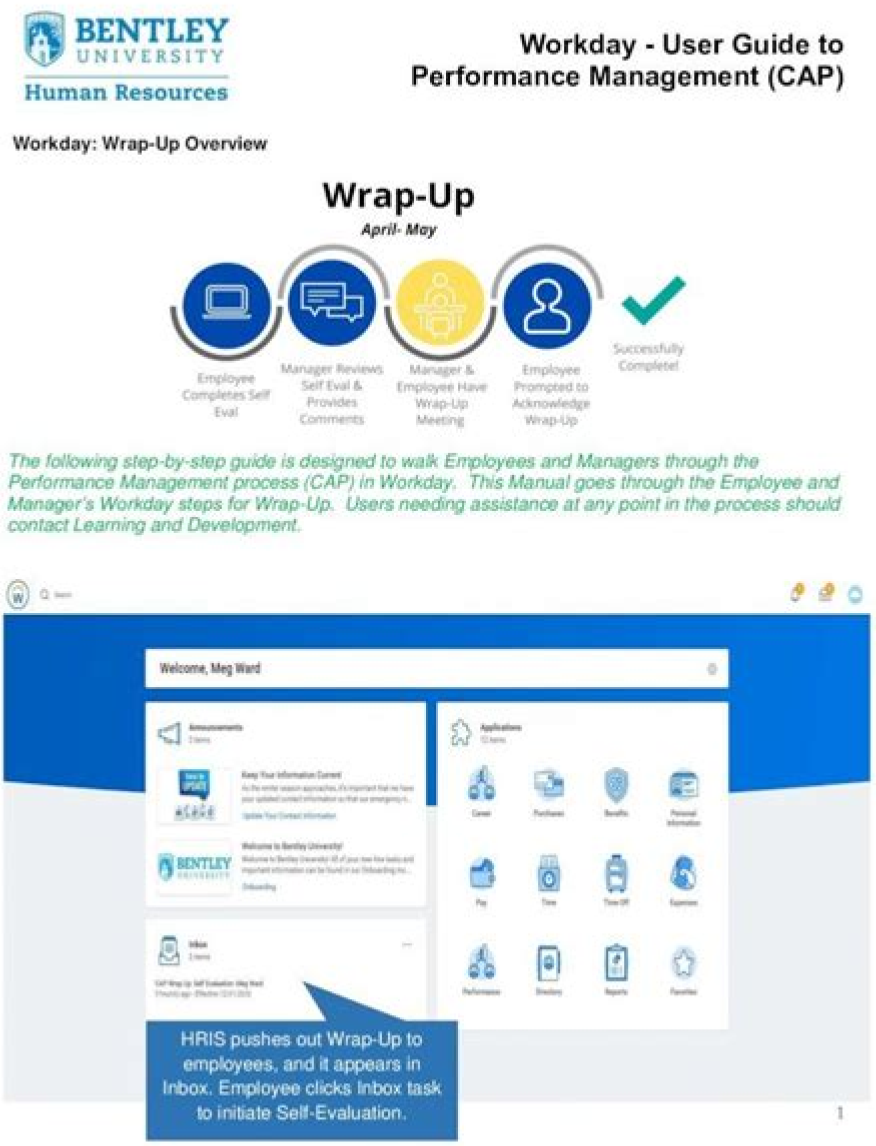
Workday User Guide For Managers



BENTLEY UNIVERSITY
Human Resources

Workday - User Guide to
Performance Management (CAP)

Workday: Wrap-Up Overview

Wrap-Up

April- May

Employee Completes Self Eval
Manager Reviews Self Eval & Provides Comments
Manager & Employee Have Wrap-Up Meeting
Employee Prompted to Acknowledge Wrap-Up
Successfully Complete!
Welcome, Meg Ward

The following step-by-step guide is designed to walk Employees and Managers through the Performance Management process (CAP) in Workday. This Manual goes through the Employee and Manager's Workday steps for Wrap-Up. Users needing assistance at any point in the process should contact Learning and Development.

HRIS pushes out Wrap-Up to employees, and it appears in Inbox. Employee clicks Inbox task to initiate Self-Evaluation.

1

Workday User Guide for Managers is an essential resource for those looking to optimize their use of Workday, a leading cloud-based software for human resources and financial management. As a manager, understanding how to navigate Workday effectively can streamline your workflow, enhance team collaboration, and improve overall productivity. This guide will walk you through the key features of Workday, offer practical tips for managing your team, and provide insights into leveraging the platform's capabilities to meet your organizational goals.

Understanding Workday: An Overview

Workday is designed to provide a unified platform for managing various HR functions, including recruiting, performance management, time tracking, and payroll. As a manager, you play a crucial role in utilizing these functionalities to support your team and ensure smooth operations.

Key Benefits of Workday for Managers

- Centralized Information: Workday consolidates employee data, making it easier for managers to access vital information about their team members.
- Enhanced Communication: The platform allows for seamless communication between team members, fostering collaboration.
- Real-time Analytics: Managers can leverage real-time data and analytics to make informed decisions regarding their team's performance and needs.
- Streamlined Processes: Automating various HR processes saves time and reduces administrative burdens.

Getting Started with Workday

To effectively use Workday, managers should familiarize themselves with its interface and core functionalities. Here's how to get started:

1. Logging In

To access Workday, follow these steps:

1. Navigate to your organization's Workday login page.
2. Enter your username and password.
3. Once logged in, you will be greeted with the Workday dashboard, displaying a summary of your tasks and notifications.

2. Navigating the Dashboard

The dashboard is your central hub in Workday. Key features include:

- Notifications: Alerts for pending actions, approvals, or messages from team members.
- Tasks: A list of tasks that require your attention, such as approving time-off requests or performance reviews.
- Reports: Access to important reports related to team performance, headcount, and other metrics.

Managing Your Team in Workday

One of the primary responsibilities of a manager is to oversee team performance and development. Workday offers several tools to assist with this.

Performance Management

Performance management is crucial for maintaining high standards within your team. Workday allows you to:

- Set Performance Goals: Collaborate with team members to establish clear, measurable goals.
- Conduct Performance Reviews: Utilize templates and guidelines to provide structured feedback.
- Monitor Progress: Regularly check in on employees' progress towards their goals via the Workday dashboard.

Time Tracking and Attendance

Understanding your team’s time and attendance is vital for resource management. In Workday, you can:

- Approve Time Off Requests: Review and approve or deny requests for vacation or personal leave.
- Track Hours Worked: View and manage your team's time entries, ensuring accurate payroll processing.
- Analyze Attendance Trends: Utilize reporting features to identify patterns in attendance and address any issues proactively.

Recruitment and Onboarding

As a manager, you may be involved in the recruitment and onboarding process. Workday simplifies these tasks by allowing you to:

- Post Job Openings: Create and manage job postings directly within the platform.
- Review Candidates: Access applications, resumes, and interview feedback from your team.
- Onboard New Hires: Facilitate a smooth onboarding experience by guiding new employees through required training and tasks.

Utilizing Data and Reporting

Data-driven decision-making is key to effective management. Workday provides various reporting tools that allow you to:

1. Generate Reports

Reports can be customized to meet your specific needs. You can create reports on:

- Employee performance metrics
- Attendance and leave trends
- Headcount and turnover statistics

2. Analyze Data

Use the analytics feature to gain insights into your team’s performance and identify areas for improvement. Key metrics to consider include:

- Employee engagement scores
- Completion rates for training programs
- Performance review outcomes

Best Practices for Managers Using Workday

To maximize your effectiveness in Workday, consider the following best practices:

1. Stay Updated on Features

Workday frequently updates its platform with new features and enhancements. Regularly check for updates and participate in training sessions to stay informed.

2. Foster Open Communication

Encourage your team to communicate openly about their experiences and challenges with Workday. This feedback can help identify training needs and improve overall efficiency.

3. Leverage Help Resources

If you encounter difficulties, take advantage of Workday's help resources, including:

- Online documentation and user guides
- Support forums and community discussions
- Training videos and webinars

Conclusion

The **Workday User Guide for Managers** serves as a comprehensive tool to help you navigate the intricacies of the Workday platform. By understanding its features and functionalities, you can enhance your team management, streamline processes, and drive performance. Whether you are approving time-off requests, conducting performance reviews, or analyzing data, Workday offers the tools you need to succeed. Embrace the platform, stay informed, and leverage its capabilities to foster a productive and engaged workforce.

Frequently Asked Questions

What is the purpose of the Workday user guide for managers?

The Workday user guide for managers provides comprehensive instructions and best practices for effectively navigating and utilizing Workday features, enabling managers to streamline processes such as performance reviews, time tracking, and employee management.

How can managers access the Workday user guide?

Managers can access the Workday user guide through the Workday help menu, company intranet, or by requesting a copy from their HR department, which may also provide training sessions on using the platform.

What key features are highlighted in the Workday user guide for managers?

The user guide typically highlights features such as managing team performance, approving time off requests, running reports, and accessing employee information, all aimed at enhancing managerial efficiency.

Are there any tips for new managers on using Workday effectively?

New managers are encouraged to familiarize themselves with the dashboard, utilize the search function for quick access to tools, attend any available training sessions, and seek help from peers or HR when needed.

How often is the Workday user guide for managers updated?

The Workday user guide for managers is updated regularly to reflect new features, changes in policies, or system upgrades, ensuring that all information remains current and relevant for users.

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