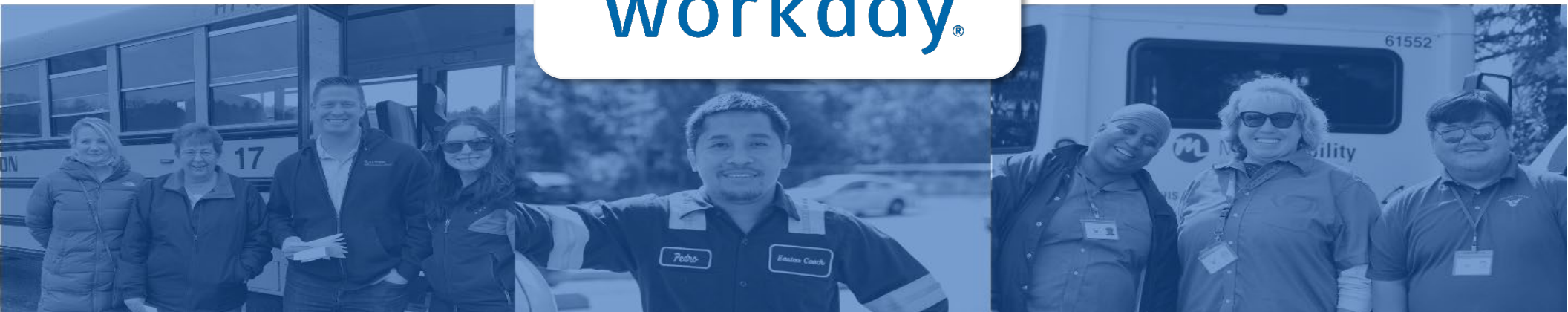


# WELCOME to



A new HR, Payroll, and Recruiting tool  
designed to make your life easier!

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## MANAGER GUIDE

### Introduction

Welcome to the *Workday Manager User Guide*.

This user guide will teach you how to navigate Workday and complete tasks within it. Keep in mind that processes are subject to change, so it is recommended to use the online version of the user guide instead of printing. Save a bookmark to the [Welcome to Workday! - Beacon](#) page for quick reference.

### About the Manager User Guide

This user guide provides step-by-step processes with visual aids to help you perform all task in Workday.

The Manager section includes step-by-step guidelines for the tasks that managers can perform for their employees.

### Quick Tips

Here are a few quick tips to help you get started:

- A brief explanation about the task is provided at the beginning of every process.
- Bolded words indicate they are an application or an action item to click on.
- Orange outlined boxes in the screenshots show you where on the page to click or fill in boxes.
- Every page of the manual has a header that includes the section, title of the job aid and who can perform the task (i.e. Employee or Manager)
- Return to the Table of Contents at any time by clicking **Back To Top** at the bottom of each section page.

### What is Workday?

Workday is a new Human Resource tool that will simplify and streamline everything related to HR, including:

- Requesting and scheduling time off
- Viewing and changing paystubs and personal information
- Managing your teams
- Coordinated Recruiting
- eLearning resources to help you learn and grow



<https://www.youtube.com/watch?v=FG46Fx17tAU>

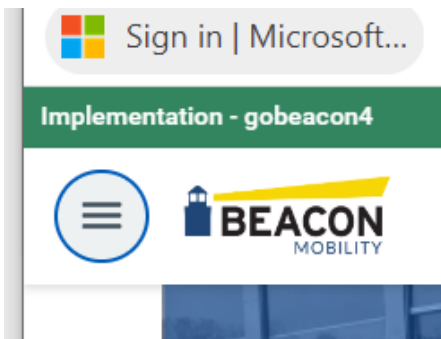
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# Dashboard: Navigation

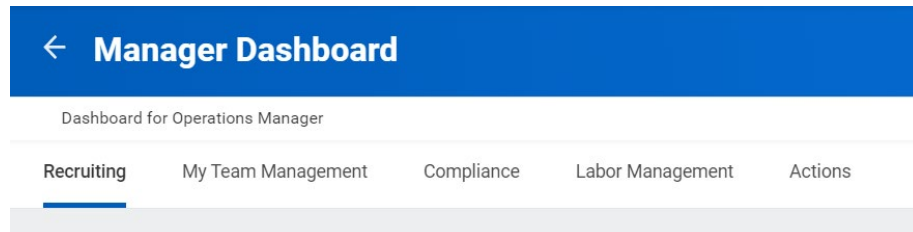
This article walks you through utilizing of the Manager Dashboard.

## Team Management

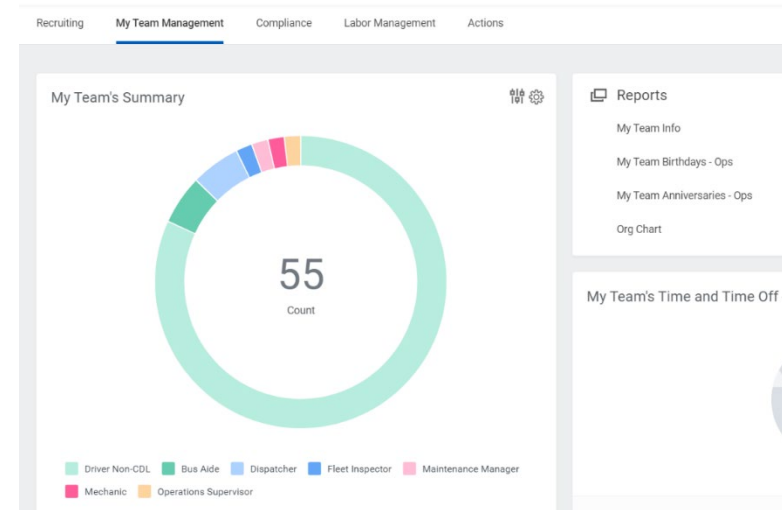
1. Log In to your Workday Account.  
<https://www.myworkday.com/gobeacon/login.html>
2. Click the *Navigation* menu in the top left corner (or *View All Apps* on the home page) and select the **Personal Information** application.



The Manager Dashboard acts as a toolkit for leaders to complete a multitude of tasks in Workday:



**My Team Management** This tab displays reports to Learning requirements, Team Birthdays & Anniversaries, and Time Off.



**Actions** The Actions tab has a list of task Managers can access to easily make changes to their direct reports.

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## MANAGER GUIDE

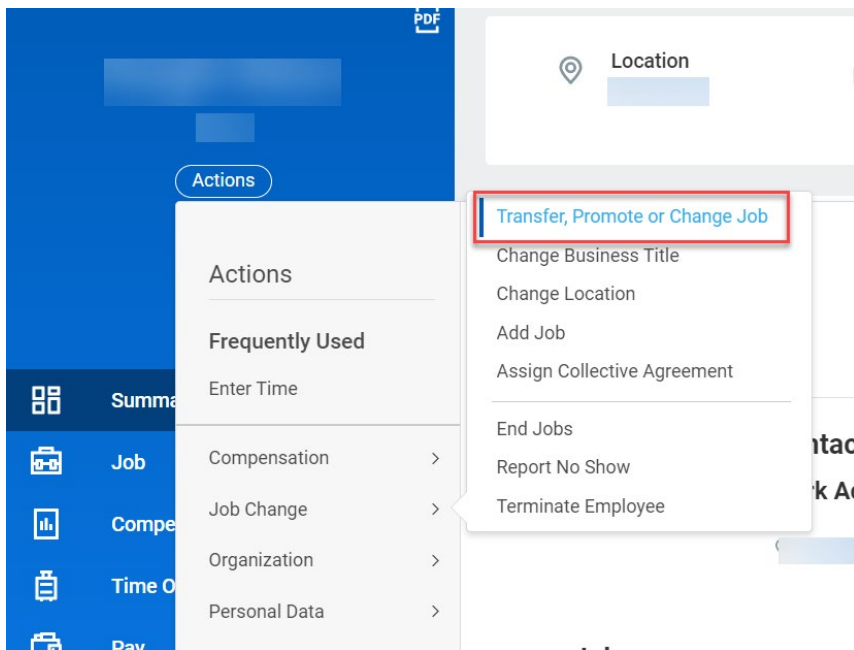
### Employee Changes/Compensation


If a promotion or other job change is within the same department, it is a one-person task. If the change involves a transfer between departments, it is a two person- process. The manager in the current supervisory organization initiates the transfer of the employee to the receiving manager. The manager in the incoming supervisory organization performs another set of actions to receive the employee.

#### Job Change

From the targeted employee's profile:

1. Click the **Actions** Button 
2. Select **Job Change > Transfer, Promote, or Change Job**.



3. From the "What do you want to do?" field, click the **prompt** icon  to select the option most relevant to your needs.

4. Click **OK**, then **Start** to edit details in the job change process.
5. Once you have made all your edits, click **Submit**.
6. Workday displays a pop-up indicating you have completed the task. From the pop-up, click **View Details**.
7. Click the **Details and Process** arrow and navigate to the **Process** tab to view next steps in the Change Job business process. The Status field indicates whether there are any required actions or steps to complete.



**Note:** You can also manage job changes by navigating to the My Team Management application. From the Actions section, select Start Job Change to initiate a location change, transfer a worker to another manager, promote a worker, or combine several changes related to the Job Change task.

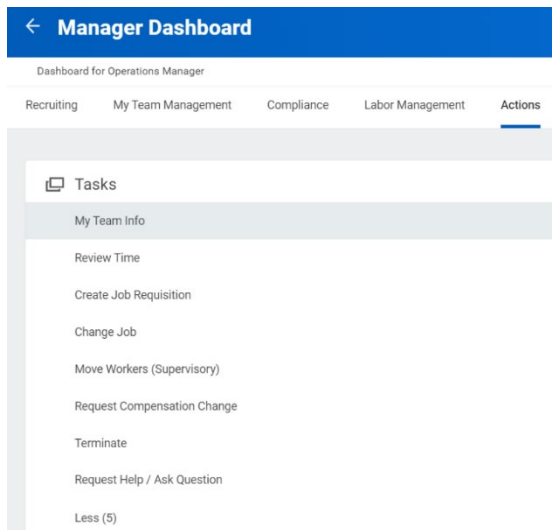
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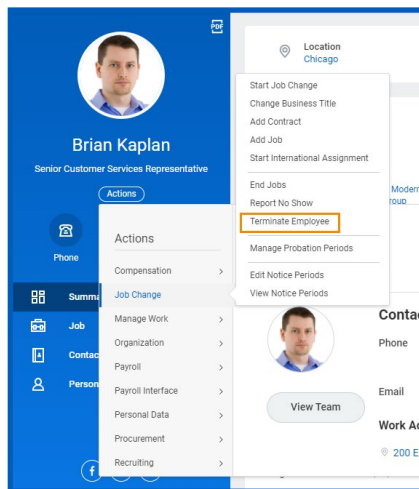
### Termination

As a manager, you may have to terminate an employee after you ask them to leave or if the employee resigns.

1. Click the **Actions** button > Select **Job Change** >



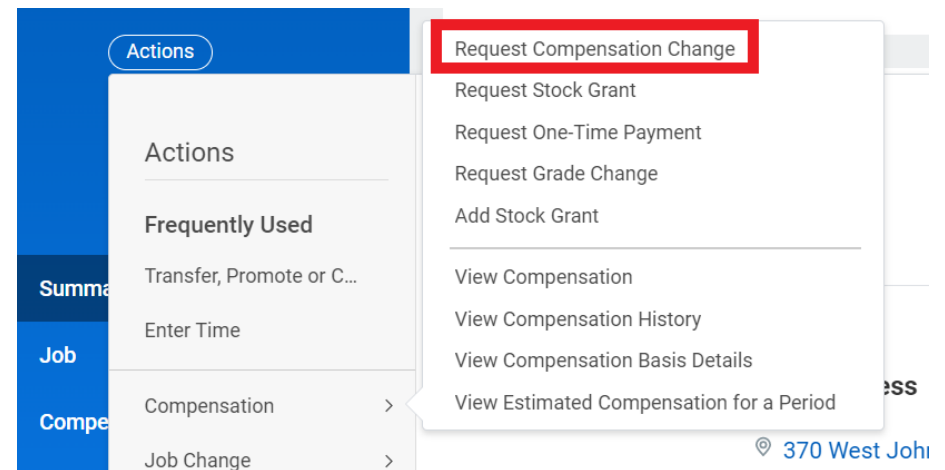
2. **Terminate Employee** to display the Terminate Employee page.



3. Complete the required termination information. Here, you will select a termination reason and date. The employee will still have an active status until midnight on the termination date.
4. Indicate whether you will close the position or if the position is available for overlap after this termination. Position overlap allows you to hire a replacement worker into the same position before the current worker leaves.
5. Click **Submit**.

### Request a Compensation Change

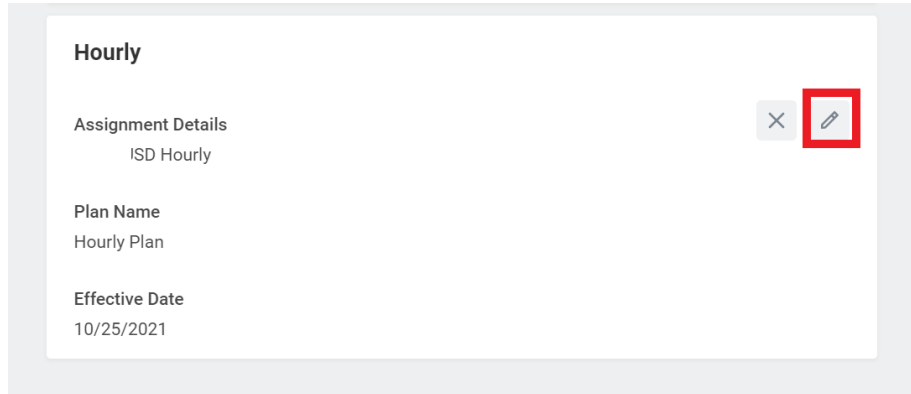
1. Select the Related **Actions** icon next to the employee's name on their Worker Profile.
2. Click on **Compensation** > **Request Compensation Change**.



3. Enter the desired effective date and click **Submit**.
4. Use the pencil to edit the intended field and change the **pay rate**.

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5. Once you have completed, click **Submit**.

### Review and Approve Time

This will be applicable if you are managing hourly people who are tracking time in Workday.

1. **Login** to Workday.
2. Click on **View All Apps**
3. Click on the **Team Time and Absence** worklet.
4. Click on **Review Time** under Time Tracking Tasks
5. As a Manager, the Review my direct reports only box will be checked. All Workers will also be selected.
6. Set the Date to a day within the last pay period and select Ok.
  - a) A listing of timesheets will display for your employees.
7. For timesheets that have been submitted for approval, you can approve the time submitted by clicking on the checkbox next to the employee's name and selecting Approve.



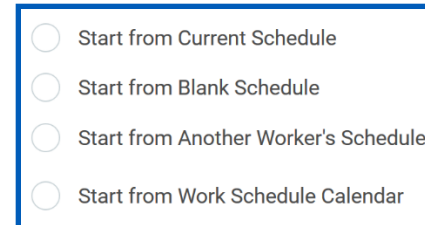
Note: You can also approve time by going to your Workday Inbox.

### Assign a Work Schedule

Managers can create, edit, and assign worker-specific schedules to workers using the Assign Work Schedule task. The options available depend on your organization's configuration and business process security policies.

To assign a work schedule:

1. Search for and select the **Assign Work Schedule** task.
2. Select the Worker and **Start Date** for the schedule assignment.
3. Optionally, select an **End Date**.
4. Choose between an existing schedule or a blank schedule.



5. Click **OK** to proceed.
6. In the Schedule Patterns grid, you can use the **Add Row** and **Remove Row** icons to add or delete weeks from the schedule pattern.

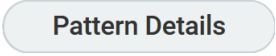
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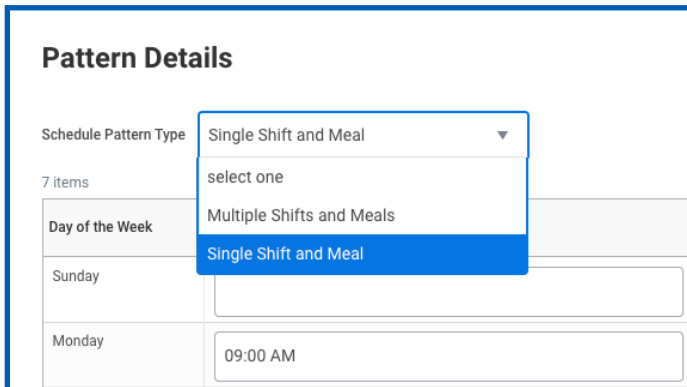


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**Example:** If you want to give a worker Friday off every other week, create a second row on the grid and enter no hours for Friday. The work schedule will alternate between the two schedule rows.

7. In the Order column, use the arrows to move rows up and down within the grid.
8. To define shift start and end times, click the **Pattern Details** button  on the appropriate row.
9. Before you begin defining pattern details, you need to select a Schedule Pattern Type.
  - a. If you are defining a simple schedule with only one meal, the default selection of Single Shift and Meal is appropriate.
  - b. If you need to define multiple shifts or multiple meals, select Multiple Shifts and Meals.



| Day of the Week | Schedule Pattern Type |
|-----------------|-----------------------|
| Sunday          | Single Shift and Meal |
| Monday          | 09:00 AM              |

10. Define the start and end times for shifts and meals each day or indicate a 24-hour shift by selecting the **24-Hour Shift** checkbox.
11. When you are satisfied with your selections, click **Done**, then **OK** to save the schedule.


### View a Worker's Schedule

To confirm the schedule assigned correctly, you can use the View Schedule for Worker report.

1. Search for and select the **View Schedule for Worker** report.
2. Select the Worker and Date.
3. Click **OK** to proceed.
4. Verify that the worker's schedule is displayed correctly on the calendar.

### View a Worker's Schedule History

You can use the Schedule History for Worker report to view the history of schedule assignment events.

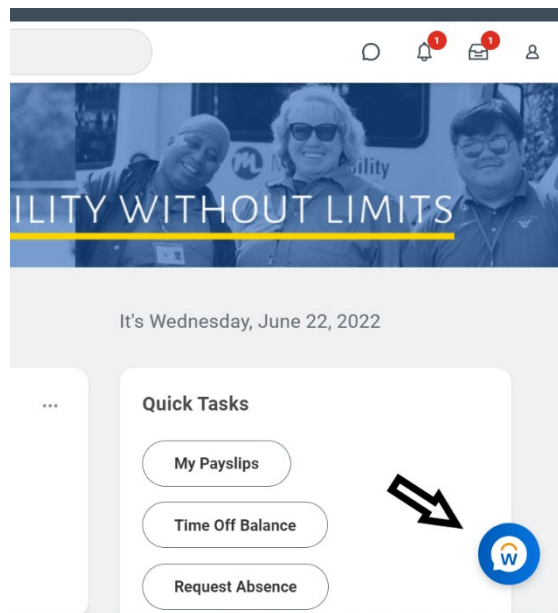
1. Search for and select the **Schedule History for Worker** report.
2. Select the **Worker**.
3. Click **OK** to proceed.
4. Review the schedule events in the grid. To see event details, click an event's **Related Actions** .

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## MANAGER GUIDE

# Workday Assistant for Managers

Workday Assistant is a tool you can utilize as a manager to quickly jump to an Action for your own questions but also to take action on your direct reports. The Workday Assistant can be found on the bottom right-hand corner of your screen.



| Staffing Changes  |
|---|
| <ul style="list-style-type: none"><li>• Change business title</li><li>• Change cost center</li><li>• Change job profile</li><li>• Change location</li><li>• Change manager/supervisory organization</li></ul> |

| Time Tracking       | Workday Help  |
|---------------------|---------------|
| Approve Time Sheets | Create a Case |

| Team Management   | <ul style="list-style-type: none"><li>• View direct reports</li><li>• View my team's check in or out</li><li>• View team anniversaries</li><li>• View team birthdays</li><li>• View team time off</li><li>• View team's time in position</li></ul> |
|---|--|
| <ul style="list-style-type: none"><li>• View direct report's anniversary</li><li>• View direct report's birthday</li><li>• View direct report's check in or out</li><li>• View direct report's time off</li></ul> |  |

In the following example, “**Change Job**”, was entered in the Assistant and the below options were returned. Managers may follow the prompts provided to complete the necessary actions through the Workday Assistant.

←

Workday Assistant

×

Workday Assistant 2:29 PM

There are a few ways we can go.

Change manager/supervisory organizati...

Change cost center

Change location

Change job profile

Change business title

Search Articles

Cancel

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