



FREQUENTLY ASKED QUESTIONS

MANAGER SELF SERVICE: NAVIGATION AND MY TEAM

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Version 19 (March 2013)

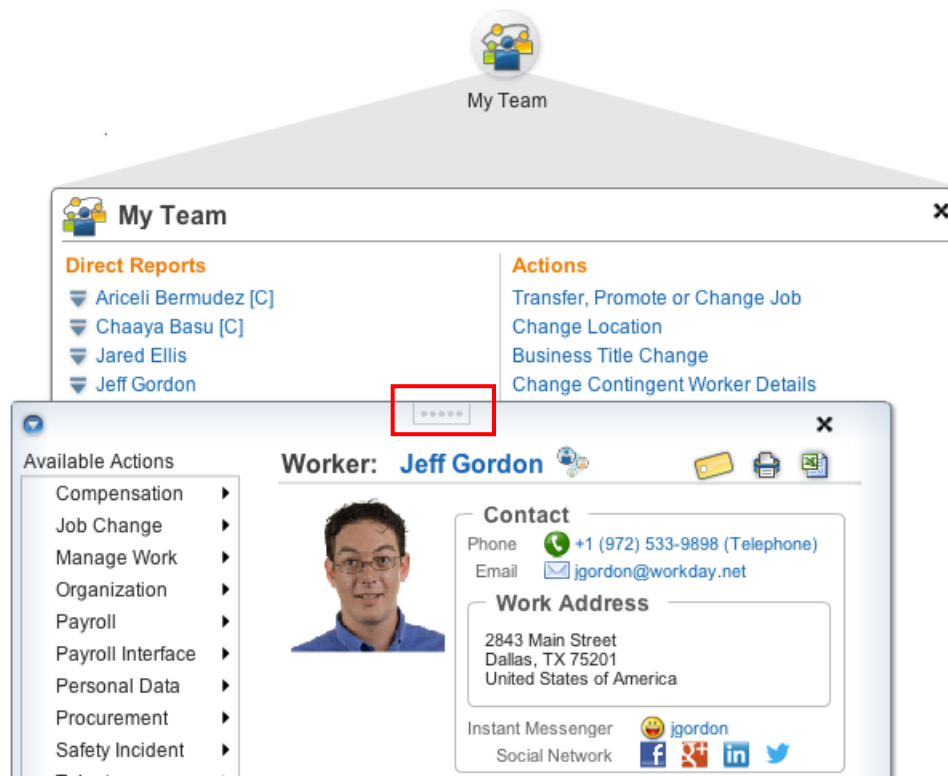
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NAVIGATION

WHAT DO I USE THE RELATED ACTIONS ICON  OR ACTIONS  MENU FOR?

The **Related Actions** icon or the **Actions** menu appears next to an object whenever there are possible actions that can be taken related to the object you are viewing. For instance, the **Actions** icon next to the name of a direct report allows you to perform a variety of tasks and to view data about your direct report record. Much of what is accessible via the **Related Actions** icon is also accessible from links in the worklets on your **My Team** page.



Click and drag the  icon to detach the window from the Related Action Icon.

The following is a list of the actions and views you can perform with the Actions  menu from your **My Team** page, depending on your Workday security policies.



Note: Actions beginning with View are “view only,” such as **View Employee Reviews**, or can include the ability to modify the information as in **View My Dependents**.

Available Actions are dependent on your organization's security policies. This list may contain more actions than available to you.

Compensation	<div>Request Compensation Change</div> <div>Request One-Time Payment</div> <div>View Compensation</div> <div>View Compensation History</div> <div>View Compensation Basis Details</div> <div>View Estimated Compensation for a Period</div> <div>View Future Payment Plan Assignments</div> <div>View Merit Statement History</div> <div>View Reimbursable Allowance Plan Activity</div> <div>View Total Compensation</div>
Job Change	<div>Transfer, Promote or Change Job</div> <div>Change Business Title</div> <div>Change Location</div> <div>Add Contract</div> <div>Add Job</div> <div>Terminate Employee</div>
Organization	Change Organization Assignments
Payroll	Assign Costing Allocation
Personal Data	<div>View Contact Information</div> <div>Maintain Social Network</div> <div>Edit Photo</div> <div>Change Background Check Status</div>

Time and Leave ▶	Enter Time
	Enter Time Off
	View Time Off
	Add Time Clock Event
	View Time Clock History
	View Time Off Balance
	View Time Off Results by Period
	View Calculated and Override Balances
	View Carryover Balances
	Place Employee On Leave
	View Leave Results

Worker History ▶	View Worker History
	View Worker History by Category
	View Worker Document File
	View Manager History
	Print Employee Job History Profile
	View Employee History

Favorite ▶	Add
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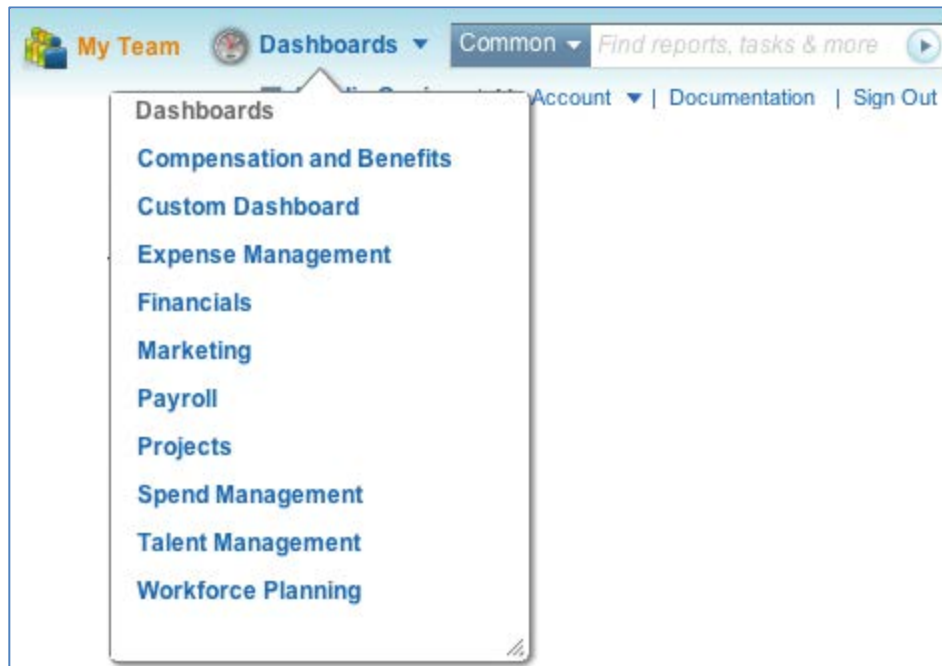
Reporting ▶	Business Object Details
	Related Reports
	Report Fields and Values

Security Profile ▶	View Support Roles
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WHAT ARE DASHBOARDS USED FOR?

Located at the top of the Workday screen, dashboards are pre-configured pages related to specific functional areas within Workday. Targeted for managers, dashboards are populated with worklets that are specific to these functional areas. Built with the report writer and report-specific calculated fields, the worklets can be customized. Additional custom worklets can be added to these dashboards using the report writer.

- 1 Click the **Dashboard** link at the top of the Workday page, then the desired dashboard to open it.



Dashboards can also be opened from the  icon.

2

The screenshot shows the Workday Talent Management dashboard. At the top, the Workday logo is on the left, and navigation links (All About Me, My Team, Dashboards) and user information (Amelia Casias) are on the right. The dashboard is titled 'Talent Management' and contains several worklets:

- Turnover Analysis:** Shows 'No data found'.
- Talent Metrics for Mana...:** A table showing metrics for 'Global Support - USA Group'.

Organization	% of Top Performers	% Top Performers below Comparison
Global Support - USA Group	50.0%	100.0%
- Review Ratings Summa...:** A bar chart showing counts for ratings. Below the chart is a table:

Rating - Current Normalized	Count
2 - Needs Improvement	1
4 - Exceeds Expectations	2
Total	3
- My Team's Talent Sum...:** A table listing team members with their ratings and potential.

Employee Name	Is High Potential	Rating - Current	Crit Jot
Brian Kaplan		★★★★☆	
Cory Young	✓	★★★★☆	
Laurie Jenkins		★★★☆☆	
Marcus Severino			
- Talent Management Da...:** A 'Custom Report' section with a table of reports.

Custom Report	Description
Alert - Which employees have certifications expiring in the next 6 months?	
Average # of Successors for Key Positions	This report shows a Manager the average numbers of successors for key positions within his / her management chain.
Hiring Success Analysis	
My Organizational Goals Progress Report	
My Team's Talent	This report will show all

Annotations:

- A:** Points to the gear icon in the top right of the 'Review Ratings Summa...' worklet header.
- B:** Points to the 'View More ...' link below the 'My Team's Talent Sum...' table.
- C:** Points to the 'CONFIGURE THIS PAGE >>' link at the bottom left of the dashboard.

- A. Some worklets are configurable.
- B. Links and Related Actions are live.
- C. Click to add or remove worklets.

WORKFEED AND INBOX

Tasks, notifications and information you may need can be found in your Workfeed and/or Inbox, depending on which one you choose to use.



Inbox



Workfeed

WHAT IS MY WORKFEED USED FOR?

Your Workfeed, like the Inbox, is a stream of actions and notifications sent to you by your organizations business processes.

1

Workfeed

Workfeed

3

Workfeed

Actions (3) Notifications (0)

3 item(s)

Demotion: [David Spiegel](#)
3 day(s) ago - Due 03/29/2013; Effective 04/01/2013

Transfer: [Betty Liu](#)
3 day(s) ago - Due 03/29/2013; Effective 04/01/2013

Review

Leave Return for [Kurt Braun \(On Leave\)](#) last day of leave on 03/29/2013, first day back at work on 04/01/2013
3 day(s) ago - Due 03/29/2013; Effective 03/29/2013

3 item(s)

A. Notifications can be viewed from the Notifications tab.

B. Hover mouse over item to view action button.

C. Items in your Workfeed may have a set time in which to complete the task.

2



CLICK TO REFRESH WORKFEED



BULK APPROVAL



FILTER ITEMS IN WORKFEED



KEEP AT TOP OF LIST



COMMENT HISTORY

3

Checking or clearing the checkbox next to the type of actions you wish to view can filter items.

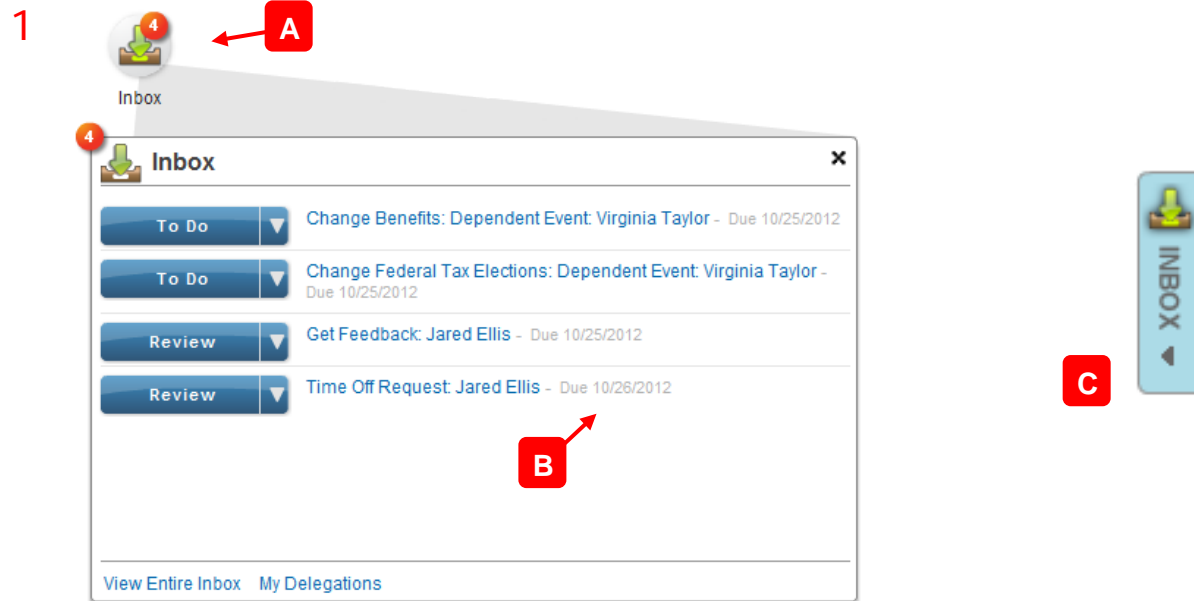
A. Filters can also be added or you can define new filters.

Filter By☐ All Active Filters

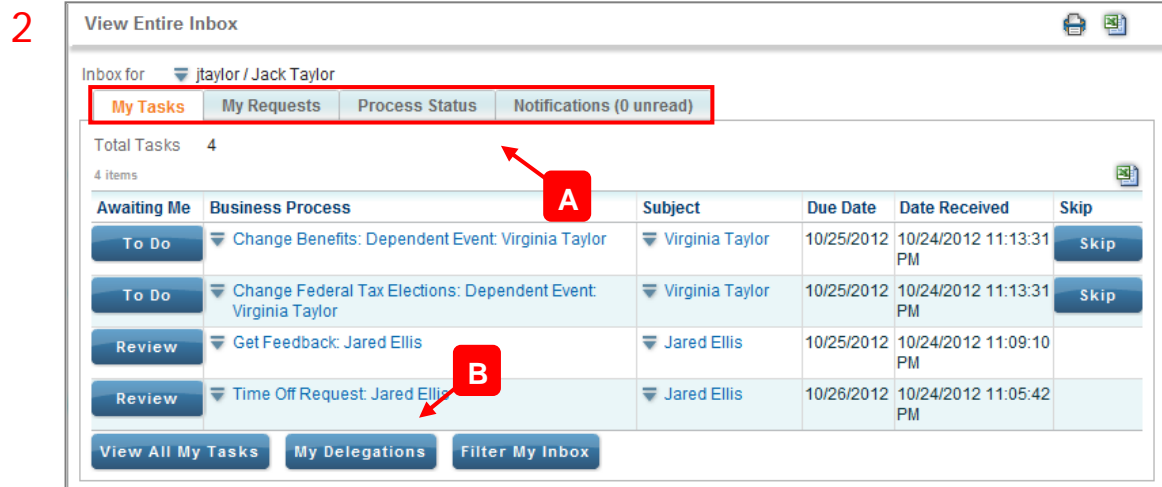
<input type="checkbox"/>	★ Favorites	0
<input checked="" type="checkbox"/>	🕒 Overdue	0
<input checked="" type="checkbox"/>	✅ Approvals	1
<input checked="" type="checkbox"/>	🌟 Tasks	2
<input checked="" type="checkbox"/>	📅 To-Dos	0
<hr/>		
<input checked="" type="checkbox"/>	🌟 All To Dos	0
<input checked="" type="checkbox"/>	🌟 Expense Report Approvals	0
<input type="checkbox"/>	🌟 Expense Reports without Exceptions	0
<input checked="" type="checkbox"/>	🌟 Spend Authorization Approvals	0
<input checked="" type="checkbox"/>	🌟 Time Off Request Approvals	0

[Add Filters](#) | [Manage Filters](#) [Cancel](#)

WHAT IS MY INBOX USED FOR?



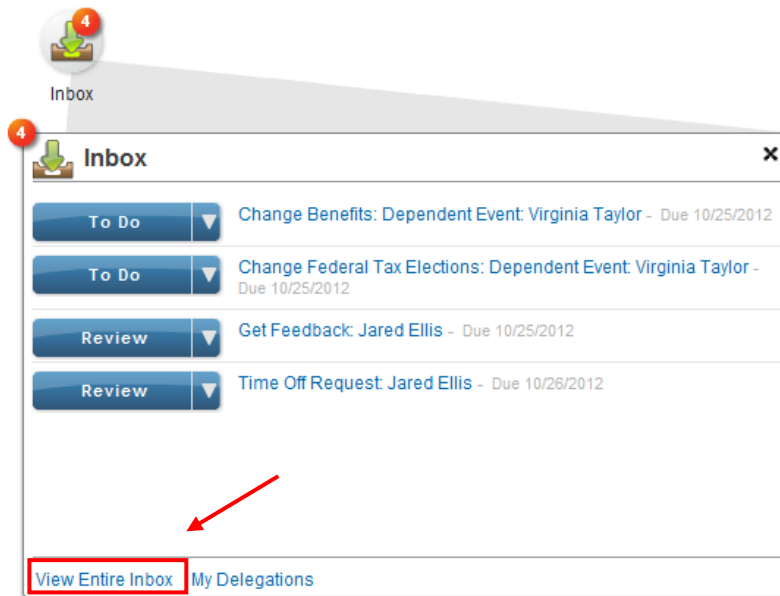
- A. Your Inbox shows notifications of tasks, reviews, items, etc., that are routed to you by your organization's business processes.
- B. Due date of a task.
- C. The Inbox is also available as a slide out tab, depending on your security profile.



- A. Inbox has four tabs that are used to view tasks, any business processes you initiated (My Requests), any business processes you're a part of (Process Status), and all notifications.
- B. The tasks in your Inbox can be delegated to another worker, either ongoing or for a specific period of time.

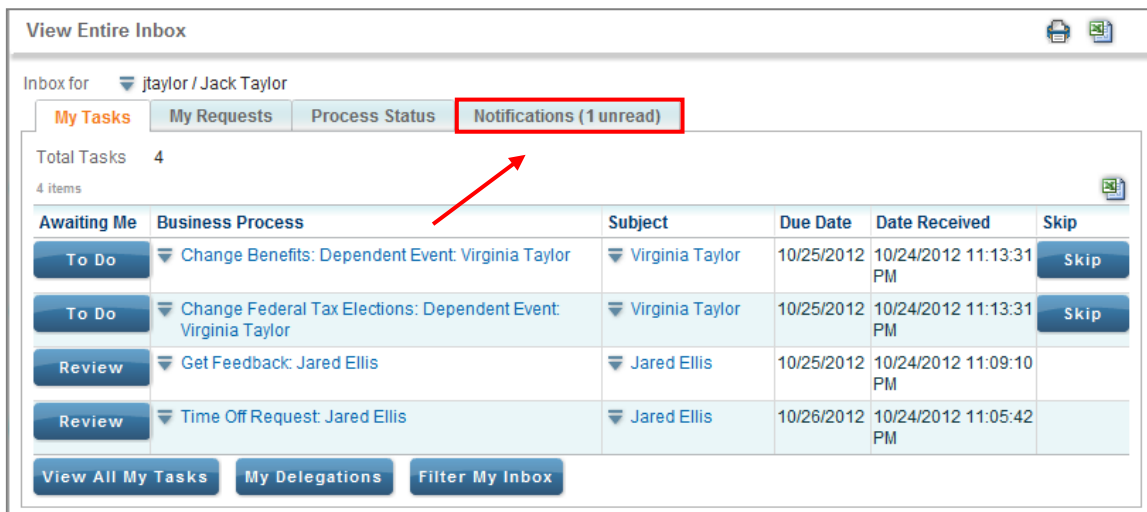
HOW CAN I ACCESS MY ENTIRE INBOX?

- 1 Your initial Inbox view will contain the most recent tasks that have been assigned to you as manager, but not all.






Click on the **View Entire Inbox** hyperlink to get more detail.

- 2 Click on the **Notifications** tab ...




3 ... to see all the messages that have been routed to you as a manager.

View Entire Inbox  

Inbox for  jtaylor / Jack Taylor

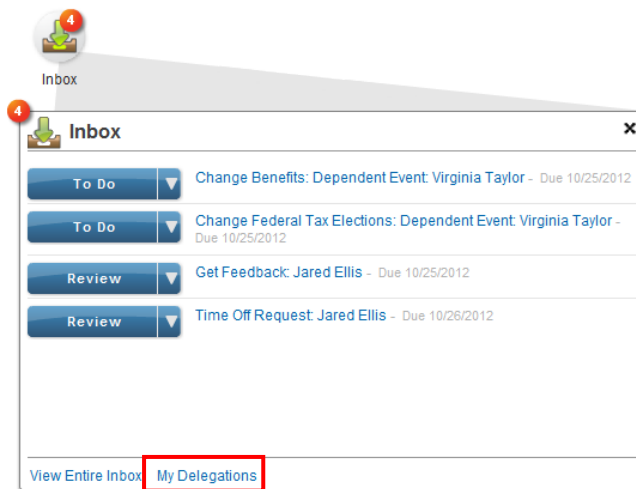
[My Tasks](#) [My Requests](#) [Process Status](#) [Notifications \(1 unread\)](#)

Subject	Body	Date Received	Details
Your Expense Report has been Approved	The following Expense Report has been approved.	02/28/2011 03:02 P.M.	 Expense Report: John Chen on 10/12/2010 for \$1,330.35

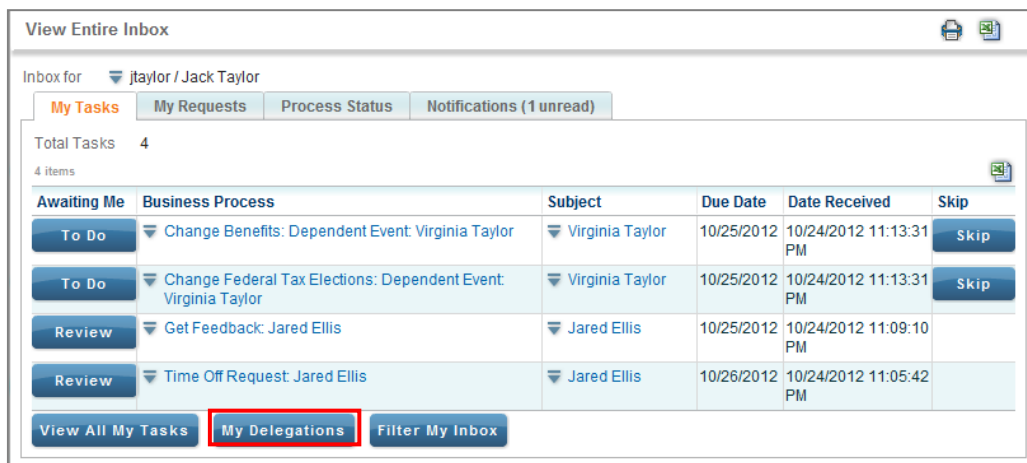
[View and Maintain Notifications](#)

HOW DO I DELEGATE MY INBOX?

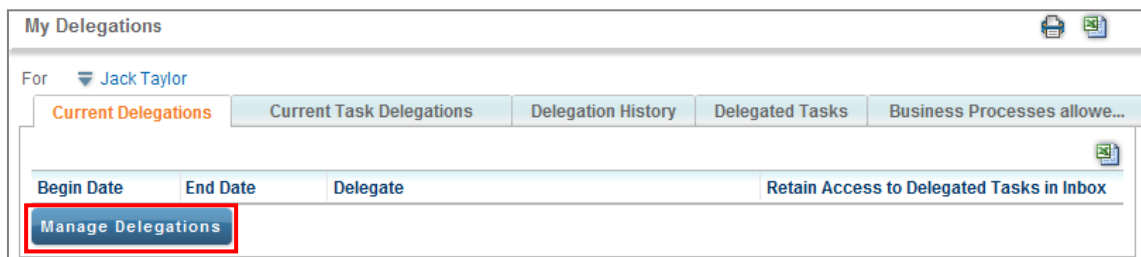
- 1 From the Inbox, click on **My Delegations**...



... **OR** from the expanded **Inbox**, click on the **My Delegations** button.



- 2 Click **Manage Delegations**.



3

- A. Expand to see which business processes you can delegate.
- B. Enter the date range for the delegation.
- C. Click this checkbox to retain access to your tasks while your inbox is delegated.

A

Manage Delegations:
Jack Taylor

Business Processes allowed for Delegation

New Delegation

*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="enter search text"/>	<input type="text" value="enter search text"/>	<div><input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text" value="enter search text"/> <input checked="" type="radio"/> None of the above</div>

B

Retain Access to Delegated Tasks in Inbox ☐
Delegation Rule

C

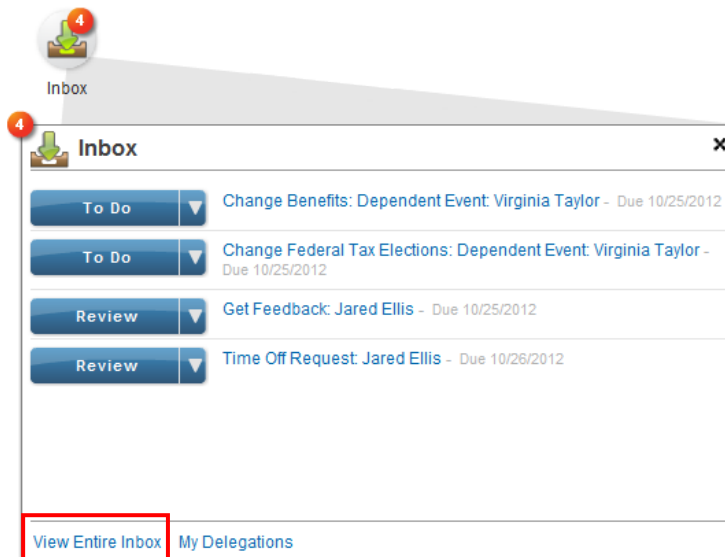
Submit Save for Later Cancel

All Comments (0) Process History Related Li

Note: Approvals may be required.

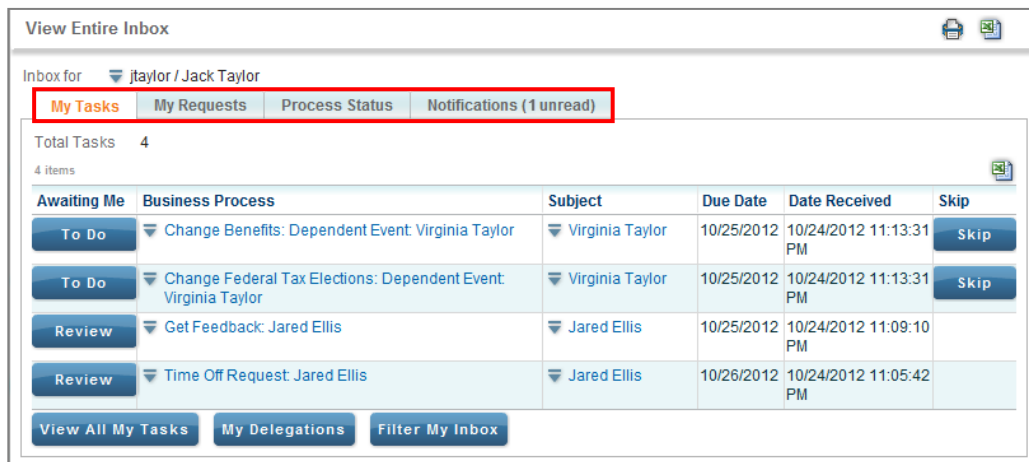
WHAT TYPES OF ITEMS WILL APPEAR IN MY INBOX?

- 1 From the Inbox, click **View Entire Inbox** to see a more detailed view of your Inbox.



- 2 Your Inbox detail contains 4 tabs:

- **My Tasks:** Here you can view all tasks that are assigned to you.
- **My Requests:** Here you can view all business processes initiated by you.
- **Process Status:** You can view the current status of all business processes you are part of.
- **Notifications:** Some business processes are configured to send a notification to the manager. This is where they are found.



CONFIGURING WORKDAY

MY TEAM

The My Team page provides an expanded view of all required and optional worklets. Links and tasks within the worklets are easily accessible, and you can configure which worklets to display on the page. Sliding Tabs appear for some managers based on their Workday tenant set up and security configuration.




















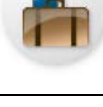

MY TEAM PAGE WORKLETS




The My Team page is composed of a circle of worklets that provides different views into your direct reports on one page. Most worklets are divided into segments related to the worklet's purpose, and for specific Actions and Views.



Most commonly used Worklets available for managers on the My Team page and their descriptions are presented in the following table:

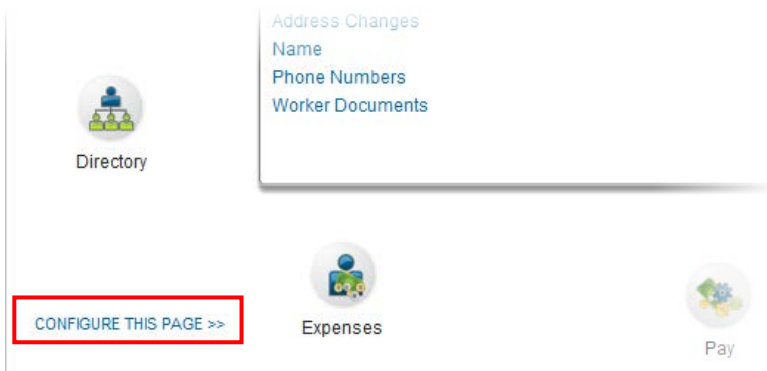
	My Team	Managers can take specific actions on or view information about their team and direct reports.
	Inbox	This is a worklet version of your Workday Inbox accessible from your my Team page.
	Workfeed	Workday provides a special Workfeed worklet modeled on the idea of an activity stream (like activity streams in Facebook and Twitter and many other modern applications). The Workfeed presents an actionable view of content items of interest to you, arranged chronologically. This enables you to see and act on pertinent tasks and content items, from a combination of sources, all presented in a simple time-line view.
	All Certifications	Using this worklet, managers can view a list of all employees they manage and the certifications owned by them. The worklet displays the certificate name and expiration date.
	Business Process Cycle Times	This worklet allows you to graph and track the time it takes your direct reports to complete specific or all business processes or tasks. Criteria and graphs are configurable.
	Compensation	Managers can graphically view their direct report's pay compared to others on the team, and by salary range. They can request bonus plan changes, stock grants, compensation changes, and view compensation history.
	Contingent Workers	Manage your contingent worker with this worklet. From here you can begin and end contracts, transfer and move workers, and convert them to full-time employees.
	Employee Changes	This worklet summarizes recent activity within your team, such as hires, promotions and transfer. Managers can promote, move or transfer workers, view open positions, and details related employee change activity.
	Favorites	Store your most favorite Workday tasks, business objects and reports in this worklet for quick and easy access.

	Financial Reporting	With this worklet you can keep important financial reports available for quick reference. Selecting a report title opens a page that allows you to set the report parameters.
	Headcount	With this worklet view your organizations available headcount, as well as access organization information and navigate the organization hierarchy. Additional delivered worklets present headcount data in dollars and in granular detail.
	Hiring	Use this worklet to create and edit positions, create applicants, and hire into your organization. Managers have full view into information related to the hire process, including applicant pools, interview results, and qualified workers.
	More	This worklet stores a comprehensive list of all the Workday tasks and reports available to you. Provides alternate view of the items on the Navigate tab's Menu list.
	My Processes	This worklet provides a summary of all process initiated by you, and their current status. Click on a particular process to drill into more detail.
	Open Positions by Quarter	View quarterly projections of open positions, for current and future quarters, organized by group or department.
	Quick Links	The Quick Links worklet lets you create and configure a list of web links.
	Reports	Access to specific reports available to you. Access is based upon the security policy of the reports.
	Time Off	Manage worker time off requests by entering or correcting time off, or place employees on leave. All time off balances can be view, or just the approved balances.
	Upcoming New Hires	Managers can see upcoming start dates of hires they have made, as well as related name, organization and position information.

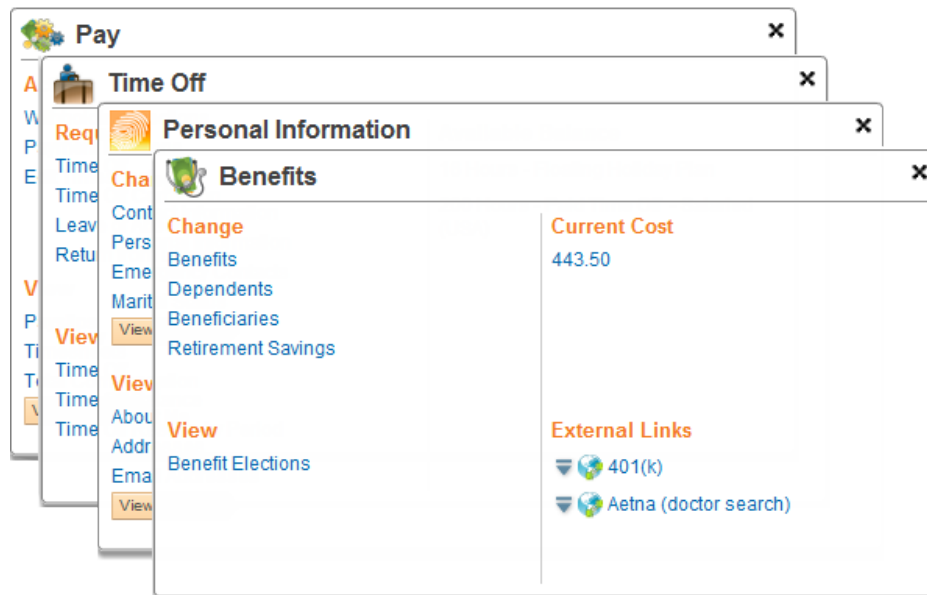
	Dashboards	This worklet provides managers with quick access to delivered Workday dashboards.
 	Birthdays & Anniversaries	These two worklets track and alert you to any upcoming worker birthdays and anniversaries within the coming two weeks.
Additional Delivered Worklets		Workday has additional designed specific manager reports and delivers them as custom worklets.

HOW DO I CONFIGURE THE MY TEAM PAGE?

- 1 From the My Team page, click the **Configure This Page** link (located lower left corner of page).



- 2 Worklets are groupings of related task links, with titles such as Personal Information and Time Off.



- 3 Some worklets are required, and may not be removable, depending on your organization's policies. Use the Up or Down arrows to change the order the worklets display on the page.

Configure Worklets

Required Worklets
The following worklets are required on your All About Me page.

3 items

Worklet
Getting Started at GMS
Personal Information
Workfeed

Optional Worklets
Select the optional worklets you would like to include on your All About Me page.

11 items

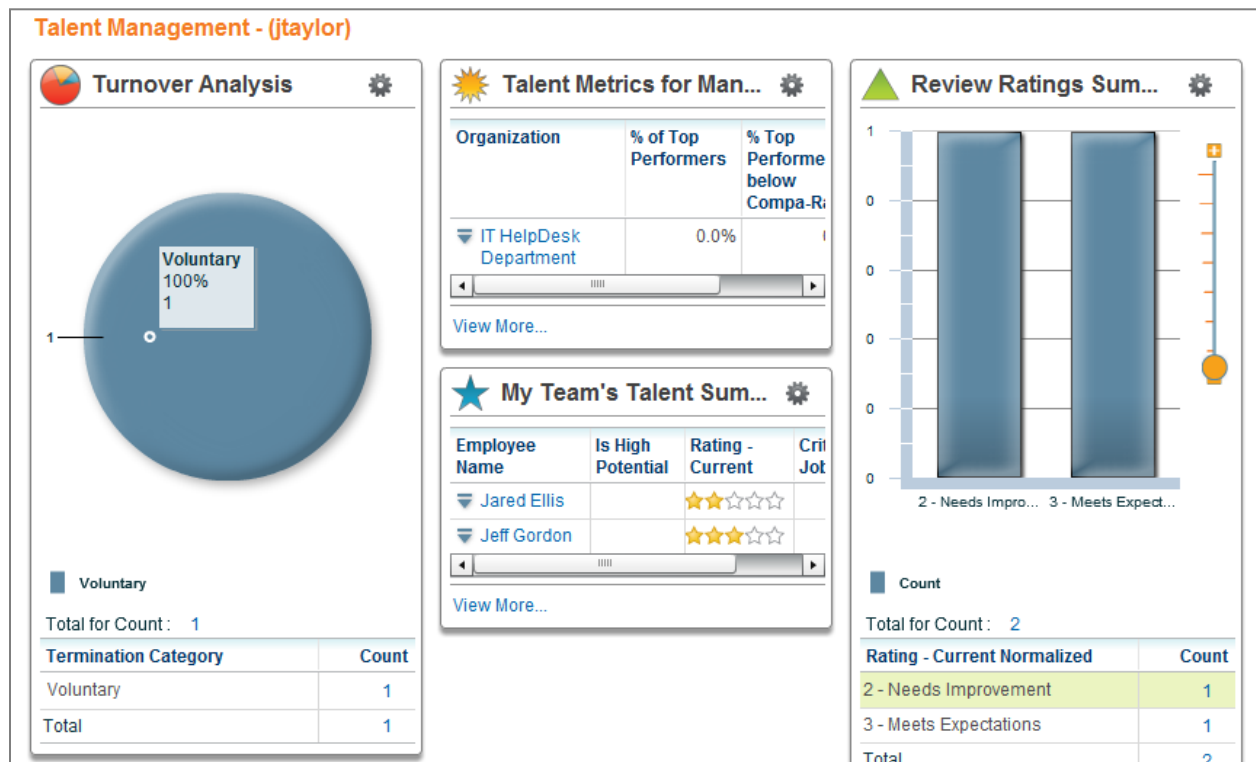
Order	*Worklet
+	Benefits
+	Favorites
+	Inbox
+	Process Status
+	Pay
+	Expenses
+	Directory
+	Performance
+	Time Off
+	Purchases
+	This Month at GMS

OK Cancel

Click **OK** to save and **Close** to return to the My Team page.

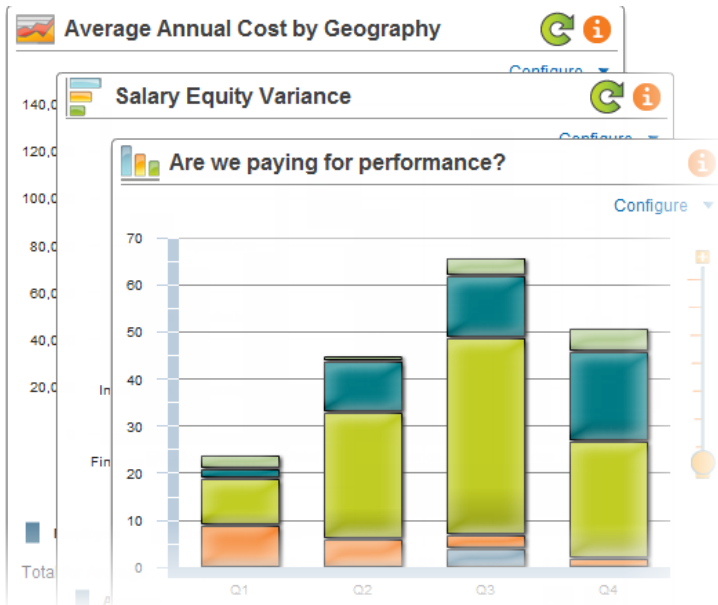
DASHBOARDS

The use of Dashboards speeds and simplifies information that managers need to effectively run their organization. The pages organize and present information in a visual format that is easy to read and interpret. Dashboards simplify navigation by placing all key information and actionable items in one location for various different areas including: Compensation and Benefits, Workforce Planning and Financials.



HOW DO I CONFIGURE A DASHBOARD?

- 1 Worklets are reports you can add your Dashboard page.



- 2 From any Dashboard page, click the **Configure This Page** link located in the lower left corner.



Note: You may need to scroll down to see it.

3 Additional Worklets can be added if allowed by your organization.

- A. Add a row by clicking the green + sign and select a worklet from the drop down list.
- B. Worklets can be deleted from a dashboard page by clicking on the blue X.
- C. Use the Up or Down arrows to change the order the worklets display on the page.

Configure Worklets

Required Worklets
The following worklets are required on your All About Me page.

3 items

Worklet
Getting Started at GMS
Personal Information
Workfeed

Optional Worklets
Select the optional worklets you would like to include on your All About Me page.

11 items

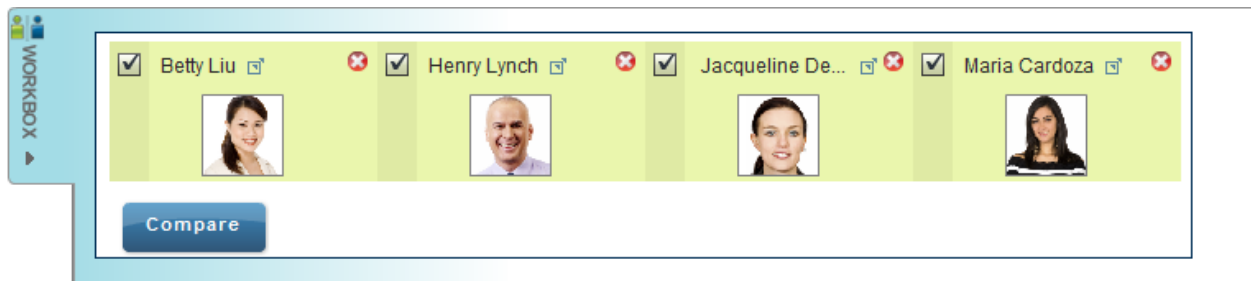
Order	*Worklet
+ X ▲ ▼	Benefits
+ X ▲ ▼	Favorites
+ X ▲ ▼	Inbox
+ X ▲ ▼	Process Status
+ X ▲ ▼	Pay
+ X ▲ ▼	Expenses
+ X ▲ ▼	Directory
+ X ▲ ▼	Performance
+ X ▲ ▼	Time Off
+ X ▲ ▼	Purchases
+ X ▲ ▼	This Month at GMS

OK Cancel

Click **OK** to save and **Close** to return to the My Team page.





WORKBOX

The Workbox sliding tab allows you to compare workers in your organization. You place workers into the Workbox by tagging them individually with the Workbox tag. You can tag up to 25 works for inclusion in your Workbox, but you can only tag them one at a time. Click Compare for a side-by-side comparison of key worker attributes from the Talent, Compensation, and general HCM areas.



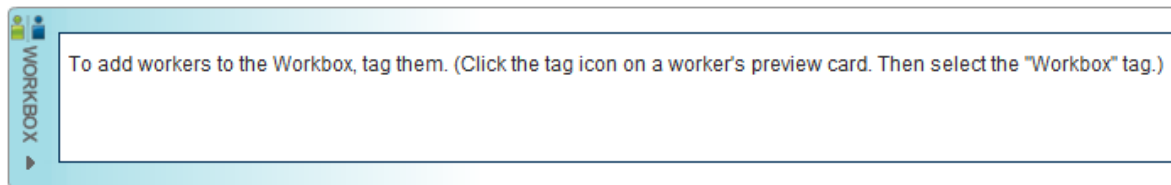
The comparison view provides a number of interactive features:

- You can expand or collapse the individual attribute sections.
- You can drag and drop workers in the list to arrange them left to right.
- An "X" appears when you move the pointer over a worker. Click it to hide the worker from the comparison.

Compare Workers				
More				
	 Betty Liu Director, Payroll Operations - San Francisco	 Henry Lynch Director, Payroll Operations - Toronto	 Jacqueline Desjardins Director, Recruiting Services - San Francisco	 Maria Cardoza Director, Employee Benefits - San Francisco
Compensation				
Base Pay	\$128,125.00	\$127,500.00 \$128,606.06	\$135,150.00	\$97,850.00
Compensation Basis	\$145,937.50	\$145,207.00 \$146,466.67	\$153,665.00	\$112,635.00
Quartile	Q3	Q3	Q4	Below Q1
Grade	Management	Management	Management	Management
Qualifications				
Talent				
Performance Over Time	4 - Exceeds Expectations		4 - Exceeds Expectations	4 - Exceeds Expectations
Current Review Rating	3 - Meets Expectations		3 - Meets Expectations	3 - Meets Expectations
Project Rating				
Potential	High Potential	Promotable	High Potential	Promotable
Retention	Low Risk	Medium Risk	Low Risk	Medium Risk
Loss Impact	Critical	Significant	Significant	Significant
Tenure				

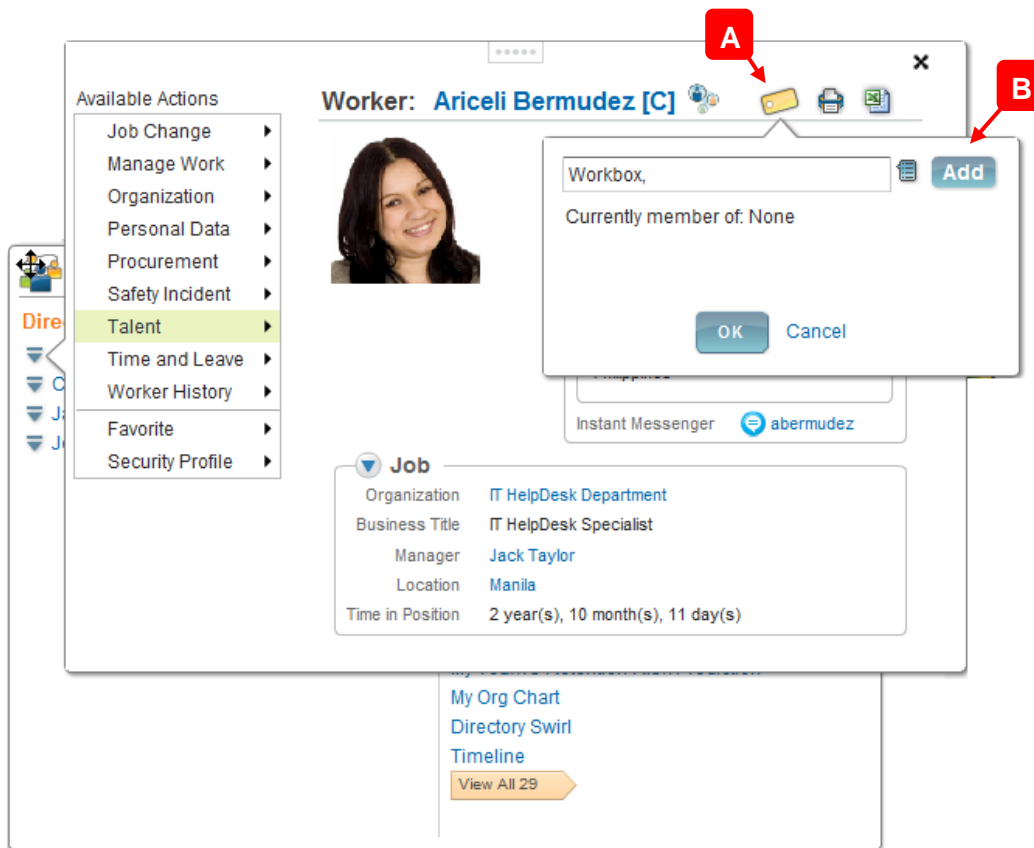
HOW DO I COMPARE WORKERS WITH WORKBOX?

- 1 From any home page, click the **Workbox** sliding tab on the right side of the screen.



- 2 A. Click the tag icon next to a worker and select **Workbox** from the dropdown menu.
B. Then select the **Add** button and **OK**.

Repeat with each worker you would like to compare in your Workbox.



- 3 Use the sliding tab to access your Workbox.
Check the boxes next to the workers you would like to compare and select **Compare**.







4

- A. Click **More** to view the full report.
- B. Click the + sign to view additional information about a particular area for both workers.

A

Compare Workers

[More](#)

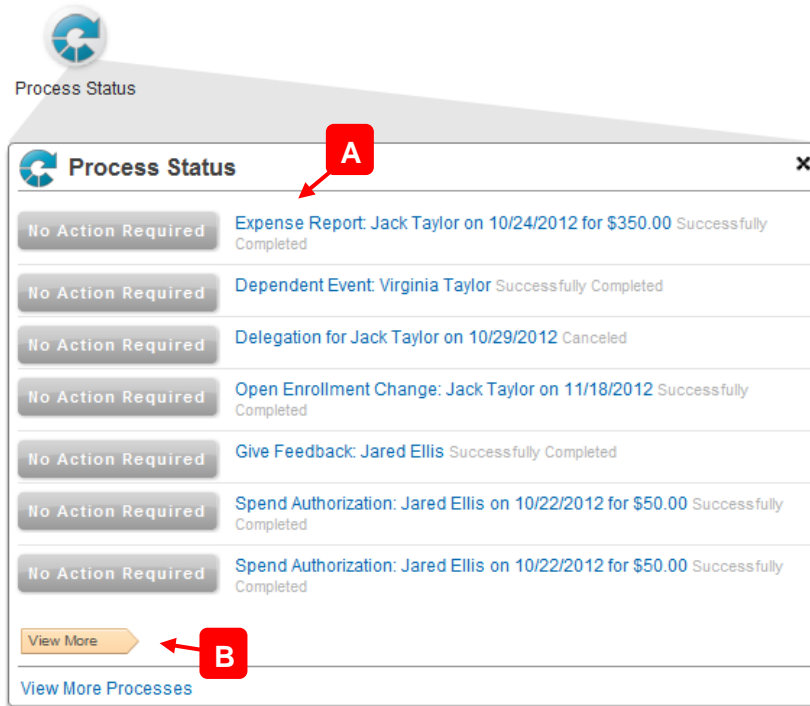
	 Ariceli Bermudez [C] IT HelpDesk Specialist - Manila	 Chaaya Basu [C] IT HelpDesk Specialist - Mumbai	 Jared Ellis IT HelpDesk Specialist - Dallas	 Jeff Gordon IT HelpDesk Specialist - Dallas
Compensation <input type="checkbox"/>				
Base Pay			\$59,450.00	\$59,450.00
Compensation Basis			\$67,395.00	\$67,395.00
Pay Range Segment			S2	S2
Grade			Non-Management	Non-Management
Qualifications <input type="checkbox"/>				
Talent <input type="checkbox"/>				
Performance Over Time			4 - Exceeds Expectations	3 - Meets Expectations
Current Review Rating			2 - Needs Improvement	3 - Meets Expectations
Project Rating				
Potential			Placement Issue	Correctly Placed
Retention			Medium Risk	Low Risk

B

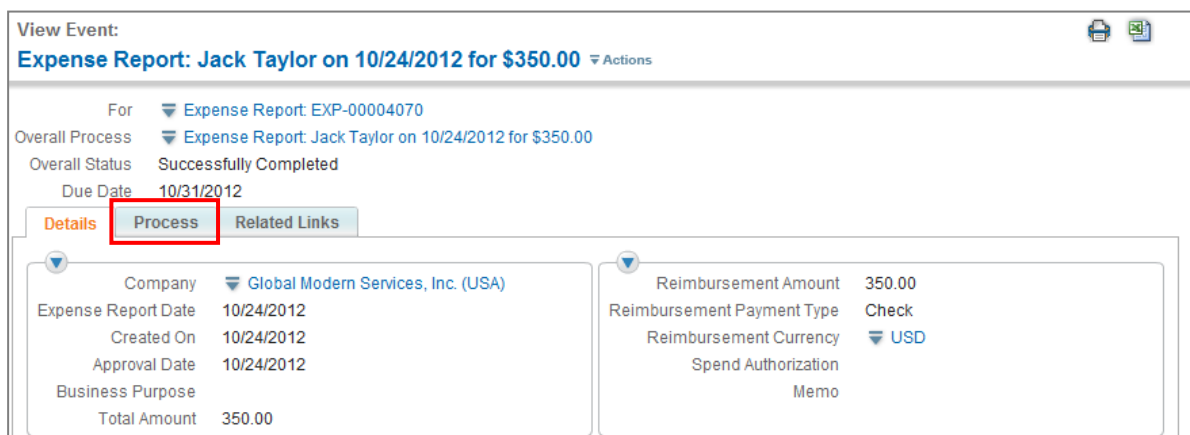
MY PROCESSES

HOW CAN I SEE THE STATUS OF THE BUSINESS PROCESSES I STARTED?

- 1 From the Process Status worklet you can see a list of recent process requests.
 - A. Click on a process link to see the status and details of that business process.
 - B. Click on **View More** to see all of your business process requests.



- 2 After selecting a process, click on the **Process** tab see details and status.



- 3 A Process History will show you all workers who are involved in this business process, and the remaining steps to complete.

Details

Process

Related Links

Process History

- 8 items

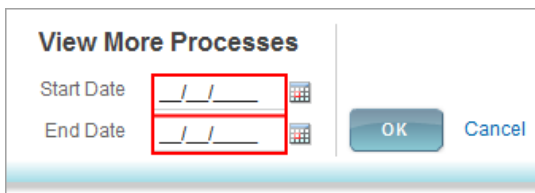
Process	Step	Status	Completed On	Due Date	Person	Comment
<div>Expense Report Event</div>	Expense Report Event	Step Completed	10/24/2012 11:48:15 PM	10/31/2012	<div>Jack Taylor</div>	
<div>Expense Report Event</div>	Approval by Manager	Approved	10/24/2012 11:49:10 PM	10/27/2012	<div>Anthony Rizzo (Manager)</div>	
<div>Expense Report Event</div>	Approval by Recruiter	Not Required		10/31/2012		
<div>Expense Report Event</div>	Approval by Project Manager	Not Required		10/31/2012		
<div>Expense Report Event</div>	Approval by Controller	Not Required		10/31/2012		
<div>Expense Report Event</div>	Approval by Chief Financial Officer	Not Required		10/31/2012		
<div>Expense Report Event</div>	Review Expense Report	Not Required		10/31/2012		
<div>Expense Report Event</div>	Audit Expense Report	Awaiting Action		10/31/2012	<div>Charles Bradley (Expense Partner)</div>	

HOW DO I LOCATE BUSINESS PROCESS REQUESTS THAT I INITIATED IN THE PAST?

- 1 From the My Processes worklet, click on **View More Processes** to see all of your business process activity.



- 2 Enter a date range to filter the process view.



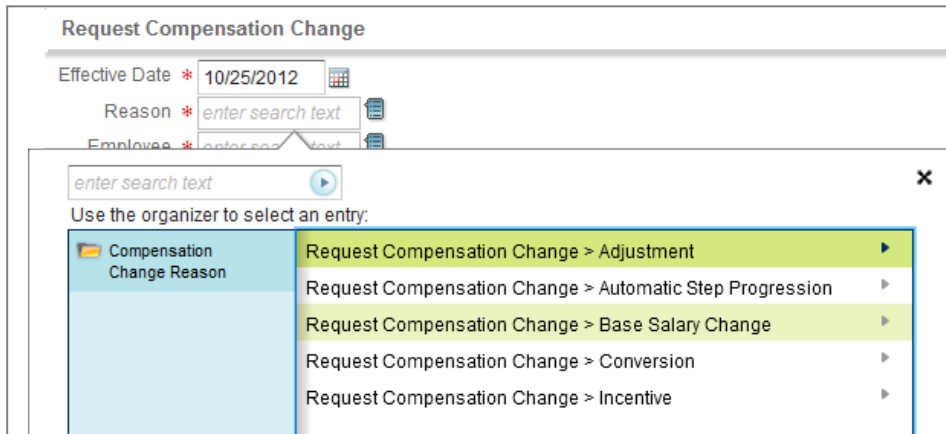
- 3 Click on the event link to view its details. Note: Each business process event is displayed with a status

The screenshot shows the 'View More Processes' window with a table of business process participation events. The table has columns for Business Process, Status, Initiated On, Completed On, and Tasks I Worked On. The first row, 'Delegation for Jack Taylor on 10/29/2012', is highlighted with a red box.

Business Process	Status	Initiated On	Completed On	Tasks I Worked On
Delegation for Jack Taylor on 10/29/2012	Canceled	10/23/2012 01:15:17.623 PM	10/24/2012 11:53:03.485 PM	Approval by Manager Request Delegation Change
Dependent Event: Virginia Taylor	Successfully Completed	10/24/2012 11:13:31.990 PM	10/24/2012 11:13:31.990 PM	Dependent Event To Do: Change Benefits To Do: Change Federal Tax Elections
Expense Report: Jack Taylor on 10/24/2012 for \$350.00	Successfully Completed	10/24/2012 11:48:15.920 PM	10/24/2012 11:49:10.628 PM	Expense Report Event

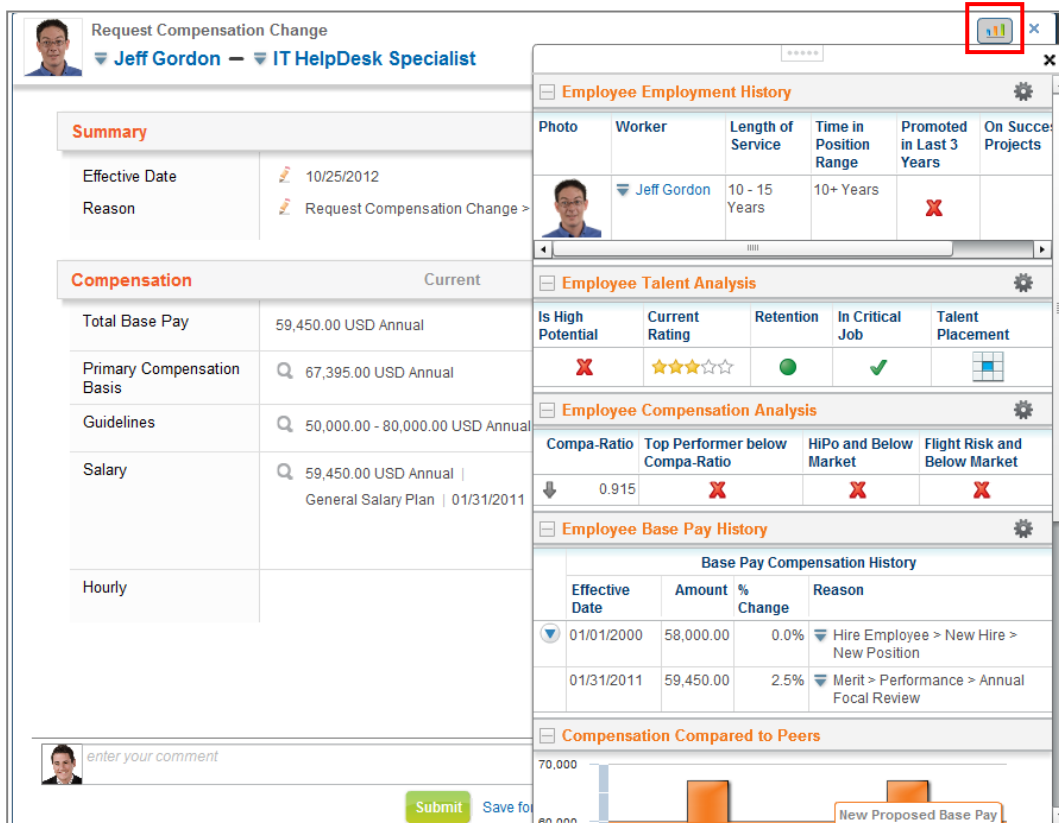
HOW CAN I ACCESS A REPORT DURING A BUSINESS PROCESS?

- 1 Initiate a business process for a worker, such as Request Compensation Change.



Note: Embedded analytics are only available on select business processes.

- 2 During the business process, if you see a graph button like the one pictured here, you can hover over it to view information you might need to make a good decision about the business process, in this case, what base pay to propose.



Effective Date	Amount	% Change	Reason
01/01/2000	58,000.00	0.0%	Hire Employee > New Hire > New Position
01/31/2011	59,450.00	2.5%	Merit > Performance > Annual Focal Review

