MANAGER JOB AID
GETTING STARTED IN WORKDAY

Use this job aid for the basics about how to use Workday as a manager. In addition, please review the Getting Started in Workday job aid for all employees for further information on system features and capabilities.

NOTE: Workday is optimized for Internet Explorer 11, Firefox, and Chrome

Topics covered in this job aid for Managers include:

- Worklets on the Manager Home Page
- An Overview of Manager and Employee Responsibilities in Workday
- Employee Information at a Glance
- Dashboards and Reporting

WORKLETS ON THE MANAGER HOME PAGE

In addition to worklets that all employees have, Managers have a set of standard worklets geared toward Managers on their Home Page. You may add additional worklets, such as Team Performance, by clicking on the gear in the upper right corner of the Home Page.

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<thead>
<tr>
<th>ICON</th>
<th>FUNCTION</th>
<th>DESCRIPTION</th>
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<tbody>
<tr>
<td><img src="image" alt="Inbox Icon" /></td>
<td>Inbox</td>
<td>View and respond to messages and tasks. You can add this Worklet to your Home Page by clicking on the Gear on the upper right corner of the Home page. (See more information below.)</td>
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<tr>
<td><img src="image" alt="Talent Icon" /></td>
<td>Talent</td>
<td>Find workers, give or get feedback on employees, view talent snapshot</td>
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<tr>
<td><img src="image" alt="Recruiting Icon" /></td>
<td>Recruiting</td>
<td>You can use this worklet to navigate directly to key recruiting-related activities. You can create job positions and requisitions or view open requisitions for your hierarchy or openings by Account Group. You can find candidates, invite candidates to apply to your requisitions, and view the status/take action on existing candidates.</td>
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<td>Team Performance</td>
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<td>You can initiate actions related to your team’s performance through this worklet, such as:</td>
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<td>• Start a performance review or print an employee’s review</td>
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<td>• Add a goal to an employee or your team</td>
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<td>• Start a performance improvement plan</td>
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<td>You can also view your employees’ goals and performance reviews, or goals you have assigned, as well as print reviews and see feedback on employees.</td>
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<td>Compensation</td>
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<td>View your direct reports’ compensation (for Senior Associates with Comp and above), bonus and one-time payments. Initiate Compensation Change or One-Time Payment actions from this page.</td>
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<td>Dashboards</td>
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<td>View dashboards such as Talent Management, Team Performance, Compensation &amp; Benefits and more. Click the gear to download to excel.</td>
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<td>Anniversaries</td>
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<td>View anniversaries (over the next 2 weeks) on your team.</td>
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<td></td>
<td>Birthday</td>
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<td>View birthdays (over the next 2 weeks) on your team.</td>
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<td>Appreciation</td>
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<td>Connects you to the Living Our Values Every Day site. Once in the worklet, click “Appreciation” to nominate your colleagues and “appreciate” their efforts. (Note: Contractors are not able to view this worklet)</td>
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<td>Discounts</td>
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<td>This icon will provide access to the largest employee discount marketplace. On BenefitHub, you will find discounts on restaurants, tickets, electronics, travel, hotels, and more.</td>
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**USING YOUR WORKDAY INBOX**

Navigate to your **Inbox** either by clicking on the **Inbox** worklet on your home page, or by clicking on your **Picture** or **cloud icon** in the top right corner of your screen and scrolling down to the Inbox link. Open up your **Inbox** to view all of your pending **actions** and **notifications**.

Whenever you want to see an action you’ve completed, you can view them up to 30 days afterwards in the **archive folder** in your inbox. To view older items, you can click the down arrow and select **View More Processes** to run a report.
NOTE: When completing actions in your inbox, make sure to click the **green button** for your inbox to mark it as complete, and move to your archive.

**IMPORTANT NOTE:**

- There are filters within your inbox to easily sort notifications. Click into the *Actions* tab, and look through the options under *Viewing* and *Sort By*.
- Notifications in Workday cannot be deleted. To curate the notifications, you see in your inbox, choose from the filters below.
  - You can also add a custom filter to sort for common tasks and processes by selecting *Edit Filters*.
  - If you cannot find something in your Inbox, ensure that you are selecting *All* in the *Viewing* tab. Completed tasks and read notifications will be auto-archived.

- Notifications from Workday to Outlook can be controlled by adjusting Preferences in your account. Click on your **picture** or **cloud icon**. Select *My Account* then *Change Preferences*.
  - Under Background Notification Preferences, go to Parent Notification Type and select your preference *Daily Digest Email* or *Immediate Email* for each item listed.
  - Repeat the process for each tab: *Business Processes*, *HCM*, *Recruiting*, and *System*.
The Workday Inbox will fill with actions and notifications from actions in the system. Actions in Workday are items that need action in order for a process to move forward. Notifications will let you know about various changes, updates, or processes that have happened in the system.

**MANAGER RESPONSIBILITIES**

Managers will be responsible for performing many transactions in Workday. In addition, Hiring Managers will create and edit positions and job requisitions.

**NOTE:** Only Managers that are Senior Associates or Chief Engineers/Technologists/Scientists and above with compensation privileges will be able to view employee compensation data in Workday and complete compensation-related tasks.

**Job aids** are available to guide you in completing transactions in Workday such as:
• **Create Job Requisition for a new Position** – To begin the recruiting process for a new position for Hiring Managers

• **Create Job Requisition for an Existing Position** – To begin the recruiting process for an existing position

• **Create Position** – Every employee and job requisition must have a position in Workday. You will create and edit the position attributes using this process

• **Edit Position Restrictions** – To update an existing employee’s time type (full-time/part-time or number of scheduled hours)

• **Change Job** – For transferring or promoting an employee

• **Request Compensation Change** – An ad-hoc compensation change that is not included as part of a job change, or a Market Salary Adjustment (MSA)

• **Request One-Time Payment** – To request a retention bonus and performance bonus.

• **Leave of Absence** – To initiate a LOA for an employee who is unable to do so, approve an LOA request or Return an employee from an LOA

**EMPLOYEE RESPONSIBILITIES IN WORKDAY**

- **UPDATE PERSONAL DATA**
  - Personal Information (e.g., legal or preferred name and home address)
  - Contact Information (e.g., home address, phone number, client phone number, personal e-mail or alternate business contact)
  - Emergency Contact

- **MAINTAIN PROFESSIONAL PROFILE**
  - Education
  - Certifications
  - Languages spoken
  - Disabilities
  - Work history
  - Relocation preferences

- **SET AND UPDATE INDIVIDUAL GOALS**
- **GIVE AND GET FEEDBACK**
- **COMPLETE A SELF-REVIEW FOR THE ANNUAL SUMMARY PROCESS**
- **REQUESTS FOR LEAVE OF ABSENCES**
- **COMPLETE OPEN ENROLLMENT FOR BENEFITS OR CHANGE BENEFITS IN THE EVENT OF A LIFE EVENT**
DIRECT REPORT INFORMATION AT A GLANCE

Workday provides one place to see all your direct report information easily.

From your home page, click on the My Team worklet and then click on an employee’s name. You will see the following tabs and sub tabs, which you can click on to view employee information:

- **Summary** - View Summary Education, Job History, Feedback, and Job Details
- **Job** – View Professional Profile, Job details, Organizations, Management Chain and RC Code
- **Compensation** – View Compensation and Pay History (for Senior Associates with Comp)
- **Performance** – View or add Firmwide Behaviors and performance expectations, and view Performance reviews, Goals, Feedback (given, received and requested) and Awards
- **Career** – You can view Job Interests, and view employee applications and status, Career interests, Education, Work experiences, Certifications, Job History, Relocation preferences, Clearances and more
- **Personal** – View contact and Emergency Contact information, Name history, and Personal Information
- **Overview** – View Service dates, Support Roles, Timeline, Worker History, manager history and any attached documents
- **Time Off** – View Time Off balance and what has been accrued and paid out to date

DASHBOARDS AND REPORTING

Workday provides the power of real time people data and analysis, and the Dashboards worklet allows you to have reports at your fingertips. On the Dashboard page, you will see a list of dashboards immediately available to you; take some time to view the reports within each dashboard. You can export reports to excel or print reports by clicking the gear on the report page.

1/27/2018
Some examples of the Dashboards you will see at the start include:

- Compensation and Benefits
- Executive People Dashboard
- Management Reporting
- Recruiting
- Supervisory Organization Recruiting
- Team Performance

1. To access the dashboards, click the **Dashboard** Worklet when you log into the Workday homepage.

2. After clicking on the Worklet, you will see the various dashboards that are available to you.

3. To view the dashboard, simply click on the dashboard name from the list and the output will be displayed automatically.

**NOTE:** Depending on your role at the firm, you will see different reports within these dashboards. Executive level employees also have Executive dashboards (sample above).