Cornell University

LEVERAGING WORKDAY AS A MANAGER

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Welcome to the Workday Manager's guide! The following document will guide managers as they navigate and use Workday as a decision-making tool.

Created by the Workday Communication, Training, and End-User Support Team; Cornell University Division of Human Resources

workday.

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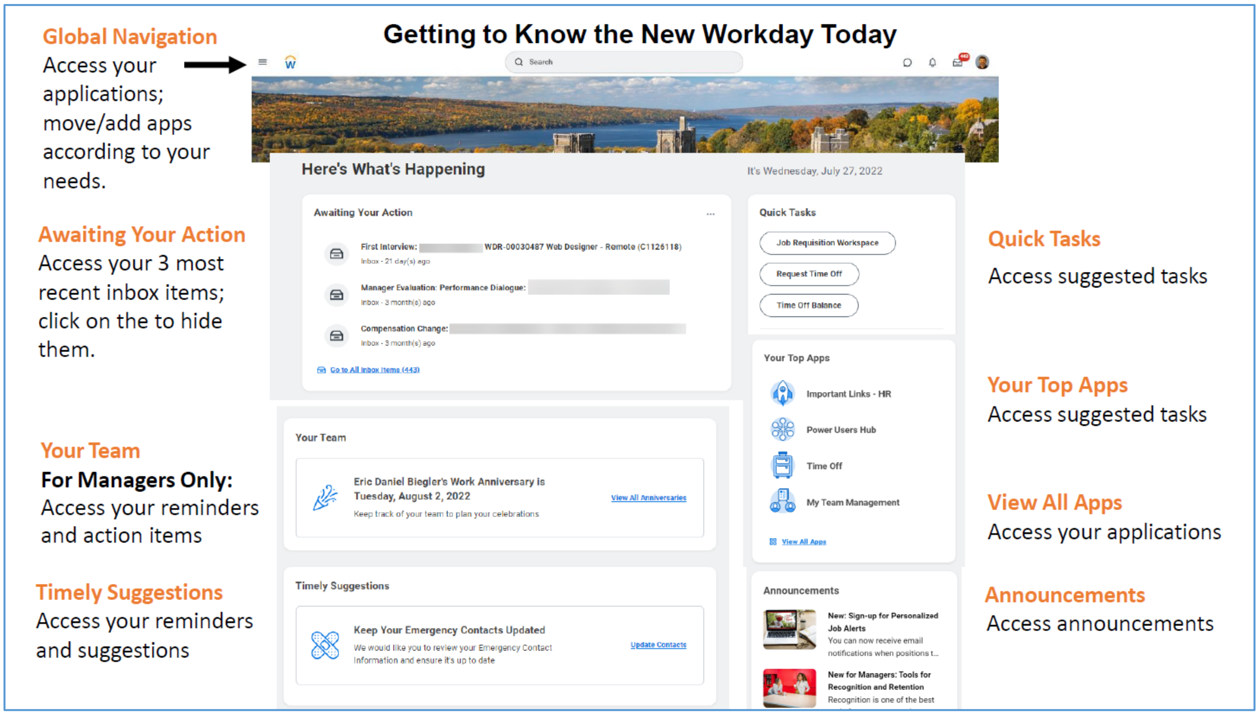
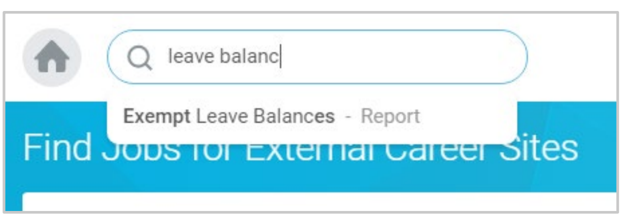
Basic Navigation

The Home page is displayed when you log into workday by going to workday.cornell.edu and clicking on **LOG IN TO WORKDAY**. Below are some of the main components of the Home page.

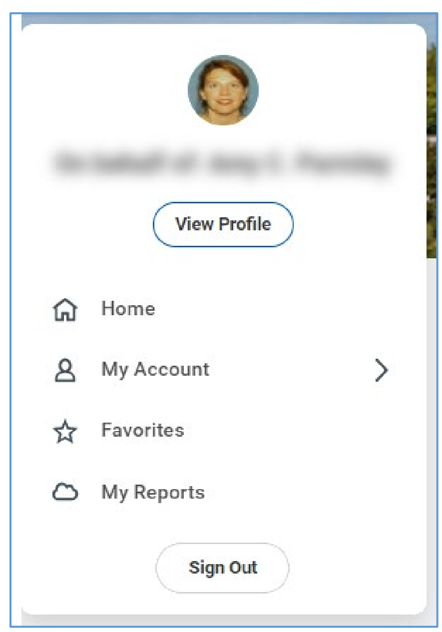


Home (Workday Icon): Click to return to the Workday home page.

Search: Search for people, tasks, reports and more. For example, if you want to search for the leave balance report, you will type in the keyword in the search box, you will see the suggestions appear as drop down. You can select a suggestion from the drop down menu or press enter to complete your search.

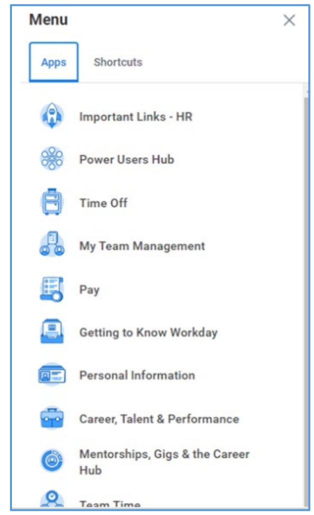


To modify your search, type "configure search" in the search bar and click on the gear icon in the lower left-hand corner, drag and drop to reorder the categories, click **Save** when finished. Click on **View Search Tips** for more information.



Profile Menu: Click to access your Profile, Home, My Account, Favorites, My Reports, or Sign Out.

Worklets (Apps)

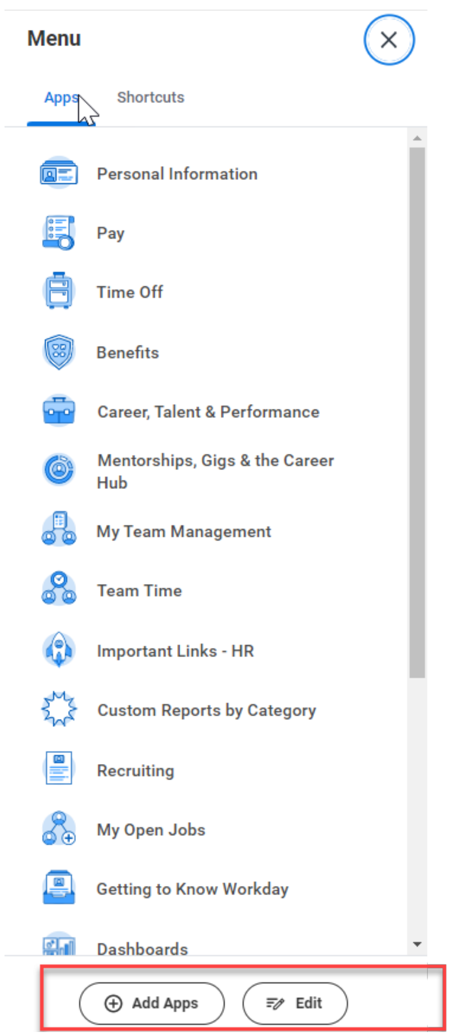


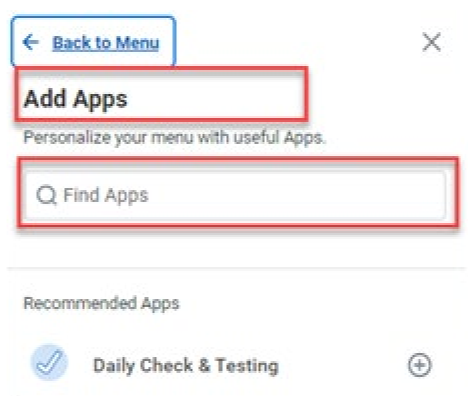
Worklets are icons that are organized by category and can be used to get easy access to the various actions and reports. As a manager you will have access to the following additional worklets:

1. **My Team**: View information about your direct reports and team.
2. **Team Time Off**: Manage time off and leave actions for your direct reports.
3. **Team performance**: Manage performance reviews for your direct reports.
4. **My Open Jobs**: View open positions that you are hiring into.

Add Worklets (Apps)

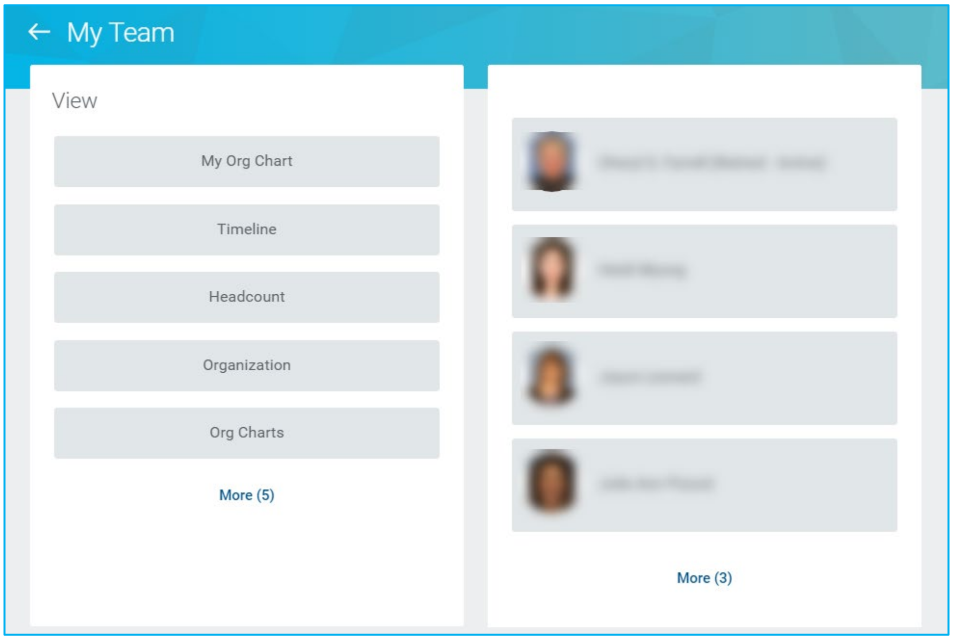
Additional worklets/apps can be added or moved to your Home page by clicking on the upper left corner **Menu** navigation bar. Click **Add Apps** to search for additional apps to add or click the **Edit** button to move the apps you most frequently use to the top of the list.





Finding Employee/Team Information

My Team



1. Click on a team member to see their profile.
2. You can click on the options under **View** section, to look up information about your team.

Based on the security you have in the system; you might have **Actions** section. This section will have tasks that you can perform on your employees, for example change job, terminate etc.

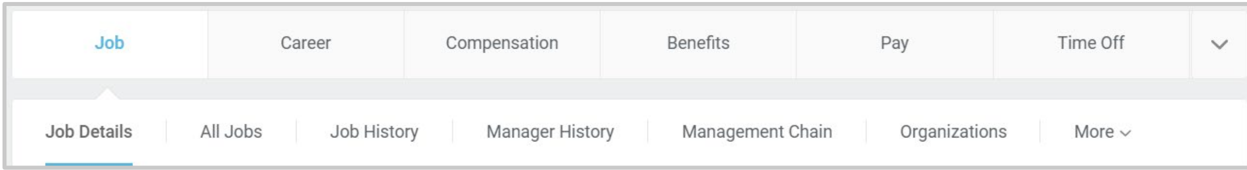
Related Actions

With almost all the objects in Workday you will notice the **Related Actions and Preview** button, which gives you access to related resources and actions for that object. When you click on this menu you get a menu of actions or views that you can perform. The available actions that appear on the menu are based on your security levels.

Employee Profile

To view employee profile:

- Click on the employee name from the **My Team** worklet.
- In the **Search** box, type the employee name, select the employee from the suggestion drop down or the search results.
- Click the **Related actions** with the employee image and click Employee's name.
- The worker/employee profile is organized into tabs. When you click on a tab, you can see the sub tabs associated with it or the information related to the tab. Below, we will look at the various tabs:



Job

You can look up the following information using this tab:

1. **Job Details**: You can look up the Employee ID, current Position Title, current Business Title, Hire Date, Years of Service and Time in Position (current) for the employee.
2. **All Jobs**: Check all current jobs held by the employee.
3. **Job History**: History of all positions held by the employee, their supervisors, job titles and other details.
4. **Manager History**: A chronological report of all supervisors for the employee.
5. **Management Chain**: A supervisory chain starting with the immediate supervisor to the president.
6. **Organizations**: To see a list of all organizations that support the position.
7. **Support Roles**: You can see the various roles that support the employee. For example, you want to see if an employee got paid or not, since you do not have access to employee's pay details, you can check under support roles to see who the employee's HR partner is and they can check the detail for you.
8. **Worker History**: Here you will find all events/transactions related to the employee. You can choose to see the transactions by category by clicking on **View Worker History By Category**.

Career

Click on this tab to view the employees **Professional Profile** and **Certifications**. You will see information under these tabs only if the employee has chosen to add information here.

Compensation

Click on this tab to view compensation information for the employee like Total Base Pay and Allowances if any.

Time Off

You can see a list of all transactions related to the employee under the **Time Off and Leave Requests** tab. Also, under the **Time Off balance** tab, you can check the employee's leave balances.

Contact

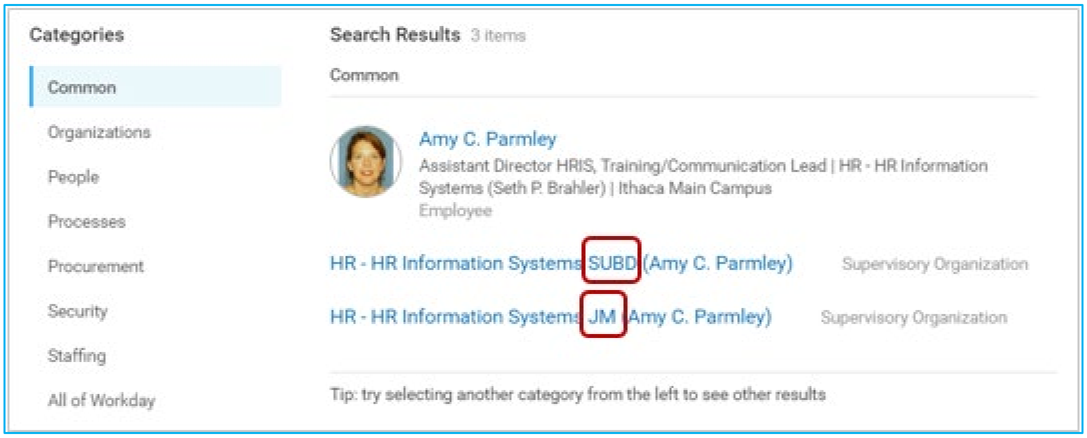
On this tab you can see the employee's Home and Work Contact Information. This includes address, phone numbers and email address.

Performance

You can view the past years' performance review under this tab. It shows 2 sections one for **Completed** reviews and the other for **In Progress** reviews.

Navigating Supervisory Organizations

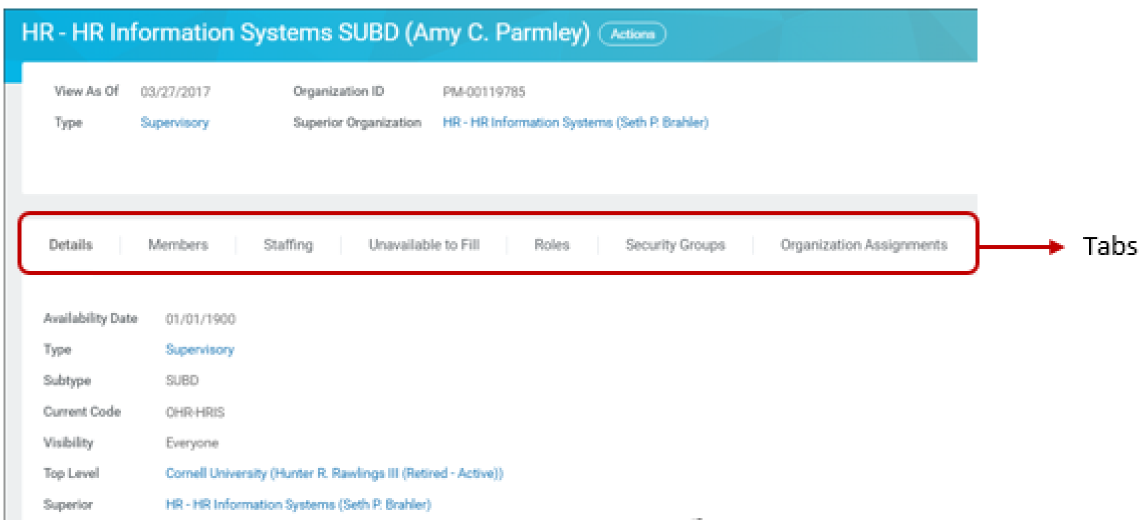
To search for staffing information for yourself or another supervisory org, type the name of the supervisor or the organization (for example, HR information systems, Cornell university hospital for animals, School of continuing education etc.) that you want to look up in the Search Box and press enter.



You will notice from the image above that the supervisory organization appears with 2 designations.

- **JM**: holds staffing information for temps, casuals, students and sometimes academic employees.
- **SUBD**: Holds staffing information for classified and banded positions.

To get details on the organization, click the link to the supervisory organization. Typically, you will click the SUBD org as it holds staffing information for your supervisory organization.



Details: Shows you details of the supervisory org including the name of the Superior org.

Members: Listing of all staff members in the org

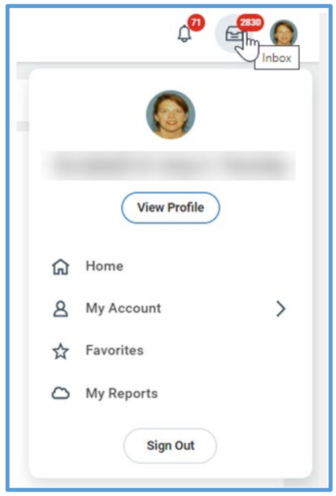
Staffing: Listing of positions that are available to fill and a job requisition is in progress.

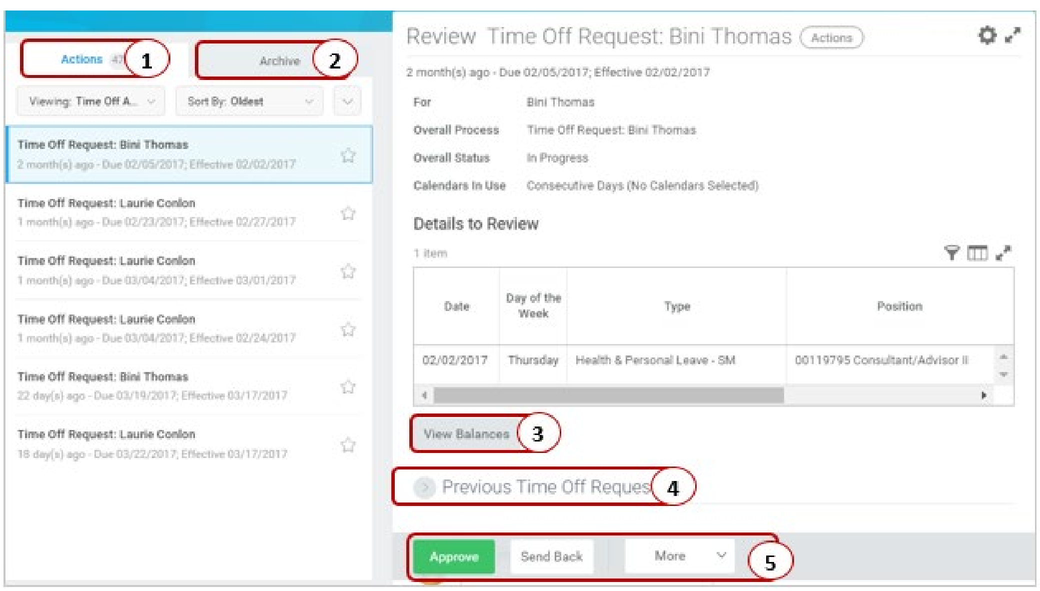
Unavailable to Fill: Shows all budgeted positions under the org that are not currently being filled.

Roles: You can check the various roles that support the organization including HR partner, Compensation partner and others.

Working from your Inbox

The Inbox is the centralized location where you receive actionable tasks. As a manager one of the tasks that you will perform is review/approve time-off. These requests appear in the Workday Inbox.





Approve Time Off

1. **Actions**: Items that require completion.
2. **Archive**: Status of items completed and historical actions.
3. **View Balances**: See leave balances for the employee.
4. **Previous Time Off Requests**: See a list of all previous time off requests.
5. **Approve, Send Back, More (Deny, Cancel)**: **Approve** to approve time off, **Send Back** if there are edits to the time off request, **Deny** to deny the time off request, **Cancel** the action and get back to it later.

Reports

Workday provides many reports that could be used for summarizing, monitoring, and making decisions related to employees that you manage. In this job aid we go through some of the reports in Workday that might be useful for you as managers.

Roles

Access to the reports is based on the type of managerial role you have in the system. Below is a table that shows the various types of managers:

Role	Description
Administrative Manager	Role used to grant access to HR job data to employees that are not in the HR role. These managers have access to recruitment, performance dialogue and compensation data.
Manager	Role that supervises the employees in an organization.
Manager with more than one level	Role that supervises multiple levels of employees rolling into an organization. (**Note**: this is not a Workday role).

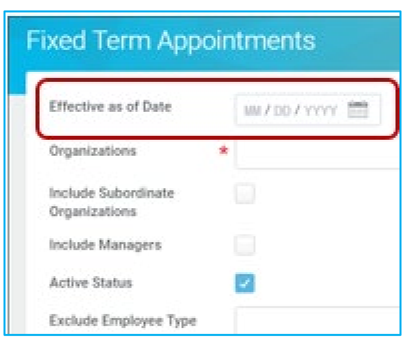
To check the roles, you can open the ***Workers I support*** report and in **Roles** field look under **All Supervisory Roles**.

Type

The reports can also be classified based on the date prompt in the report as

- Point in time report: Choose a date and see data in the past, current or future.
- Current report: No date prompt, generates report based on current date.

For example, the Fixed Term Appointments report has the **Effective as of Date** field in which we choose a date to see the data at that point in time. The Headcount & Open Position Analysis report runs based on current date.



Categories

There are broadly five categories of reports you have access to:

- Workforce
- Time Off
- Performance Dialogue
- Compensation
- Recruiting

List of Reports

Workforce

Report Name	Type	Who(Roles)	Why
Headcount and Open Position Analysis**	Current	All Manager roles	To see a list of filled positions(headcount) and open position by supervisory org.
Positions and their FTE	Point in time	All Manager roles	To see scheduled weekly hours, FTE (full-time equivalent) for all employees in a supervisory organization.
Fixed Term Appointments	Point in time	All Manager roles	To see the term end date if you have employees who are appointed with an employment end date.
My Direct Reports Staffing History	Current	All Manager roles	To see all staffing transactions for employees in your supervisory organization.
Headcount by Years of Service	Current	All Manager roles	To see employees years of service for your supervisory org/s selected.
Terminations	Time period	All managers	To see a list of all employee terminations in the supervisory organization(s) for a given time period or date range.
Comprehensive Informational Extract	Point in time	Administrative managers	To see personal, compensation, demographic and job related information of employees in a supervisory organization.

Compensation

Report Name	Type	Who(Roles)	Why
Direct Reports Compensation Summary	Current	Managers, managers with more than one level	To see employee compensation for each direct report currently in your organization. Enables you to manage compensation at a broad level across your organization.
Compensation Summary	Point in time	Managers with more than one level	To see summary information, overall compensation, and average employee compensation for one or more organizations that you manage or support and, optionally you can include the subordinate organizations.
Compensation Grade Profile	Point in time	All managers	To see compensation for a job profile.
Compensation Changes - SIP	Current	All managers	To view all SIP related transactions by supervisory organization and were processed within the current fiscal year.

There is a similar report **Headcount & Open Position Analysis - With Prompts for administrative managers that lets you select **Organizations**.

Time Off

Report Name	Type	Who(Roles)	Why
Exempt Leave Balances	Current	All managers	To see a complete review of all balances for exempt employees.
Exempt Vacation Balances over max	Current	All managers	To view a list of exempt employees who will exceed their maximum vacation accrual at the time of the system generated cutter.

Recruiting

Report Name	Type	Who(Roles)	Why
My Open Jobs	Current	All managers	To view a list of your open job requisitions.
Time to Fill	Point in time	All managers	To view the time (in days) from when requisition was posted to the time hire was completed.

Performance Dialogue

Report Name	Type	Who(Roles)	Why
Performance Dialogue Summary - Manager	Current	All managers	To see a summary of all the Performance Dialogues based on Supervisory Organization and Date Range
Performance Dialogue Review and Compliance Overview - Manager	Current	All managers	To see the Review and Compliance overview for the employees in a Supervisory Organization.
Performance Dialogue Ratings Overview - Manager	Current	All managers	To view the number of Performance Dialogues by Supervisory Organization and Rating (Successful, Needs Improvement, etc.)

Other Reports

Here is a list of reports that you might find useful:

1. Birthdays for this week and next
2. Headcount
3. Headcount by years of experience
4. Staffing activity
5. Compensation plan expected end date

Add a Report to Favorites Worklet

1. Search Manage Favorites
2. On the Manage Favorites page, search for the report to be added to Favorites worklet under Favorite Tasks/Reports or Favorite Custom Reports. Click OK.