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.

Contents:

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.

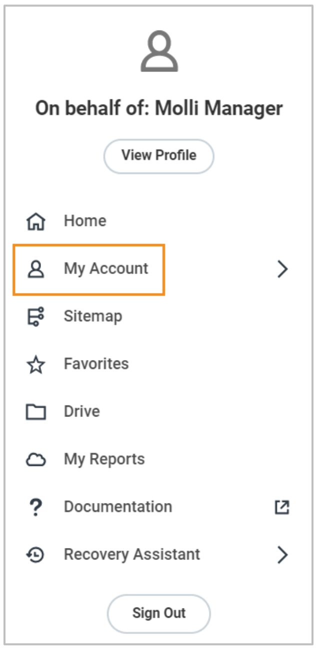
- **Position**: A role on a specified team with an assigned job code and specific job attributes: every employee must have a position and each position can only be occupied by one employee at a time.

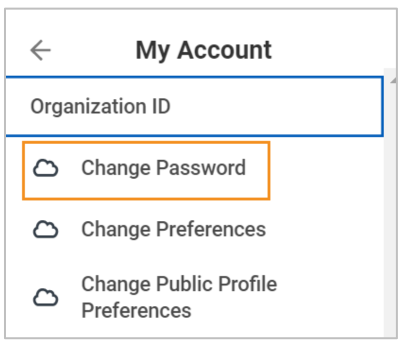
- **Business Process**: A transaction with specific steps, defined notifications, and defined authorized initiator, reviewers, and approvers.

The Profile Icon

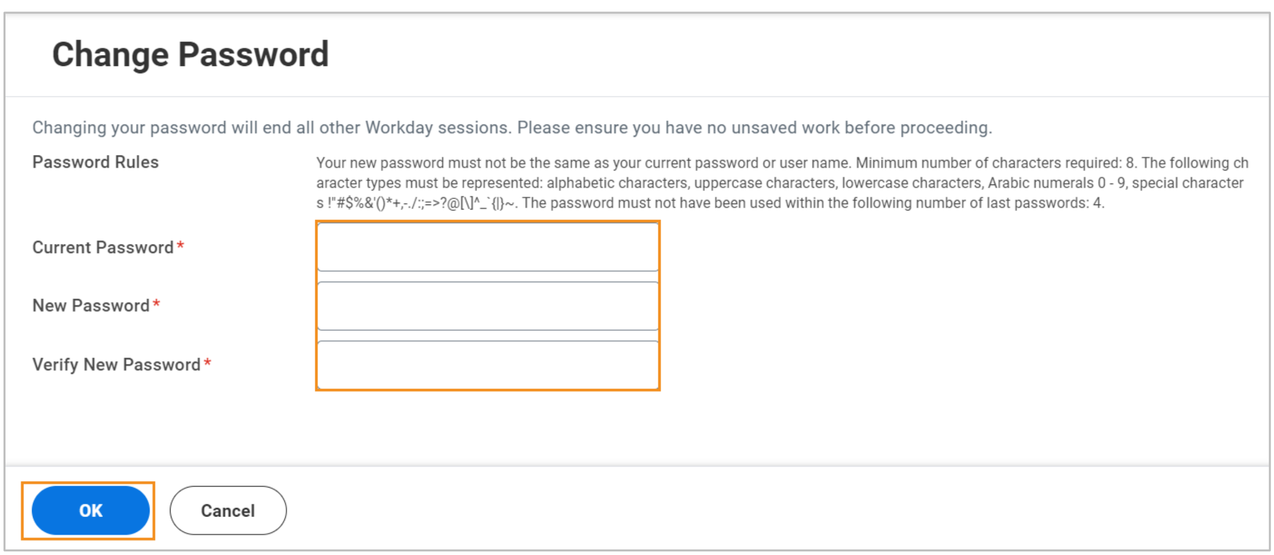
The **Profile** icon in the upper right corner of your Workday screen contains links to your homepage, favorites, and your Workday account. Click the **Profile** icon.

1. To <u>change your password</u>, select **My Account** and then select **Change Password**.

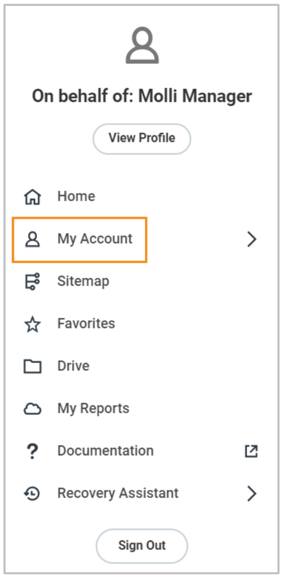


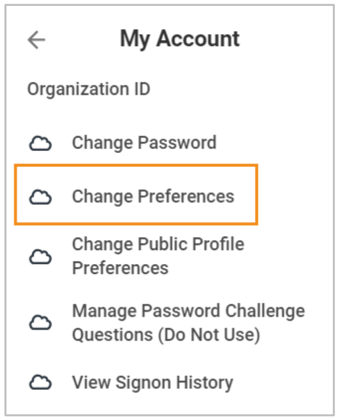


Enter the required password information and click **OK**.

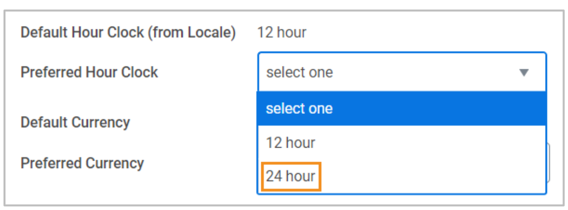


2. To <u>update preferences</u>, select **My Account**, then select **Change Preferences**.

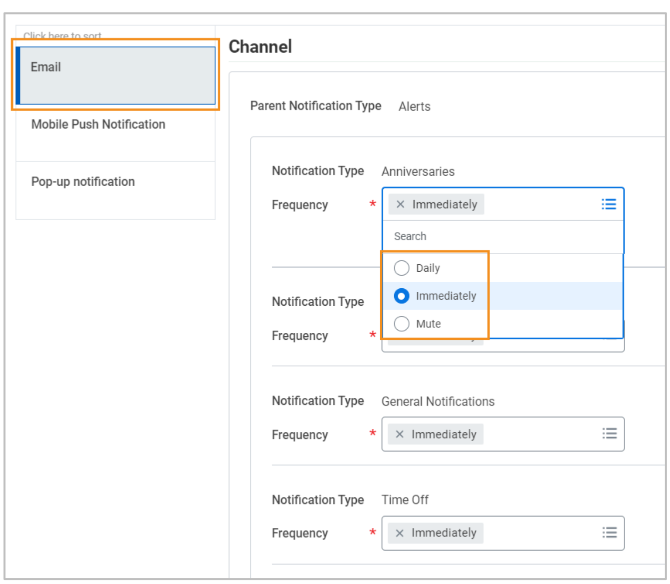




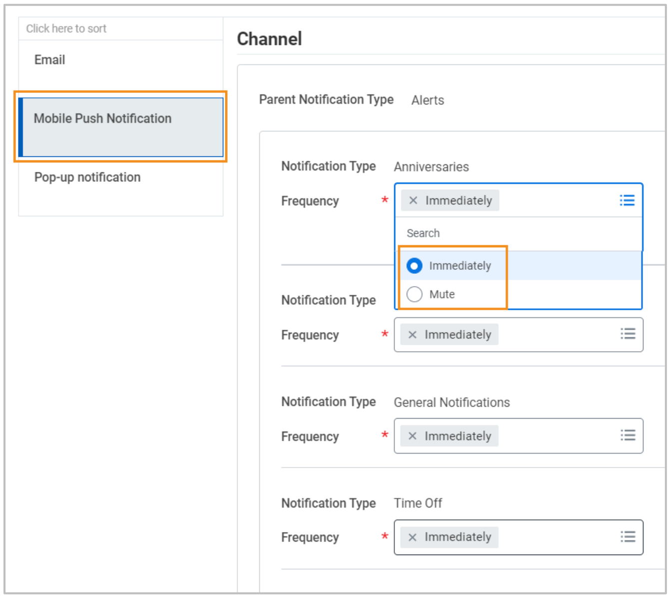
- You can update your **Preferred Hour Clock,** if you prefer a 24-hour clock. 12-hour clock is set as the default option.



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

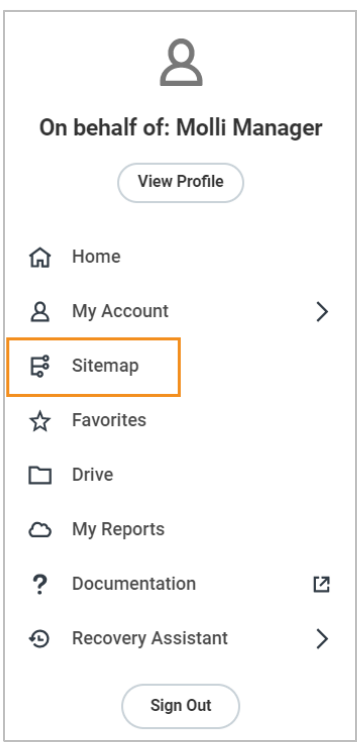


- **Mobile Push Notification** Frequency options include **Immediately** or **Mute**.

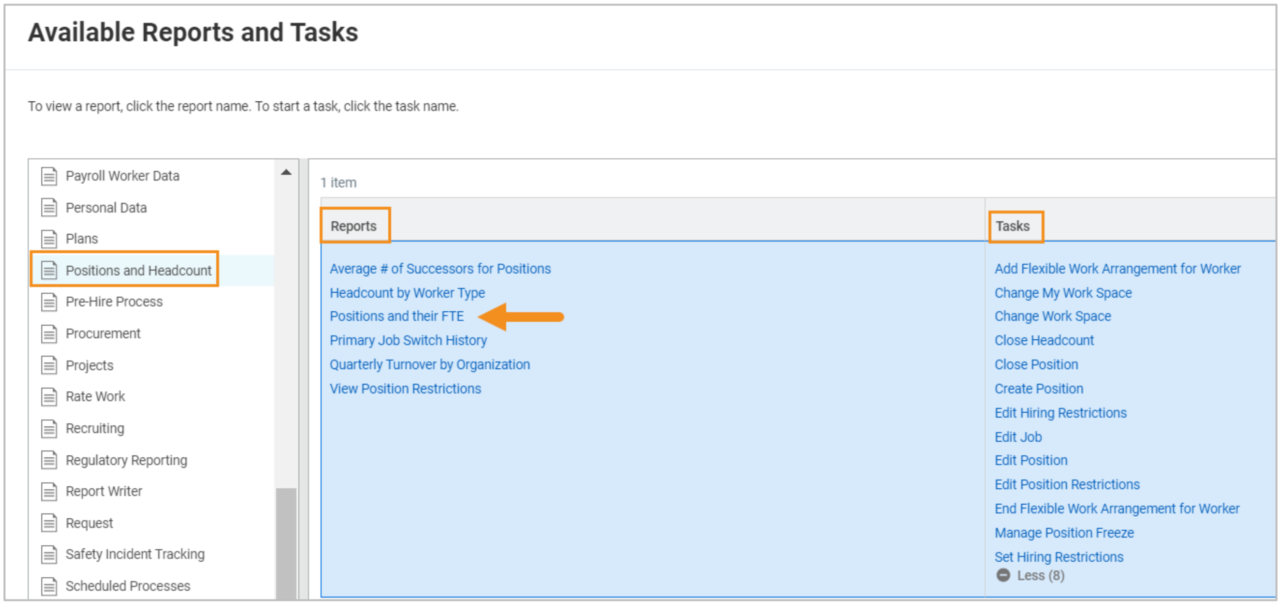


- Click **OK** when you have made your preference selections.

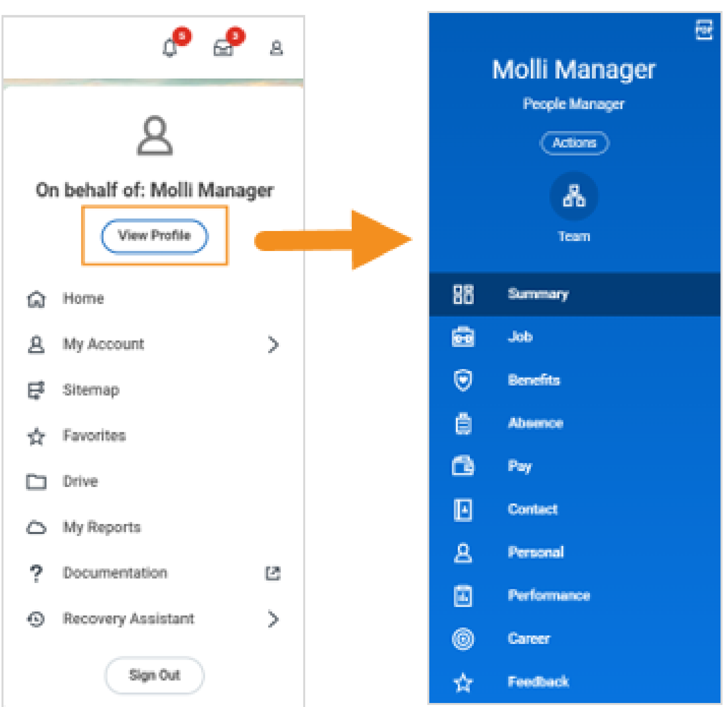
3. Select **Sitemap** to see the **Reports** and **Tasks** in a list format, which are available to you.



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.



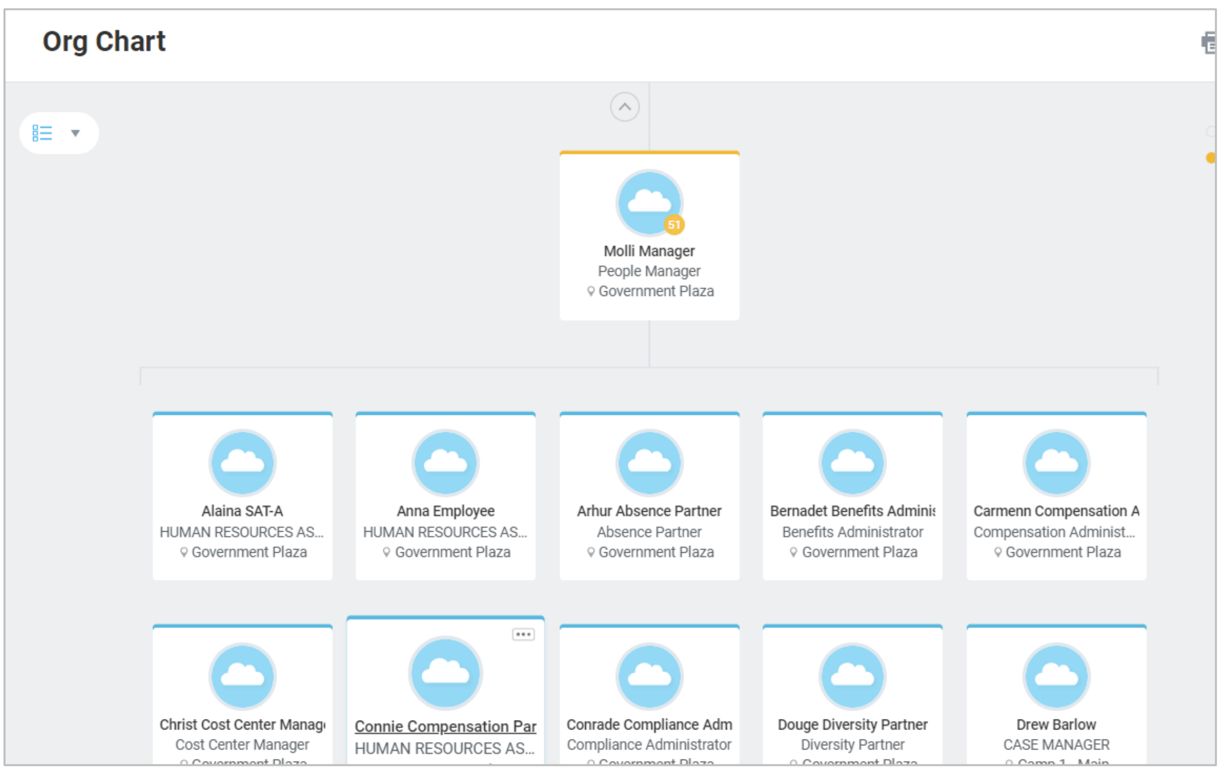
4. From the **Profile** icon, you can also access your profile information, such as your job and compensation details, your contact information, and more, by clicking **View Profile,** below your name.



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.

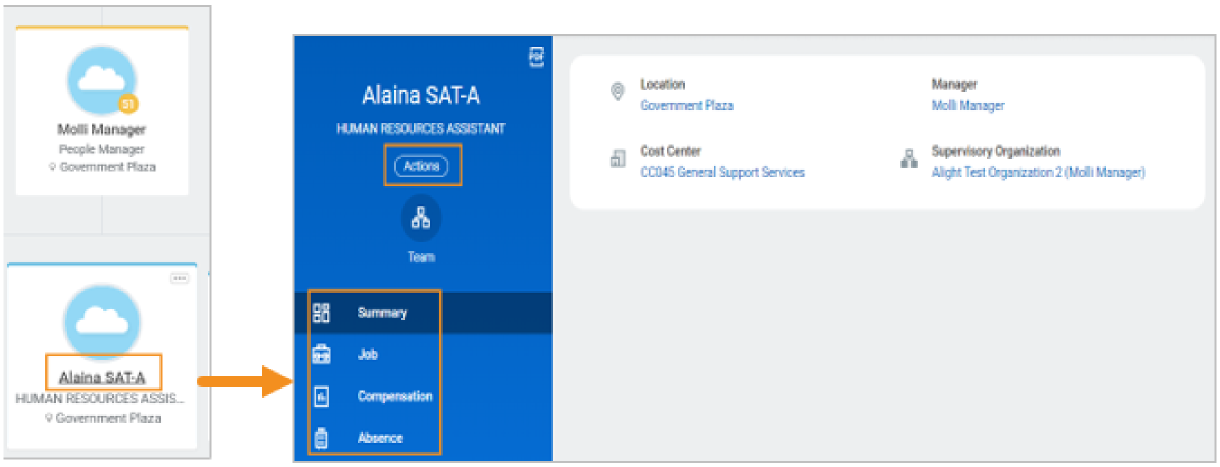


Within your org chart, you can scroll up the hierarchy to see higher levels of the organization. You can also click on members within your organization to view their job details/profiles.

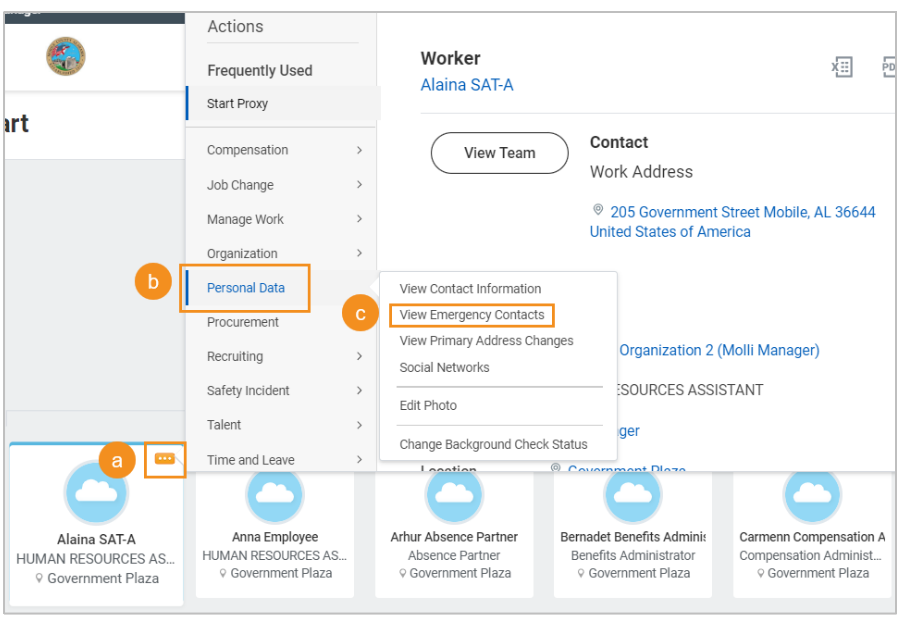
View Employee Profile

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

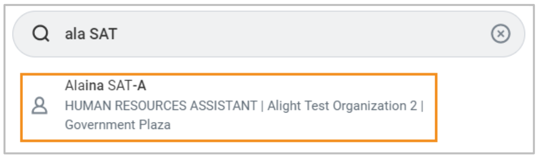
1. Click on the employee's name to view their profile. View profile items from the left-side column or select the **Actions** button to view details or initiate tasks.

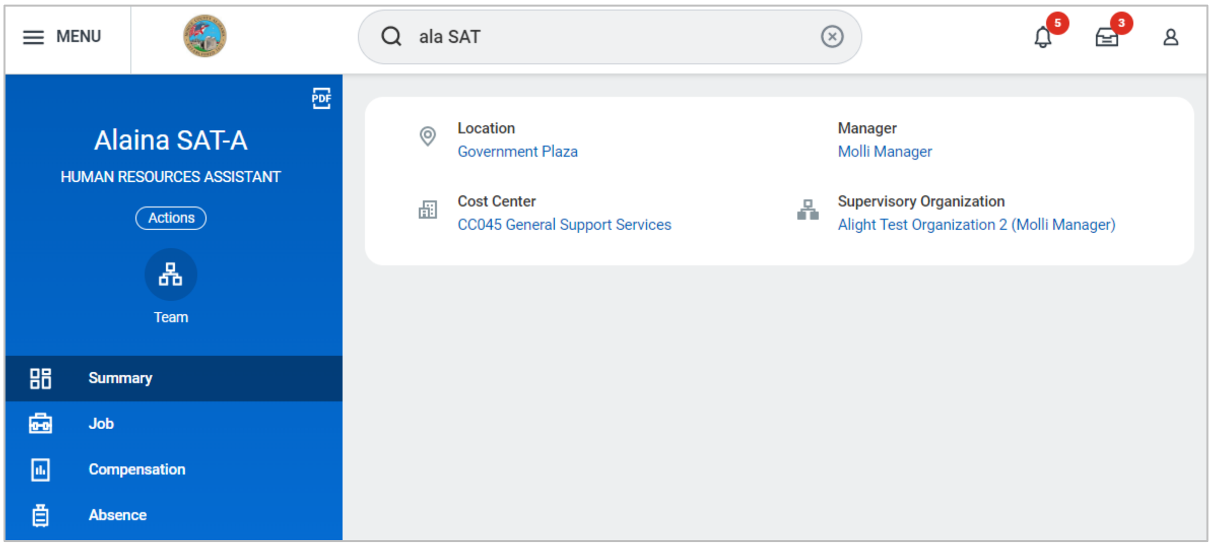


2. **Action** items for you staff can also be accessed from the Org Chart.
   a. Left click on the **Related Actions** icon for the employee.
   b. The left-side column in the pop-up, includes Actions for the employee. Hover over an Action item and additional options will appear.
   c. Make your selection to view details or initiate a task.



3. 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.

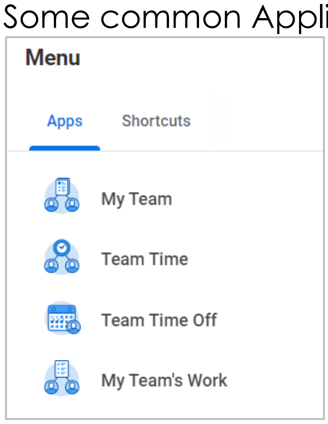




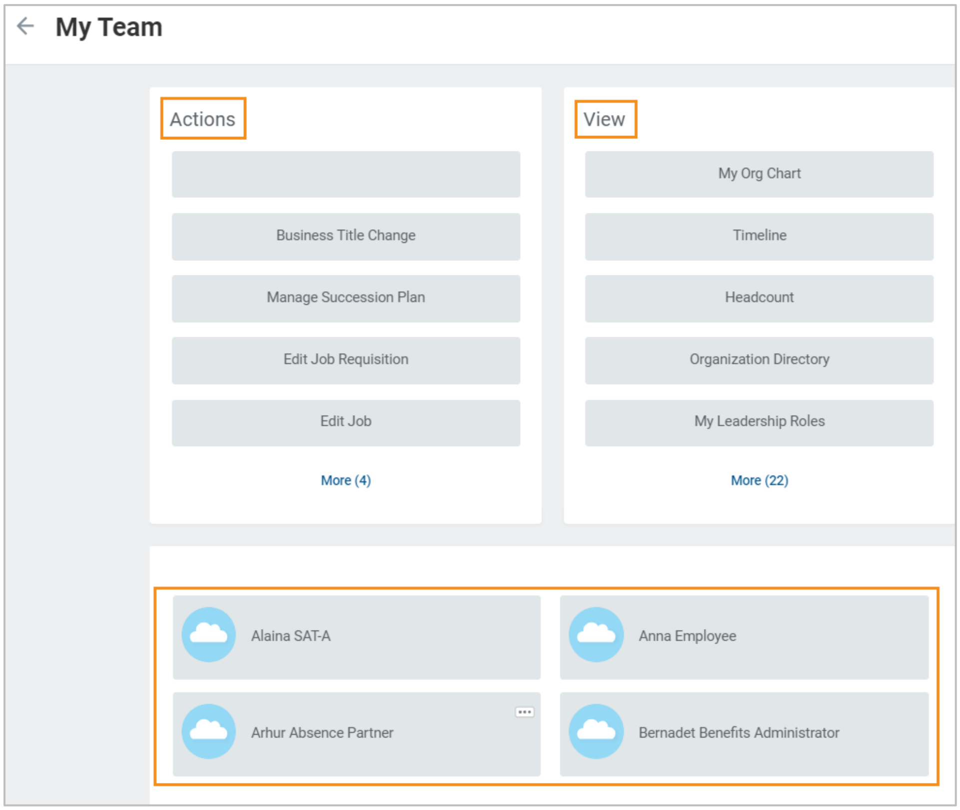
Manager Applications (Apps)

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

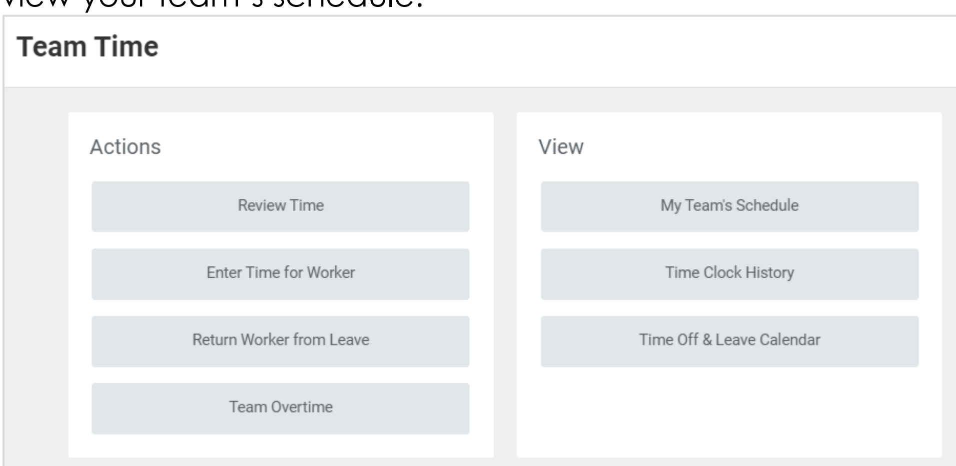
Some common Applications for Managers include:



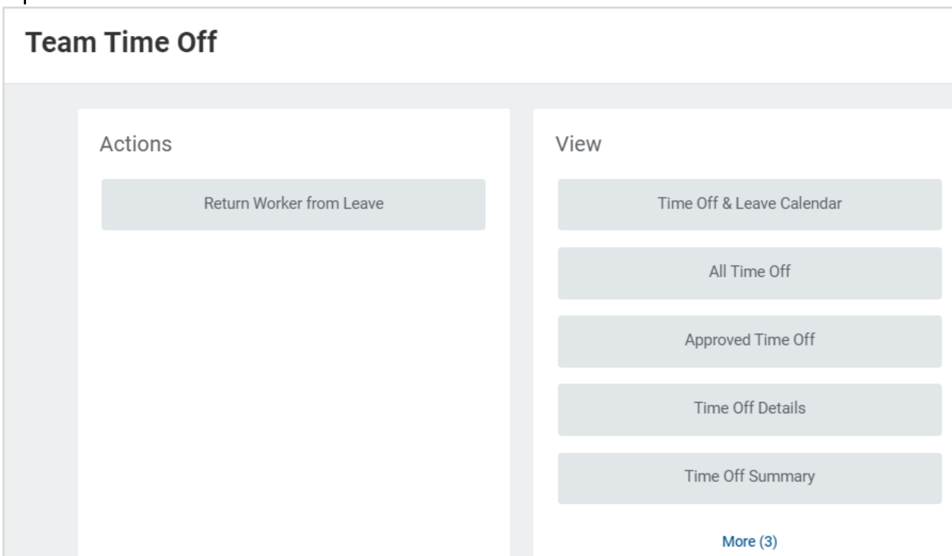
- **My Team** – Application displays the **Actions** and **View** options as well as the team members.



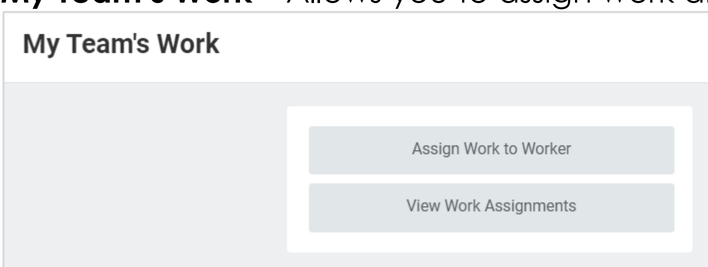
- **Team Time** – Allows you to review time for your team, enter time for an employee, and view your team's schedule.



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



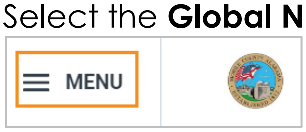
- **My Team's Work** – Allows you to assign work and view work assignments.



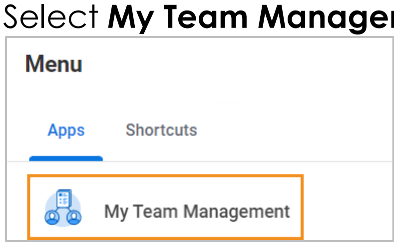
My Team Management Dashboard

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

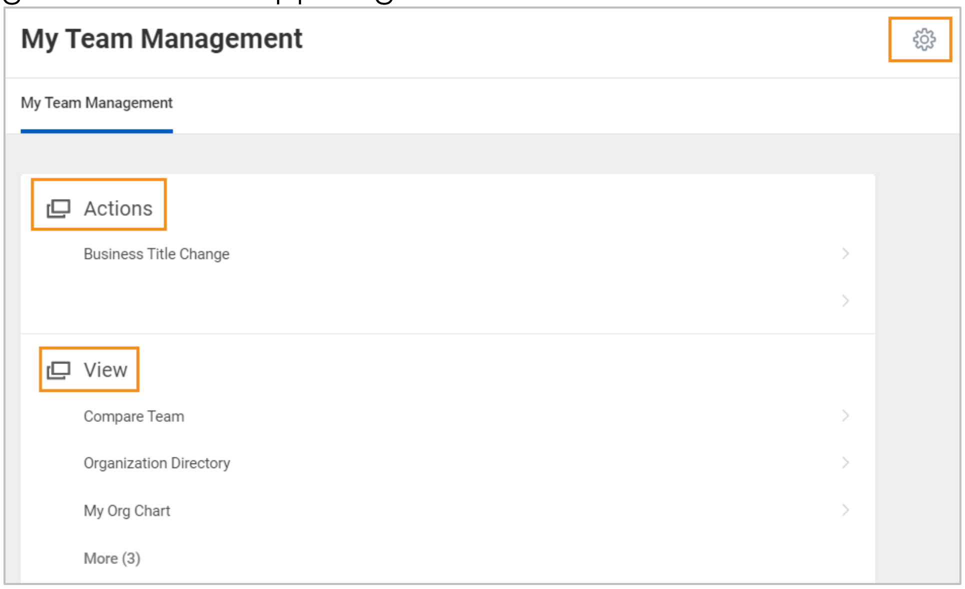
1. Select the **Global Navigation Menu** icon.



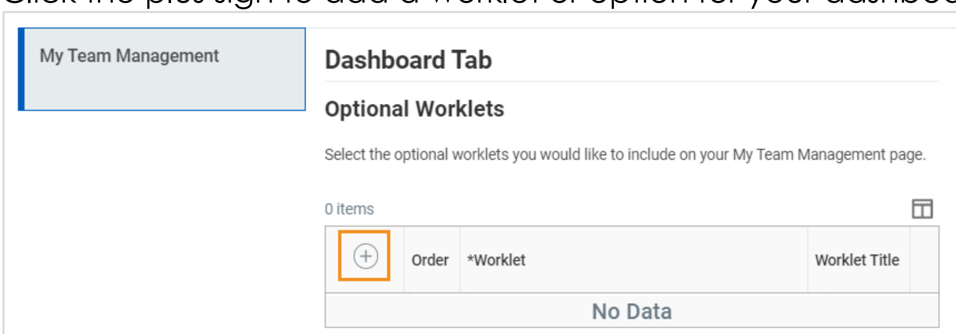
2. Select **My Team Management** app.



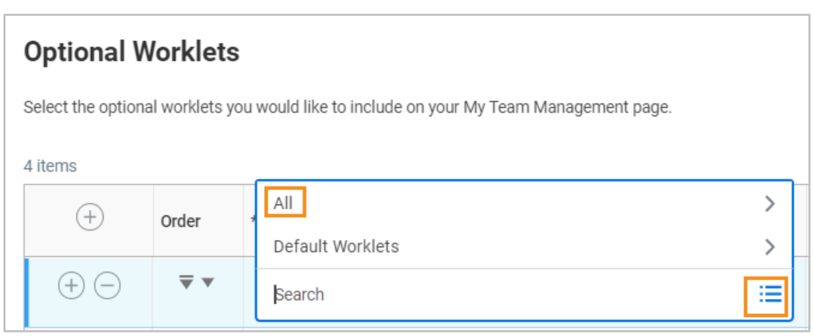
3. You can select options for **Actions** and **View**. To customize your dashboard, just click the gear icon in the upper right-side of the screen.

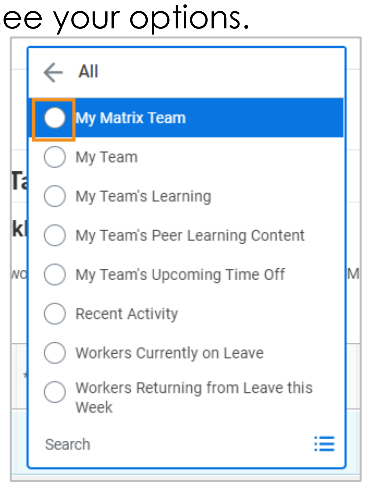


4. Click the plus sign to add a worklet or option for your dashboard.

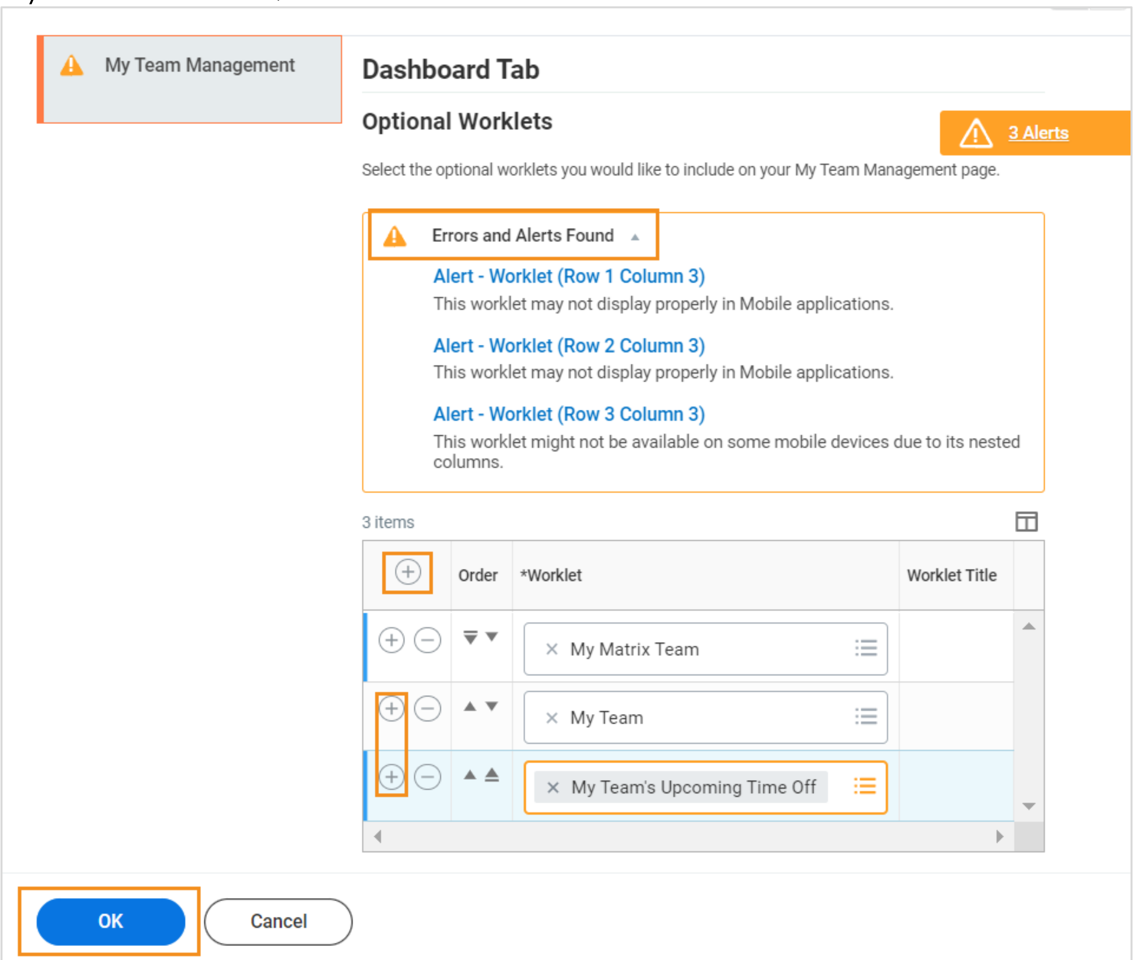


5. In the Worklet field, click the prompt and select **All** to see your options.

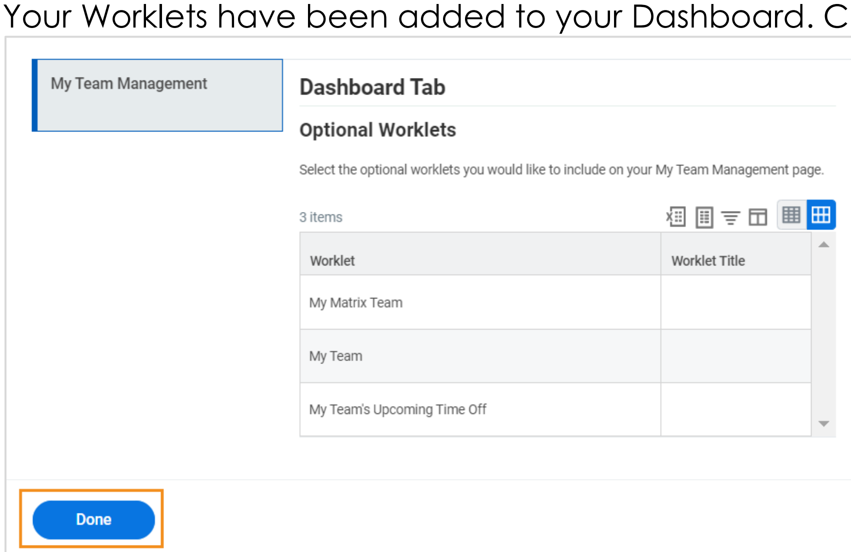




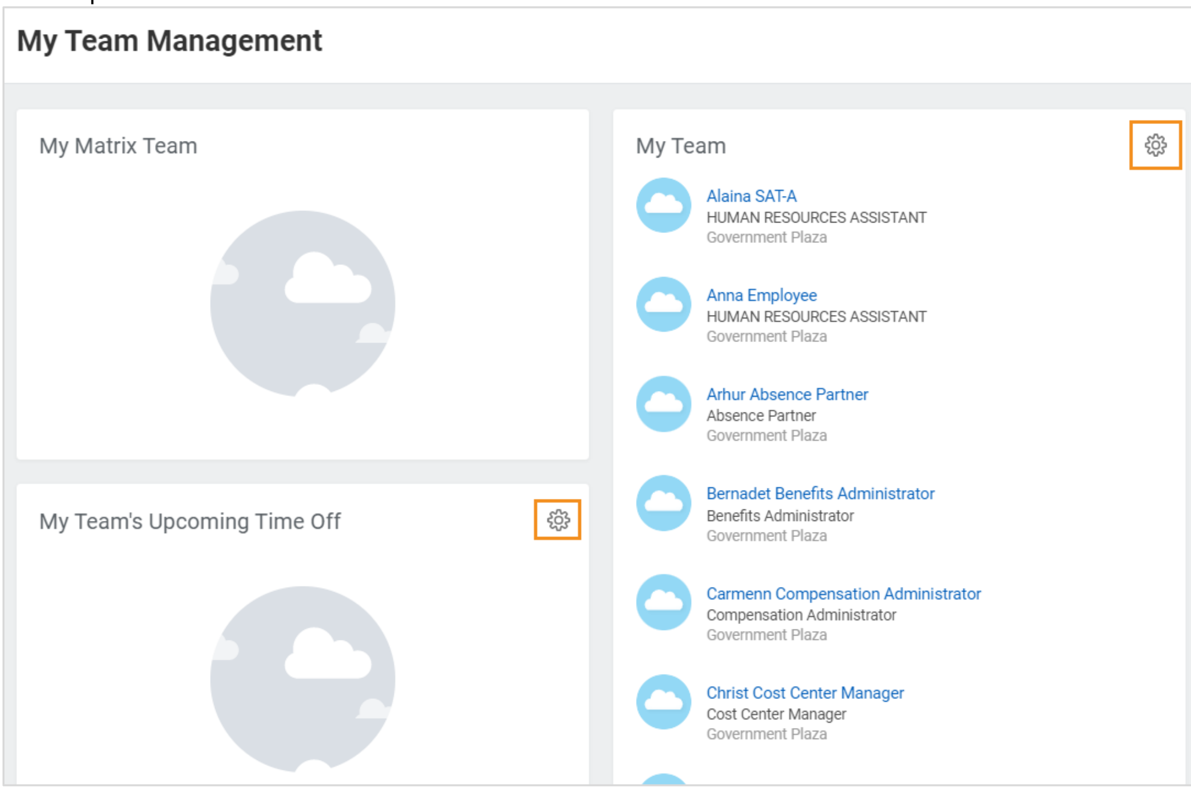
6. To select another Worklet, click the plus sign again to make another selection. You can add multiple Worklets to your dashboard.
   If you see an Alert, click on the **Alert** for more information. Click **OK**.



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



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.

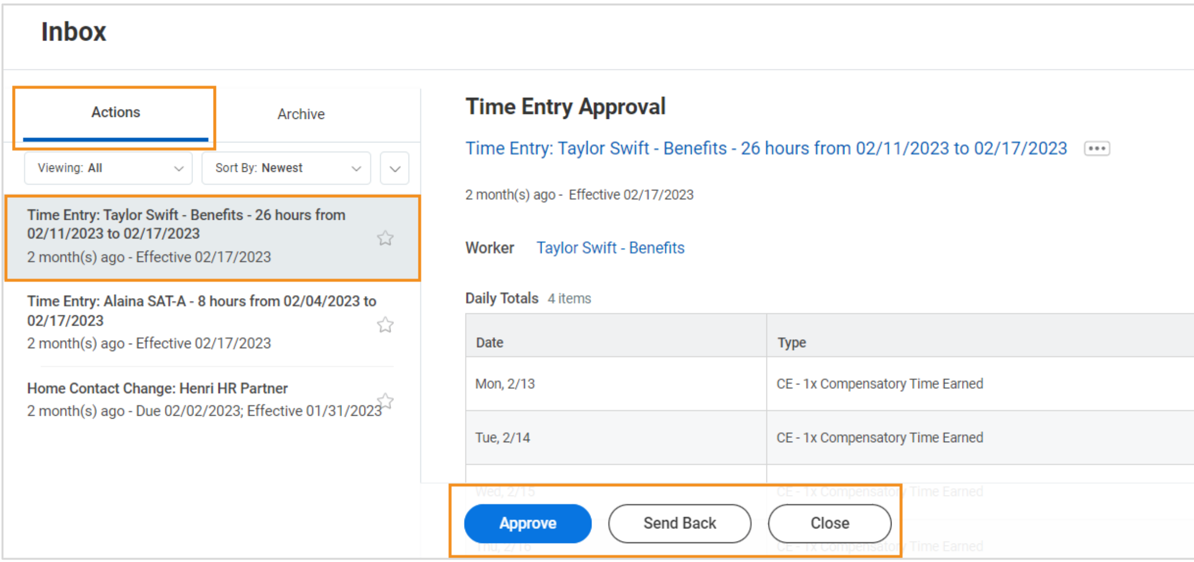


Workday Inbox Action Items/To Do's

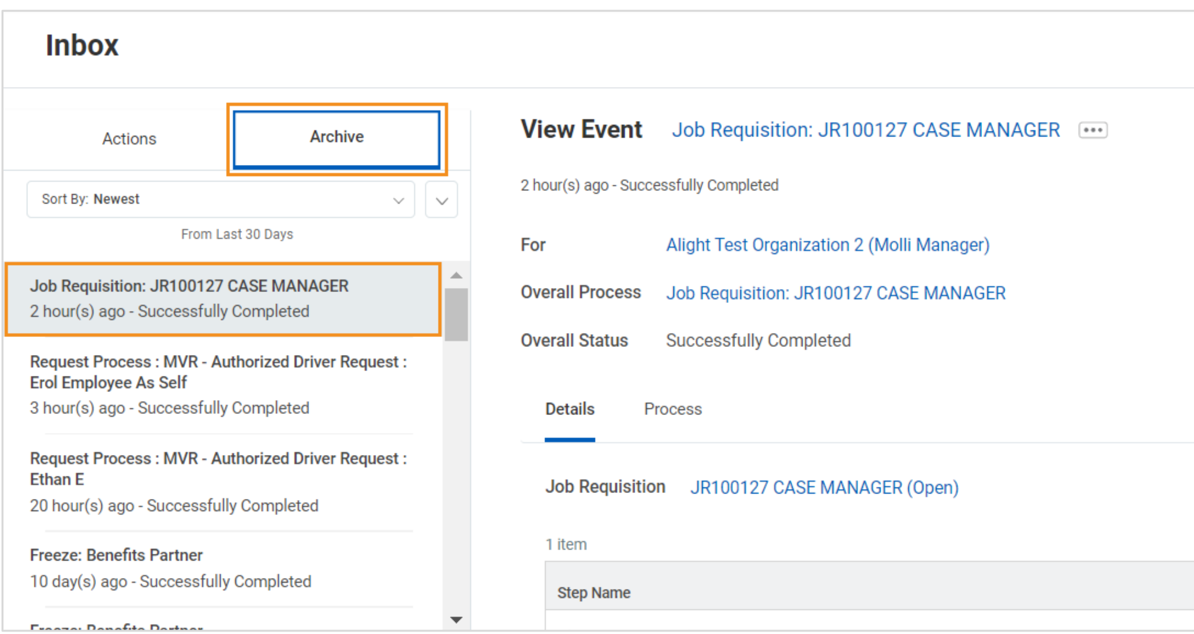
Your Workday **Inbox** is the central location for tasks that require your attention. It also contains an archive of recently completed tasks.

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 may actions you have waiting for you to complete.

2. 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.



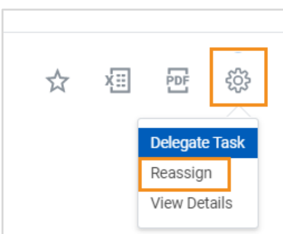
3. Items in your Inbox cannot be deleted; they move to the Archive tab once you have completed or submitted the task. Click the **Archive** tab to access the status of any business process you participated in within the last 30 days.



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

- **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.