FREQUENTLY ASKED QUESTIONS

MANAGER SELF SERVICE: NAVIGATION AND MY TEAM

CONTENTS

NAVIGATION

WHAT DO I USE THE RELATED ACTIONS ICON 🔽 OR ACTIONS [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.
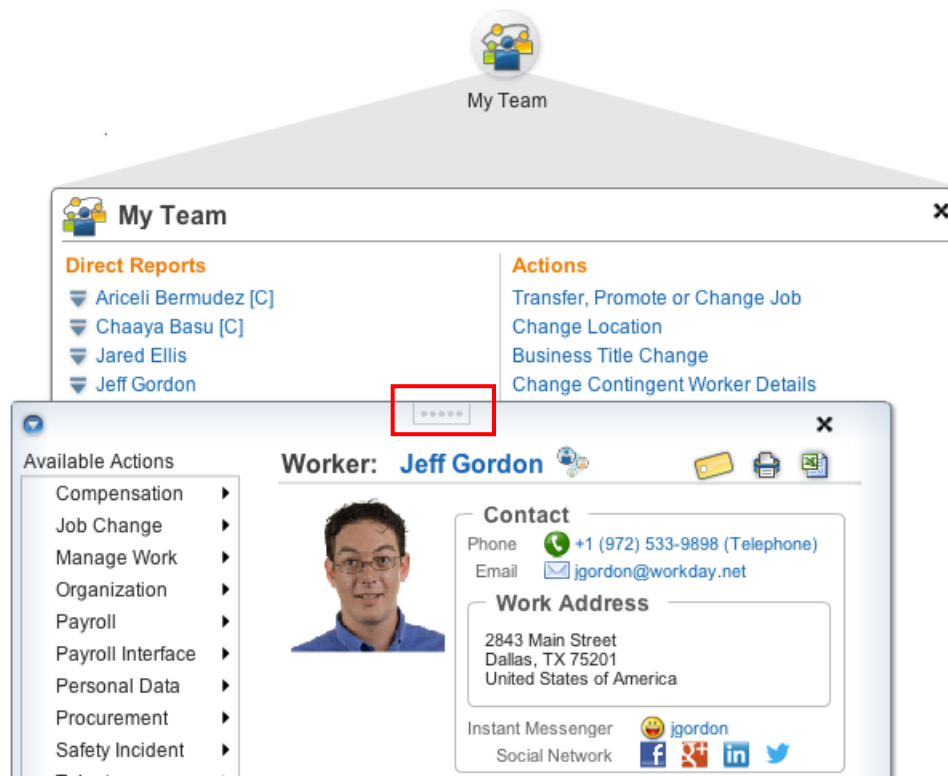
Click and drag the [·····] icon to detach the window from the Related Action Icon.

The following is a list of the actions and views you can perform with the Actions [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 ▶
- Request Compensation Change
- Request One-Time Payment

- View Compensation
- View Compensation History
- View Compensation Basis Details
- View Estimated Compensation for a Period
- View Future Payment Plan Assignments
- View Merit Statement History
- View Reimbursable Allowance Plan Activity
- View Total Compensation

Job Change ▶
- Transfer, Promote or Change Job
- Change Business Title
- Change Location
- Add Contract
- Add Job
- Terminate Employee

Organization ▶
- Change Organization Assignments

Payroll ▶
- Assign Costing Allocation

Personal Data ▶
- View Contact Information
- Maintain Social Network
- Edit Photo
- Change Background Check Status

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 ▶

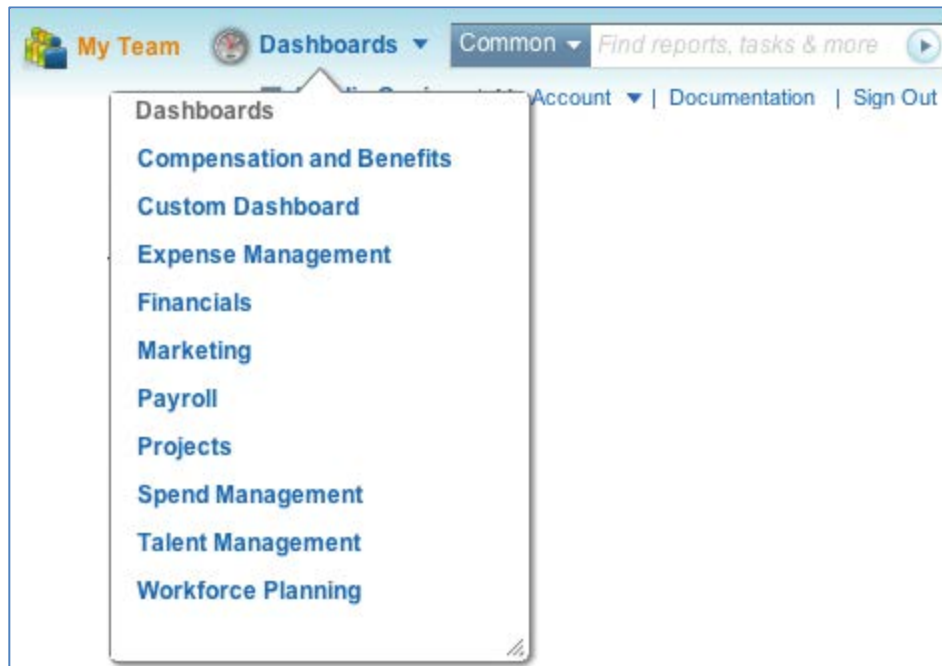| |
|---|
| View Worker History |
| View Worker History by Category |
| View Worker Document File |
| View Manager History |
| Print Employee Job History Profile |
| View Employee History |

Favorite ▶

Add

Reporting ▶

Business Object Details
Related Reports
Report Fields and Values

Security Profile ▶

View Support Roles

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

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.

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

☐ ⭐ Favorites	0
☑ Overdue	0
☑ Approvals	1
☑ Tasks	2
☑ To-Dos	0
☑ All To Dos	0
☑ Expense Report Approvals	0
☐ Expense Reports without Exceptions	0
☑ Spend Authorization Approvals	0
☑ Time Off Request Approvals	0

Add Filters | Manage Filters

OK   Cancel

A

WHAT IS MY INBOX USED FOR?

1
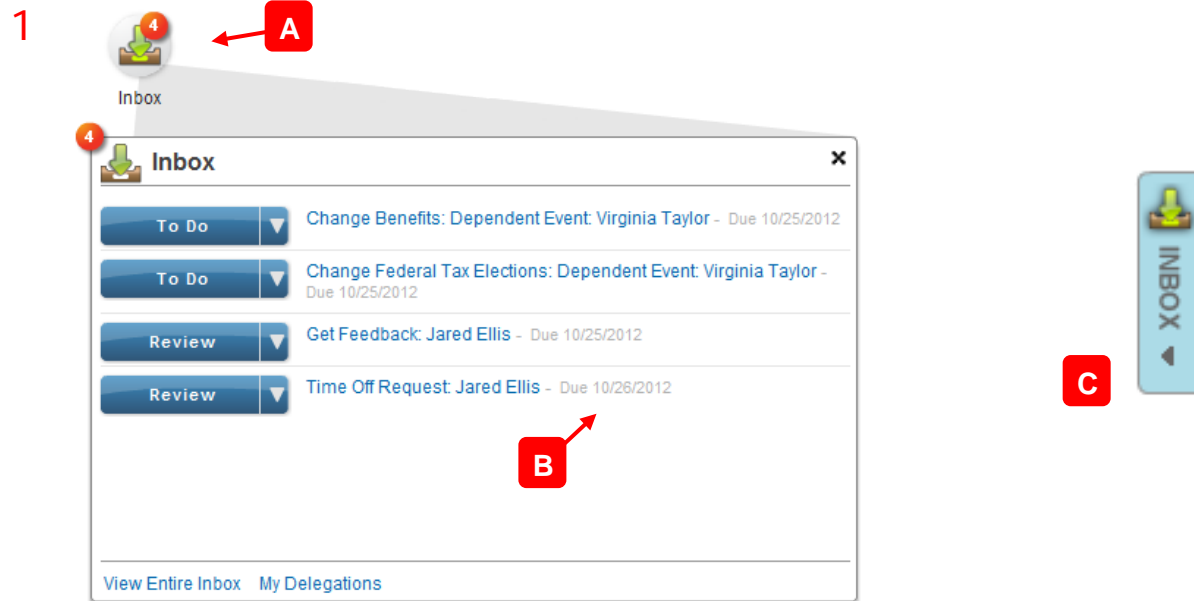
A. Your Inbox shows notifications of tasks, reviews, items, etc., that are routed to you by your organization's business processes.

B. Due date of a task.

C. The Inbox is also available as a slide out tab, depending on your security profile.

2
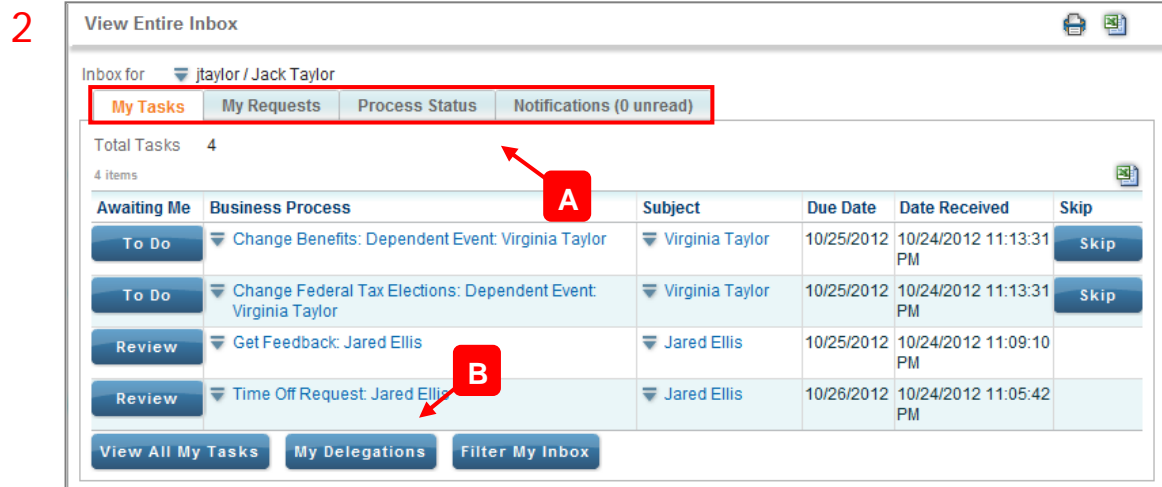
A. Inbox has four tabs that are used to view tasks, any business processes you initiated (My Requests), any business processes you're a part of (Process Status), and all notifications.

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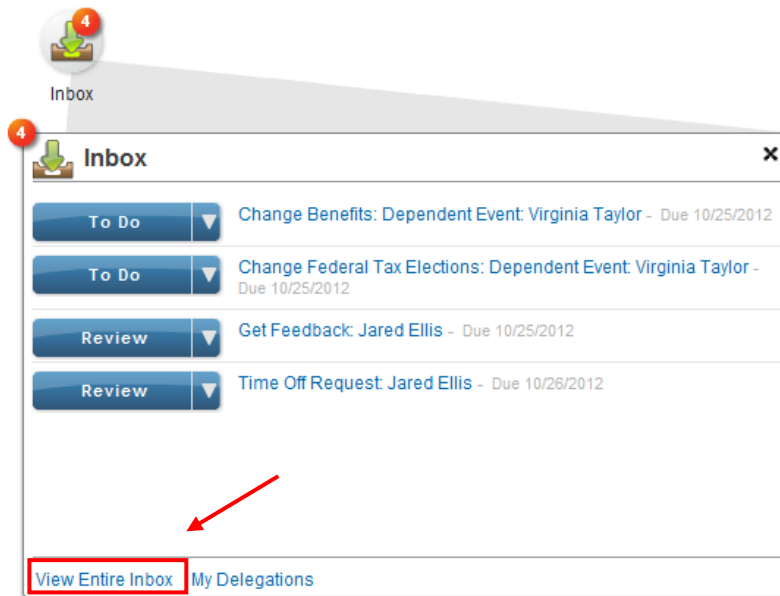
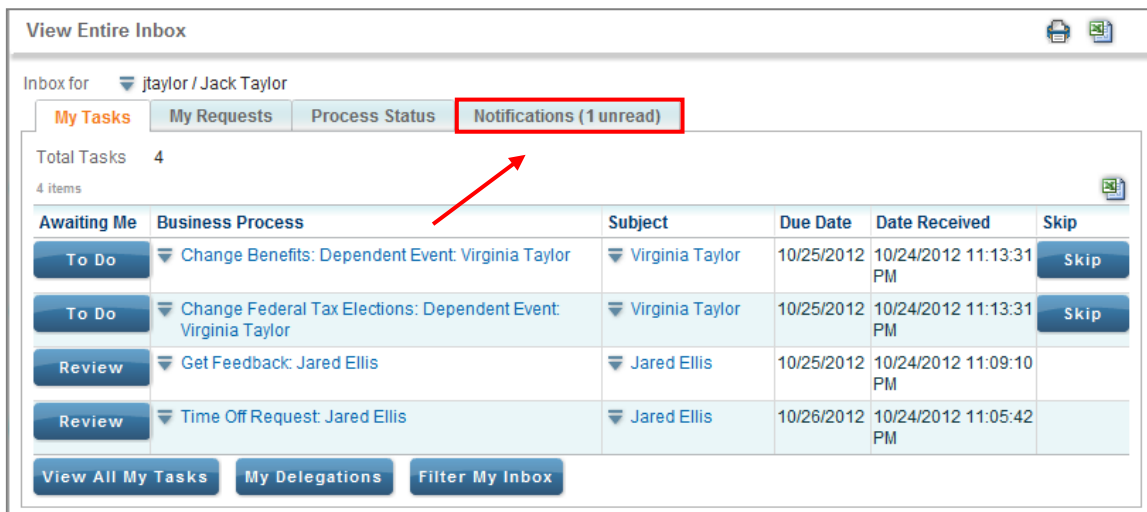Click on the **View Entire Inbox** hyperlink to get more detail.

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**...
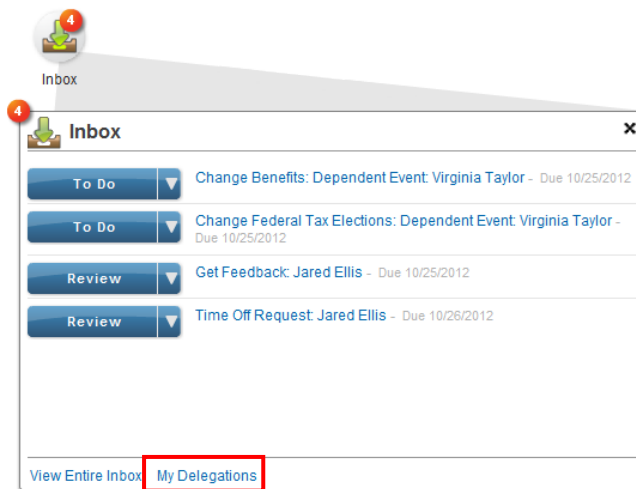
... **OR** from the expanded **Inbox**, click on the **My Delegations** button.
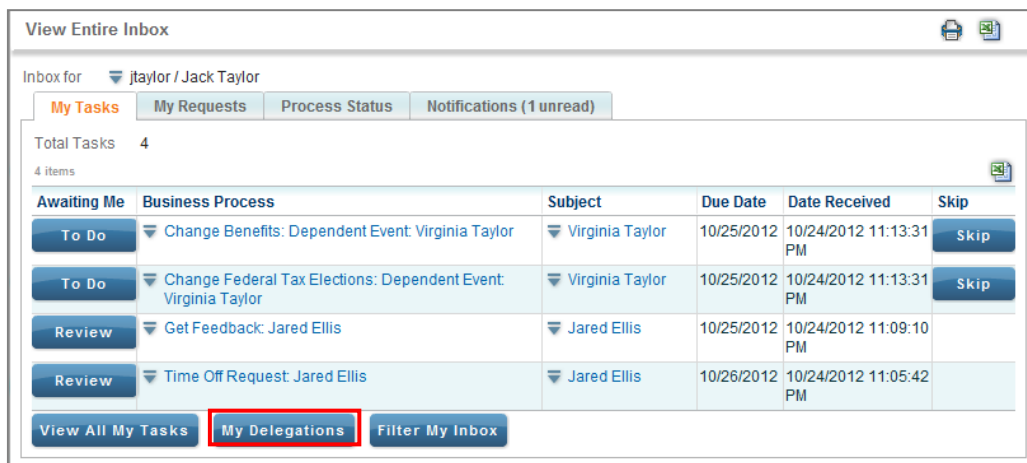
2 Click **Manage Delegations**.
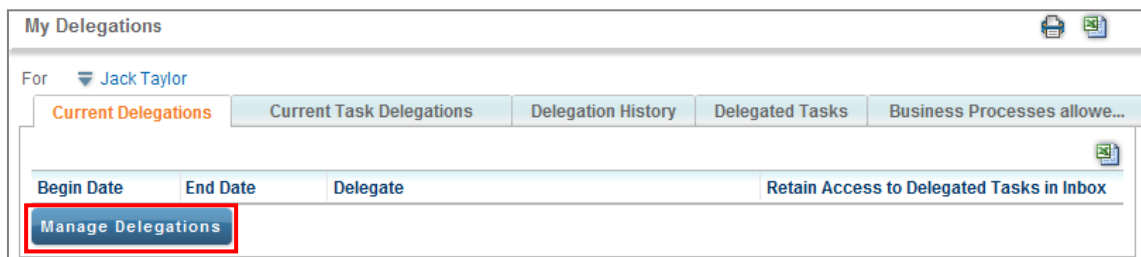
3

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.

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.
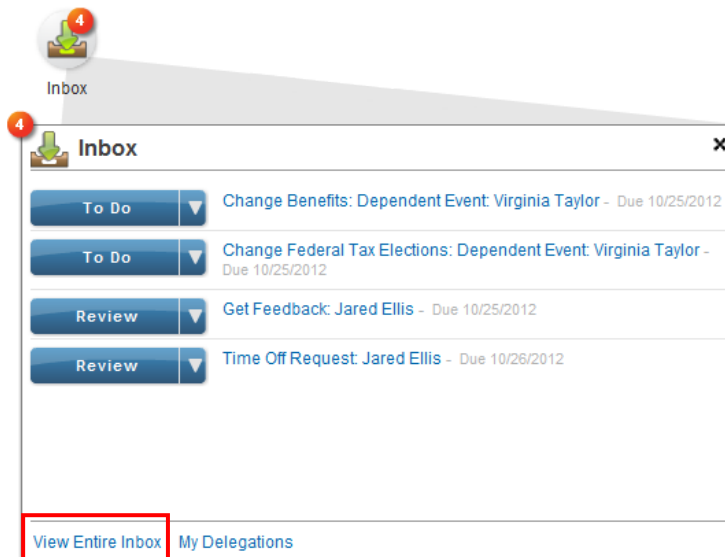
| 2 | Your Inbox detail contains 4 tabs:

- **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.
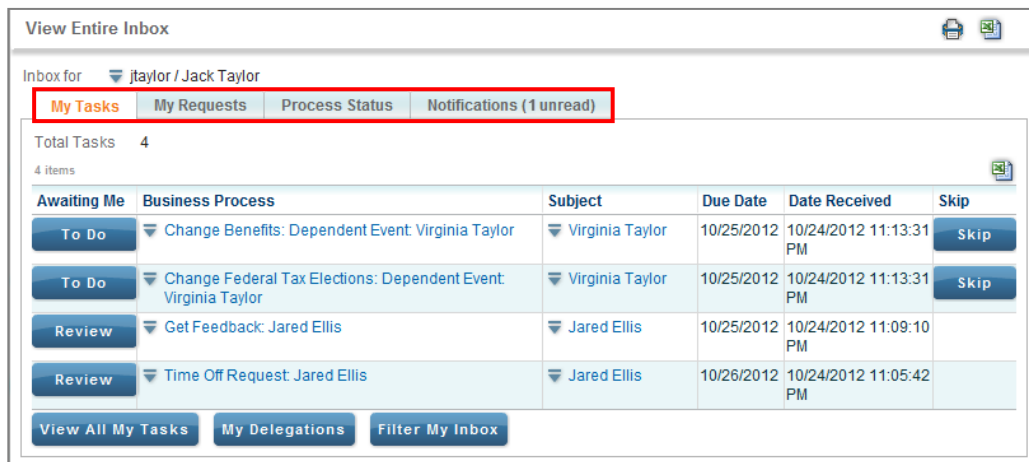
CONFIGURING WORKDAY

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.
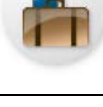
MY TEAM PAGE WORKLETS

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).
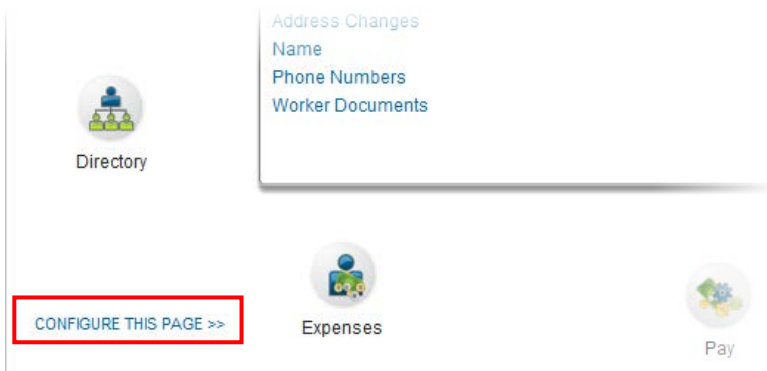
2   Worklets are groupings of related task links, with titles such as Personal Information and Time Off.
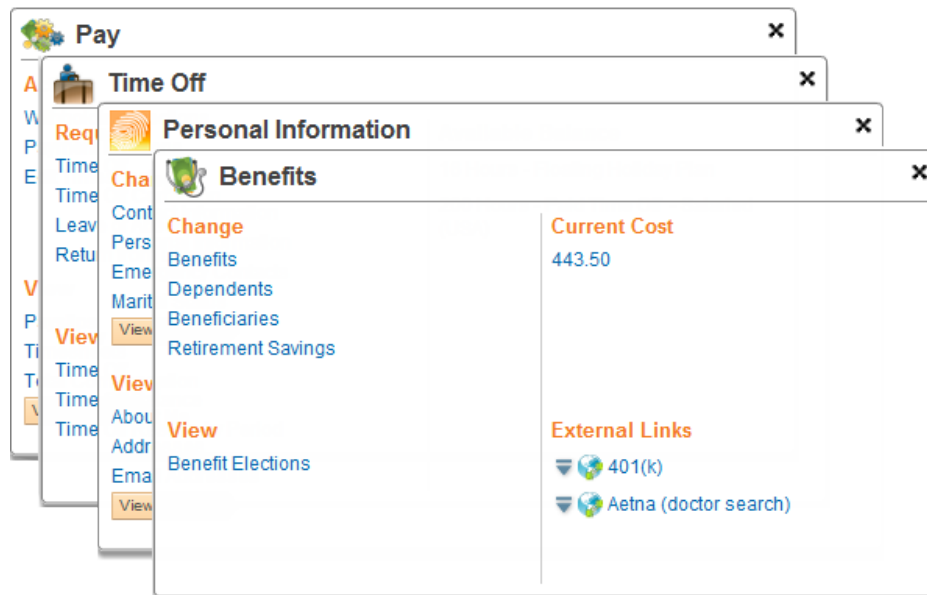
3 Some worklets are required, and may not be removable, depending on your organization's policies. Use the Up or Down arrows to change the order the worklets display on the page.

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.
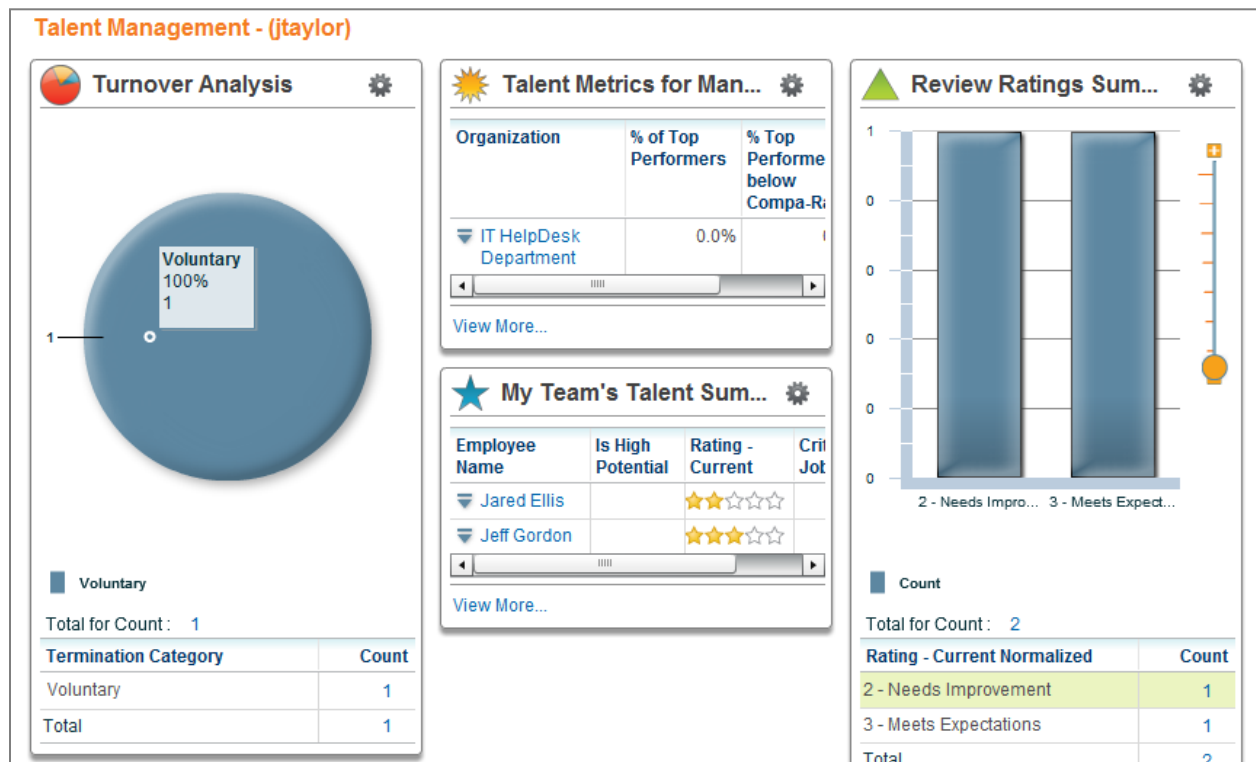
HOW DO I CONFIGURE A DASHBOARD?

1 Worklets are reports you can add your Dashboard page.
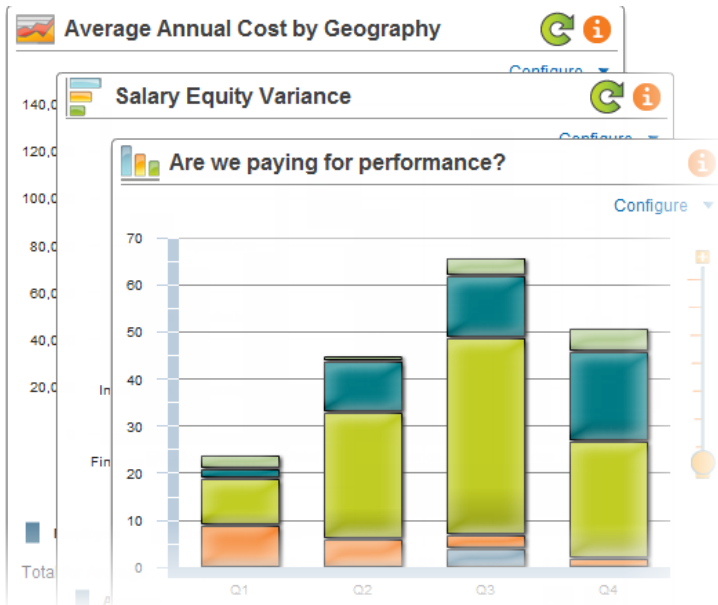
2 From any Dashboard page, click the **Configure This Page** link located in the lower left corner.

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.

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.
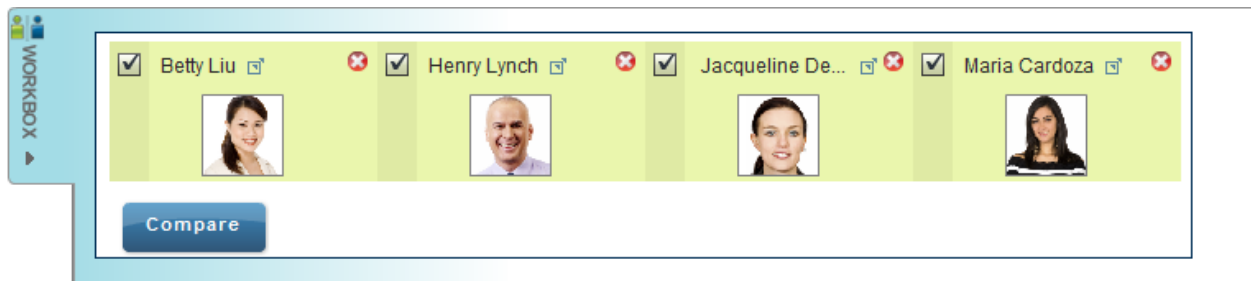
The comparison view provides a number of interactive features:

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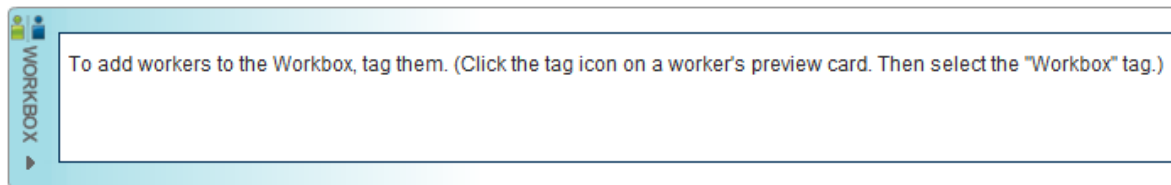
2 A. Click the tag icon next to a worker and select **Workbox** from the dropdown menu.
     B. Then select the **Add** button and **OK**.

Repeat with each worker you would like to compare in your Workbox.
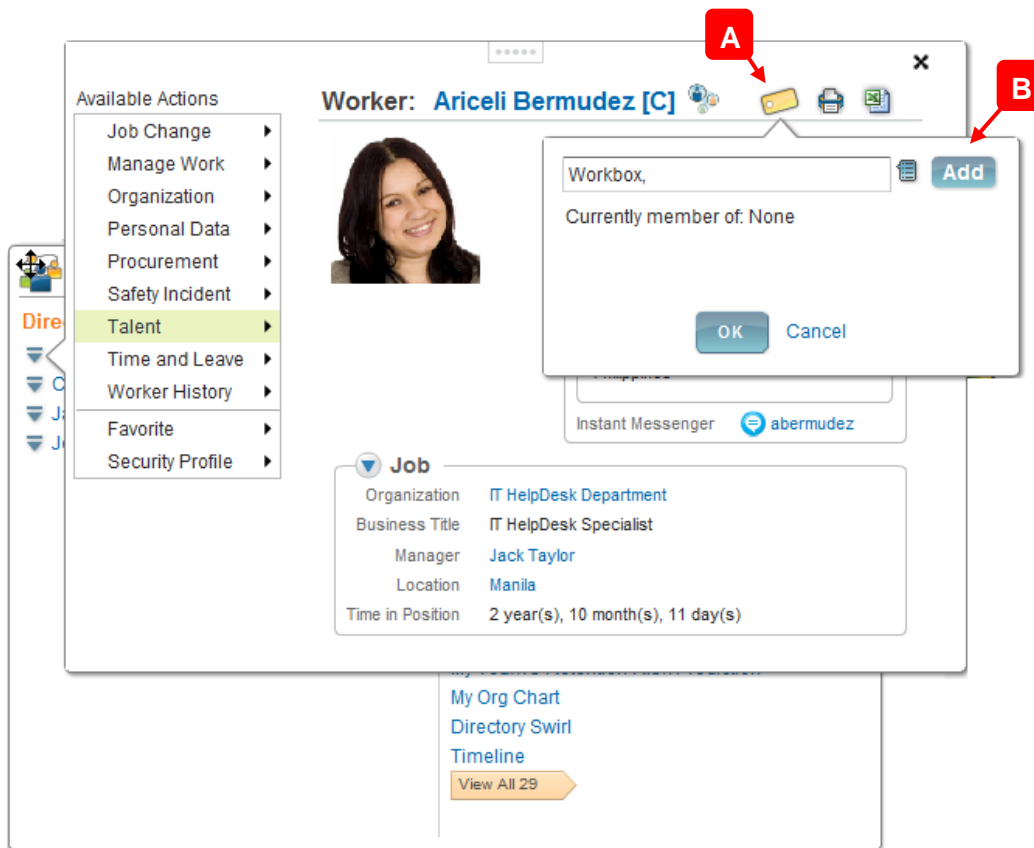
3 Use the sliding tab to access your Workbox. Check the boxes next to the workers you would like to compare and select **Compare**.

4

A. Click **More** to view the full report.

B. Click the + sign to view additional information about a particular area for both workers.

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.
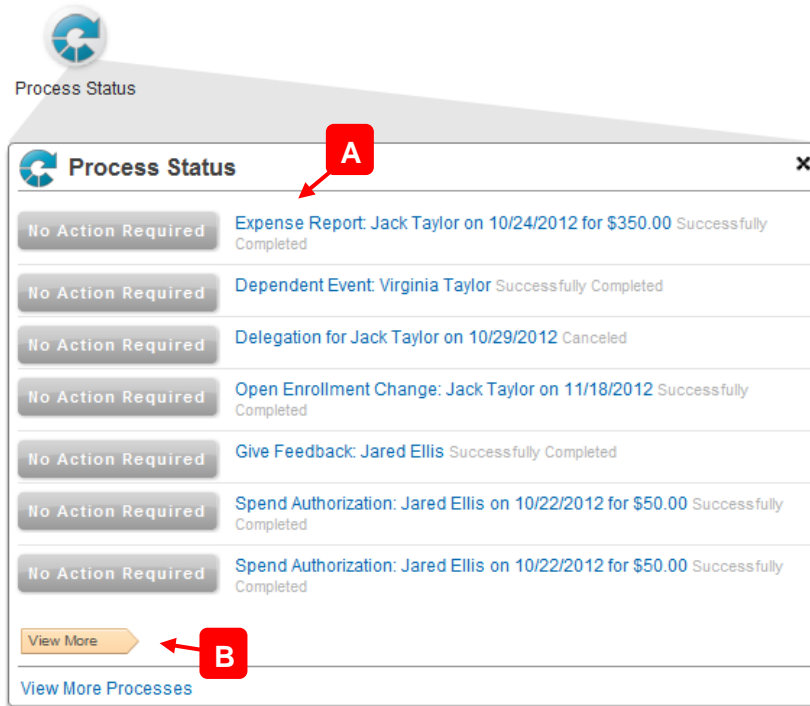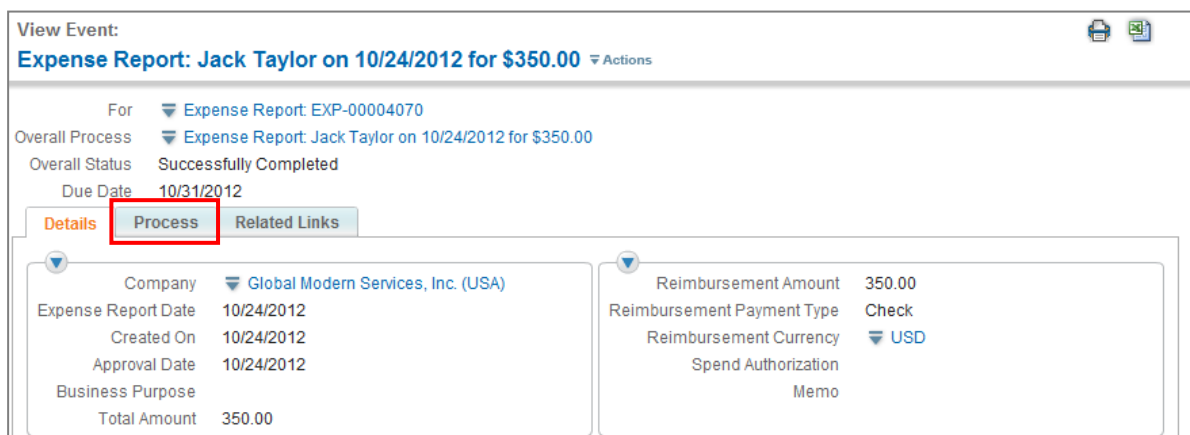   B. Click on **View More** to see all of your business process requests.

Process Status

Process Status   **A**   ✕

No Action Required	Expense Report: Jack Taylor on 10/24/2012 for $350.00 Successfully Completed
No Action Required	Dependent Event: Virginia Taylor Successfully Completed
No Action Required	Delegation for Jack Taylor on 10/29/2012 Canceled
No Action Required	Open Enrollment Change: Jack Taylor on 11/18/2012 Successfully Completed
No Action Required	Give Feedback: Jared Ellis Successfully Completed
No Action Required	Spend Authorization: Jared Ellis on 10/22/2012 for $50.00 Successfully Completed
No Action Required	Spend Authorization: Jared Ellis on 10/22/2012 for $50.00 Successfully Completed

View More   **B**

View More Processes

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

View Event:
Expense Report: Jack Taylor on 10/24/2012 for $350.00 ▾Actions

For	▾ Expense Report: EXP-00004070
Overall Process	▾ Expense Report: Jack Taylor on 10/24/2012 for $350.00
Overall Status	Successfully Completed
Due Date	10/31/2012

Details   **Process**   **Related Links**

Company	▾ Global Modern Services, Inc. (USA)	Reimbursement Amount	350.00
Expense Report Date	10/24/2012	Reimbursement Payment Type	Check
Created On	10/24/2012	Reimbursement Currency	▾ USD
Approval Date	10/24/2012	Spend Authorization	
Business Purpose		Memo	
Total Amount	350.00		

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
▼ Expense Report Event	Expense Report Event	Step Completed	10/24/2012 11:48:15 PM	10/31/2012	▼ Jack Taylor	
▼ Expense Report Event	Approval by Manager	Approved	10/24/2012 11:49:10 PM	10/27/2012	▼ Anthony Rizzo (Manager)	
▼ Expense Report Event	Approval by Recruiter	Not Required		10/31/2012		
▼ Expense Report Event	Approval by Project Manager	Not Required		10/31/2012		
▼ Expense Report Event	Approval by Controller	Not Required		10/31/2012		
▼ Expense Report Event	Approval by Chief Financial Officer	Not Required		10/31/2012		
▼ Expense Report Event	Review Expense Report	Not Required		10/31/2012		
▼ Expense Report Event	Audit Expense Report	Awaiting Action		10/31/2012	▼ Charles Bradley (Expense Partner)	

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.

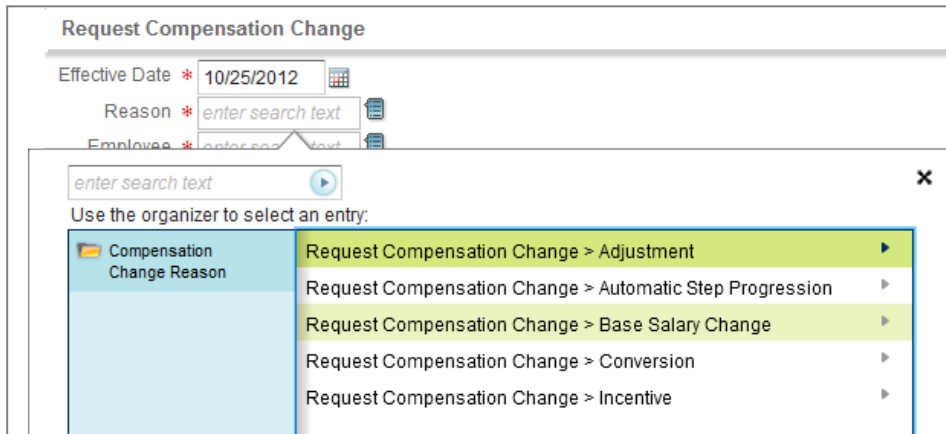**2** Enter a date range to filter the process view.
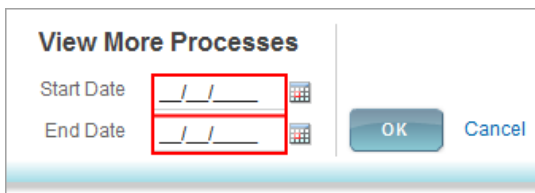
3 Click on the event link to view its details. <u>Note</u>: Each business process event is displayed with a status
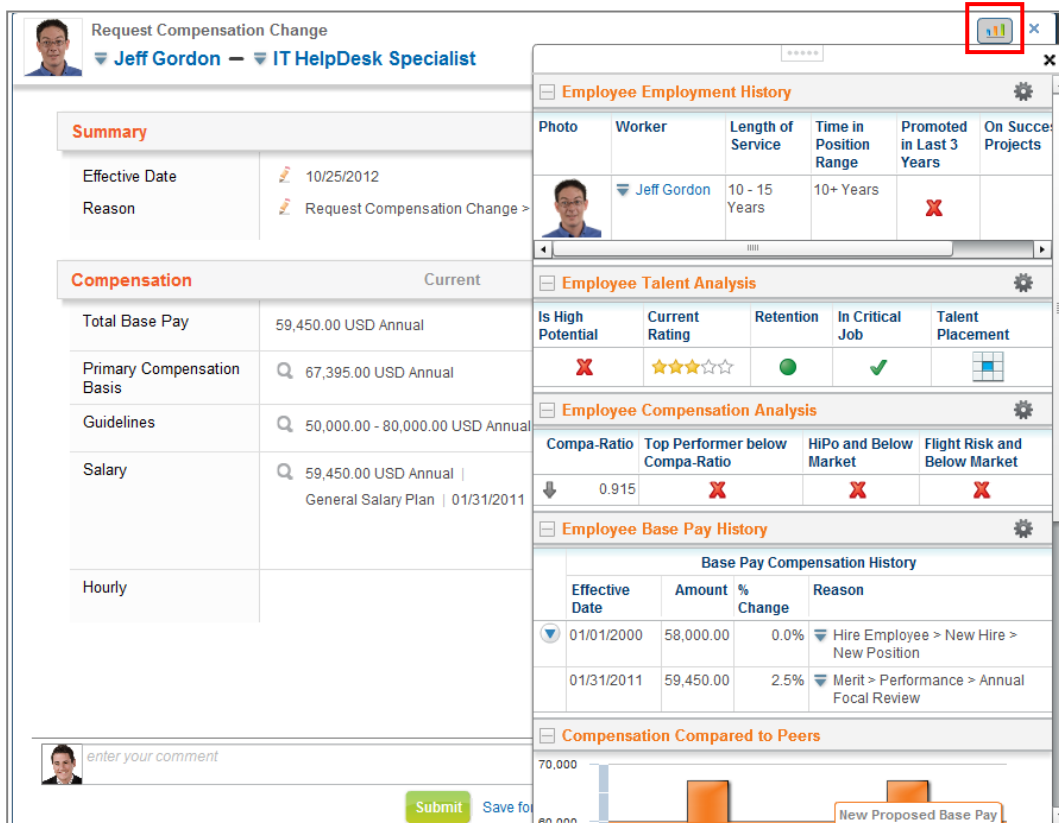
HOW CAN I ACCESS A REPORT DURING A BUSINESS PROCESS?

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.