Checklist - Managers

This is a recommended list of tasks for managers to get familiar with Workday.

For approvals, you will need a direct report to submit a task.

ALL EMPLOYEES AND ACADEMIC MANAGERS	
LOGIN	Log into Workday. View login instructions.
TOOLS AND NAVIGATION FOR MANAGERS	Job Aid: Additional Navigation for Managers, Delegations, Approvals in Workday REVIEW: ☐ Compare your team information: Search Compare Team Report ☐ Check the status of the latest approval in your archive inbox: Inbox, Archive, Process tab. ADD: ☐ Add Manager Optional applications (My Team Management, My Team Reports, Spend Management, and Compensation) Apps/Worklets to your home page. Click Configure applications icon, under Optional Worklets click + sign. ☐ Create a delegation. Under your inbox, arrow button, My Delegations.
STAFF INFORMATION	Job Aid: Additional Navigation for Managers REVIEW: ☐ Search for a direct report: Search bar, type employee's name. ☐ View staff emergency contacts: Profile, Actions, Personal Data, View Emergency Contacts ADD: ☐ Change direct report business title: Profile, Actions, Job Change, Change Business Title

MANAGE TIME	Job Aid: Approving Timesheets REVIEW: ☐ How to Review and Submit Time: Time and Absence Review Time, Submit time. ADD: ☐ Review and approve hours (hourly employees must submit hours first): Time and Absence application, Review Time
MANAGE ABSENCES	Job Aid: Manage Team Absences REVIEW: ☐ Approve, Deny, and Send Back Absence Requests: Time and Absence application ☐ Check your Time and Absence Dashboard: Time and Absence application, Time Off and Leave Calendar ADD: ☐ Enter Absence for a Direct Report: Time and Absence application, Absence ☐ Correct Time Off for a Direct Report (employees must submit absence request first): Time and Absence, Correct Absence
TEAM COMPENSATION	Job Aid: Manage Team Compensation REVIEW: ☐ View Team Compensation: Compensation, Direct Report Compensation report ☐ View Team Compensation Summary: Compensation, Compensation Summary report ADD: ☐ Request a One-Time Payment for a Direct Report: Compensation, Request, One-Time Payment.

COST CENTER, GIFT, PROGRAM, PROJECT MANAGERS (BUDGET/ COST CENTER MANAGERS)

MANAGE COST CENTERS	Job Aid: Manage Cost Centers, Approvals in Workday REVIEW: ☐ Business Process: Routing and Approvals ☐ Review Lynn's new approval amounts

FOUNDATION DATA MODEL (FDM)	Job Aid: Foundation Data Model (FDM) REVIEW: ☐ Review Worktags: Cost Center, Gift, Project, Program, Spend Category, Revenue Category.
SPEND MANAGEMENT	Job Aid: Review and Approve Expenses (only Cost Center managers) REVIEW: ☐ View Your Team's Expense Reports: Spend Management, My Team's Expense Reports
APPROVE EXPENSES	Job Aid: Review and Approve Expenses (only Cost Center managers) REVIEW: ☐ Review and Approve an Expense Report: Inbox, Actions, Expense Report task ☐ Review and Manage Requisitions (Procurement Requests): Inbox, Actions, Requisition task