GETTING STARTED IN WORKDAY
FOR: MANAGERS

OVERVIEW
This job aid provides information on how to use Workday as a manager. Also, please review the Getting Started in Workday job aid for all employees for further information on system features and capabilities.

TOPICS COVERED
- Manager Worklets
- Your Workday Inbox
- Manager Responsibilities in Workday
- Employee Responsibilities in Workday
- Direct Report Information at a Glance
- Dashboards and Reporting

MANAGER WORKLETS
In addition to Worklets that all employees have, Managers have a set of standard Worklets geared towards Managers on their Homepage. You may add additional Worklets, such as Team Performance, by clicking on the gear in the upper right corner of the Homepage.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Inbox Icon" /></td>
<td>Inbox</td>
<td>The larger icon is visible on your homepage. The smaller icon is in the right corner of every page in Workday. 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.) View and respond to messages and take action on tasks.</td>
</tr>
<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>
</tr>
<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>
</tr>
<tr>
<td><img src="image" alt="Compensation Icon" /></td>
<td>Compensation</td>
<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>
</tr>
<tr>
<td><img src="image" alt="Dashboards Icon" /></td>
<td>Dashboards</td>
<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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YOUR WORKDAY INBOX

Navigate to your Inbox either by clicking on the Inbox Worklet on your homepage or by clicking on your smaller icon in the top right corner of your screen and scrolling down to the Inbox link. Open your Inbox to view all of your pending tasks.

When you want to see a task you’ve completed, click on the Archive tab in your Inbox (you can view them up to 30 days.) To view older items, you can click the down arrow and select View More Processes to run a report.

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
- You cannot delete items in your Workday Inbox. To curate the items, you see in your inbox, choose from the filters shown by clicking on Viewing
- You can add a custom filter to sort for common tasks and processes by selecting Edit Filters
- If you cannot find something in your Inbox, select All in the Viewing tab. Completed tasks will be auto-archived.
- Click the star next to inbox items to make them a favorite which you can then filter on by clicking on Viewing and select Favorites
- You can control your Outlook Notifications from Workday by adjusting Preferences in your account
  - Click on your picture or cloud icon. Select My Account then Change Preferences
  - Under Background Notification Preferences, select your preference Daily Digest Email or Immediate Email
  - Repeat the process for each tab: Business Processes, HCM, Recruiting, and System

MANAGER RESPONSIBILITIES IN WORKDAY

Managers are responsible for performing many transactions in Workday. Also, 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 start 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 an 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 changes**
  - 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 change**

## DIRECT REPORT INFORMATION AT A GLANCE

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

From your homepage, click the **My Team** Worklet and then click on an **employee’s name**. You will see the following **tabs** and **subtabs** on the blue panel on the left. Click on the tabs to:

- **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 see 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

## DASHBOARD 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.

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, the various dashboards that are available to you displays.
3. To view a dashboard, click on the dashboard name from the list and the output displays

   *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).