

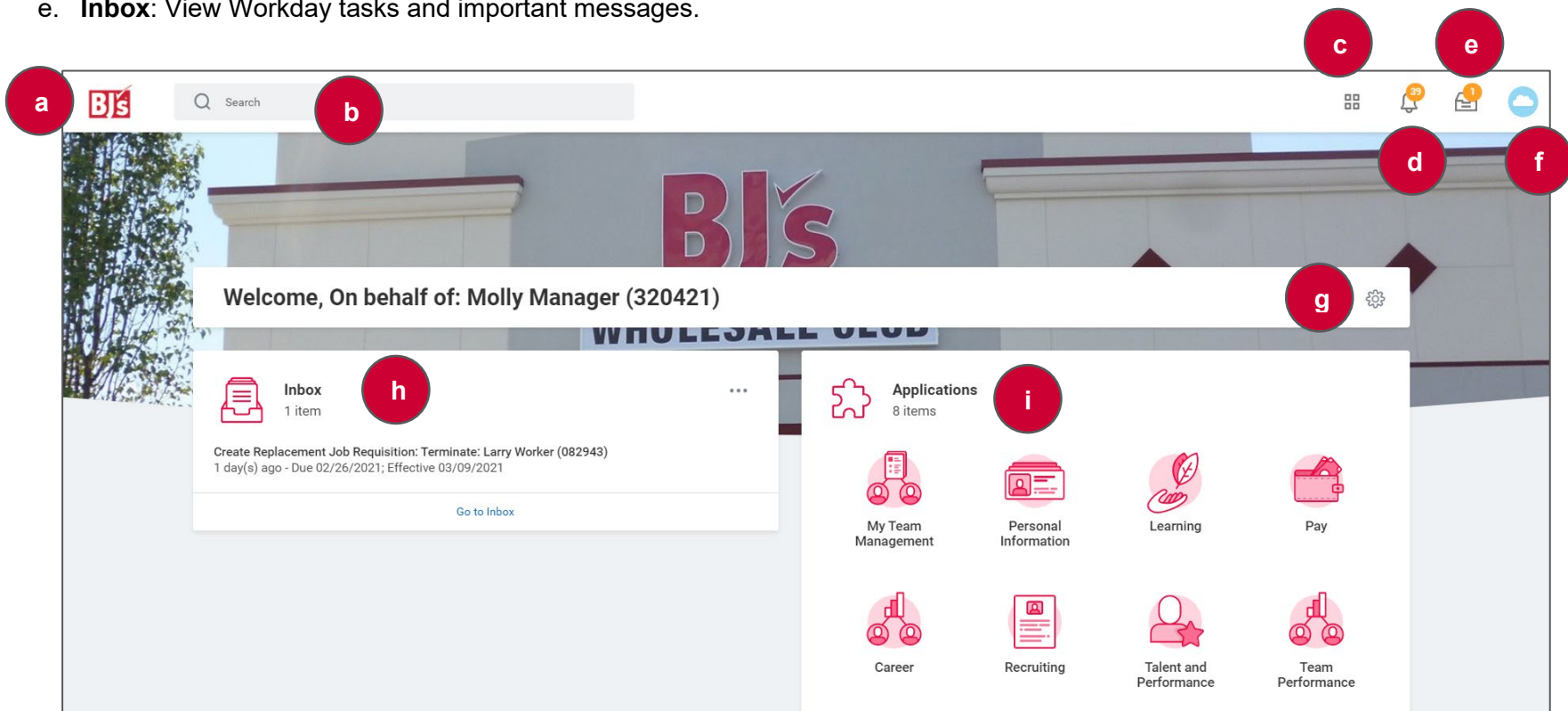
Use this job aid to learn basic navigation for Managers in Workday.

Manager Basic Navigation – Home Screen

1. Home Screen Navigation:




- a. **Home Button:** Click the BJ's icon to return to the home screen.
- b. **Search:** Use to search for tasks, reports, and people.
- c. **Shortcuts:** Access to locate favorite tasks and most frequently used applications.
- d. **Notifications:** View notifications for activities related to you.
- e. **Inbox:** View Workday tasks and important messages.

- f. **Profile:** Click the Cloud and then View Profile to view details about your information and initiate tasks that affect you.
- g. **Options:** Click to configure applications on your home screen.
- h. **Inbox and Announcements:** Access to Workday inbox and view company/department announcements.
- i. **Applications:** Access to view additional information and actions for each process area.



Manager-Specific Applications

As a manager, you have access to applications that help you manage your team. Below is a description of the applications for managers.

Application	Description
 <p>My Team Management</p>	<p>My Team Management</p> <ul style="list-style-type: none"> • Actions: Initiate transactions such as termination, and business title change • View: Compare team members, view org chart, run headcount report, etc.
 <p>Recruiting</p>	<p>Recruiting</p> <ul style="list-style-type: none"> • Actions: Create job requisition view reminders, find candidates, take action on my candidates • View: Access job requisitions, My Recruiting Jobs
 <p>Team Performance</p>	<p>Team Performance</p> <ul style="list-style-type: none"> • Actions: Review rating, employee reviews, performance reviews, opportunity graph • View: Review performance review status, top performers, track team's goals

Initiate Action – My Team Management Application

From your home screen:

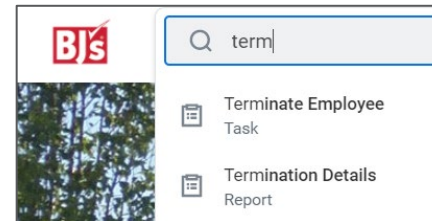
1. Navigate to the **My Team Management** application.
2. Below the **Actions** section, select the task you want to access.




Initiate Action – Using Search Bar

From your home screen:

1. Navigate to the search bar > enter the action name. Select the action from the options that appear based on your security.



 You can also search for direct reports and Team Members using the search field.

See common search prefixes below.

Perform Actions on Team Members

Managers have autonomy to initiate an action on their Team Members. There are multiple ways to initiate an action.

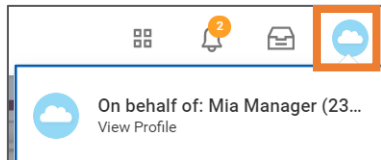
Perform Actions on Team Members (continued)

Type in the Search Field	Business Process
Ter	Terminate Team Member - Task
Cha job	Change Job - Task
Req comp	Request Compensation Change - Task
Req one	Request One-Time Payment - Task
My del	My Delegations - Report
Create job	Create Job Requisition - Task
?	Display of all prefixes and shortcuts

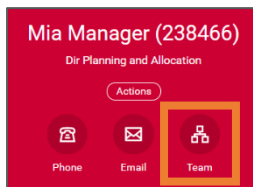
Initiate Action – From Team Member Profile

From you home screen:

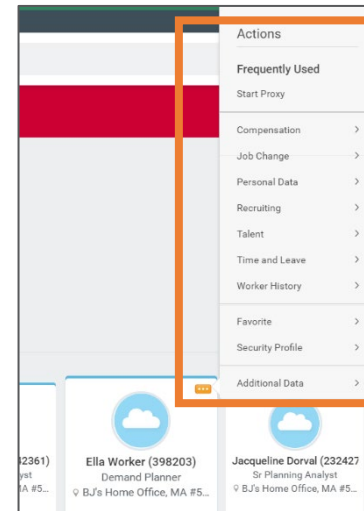
1. Navigate to the profile icon > Select **View Profile**.



2. Select the **Team** icon to access your team's org chart.



3. Hover over the top right corner box of the Team Member you want to act on, so the **Related Actions** icon appears. Click the icon to populate a menu of options to take action on for the Team Member.



Inbox: Approve, Send Back, Deny, Cancel

Managers must review and approve action items, such as compensation changes, job requisitions, and employment offers.

Approve	Send Back	Deny	Cancel
Submit your approval and send the task downstream.	Send the task back, with specific comments to the sender.	Deny terminates the task and all previous steps. Do over.	Closes the task and saves it in your Inbox.

Archive: Process Status & History

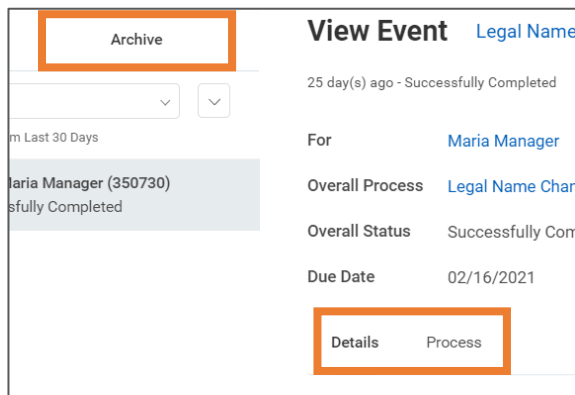
The Workday inbox contains an archive of actions completed within the last 30 days. You can also view process history and remaining steps.

From your home screen:

1. Navigate to the inbox icon.



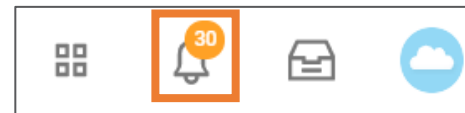
2. Click the **Archive** tab.
3. Within the event, **Details** and **Process** tabs display.
 - **Details:** Displays the data entered when initiating the transaction or what you approved when the transaction was routed to your inbox.
 - **Process:** Lists the steps that occurred prior to your involvement in the process and the next steps to be completed (if applicable). Your visibility into the process history is determined by your security access. Some steps may be hidden.



Notifications

Click the Notifications icon to view alerts and reminders. When action is taken or a process is approved that involved you, you receive a notification. Examples include:

- A job requisition you created has been posted.
- Promotion of a team member has been completed.
- Termination of a team member has been completed.



Error and Alert Messages

Within a process, Workday generates **Error** and **Alert** messages that may prompt additional action.

- **Red Error:** The process cannot be submitted until you resolve the error. Click the error message to view the specific error/s. For example, a required field that is not completed will trigger an error message.



- **Orange Alert:** The process can be submitted but may require additional attention before proceeding. For example, a compensation increase outside of range will trigger an alert and prompt additional approvals.

