Manager/Supervisor Job Aids and Training Materials

Who is considered a Manager in Workday?

Anyone who has employees reporting to them will have the Workday role of "Manager", which grants a certain level of access. Managers can delegate tasks (such as approve time) to assistants or other staff.

What can Managers view and do in the system?

Manager Self Service provides supervisors with job, position, and compensation information for their direct reports, including access to numerous built-in reports to support HR-related analytics and decisions. Managers will not be able to view particular employee data, such as direct deposit information or benefits enrollment, pension, nor retirement information.

Workday empowers managers by allowing them to directly do common things they need to do, leading others. Examples include:

- Approve timesheets
- Absence request management
- Kick-off recruiting an open position
- Onboard new hires
- Initiate changes indirect reports jobs

Day 1 Focus For Managers

1. Prioritize Inbox approvals and To-Dos
2. Approve Timesheets
3. Approve Absence Requests
4. Approve Expense Reports
5. Create/Approve Requisitions

Essential Core Concepts in Workday:

- Supervisory Organization
- Security Roles
- Business Process
- Location

Organization Worktag Types:

Organization Worktags provide security for accessing data and approvals. They are organized in hierarchies that roll up to the highest level. Examples of these Organizations are Company, Cost Centers, Locations. Note: Not all worktags are organizations.

Supervisory Organization:

Supervisory Organizations are the foundational structure that groups workers into a management hierarchy. All workers are hired into a Supervisory Org that group workers into a management hierarchy that provides context for staffing actions.

The foundational organization structure in Workday:

- Define who reports to whom – groups employees into a management hierarchy
- Employees are hired into supervisory organizations
- Drive business process routing (initiation and approval)

- Organizational roles have responsibilities within them

Security Roles:

Determine what you can see and do in Workday. Security roles are:

- A collection of permissions in Workday
- Assigned to sup orgs, and cost centers
- A person can have **more than one role**
- **Multiple people can hold the same role** (even within the same supervisory organization)
- In Workday, Manager is a Security Role

Business Processes:

Define the specific steps needed to complete a process.

- Set of steps that people **initiate**, **act upon**, and **complete**
- Only users with an **appropriate role** can initiate a process
- Once initiated, processes route to the appropriate role for action

> **Note**
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> Pay attention to the **Effective Date** and the **Overall Status** of business process events that are initiated or approved for employees.
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> **Effective Dates:** (1) Determine when data from business process events are active; (2) Consider the effective date of events when initiating other events for an employee
>
> **Event Statuses:** (1)Determine when a process is completed, and data is available for Payroll, external systems or reporting; (2) Event statuses include: "In Progress" or "Successfully Completed"

Location:

Locations are used in Workday to track business assets and physical work spaces.

- Each Location is configured with usage types (Business assets, payroll tax, work location). Currently, we only have main buildings and "Remote" locations defined on campus. We will expand those locations as we progress in our implementation.
- Workers are dynamically included as members of a location hierarchy based on the location of their location assignment.

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