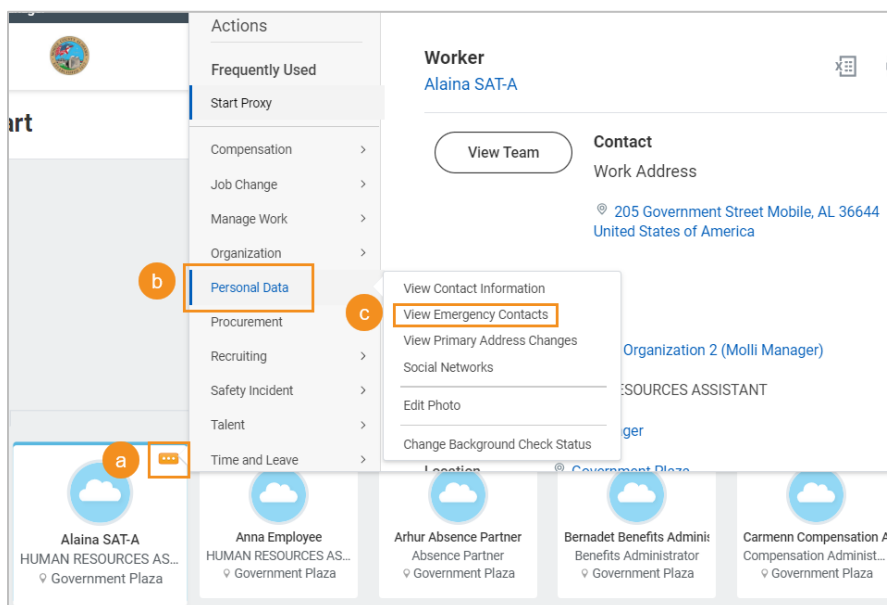
From the Org Chart you can view a direct report's profile as well as initiate tasks.

1. Click on the employee's name to view their profile. View profile items from the left-side column or select the **Actions** button to view details or initiate tasks.



2. **Action** items for you staff can also be accessed from the Org Chart.

- a. Left click on the **Related Actions** icon for the employee.
- b. The left-side column in the pop-up, includes Actions for the employee. Hover over an Action item and additional options will appear.
- c. Make your selection to view details or initiate a task.

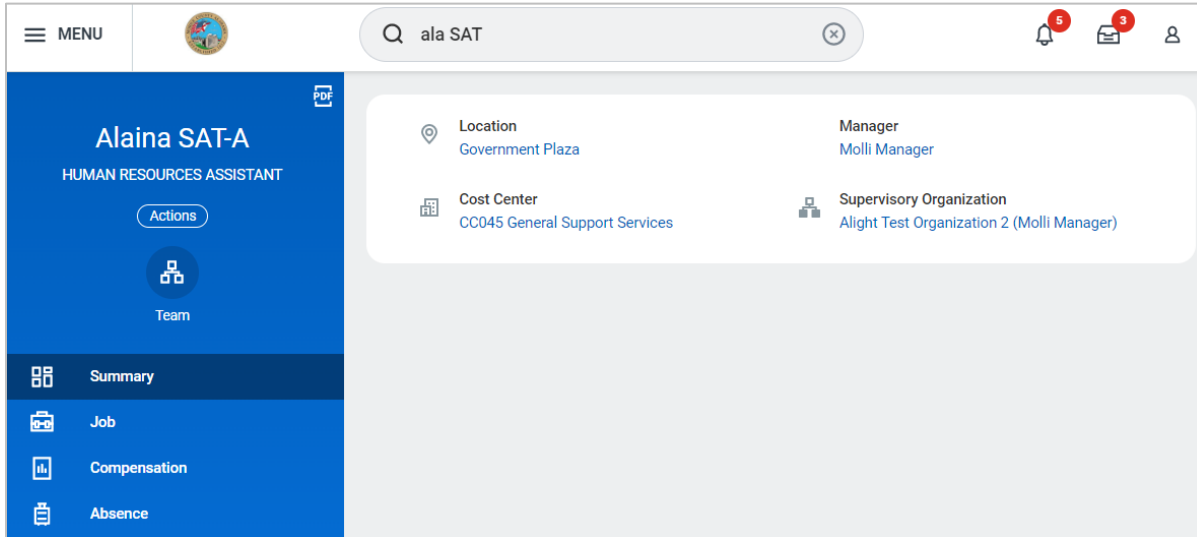
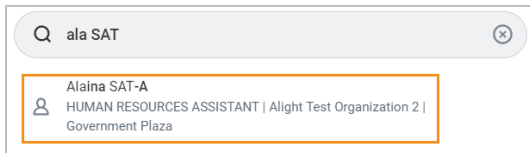


# Workday Basic Navigation for Managers

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- You can also access your staff's profile by typing their name in the Workday search bar. If you type in a minimum of the first three letters of the first and last name, Workday will provide suggestions below the search bar if you do not hit enter. Select the employee.

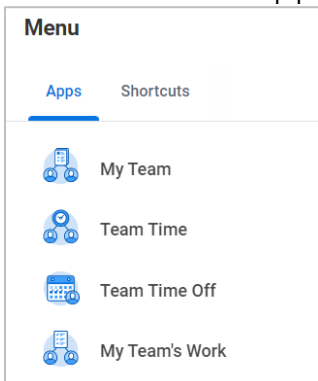


## Manager Applications (Apps)

From the Workday homepage, click the **Global Navigation Menu** icon to view your apps. Your applications provide access to launch different tasks and reports.



Some common Applications for Managers include:





# Workday Basic Navigation for Managers

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- **My Team** – Application displays the **Actions** and **View** options as well as the team members.

The screenshot shows the "My Team" page in Workday. At the top left, there is a back arrow and the text "My Team". Below this, the page is divided into two main columns: "Actions" and "View".

The "Actions" column contains the following buttons: "Business Title Change", "Manage Succession Plan", "Edit Job Requisition", "Edit Job", and "More (4)".

The "View" column contains the following buttons: "My Org Chart", "Timeline", "Headcount", "Organization Directory", "My Leadership Roles", and "More (22)".

Below these columns, there is a section for team members, which is highlighted with an orange border. It contains four cards, each with a cloud icon and a name: "Alaina SAT-A", "Anna Employee", "Arhur Absence Partner", and "Bernadet Benefits Administrator".

- **Team Time** – Allows you to review time for your team, enter time for an employee, and view your team's schedule.

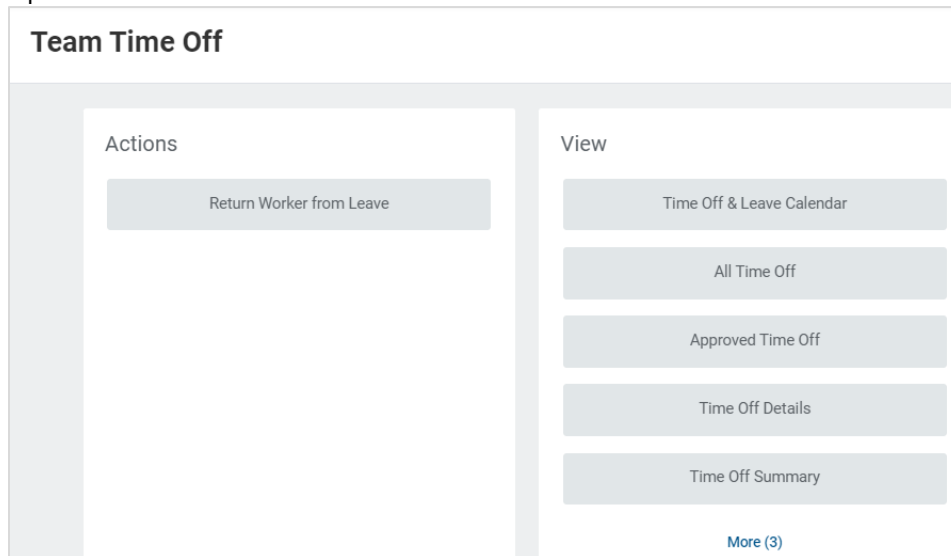
The screenshot shows the "Team Time" page in Workday. At the top left, there is a back arrow and the text "Team Time". Below this, the page is divided into two main columns: "Actions" and "View".

The "Actions" column contains the following buttons: "Review Time", "Enter Time for Worker", "Return Worker from Leave", and "Team Overtime".

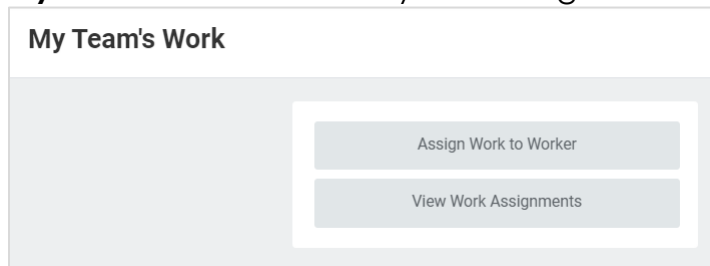
The "View" column contains the following buttons: "My Team's Schedule", "Time Clock History", and "Time Off & Leave Calendar".



- **Team Time Off** – Allows you to return an employee from leave and several detailed options of views for team time off.



- **My Team's Work** – Allows you to assign work and view work assignments.



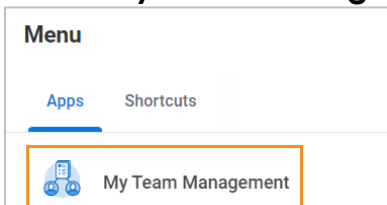
## My Team Management Dashboard

The **My Team Management** Dashboard offers several Actions and View options for Managers. This dashboard is configurable and can be customized with your preferences.

1. Select the **Global Navigation Menu** icon.



2. Select **My Team Management** app.

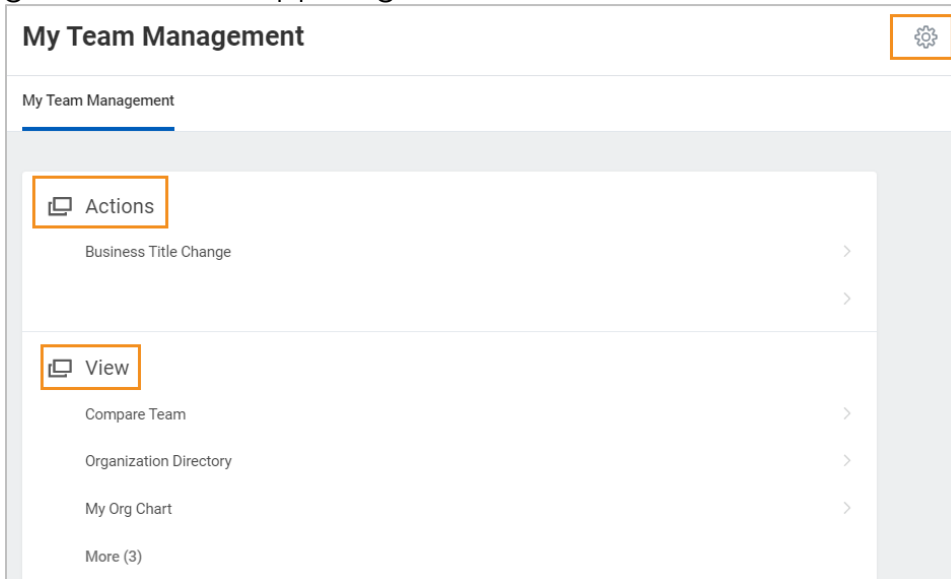


# Workday Basic Navigation for Managers

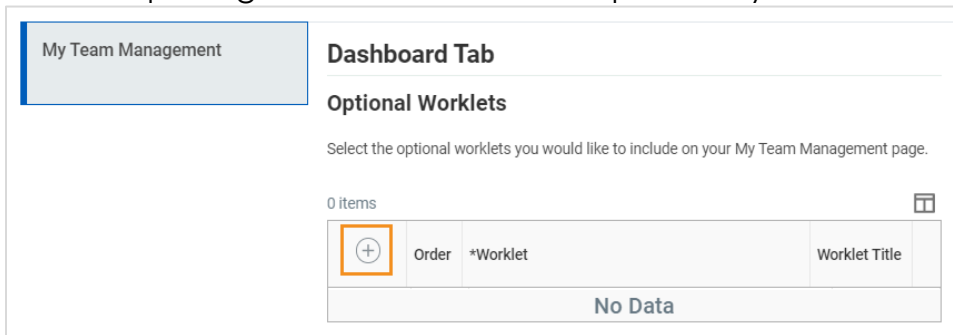
## Audience: Managers



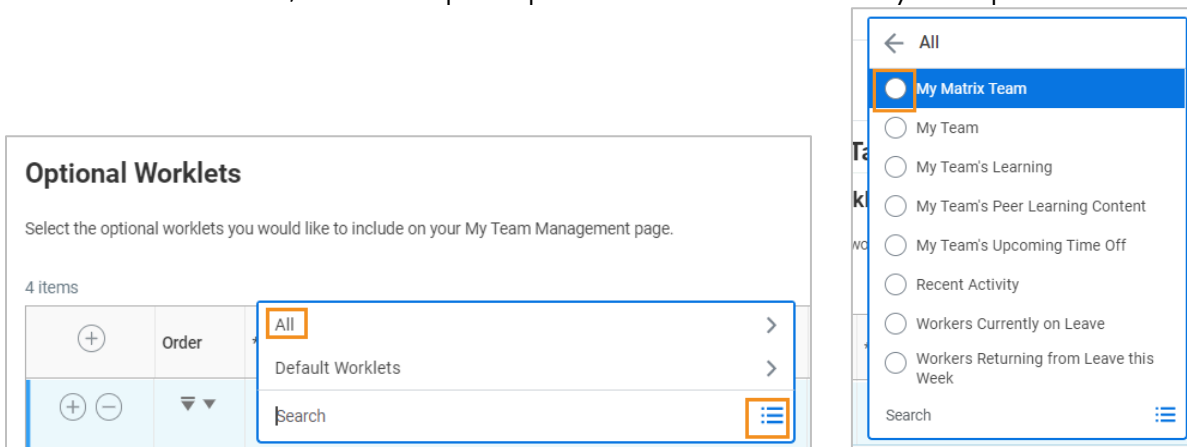
3. You can select options for **Actions** and **View**. To customize your dashboard, just click the gear icon in the upper right-side of the screen.



4. Click the plus sign to add a worklet or option for your dashboard.



5. In the Worklet field, click the prompt and select **All** to see your options.



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- To select another Worklet, click the plus sign again to make another selection. You can add multiple Worklets to your dashboard.  
If you see an Alert, click on the **Alert** for more information. Click **OK**.

The screenshot shows the 'Optional Worklets' dialog box for 'My Team Management'. At the top left, the 'My Team Management' tab is highlighted. The main heading is 'Dashboard Tab'. Below it, the 'Optional Worklets' section has a sub-heading and a note: 'Select the optional worklets you would like to include on your My Team Management page.' To the right of this section is an orange alert banner with a warning icon and the text '3 Alerts'. Below the alert, a box titled 'Errors and Alerts Found' contains three entries, each with a warning icon and a title: 'Alert - Worklet (Row 1 Column 3)', 'Alert - Worklet (Row 2 Column 3)', and 'Alert - Worklet (Row 3 Column 3)'. Below this is a table with 3 items. The table has columns for 'Order', '\*Worklet', and 'Worklet Title'. The first row is highlighted in blue and has a plus sign in a box next to the 'Order' column. The second row has a plus sign in a box next to the 'Order' column. The third row has a plus sign in a box next to the 'Order' column and a box around the 'My Team's Upcoming Time Off' worklet. At the bottom, there are 'OK' and 'Cancel' buttons, with 'OK' highlighted in a box.

Order	*Worklet	Worklet Title
+	My Matrix Team	
+	My Team	
+	My Team's Upcoming Time Off	

- Your Worklets have been added to your Dashboard. Click **Done**.

The screenshot shows the 'My Team Management' dashboard. The 'Optional Worklets' section now displays the three selected worklets in a table. The 'Done' button at the bottom is highlighted in a box.

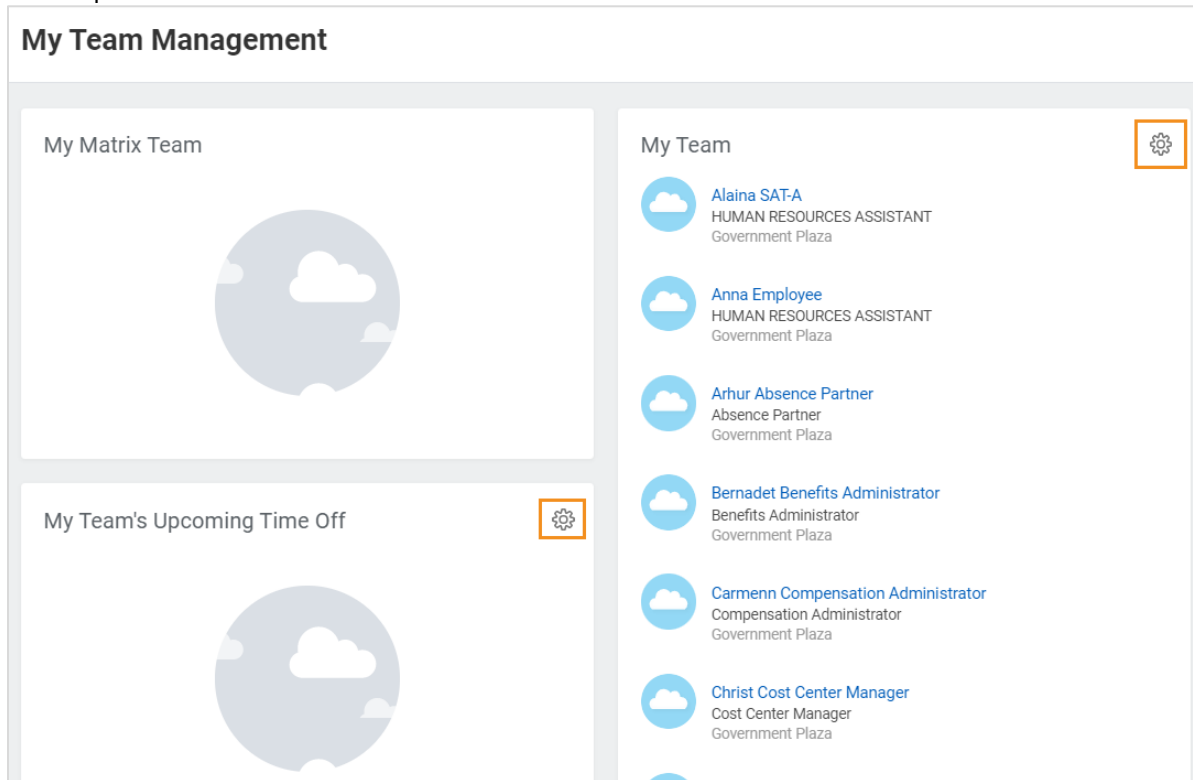
Worklet	Worklet Title
My Matrix Team	
My Team	
My Team's Upcoming Time Off	

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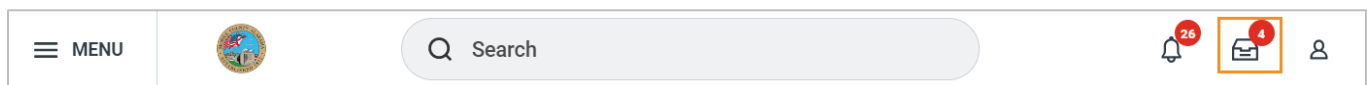
8. Your dashboard is now customized with your preferences. Worklets can be further customized by clicking the gear icon to select a date range or see a full view, for example.



## Workday Inbox Action Items/To Do's

Your Workday **Inbox** is the central location for tasks that require your attention. It also contains an archive of recently completed tasks.

1. You can access your Workday Inbox by clicking the **Inbox**  icon in the upper right corner of your Workday screen. The number next to your inbox indicates how many actions you have waiting for you to complete.



# Workday Basic Navigation for Managers

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- The **Actions** tab defaults and lists any pending transactions that require an action from you. Click an item to open the transaction details and complete the task.

A screenshot of the Workday 'Inbox' interface. The 'Actions' tab is selected and highlighted with a blue box. Below it, a list of transactions is shown, with the first one, 'Time Entry: Taylor Swift - Benefits - 26 hours from 02/11/2023 to 02/17/2023', highlighted with an orange box. To the right, the 'Time Entry Approval' details are displayed, including the worker's name 'Taylor Swift - Benefits' and a table of 'Daily Totals'. At the bottom of the details panel, three buttons are visible: 'Approve' (highlighted with a blue box), 'Send Back', and 'Close'.

- Items in your Inbox cannot be deleted; they move to the Archive tab once you have completed or submitted the task. Click the **Archive** tab to access the status of any business process you participated in within the last 30 days.

A screenshot of the Workday 'Inbox' interface. The 'Archive' tab is selected and highlighted with a blue box. Below it, a list of transactions is shown, with the first one, 'Job Requisition: JR100127 CASE MANAGER', highlighted with an orange box. To the right, the 'View Event' details are displayed, including the job requisition title 'Job Requisition: JR100127 CASE MANAGER' and the overall status 'Successfully Completed'. Below the details, there is a section for 'Job Requisition' with a link to 'JR100127 CASE MANAGER (Open)' and a table with one item, 'Step Name'.

- For Inbox transactions requiring your approval, review the information and click one of the following options:

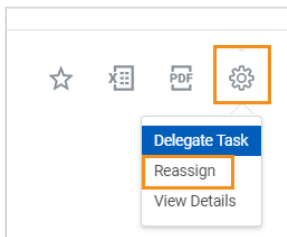
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- **Approve:** Approves a task and allows it to proceed to the next processing step. This will move the item to your Inbox Archive.
- **Cancel:** Cancels any action on the task and leaves it in your Inbox for future review or action. Note: this does not cancel the task itself.
- **Deny:** Deny will end the business process and notifies the initiator of the denial, including the reason for the denial. This will move the item to your Inbox Archive.
- **Save for Later:** Saves any changes you have made to the task and leaves it in your Inbox for future review or action.
- **Send Back:** Returns the item to the previous person in the process for revision. This will move the item to your Inbox Archive.
- **Submit:** Submits the item to the next level Approver or completes a process. This will move the item to your Inbox Archive.

5. To reassign the task to another manager, in the Inbox item to be reassigned, click the gear icon in the upper right side of the screen and select **Reassign**.



6. Enter the employee's name in the **Proposed Person** field, enter a **Reassignment Reason**, and click **OK**. Note: Reassign is not available for all business processes.

**Reassign This Task**

2 month(s) ago - Effective 02/17/2023

To reassign a step, you must enter a reason in the Reassignment Reason field.

Business Process \* Approval: Awaiting Action by Molli Manager

My Tasks 1 item

Step	Business Process	Subject	Due Date	Proposed Person	Reassignment Reason
Approval by Manager	Approval: Awaiting Action by Molli Manager	Taylor Swift - Benefits		<input type="text" value="Marthay Manager's Manager"/>	<input type="text" value="Going home sick, need help reviewing/appro"/>

Expand