Quick Reference Guide

GETTING STARTED IN WORKDAY
MANAGERS

OVERVIEW

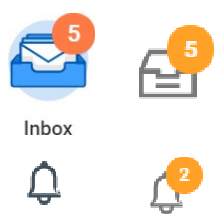
This guide provides information on how to use Workday as a manager. Download and review the **Basic Workday Overview** job aid, intended for all employees, for further information on system features and capabilities.

TOPICS COVERED

- Worklets
- Manager responsibilities in Workday
- Direct report information at a glance
- Dashboards and reporting

WORKLETS

In addition to Worklets that all employees have, managers have additional Worklets on their Homepage. You may add additional Worklets, such as the Performance worklet, by clicking on the gear icon in the upper right corner of the Homepage:

Icon	Function	Description
	Inbox: Notification:	View and respond to messages and take action on tasks. For additional navigation details, download the quick reference guides for "Additional navigation" and "Inbox overview" on the Workday training webpage for supervisory managers. *Note: Your responsibility to respond to or complete an activity depends upon each inbox notification.*
	Recruiting	View open requisitions for your vacancies. Invite candidates to apply to your requisitions, view application statuses, and take action on existing candidates from the requisition.
	Team Performance	You can initiate actions related to your team's performance such as: • Start an Individual Development Plan • Add a goal to an employee or your team • Start a performance improvement plan • Request feedback on a worker You can also view your employees' performance review statuses.
	Compensation	View your direct reports' compensation-related information.
	Dashboards	View dashboards such as Management Dashboard. Click the gear icon to export data to Excel.

Quick Reference Guide

MANAGER RESPONSIBILITIES IN WORKDAY

Managers are responsible for performing various transactions in Workday, including performance reviews, initiating a job requisition for a vacancy and compensation-related actions. Job aids are available to guide you in completing transactions in Workday such as:

- Create Job Requisition for a vacancy –to begin the recruiting process for a vacant position.
- Edit Position Restrictions – to edit position information.
- Change Job – for transferring or moving an employee to another position.
- View and approve time off requests – to view your team members' absences at a glance on the unified absence calendar, which can be helpful to view prior to approving a time off request.

DIRECT REPORT INFORMATION AT A GLANCE

Workday provides one place to easily see information on your direct reports that you are permitted to view. From your Homepage, click on "My Team" and then click on an employee's name. The following tabs on the blue panel on the left-hand side of the application include but are not limited to:

- Summary – View summary education, job history, feedback and job details.
- Overview – View service dates, support roles, timeline, worker history, and manager history, etc.
- Personal – View name history, licenses and personal information, etc.
- Compensation – View compensation and pay history.
- Contact – View emergency contact information, organizations and support roles.
- Performance – View or add Goals, Performance Reviews, Individual Development Plans, Performance Improvement Plans and Disciplinary Actions.
- Career – You can see job interests, career interests, education, work experiences, certifications, job history and more.
- Time Off – View time off balance and previous time off requests.
- Feedback – View Feedback given and received.

DASHBOARDS AND REPORTING

Workday provides the power of real-time data and analysis, and the Dashboards Worklet allows you to have reports at your fingertips. Review the "Worklets" section of this document to add the Dashboards Worklet to your Homepage. You can also export reports to Excel by clicking the Excel icon on the report page:

Some examples of Dashboards you will see include but are not necessarily limited to*:

- Management Reporting
- Recruiting
- Compensation
- Team Performance

**Depending on your security role(s), you will see different reports within these dashboards.*