

# What Can a Manager Do in Workday

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## 1. DEFINITIONS

| Word or Phrase                             | Definition                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subordinate Teammate                       | A <b>subordinate teammate</b> is someone that you supervise.                                                                                                                                                                                                                                                                                                                                       |
| Supervisory Organization (a.k.a., Sup Org) | A <b>Supervisory Organization</b> "contains" teammates and/or vacant positions. Sup Orgs create the reporting structure in Workday. The top level is the actual agency. From there, the Sup Orgs, and Subordinate Sup Orgs, create the reporting structure of the employees within those Sup Orgs.                                                                                                 |
| Widget                                     | <b>Widget</b> is a broad term that can refer to either any GUI (graphical user interface) element or a tiny application that can display information and/or interact with the user. A widget can be as simple as a button, scroll bar, label, dialog box, or check box; or it can be something slightly more sophisticated like a search box, tiny map, clock, visitor counter, or unit converter. |
| Workday Role Assignment                    | In Workday, Role Assignments manage the things that teammates can do and/or see. Some Roles allow one to do certain actions (for example, HR Partners can hire, create positions, or Move Workers from one Sup Org to another), or a Role can allow one to see additional information that may not be seen by a "regular" system user. A few examples are HR Analyst, HR Partner, or HR Review.    |
| Worklet                                    | A <b>worklet</b> is a report that can be displayed in a "tile" on Workday home pages and provides quick access to frequently referenced data and tasks                                                                                                                                                                                                                                             |

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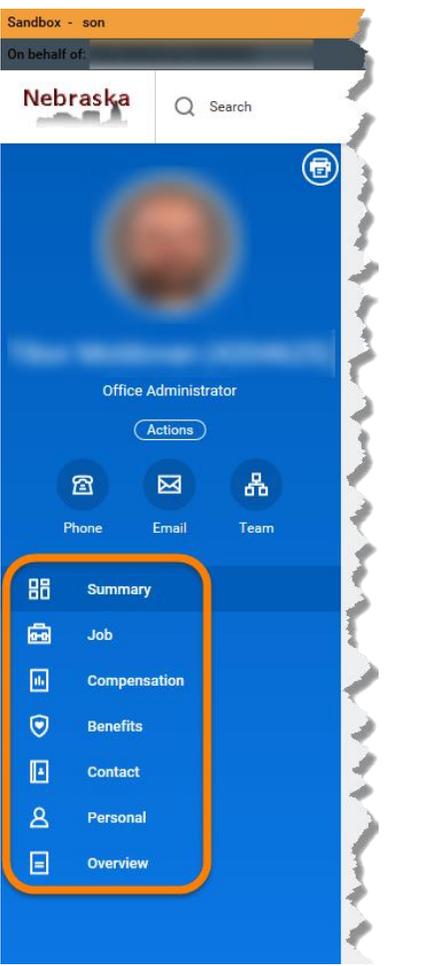
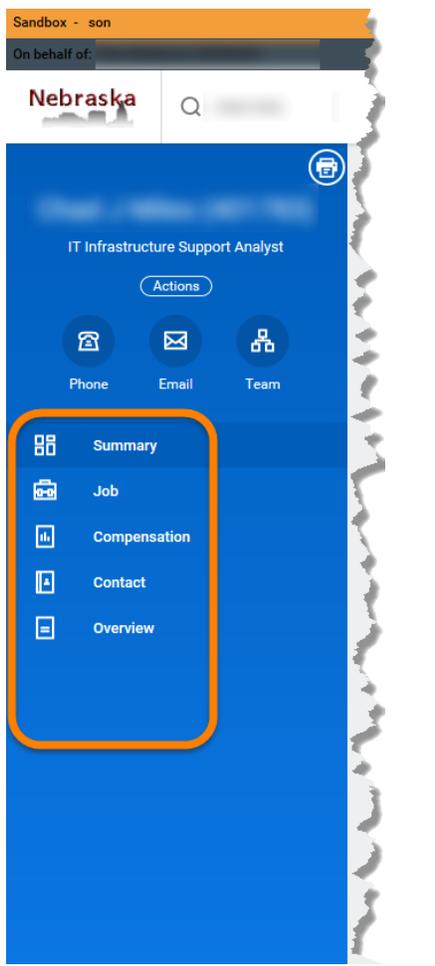
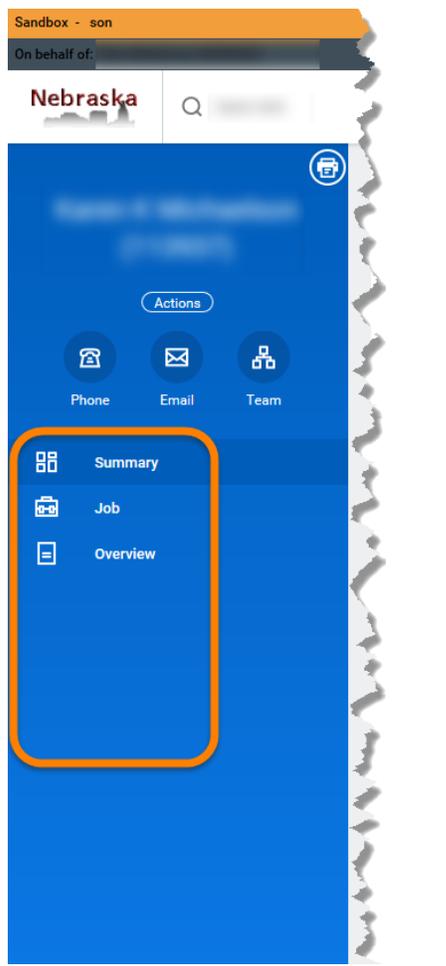
## 2. PURPOSE

This will provide a list of things that a Manager / Supervisor can see about her/his subordinate teammates in Workday. What a person sees is dependent upon her/his “relationship” to the other person, whether it be the teammate’s own record, or that of a subordinate teammate, or that of a teammate in another agency.

In addition, the items on the right side of page will vary, depending on the record one is viewing, and depending on one’s Role Assignments.

The table below shows examples of the differences of what a person will see when viewing records in Workday. Note the differences in the items in the blue menu. In addition, when you click any of “blue menu” items, what you see will vary, depending on whose record you are viewing, and your Workday Role Assignments.

- On your record, you should be able to see everything.
- For your teammate subordinates, you will see less information. However, you will still be able to see the information you need to see.
- For teammates in other agencies, you will see even less information than outlined above.

|                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| This is a teammate viewing her/his own record (NOTE: this person has a photo on her/his record).                                                                                                                                                                                                            | This is the same teammate viewing the record of one of her/his Subordinate teammates.                                                                                                                                                                                                           | This is the same teammate viewing the record of a teammate in another agency.                                                                                                                                              |
|  <p>Sandbox - son<br/>On behalf of:<br/>Nebraska Search</p> <p>Office Administrator</p> <p>Actions</p> <p>Phone Email Team</p> <p>Summary<br/>Job<br/>Compensation<br/>Benefits<br/>Contact<br/>Personal<br/>Overview</p> |  <p>Sandbox - son<br/>On behalf of:<br/>Nebraska Search</p> <p>IT Infrastructure Support Analyst</p> <p>Actions</p> <p>Phone Email Team</p> <p>Summary<br/>Job<br/>Compensation<br/>Contact<br/>Overview</p> |  <p>Sandbox - son<br/>On behalf of:<br/>Nebraska Search</p> <p>Actions</p> <p>Phone Email Team</p> <p>Summary<br/>Job<br/>Overview</p> |

### **3. FIND MY TEAMMATES**

1. You can locate teammates in a couple of ways.
  - a) Click in the Search box (upper left-hand corner). Type one of the following:
    - i) Part, or all, of the person's name. You do not have to type the entire name, but what you do type you need to spell correctly.

NOTE: We recommend not typing single letters, like the middle initial, because Workday will search for all instances of that letter.
    - ii) The Employee ID (i.e., EmpID) for the person.
    - iii) While you are typing, you will see some results show up below where you are typing. If one of the results is the person for whom you are looking, you can click that item.
2. To locate your subordinate teammates, from your Workday Home Page (the Nebraska icon in the upper left-hand corner), and click the My Team icon, under Applications, on the right side of the page.
  - a) On the My Team page, look towards the bottom of the screen and you should see your subordinate teammates listed. Find the one you want and click to open that person's employee record.

### **4. FIND MY TEAMMATES' EMERGENCY CONTACT INFORMATION**

1. You can find your teammates' Emergency Contact Information in a few different ways.
  - a) Search for, and click, the teammate record, using her/his name or the EmpID.
    - i) On that page, click the Contact link on the left side of the page.
    - ii) On the right side, click the Emergency Contacts header.
  - b) Type the word emergency in the Search box, and then click Emergency Contacts for Worker.
    - i) On the next screen, either
      - (1) Type part of the teammate's name (see 3.1.a.i about spelling), then press enter OR
      - (2) Click the Prompt icon, and navigate to My Team, then click one of the teammates to locate her/his Emergency Contacts.
  - c) Run a report (**My Employee Emergency Contacts (SoN)**). See the Run Reports section below.

### **5. INFORMATION ABOUT MY TEAMMATES**

1. If the person is someone you supervise, you will be able to see the following information about that person:
  - a) Her/his employee record, including:
    - i) Summary.
    - ii) Job.
    - iii) Compensation.
    - iv) Contact.
    - v) Overview (which contains a list of the above items).

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- b) The menu items in the blue bar on the left of the screen contains links to each of the items shown above. When you click one of them, you will be able to see:
  - i) **Summary**, which is General information about that employee's job, i.e.,
    - (1) To whom she/he reports.
    - (2) Work Location, and address.
    - (3) Work Contact information, i.e., Work Phone Number and Work Email Address.
    - (4) Other work-related date information.
  - ii) **Job**, including:
    - (1) Job Details.
    - (2) Manager History.
    - (3) Management Chain.
    - (4) Organizations.
    - (5) Worker History.
  - iii) **Compensation**, including:
    - (1) Compensation.
    - (2) Pay Change History.
  - iv) **Contact**, including:
    - (1) Contact information, including Home Contact Information and Work Contact Information.
    - (2) Emergency Contacts.
    - (3) Support Roles, i.e., those people who support that person in Workday, as far as Benefits, HR related activities, and other related Roles for Workday.
- 2. If the person is NOT on your team, you will ONLY see the following information about that person:
  - a) Her/his employee record, including:
    - i) **Summary**.
      - (1) Less information than above in 3.1.a.i.
    - ii) **Job**.
      - (1) Job Details.
      - (2) Management Chain.
      - (3) Organizations.
    - iii) **Overview** (which contains links that are included in the above items).

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### 6. VIEW MY ORG CHART

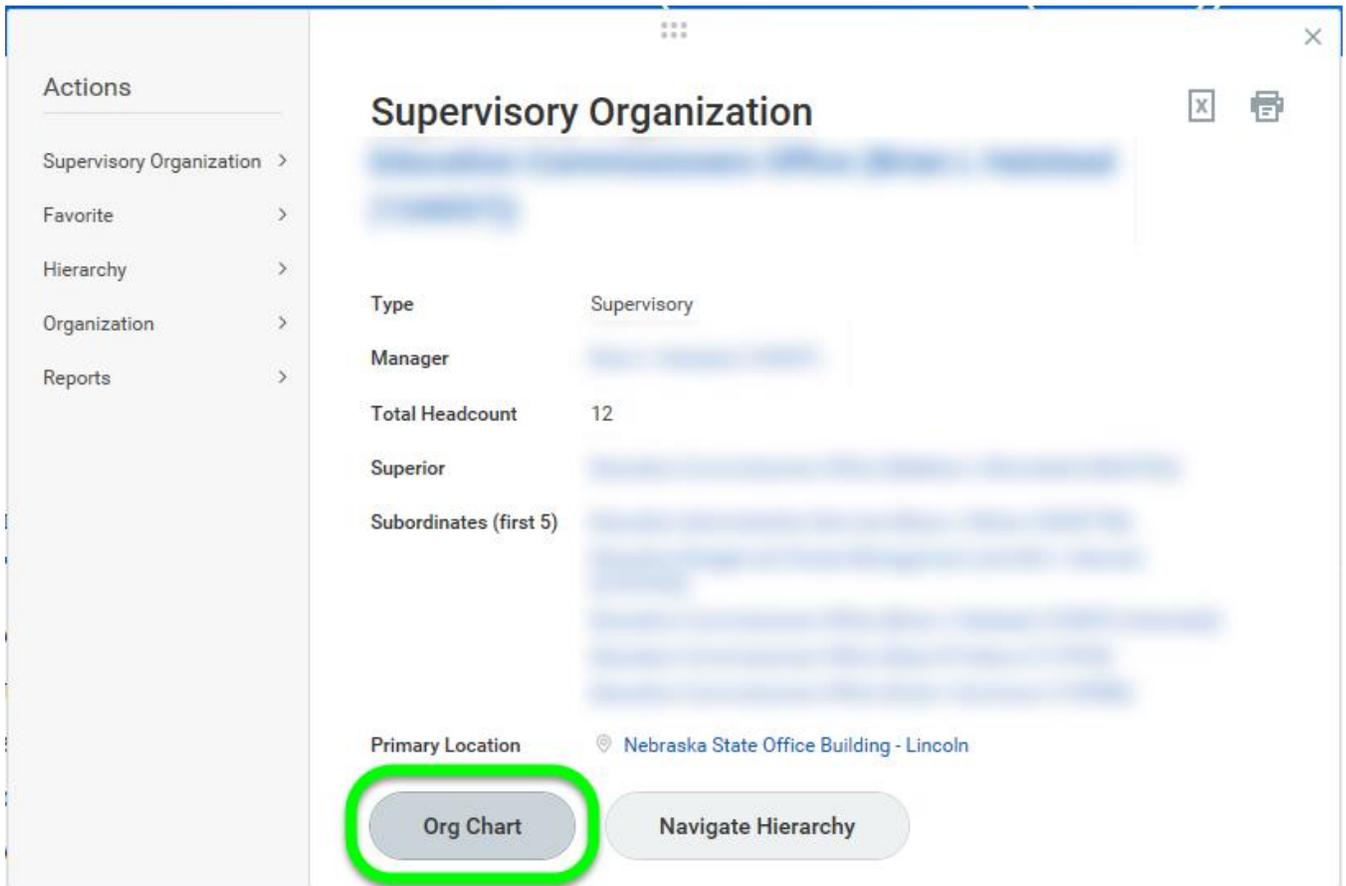
1. In the upper right-hand corner of the page, click your “profile” button ... either the blue and white cloud icon or, if you have a photo on your record, the miniature version of your photo.
2. Click View Profile. This is your employee record, and includes information about you and your State employment.

The screenshot displays the Workday interface for an employee profile. The top navigation bar includes the 'Nebraska' logo and a search bar. The left sidebar contains a navigation menu with options: Summary, Job, Compensation, Benefits, Contact, Personal, and Overview. The main content area is divided into three columns. The first column shows the employee's profile picture and title 'Office Administrator'. The second column contains 'Manager' and 'Supervisory Organization' (highlighted with a green rectangle). The third column displays 'Job Details' with various fields: Employee ID, Organization, Position, Business Title (Office Administrator), Job Profile (EDR011 - Administrator), Employee Type (Regular), Time Type (Full time), FTE (100.00%), Location (Nebraska State Office Building - Lincoln), Hire Date (06/09/2006), Original Hire Date (09/29/2003), Continuous Service Date (09/29/2003), Years of Service (15.86), Time in Position (9.76 year(s)), and Time in Job Profile (1.52 year(s)). A 'Contact Information - Public' section is visible at the bottom.

3. On that screen, you will see an item named Supervisory Organization. See the green rectangle in the screenshot above. Click that link.

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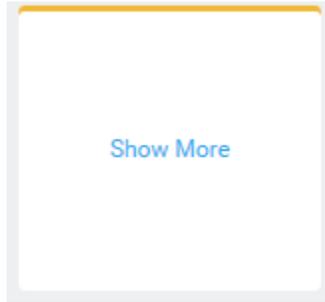
4. On the next screen, click the Actions icon to the right of the name of that Supervisory Org, then go to and click the Org Chart button (lower left corner of that dialog box – see green rectangle below).



5. You will be able to see information about THAT Organization.
6. You can view information about the teammates in that organization and the structure of the Organization on any Supervisory Organization in Workday.
7. You will see Supervisory Organization, any teammates that report to the Manager of that Org (these have a blue bar at the top of the widget), and any Supervisory Organizations that are “assigned to” that Manager (these have an orange bar at the top of the widget).
8. You can click any of those widgets to drill down to see information on the teammates and/or the other Supervisory Organizations.
9. To go up, or down, a level, from the Org Chart, you can either
  - a) Hover over the page, and scroll with the scroll button on your mouse, or
  - b) Click in the menu list in the upper right-hand corner of the page, which shows the structure of the organizations. You will have to scroll a bit on the page to see the organization structure menu.

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- c) On some of the lists, you may not immediately see everything for that organization. Click the “Show More” link to see more of the Sup Orgs in that Org or more teammates.



### 10. While you are viewing the Organization structure ...

- a) If you want to view a specific teammate, hover over and click the teammate’s name. You may be limited as to what you see when you click an employee record, depending on your Workday Role Assignments and whether or not you supervise the teammate.
- b) If you want to view more information about a Supervisory Organization, hover over and click the name of that Sup Org.

## 7. RUN REPORTS

1. In Workday, teammates can see, and run, a variety of reports. In most cases, “regular” teammates will be able to see reports, but not run them, because they do not have the Security or Role Assignment, OR she/he may be able to run a report, but not see all of the information contained in the report, again, because of Security or Role Assignment.
2. To locate all Custom Reports you CAN see, do this:
  - a) From your Workday Home Page (the Nebraska icon in the upper left-hand corner), click the gear icon (towards the top of the page, on the right side).



- b) On the right side, under Optional Worklets, click the plus sign in the table.
- c) In the Worklets search box, type the word custom, and then press enter. Custom Reports should populate.
- d) Click OK.
- e) Click Done. This will return you to your Workday Home Page.
- f) In the Applications section, you will now see a Custom Reports worklet. Click that icon.
  - i) You will see a list of five Custom Reports.
  - ii) To expand the list, click **More** (with a number in parentheses ... this is the count of the Custom Reports you can see) underneath the list.
  - iii) Once you expand the list, you can scroll the page to see all of the reports, OR,
  - iv) You can search the page for specific terms, for example, emergency.
    - (1) Press Ctrl + F (Find).
    - (2) In the Find box, type the word emergency, and then press enter.

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- (3) To the right of the word emergency, you will see a count of the number of reports that contain the word that you typed. In my example, I saw 1/6. This means I was on report #1 that contains the word emergency and that there are five more reports that contain that word.
- (4) To view the next report with that word in it, click the down arrow in the Find box.

### **8. SEND AN EMAIL FROM WORKDAY**

1. From a teammate record, on the Summary screen, locate the Contact Information - Public section.
2. Locate, and click, the teammate's email address. This should start a new email in your preferred email application.
3. IF you have a microphone and speaker on your computer, you can click the phone number link in that section to start a phone call from your computer.

### **9. LINK HELP DESK CONTACT INFORMATION**

You might also find this document useful ... [Workday Icon Glossary](#).

The LINK Help Desk provides assistance for the following programs:

- The Employee Work Center (Workday)
- The Employee Development Center

Email: [as.linkhelp@nebraska.gov](mailto:as.linkhelp@nebraska.gov)

Phone: 402.471.6234