

Overview

This job aid describes manager-specific features and functionality. For basic navigation information, read the *General Workday Navigation* job aid.

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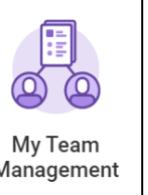
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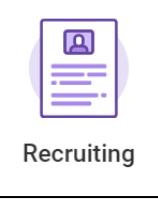
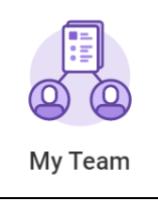
Manager Navigation

Workday Job Aid for Managers

Home: Manager-specific Applications (Icons)

As a manager, you have access to tools and data that help you manage your team. Below is a description of the Home page icons for managers. From the Workday home page, click **View All Apps** and select an application.

| Application | Description |
|---|---|
| My Team Management  My Team Management | Take Action: Change Contingent Worker Details, Add or End Job, and Separate a direct report. View Data: Compare Team, Organization Directory, My Org Chart, Headcount, and Management Chain. |
| Team Performance  Team Performance | Take Action: Add Goal to Employees, Give Feedback, Start Disciplinary Action and more. View Data: Team Goals, Performance Review Status, and more. |

| Application | Description |
|---|--|
| Team Time  Team Time | Take Action: Review Time, Enter Time for Worker, and Enter or Correct Absence. View Data: My Team's Schedule and Team Absence Calendar. |
| Recruiting  Recruiting | Take Action: Create Job Requisition. View Data: Candidates for Search Committee Review, My Open Job Requisitions, My Recruiting Jobs, and Job Requisition. |
| My Team  My Team | Access a list of your direct reports. Take Action: Separate, Create Job Requisition, Add or End Job, and Change Organizations. View Data: My Org Chart, Organization Directory, Organization, Headcount, My Management, and Positions & FTE. |

Manager Navigation

Workday Job Aid for Managers

Transact on Direct Reports

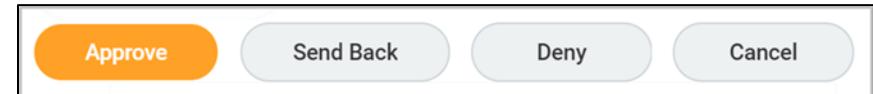
Managers have the autonomy to initiate HR-related actions on behalf of their direct reports. There are three ways to initiate a task: from an employee's profile; locating the employee in the My Team application; or using the Search bar.

| Initiate a Task via... | Steps |
|------------------------|--|
| Employee Profile | <ol style="list-style-type: none"> From the Workday Search bar, type and select the employee's name. Click Actions > select the appropriate menu > select an action. |
| My Team | <ol style="list-style-type: none"> From the Workday home page, click View All Apps and select My Team. Hover over one of your direct reports. Click the Related Actions icon and choose an appropriate task. |
| Search Bar | <ol style="list-style-type: none"> From the Workday search bar, type and select the task name. From the task start page, select your direct report's name and proceed with the subsequent steps. |

Workday Inbox: Approve/Send Back/Deny/Cancel

Managers must review and approve action items such as time off requests, job changes, and more.

The following actions can be taken on Inbox tasks:



- **Approve:** Submit your approval. The task flows downstream to the next person in the workflow. Or, if there are no remaining steps, the process is completed.
- **Send Back:** Send the task back, with specific comments, to the previous person in the workflow. This person can then edit the details before resubmitting to you.
- **Cancel:** Closes the task and saves it in your Inbox.
- **Deny:** May appear on certain processes. If selected, the process is completely canceled. Use with caution to avoid rework.

Manager Navigation

Workday Job Aid for Managers

Workday Archive: Process Status & History

The Inbox contains an Archive of actions completed in the last 30 days that also shows the process history and remaining steps.

1. To access the Archive, click the Workday **Inbox**.
2. Click **Archive**.
3. On the right, the Details and Process tabs display.

Inbox

Actions Archive

Sort By: Newest From Last 30 Days

13 day(s) ago - Successfully Completed

Reference Check for Job Application: Mark Morrison - R2755 Instructional Faculty FT (CA28176)

14 day(s) ago - In Progress: Edesa Ashourian

Interview: Mark Morrison - R2755 Instructional Faculty FT (CA28176)

14 day(s) ago - Successfully Completed

Supplier Request: Test 2.817 on 08/17/2021

21 day(s) ago - Successfully Completed

View Event

Interview: Mark Morrison - P

14 day(s) ago - Successfully Complete

For Mark Morris

Overall Process Job Application

Overall Status In Progress

Details Process

Candidate Mark Morrison

- **Details:** Displays all transaction details, e.g. Effective Date, Reason, Employee, and all other data unique to the task.
- **Process:** Lists steps, status, person responsible, and due date. Shows steps that occurred prior to your involvement with the process (if applicable) and the next steps yet to be completed. Your visibility into the process history is governed by your security access so steps may be hidden.

Notifications

Click the Notifications icon to read important alerts and reminders. In some cases, a notification may prompt you to act outside of the system.



As a manager, expect to receive notifications for important events. Some examples include, but are not limited to:

- A reference check for a candidate is complete.
- A direct report has submitted their resignation in Workday.

Error & Alert Messages

Within processes, Workday generates Error and Alert messages that may prompt additional action.

Red Error: The process cannot be submitted until the error is resolved (e.g. you tried to submit a task but missed a required field).



Orange Alert: The process can be submitted but may require additional attention or thought before proceeding (e.g. you requested an effective date outside of a date range). Additional approvals may trigger upon submission.

