Workday@OK

GETTING STARTED IN WORKDAY@OK – AGENCY DIRECTORS

THIS GUIDE IS FOR: AGENCY LEADERSHIP

Agency directors in Workday@OK have enhanced visibility and access to complete tasks relating to direct reports. The guide below outlines the basics of getting started as an agency director in Workday@OK.

Access the Getting Started Guide for All Employees, which provides information on signing into Workday@OK, as well as basic navigation.

MY TEAM MANAGEMENT APP

(**Pro Tip**: Select **Manage Apps** from the top right of the **Apps** menu to personalize how apps are listed.)

Located under **View All Apps** on the homepage, this dashboard provides quick insights into the team you lead and the tasks you will manage in Workday@OK. The dashboard features the following tasks and reports:

- **My Team:** Select the name of a member of your team to view their profile. Note: By selecting the **Related Actions** icon, you can act on a particular employee.
- **Recent Activity:** Shows status of in-progress business processes related to your direct reports; provides insight into new hire onboarding, which will take place in Workday@OK.
- **My Team's Upcoming Time Off:** Consolidated view of upcoming approved time off requests.
- **My Team's Learning:** View a list of enrolled content by team member.

ADDITIONAL TOOLS FOR DIRECTORS

- **Recruiting App:** Starting point for the **Create Job Requisition** task and viewing active requisitions for your team.
- **Team Performance App:** Dashboard to monitor team feedback, goals and performance management information.
- **Time and Absence App:** Dashboard to monitor your team's reported time, time off and time- and absence-related trends.
- **Setting up Delegations** (delegations are for when you want to assign someone else to manage your inbox, temporarily or long-term):
    1. Navigate to your **Inbox** by selecting the inbox icon on the top right. Under the **Actions** and **Archive**, to the right, there is a drop-down menu that allows you to bulk approve transactions, refresh your inbox and manage your delegations.
    2. Select **My Delegations**, scroll down and select **Manage Delegations**. Also, you can use the search bar to type **My Delegations** and select the report from the list of results.
    3. Enter the **Begin** and **End Date** of your delegations.
    4. Use the **Do Inbox Tasks on My Behalf** to delegate access for all business processes or for specific ones or none of the above.
    5. Select **Submit**.
- **Inbox** (approving transactions)**:** The inbox is where tasks requiring your input (approval) will reside in Workday@OK. There are two general types of tasks you will see here:

- Review information entered by your direct reports (e.g., **Review Time Off Requests**, **Time Tracking**, **Goals**).
- Agency director steps within a broader business process (e.g., **Enter Interview Feedback**, **Review Offer**, **Review Termination**).

WHAT ELSE CAN YOU DO IN WORKDAY@OK?

Absence management
Review, approve or send back absence requests.

Goal setting
Review goals established by your team.

Cascading goals
Understand goal types and review goals submitted by your team.

Compensation planning
Review pay ranges and request one-time payments for your team.

Job changes
Transfer employees to a new job, role or manager within the organization.

Managing feedback
Request and review available feedback for your team.

Performance management
View employee talent profiles, development items and development plans.

Recruitment process
Create job requisitions, view candidate profiles and leave feedback post interviews.

Review and approve time
Review and approve time entries, time sheets and schedules for your team.

Talent management
Review talent profiles, reviews and talent cards for your team.

Termination
Steps to complete as a manager in the termination process.

Learning
Enroll your team in new courses or approve requests for learning.