

## Workday: Getting Started in Workday for Managers

### Document Information

Department: Office of Human Resources | HR Training Template No.:

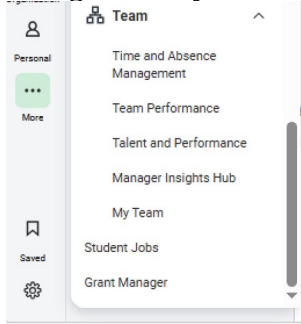
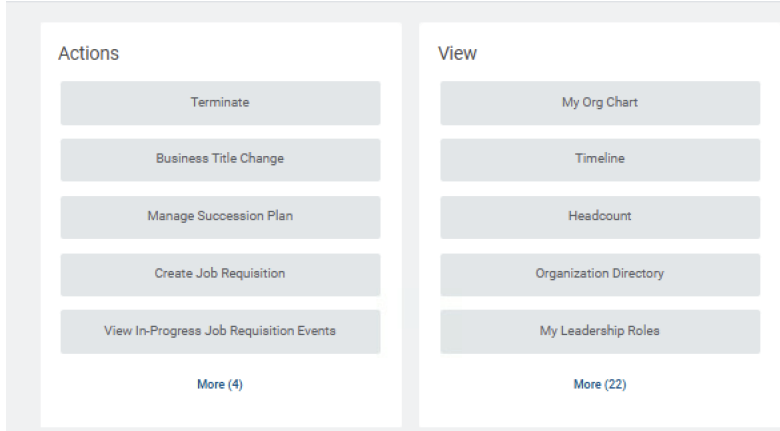
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Subject: Getting Started in Workday for Managers

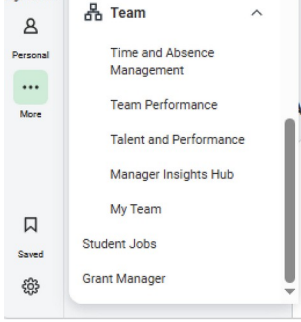
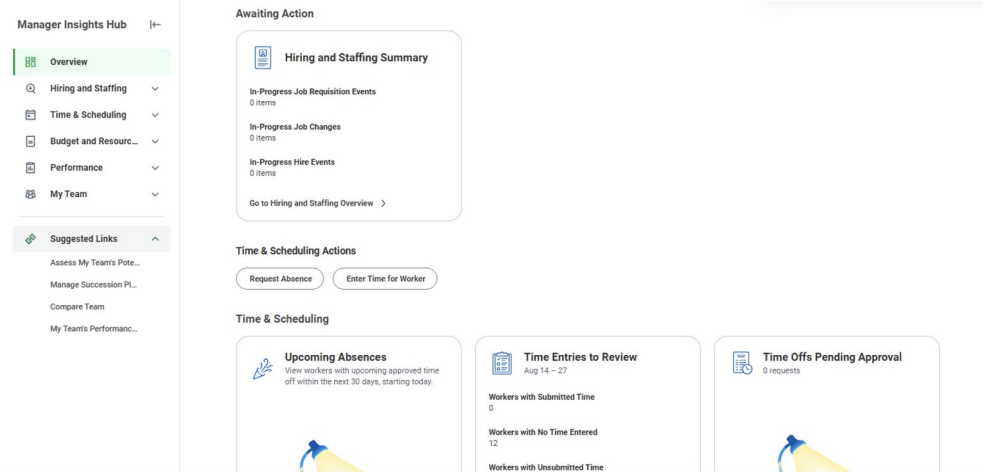
Purpose: Guides managers through navigating the My Team app, Manager Insights Hub and additional tools for managers.

Related References: | Getting Started in Workday for Employees (for basic navigation)

### My Team App

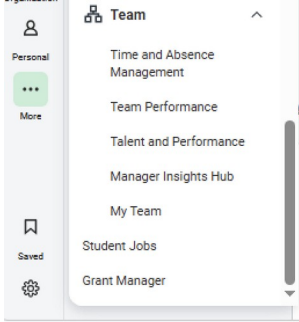
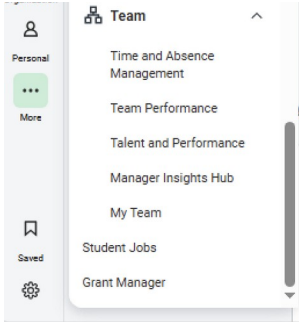
| Step | Actions                                                                                                                                                                                                                                                                                                                                                                         |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p>Navigate to <b>My Team</b> app from the Global Navigation bar on the homepage.</p>                                                                                                                                                                                                         |
| 2.   | <p>The dashboard features the below tasks and reports.</p>  <ul style="list-style-type: none"><li>• Quick Linked Actions: Start a business title change, start a termination</li><li>• Quick Linked Reports: View your organization directory, your org chart, or your headcount.</li></ul> |
| 3.   | <p>Scroll down to click the name of a member of your team to view their profile.</p>                                                                                                                                                                                                                                                                                            |

## Manager Insights Hub

| Step | Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | <p>The <b>Manager Insights Hub</b> is a one-stop shop on your team's tasks. This app includes several areas with quick links for actions and reports that you will use as a manager</p> <p>Navigate to <b>My Team</b> app from the Global Navigation bar on the homepage.</p>                                                                                                                                                                                                                                                                                                                   |
| 2.   | <p>The dashboard features the below tasks and reports.</p>  <ol style="list-style-type: none"> <li><b>Hiring and Staffing</b> (includes an overview and current job requisitions)</li> <li><b>Time and Scheduling</b> (for edit, review and/or approve time for direct reports)</li> <li><b>Budget and Resources</b> (includes an overview on team pay, and your team compensation report)</li> <li><b>Performance</b> (includes details on your team's goals progress)</li> <li><b>My Team</b> (includes an overview of your team, with quick links to each individual's profile)</li> </ol> |

## Additional Tools for Managers

| Step | Actions                                                                             |
|------|-------------------------------------------------------------------------------------|
| 1.   | <b>Time &amp; Absence App:</b> Dashboard to monitor your team's reported time, time |

| Step | Actions                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      | <p>off, and time and absence related trends.</p>                                                                                                                                                                                                                                                                                                     |
| 2.   | <p><b>Team Performance App:</b> Dashboard to monitor team feedback, goals, and performance management information.</p>                                                                                                                                                                                                                              |
| 3.   | <p><b>My Tasks:</b> This is where tasks requiring your input will reside in Workday. There are two general types of tasks you will see here:</p> <ol style="list-style-type: none"> <li>Review information entered by your direct reports (i.e. review time off requests, time tracking, goals)</li> <li>Manager steps within a broader business process (i.e. enter interview feedback, review offer, review termination)</li> </ol> |

Other Job Aids to Reference: 

| Category                   | Job Aids                                                                                                                  |
|----------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Recruitment Process</b> | Recruitment Process for Department Leads/Managers<br>Create Position<br>Create Job Requisition<br>Hire & Onboarding Setup |
| <b>Talent</b>              | Performance Management Process<br>Goalsetting<br>Cascade Goals<br>Managing Feedback for your Direct Reports               |

| Category                     | Job Aids                                      |
|------------------------------|-----------------------------------------------|
|                              |                                               |
| <b>Time</b>                  | Reviewing and Approving Time                  |
| <b>Terminations</b>          | Termination                                   |
| <b>Job Changes</b>           | Job Change                                    |
| <b>Compensation Planning</b> | Compensation Planning for Managers            |
| <b>Financials</b>            | Expenses<br>Procurement<br>Assets<br>Supplier |
| <b>General</b>               | Delegations                                   |

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