



## FAQ for Managers

A list of Frequently asked questions (FAQ) is available here for managers/supervisors to complement existing Workday training and tutorials. They address questions specific to the Manager role and the My Team page. If you still don't see your question or answer on these pages, see the [Workday Support page](#) for further assistance.

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### General

#### **Q: I am a supervisor, not Manager. Should I have access to Workday?**

A: Anyone who has employees reporting to them will have the Workday role "Manager," despite your specific title at Cornell.

#### **Q: As the Manager role, what can I view and do in the system?**

A: With Workday's manager self-service, supervisors are empowered with necessary and relevant job, position, compensation, labor distribution (called costing data in Workday), performance reviews, goals, recruiting and not time and attendance information. This includes access to numerous Workday reports with information about your team to support all HR related decisions. In addition, you will be required to approve Time Entry (timesheets for hourly employees only) and Time Off Requests, which will be routed to you in your InBox.

#### **Q: What is my Inbox and how would I use it?**

Your Inbox will show notifications of tasks related to you or your employees and items that have been routed to you for an approval, such Hourly Time Entry and Time Off requests.

#### **Q: What reports are available to me?**

A: The **Custom Reports by Category** worklet from the **Home** page shows you categories of reports and tasks, to give you an idea of what is available in Workday. Please review the [Workday Manager: How to Navigate](#) guide to learn more about specific reports that may be valuable to you.

#### **Q: What is delegation and how may it be used?**

A: Delegation is used to allow another employee to review and approve on your behalf. As a manager, you may wish to delegate your Time Entry and Time Off approval responsibilities to another. This can be done for short periods of time or on an on-going basis. In addition, an entire inbox can be delegated to another individual during a leave or vacation. Please see the [Delegate Quick Reference guide](#) to walk you through the necessary steps.

## Job Information for Your Employees

#### **Q: How can I view more detailed information about each of my direct reports?**

A: Click on the **My Team** icon on your **Home** page. The My Team page is composed of windows that provide different views into your direct reports. Click on the link with their name and photo of each employee to view more details about that individual.

### **Q: How can I see what HR changes have occurred to my employee?**

A: To examine a specific employee's history, click on the **Timeline** option with the My Team icon on the homepage. This view contains a historical record of all the changes made to a worker, including changes to their job, position, compensation, etc. It is arranged by date.

### **Q: How can I view Compensation information for my employees?**

A: To examine a specific employee's compensation, click on the hyperlink with employee's name (either from the **My Team** worklet or wherever their name is visible) and then click on their Compensation tab.

### **Q: I have questions about the accuracy of one of my employee's compensation, who do I contact for help?**

A: Any questions about compensation should be directed to your local Human Resource Office.

## **Time Worked (for hourly employees and students) and Time Off Approvals**

### **Q: How can view Time Off balances for all of my employee?**

A: Workday is now the system to record and track time off balances for all both hourly and salaried employees. To view your employees' time off balance, on the **Home** page click on the **Team Time Off** worklet. There are various options, including a Time Off Leave and Calendar view. To see current balances you may wish to select the **Time Off Summary** view from that page.

### **Q: How do I approve Time Off Requests?**

A: Time Off Requests will appear in your Inbox for review and approval. To learn about the specific steps to approve time, please see the [Approving Time Off](#) job aid.

## **Performance and Goals**

### **Q: How do Performance Reviews work?**

A: When your team member has submitted their **Self-Evaluation**, you will receive a Manager Evaluation item in your Workday **Inbox**. You may also click on the **Term Performance** icon on your home page and click under View, **My Team's Performance Reviews**. This report will show you the current status of each of your direct reports. If the current step states **Complete Manager Evaluation**, you may click on that employee's performance review link to begin your evaluation.

### **Q: Can I complete my Evaluation in advance of the employee completing their Self-Evaluation?**

A: Employees begin the Performance Review process by answering the questions in the **Self-Evaluation** portion of Workday. Only you are able to view your responses while the **Self-Evaluation** is in progress. As such, it will be important to communicate deadlines so you have sufficient time to complete **Evaluations** for your direct reports.

### **Q: What do I do if one of my employees is unable to complete their Self-Evaluation?**

A: Please contact your HR representative if this situation happens. Workday does offer the ability to force a review to the next step, as needed and as appropriate but this process is managed by HR.

### **Q: How can I SEND BACK a review to an employee?**

A: If an employee needs to make further revisions after they clicked on **Submit** button, you can "**Send Back**" their review, as needed. Click on the **Term Performance** icon on your home page and click under View, **My Team's Performance Reviews**. Locate the correct review in the Performance Review column and click on the and then select **Business Process > Manual Send Back**.

### **Q: I finished the Evaluation step, now I see the Performance Meeting - To Do step, what do I do?**

A: Once you have completed your employee's Evaluation, Workday will move to the next step in the process,

the **Performance Meeting – To Do**. This is a reminder to schedule your face-to-face dialogue session with your employee. **Important:** We recommend that you leave the **To Do** step in your Inbox until after you have met with your employee. Then go back to your Inbox, open the **To Do** step and then click the **Submit** button. Once you click the **Submit** button, Workday will route the performance review back to the employee for the next step, the **Final Acknowledgement**. If you click **Submit** before your meeting, the employee will be able to view your comments.

**Q: How do I share my comments with my employee?**

A: When you are ready, you can click on the **Team Performance** icon on your homepage, then the click **Printable Reviews** button once will generate a PDF document to be printed or emailed.

**Q: My manager has always reviewed my direct reports' reviews before I meet with them. How is this done in Workday?**

A: Your manager is still able to view your direct reports' reviews, however, it is not a step in the formal performance review process. Instead, they may generate a report **Employee Review by Supervisory Organization**.

1. Type the name of the report in the search box located in the upper left-hand corner:
2. Select the organization by typing in the manager's name.
3. If you wish to see all of the employees' reviews for the whole organization, click on the Include Subordinate Organizations box.

There are additional options to filter the results, as you wish.

**Q: As a manager how do I create a goal for my team?**

A: To create a goal for your team click on the **Performance** icon. Under Action click on the **Add Goal to Employees** button and proceed to fill in the name of the employee or group of employees you want to cascade the goal to as well as enter all of the other goal related fields.

**Q: What is the difference between the Personal Goals, Goal Details, and Organizational Goals tabs?**

A: The Personal Goals tab is where all of the goals that you create for yourself, and that your manager creates or cascades to you exist. The Goal Details tab contains all of the basic goal information from the Personal Goals tab in a table-style view. The Organization Goals tab is where goals that are set at the College or Unit level would be viewed.

**Q: What is the difference between deleting a goal and marking its status as "On Hold"?**

A: When handling a goal that may not be used during a given year there are two options, one is to **Remove** the goal. Doing this would **permanently** delete the goal from Workday (with no way to recover this information). Another option is to change that goal's Status to **On Hold**. This moves the goal to the bottom of your Personal Goals profile tab where it can be updated in the future.

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