

# Workday Wednesday: Advanced Manager Functions



## Agenda

- Job Changes (Terminations, Transfers and Change Job Details)
- Approving and Correcting Absence



## WHAT ARE SOME JOB CHANGES IN WORKDAY AND WHEN WILL I USE IT?

1. **Termination:** to end an employee's primary job or position within an organization.
2. **Transfer:** to move an employee in your organization to a new manager.
3. **Change Job:** to update the employees **job details** (i.e. scheduled hours, location, etc.)

## WHO CAN INITIATE THESE?

The **Manager** and Management Chain (i.e. managers manager up to the VP level) can initiate job changes.

The screenshot displays the Workday user interface for an employee named 'Sponge Bob', who is an Executive Director. The interface is in a mobile or tablet view. At the top, the employee's name and title are shown. Below this, there is a 'Job Details' section. A navigation menu on the left side includes options like 'Phone', 'Summary', 'Job', 'Compensation', 'Benefits', 'Pay', 'Time Off', 'Contact', and 'Personal'. The 'Job' option is selected, and an 'Actions' menu is open, listing various actions such as 'Benefits', 'Business Process', 'Calendar', 'Compensation', 'Job Change', 'Organization', 'Payroll', 'Payroll Interface', 'Personal Data', 'Provisioning Groups', and 'Recruiting'. The 'Job Change' option is highlighted in yellow. A sub-menu is visible for 'Job Change', listing actions like 'Transfer, Promote or Change Job', 'Change Business Title', 'Change Location', 'Add Contract', 'Add Job', 'Launch Onboarding', 'Report No Show', and 'Terminate Employee'. The 'Transfer, Promote or Change Job' and 'Terminate Employee' options are also highlighted in yellow. The background shows a 'Worker' profile for 'Sponge Bob' with a 'View Team' button and other details.

# 1 Workflow Process for Terminate Employee



# SAINTS CONNECT : Complete a Termination

**WHO CAN I TERMINATE?** Any position that is in your organization (including Students)

1. Access the **Terminate Employee** Task
2. Complete the **Reason** section by selecting a primary reason for this termination
3. Complete the **Details** section:

<b>Termination Date</b>	Enter the date the employee notified you of their resignation or the date you notified the employee of their termination. Automatically populates when the employee's resignation initiates the termination.
<b>Last Day of Work</b>	Automatically populates from the termination date.
<b>Pay Through Date</b>	Change this date to at least two weeks out or to next pay day.
<b>Resignation Date</b>	Automatically populates when the employee's resignation initiates the termination.

4. Use the **Regrettable** section to specify whether the termination is a loss to the organization, regardless of the reason.
5. Use the **Eligibility** section to indicate whether the employee is available for rehire.
6. Complete the **Position Details** section:

<b>Close Position</b>	Select this check box to close the position in the employee's former organization. Please note that you will want to keep the position open if you plan on rehiring.
<b>Is this position available for overlap?</b>	Specify whether another worker can fill the position before the employee departs.

7. Add the letter of resignation or other supporting documents in the **Attachments** section.

## 2 Workflow Process for Transfer



# SAINTS CONNECT : Transfer an Employee to a New Manager

**WHY YOU WOULD DO THIS?** To transfer a worker to a new manager. Before doing so, please verify that the new manager's organization exists. If not, please contact the HR Department.

## **CURRENT MANAGER WILL:**

- 1.** Access the **Change Job** task and select a **Worker**.
- 2.** In the **Start** section, select the date, reason (**transfer > move to new manager**), the manager, supervisory organization, and location. This change should always happen at the beginning of the next pay period.
- 3.** Under the section labeled **Move**, specify whether you plan to backfill, move, or close the headcount.
- 4.** Attach any supporting **Documents** to justify the manager change.
- 5. Review** the overall changes and hit Submit.

# 3 Workflow Process for Change Job

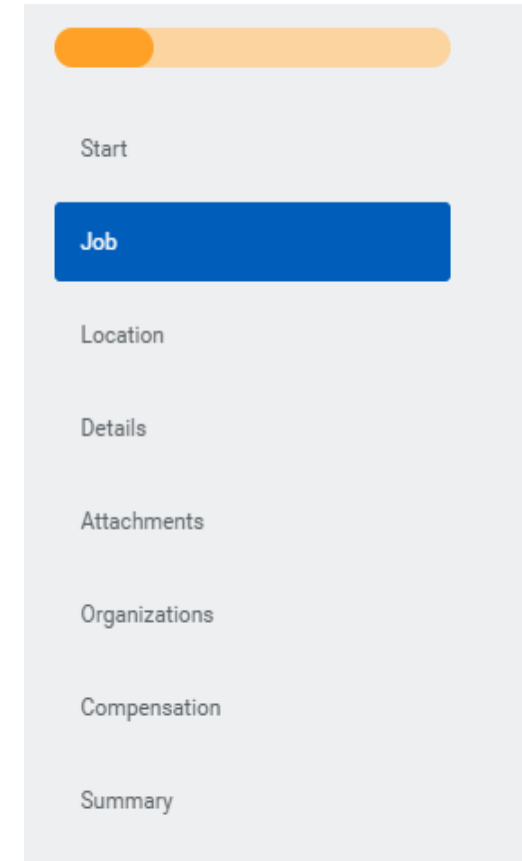




# SAINTS CONNECT: Complete a Change Job

**WHY YOU WOULD DO THIS?** To update an employee's job details (i.e. scheduled hours, location, etc.)

1. Access the **Change Job** task and select a **Worker**.
2. In the **Start** section, select the date, reason (select data **Data Changes** > select one of the three reasons), the manager, supervisory organization, and location.
3. Confirm/Update the sections labeled **Job, Location, and Details** accordingly.
4. Attach any supporting **Documents** to justify the update/change.
5. Confirm the employees **Organizations** (i.e. Cost Center) and **Compensation**.
6. Review the overall changes and hit **Submit**.



The screenshot displays a vertical navigation menu for the 'Change Job' task. At the top, there is a progress indicator consisting of a blue bar on the left and an orange bar on the right. Below this, the menu items are listed: 'Start', 'Job', 'Location', 'Details', 'Attachments', 'Organizations', 'Compensation', and 'Summary'. The 'Job' item is highlighted with a blue background, indicating it is the active section.

# 4 Workflow Process for Approving and Correcting Absence



# Approving Absence

1. Go to your Inbox
2. Click on the Absence request
3. Click Approve (if it is not approved, click The three dots, next to approve for other Options, send back (if want additional information), Deny, or cancel request)
4. The approved time will show on the calendar as green

The screenshot displays the 'Inbox' interface. At the top, there's a blue header with the word 'Inbox'. Below it, there are two tabs: 'Actions (2)' and 'Archive'. Under the 'Actions (2)' tab, there are two dropdown menus: 'Viewing: All' and 'Sort By: Newest'. The main content area shows a list of absence requests. The first request is highlighted in grey and is for 'Sponge Bob', with a timestamp of '29 second(s) ago - Due 10/25/2019; Effective 10/16/2019'. Below it is another request for 'Aline Archak Orfali', with a timestamp of '7 day(s) ago - Due 10/17/2019; Effective 11/18/2019'. To the right of the list, there is a 'Review' panel for the selected 'Absence Request: Sponge Bob'. This panel includes a star icon, a gear icon, and a '1' icon. It shows the request details: '29 second(s) ago - Due 10/25/2019; Effective 10/16/2019', 'For: Sponge Bob', 'Overall Process: Absence Request: Sponge Bob', 'Overall Status: In Progress', and 'Due Date: 10/25/2019'. At the bottom of the review panel, there is a three-dot menu icon and a large orange 'Approve' button.

# Correcting Absence

1. Go to the Team Time Worklet
2. Under Actions Select Enter Worker Time
3. Select the employee you want to correct
4. Click on the calendar absence to correct
5. edit the absence

