

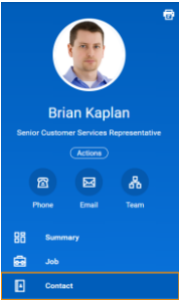








Checklist - Managers

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 	<p>Log into Workday. View login instructions.</p>
TOOLS AND NAVIGATION FOR MANAGERS 	<p>Job Aid: Additional Navigation for Managers, Delegations, Approvals in Workday</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Compare your team information: Search Compare Team Report <input type="checkbox"/> Check the status of the latest approval in your archive inbox: Inbox, Archive, Process tab. <p>ADD:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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. <input type="checkbox"/> Create a delegation. Under your inbox, arrow button, My Delegations.
STAFF INFORMATION 	<p>Job Aid: Additional Navigation for Managers</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Search for a direct report: Search bar, type employee's name. <input type="checkbox"/> View staff emergency contacts: Profile, Actions, Personal Data, View Emergency Contacts <p>ADD:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Change direct report business title: Profile, Actions, Job Change, Change Business Title

MANAGE TIME 	<p>Job Aid: Approving Timesheets</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> How to Review and Submit Time: Time and Absence Review Time, Submit time. <p>ADD:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review and approve hours (hourly employees must submit hours first): Time and Absence application, Review Time
MANAGE ABSENCES 	<p>Job Aid: Manage Team Absences</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Approve, Deny, and Send Back Absence Requests: Time and Absence application <input type="checkbox"/> Check your Time and Absence Dashboard: Time and Absence application, Time Off and Leave Calendar <p>ADD:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Enter Absence for a Direct Report: Time and Absence application, Absence <input type="checkbox"/> Correct Time Off for a Direct Report (employees must submit absence request first): Time and Absence, Correct Absence
TEAM COMPENSATION 	<p>Job Aid: Manage Team Compensation</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> View Team Compensation: Compensation, Direct Report Compensation report <input type="checkbox"/> View Team Compensation Summary: Compensation, Compensation Summary report <p>ADD:</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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 	<p>Job Aid: Manage Cost Centers, Approvals in Workday</p> <p>REVIEW:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Business Process: Routing and Approvals <input type="checkbox"/> Review Lynn's new approval amounts

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

