

Human Resource Management System

Workday Job Aid View Team Information



This Job Aid describes the information People Managers can view about their workers in the organization.

- Employees
- People Managers
- Human Resources

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1. Team Information Overview

By using the Team Information functions, People Managers (managers who oversee the work and responsibilities of other individuals) can view information across their teams at a glance. They will only be able to see this information for their direct reports. Using the **My Team** application, People Managers are provided quick access to actions, reports, and information for their direct report employees. The **Team Time Off** application also provides quick access to actions and reports for managing time and time off for direct report employees.



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2. My Team

1. Start the process from the Workday Home Page. Click on the **My Team** application from the Workday Home Page.
2. Examine the wide variety of links to various functions for your team. The **Actions** section represents things you can do. The **View** section represents things you can look up. Clicking the **More** hyperlink under the **View** section or **Actions** section will show additional functions you can access. Your direct reports will be listed at the bottom of the application.
3. To show comparative information about your team members using the **Compare Team** report:
 - From the **View** section, select the **Compare Team** button.
 - On the **Compare Team** report, select your organization to run the report for.
 - If you have more than one team, you can search for alternate organizations' team members to view by clicking on the drop-down box and searching using one of the search options shown below.
 - Click **Ok**.
 - You are now viewing the **Compare Team** report. This displays your individual team members in a comparative format. Information is arranged by categories such as Job and Base Pay information. This report helps analyze key worker attributes.



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3. View Employee Information

1. Select the **My Team** application from the Workday Home Page.
2. Your direct reports are displayed by name on the bottom section of the page. Select one of the employee names to bring up information regarding this employee. You are now viewing this employee's Workday profile.

Note: You may also view an employee's Workday profile by searching for the employee's name within the search bar at the top of the page.

3. Different types of information appear in an employee's Workday profile. You will see tabs on the blue panel on the left. The following tabs provide useful information:
 - **Summary-** View the employee's manager and location of work
 - **Overview-** View employee Compensation information including their grade, salary step, and total salary. You may also view any Personal notes.
 - **Job-** View Job Details including the employee's position, business title, hire date, length of service, and contact information. View Employment Data including details about the employee's current position and salary, view the Manager History of the employee, view the employee's Management Chain, view the Organizations the employee belongs to (company, cost center, cost center hierarchy, location hierarchy, pay group and supervisory organization), view the employee's Support Roles, view the employee's Job History and view the employee's Worker History (business processes involving the employee within Workday).
 - **Compensation-** View the employee's Compensation, including grade, salary step, and total salary. You may also view the employee's Pay Change History.
 - **Benefits-** View a list of the employee's dependents.
 - **Time Off-** View the employee's time off balances (sick, vacation, comp time, deferred 2009 hours, lag 2012 hours, personal hours, and retro 2019 hours).
 - **Contact-** View the employee's emergency contacts.
 - **Personal-** View employee's personal information, including gender, DOB, marital status, and SSN.
 - **Performance-** View Performance reviews, Goals, Feedback and Awards
 - **Career-** You can view Job Interests, employee skills, work experience, learning, education, languages, certifications, achievements, professional affiliations, and training.



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4. The **Actions** button on an employee's Workday profile (directly under the employee's name and job title) also provides menus to easily access/modify employee information. **Note:** Depending on your security role within Workday (Employee, Manager, or Payroll Representative), your list of features may differ.

- **Benefits-** View and Change employee benefit information.
- **Compensation-** Request a Compensation Change, View Compensation, View Compensation History, and others.
- **Job Change-** Start Job Change, Change Business title, Report No Show, and others.
- **Manage Work-** View Work Assignments, Assign Work to Worker.
- **Organization-** Assign Matrix Organization, Change Organization Assignments.
- **Payment-** Find Payments.
- **Payroll-** Change Tax Document Printing Elections.
- **Personal Data-** View Emergency Contacts, Edit Photo.
- **Recruiting-** Open Job Requisitions for Manager.
- **Talent-** Give Feedback on Worker, View Feedback by Request, View Feedback Given to Others, Edit/View Goals, Add Goal to Employees, View Skills and Experience, Start Performance Review, View Employee Reviews, Start Development Place, Start Disciplinary Action, Start Performance Improvement Plan, Add a Mentor for Worker, Add Personal Note, Add as a Connection and others.
- **Time and Leave-** Enter Time, Enter Absence, View Time Off, Overtime Requests, View Schedule for Worker, Add Time Clock Event, View Time Clock History, View Time Off Balance, View Carryover Balances, Assign Work Schedule, Schedule History for Worker, and others.
- **Worker History-** View Worker History, View Manager History, View Employee History

5. Icons are listed below the **Actions** button:

- **Phone-** Provides the employee's phone number
- **Email-** Provides the employee's email.
- **Team-** View the employee's Org Chart.



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4. View Organizational Chart

1. Select the **My Team Management** application from the Workday Home Page.
2. From the **View** section, select **My Org Charts**.
3. Select the organization you wish to display.
4. You are now viewing a graphical organizational chart of the portion of your team that you selected. The Org Chart includes information about your direct reports and the organizational hierarchy of Managers.
5. In the top-right corner of the page, hover over the dots to reveal the management chain. Click the names in the chain to navigate your hierarchy. You can also use the pull-down menu in the top left to view your Org Chart with or without contingent workers, matrix reports, or open positions.
6. You may print out the Org Chart by clicking the printer icon on the top right of the screen. When printing, enter a file name, select excel as the file format, and select how many levels of your org chart you would like to print.



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5. View Team Compensation

1. Compensation for your team can be viewed in more than one way. As noted above, run the **compare team** report to view your team member's compensation.
2. You can also run a report from the Search called "**Direct Reports Compensation Summary.**"
3. To run a report from the search, click inside the search bar and type "**Direct Reports Compensation.**"

Note: Workday has a powerful search engine that will return search values if you type only partial words, such as "dir rep comp." Click the **Direct Reports Compensation Summary** report from the search results to run the report for your team.

4. The report output will outline specific compensation details for your team members in a spreadsheet that you can export to Microsoft Excel.
 - To export the report to excel, click the Export to Excel Icon (grid icon to the left of the printer icon).
5. As an alternative to the Search bar, the **Compensation** application can be used to run the report.
 - From the Workday Home Page, select the **Compensation** application.
 - Under the **View** section, select the **Direct Reports Compensation.**



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6. Compensation for your team may also be viewed within the **Compensation Summary** report:

- From the Workday Home Page, select the **Compensation** application.
- Under the **View** section, select the **Compensation Summary**.
- Enter the **View as Of** date, select the **Organizations** and check the box if you wish to **include Subordinate Organizations**.
- Click **Ok**.
- You are now viewing the **Compensation Summary** report. This provides a combined view of your direct reports' compensation.

7. One other way to view your direct reports' compensation in a comparative manner is through the Compensation Spreadsheet:

- From the Workday Home Page, select the **Compensation** application.
- Under the **View** section, select **Compensation Summary**.
- Enter the **Effective as of Date**, select the **Organizations** and check the box if you wish to **include Subordinate Organizations**.
- Click **Ok**.
- You are now viewing the **Compensation Spreadsheet** report. This provides a comparative view of your direct reports' compensation information, including their hire date, salary grade, total salary, and total base pay biweekly.



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6. View Employee Time Off

A manager may view a single employee's time-off requests and balances:

1. Time Off Requests- View employee time balances as of the current date.

- Type in the employee's name from the search.
- Select the employee's name to navigate to their Workday profile.
- Select the **Actions** button.
- Navigate to Time and Leave > View Time Off.
- This lists all time-off requests that are approved, pending, denied, canceled, submitted, or not submitted as of the current date.

2. Time Off Balance- View employee time balances as of a certain date.

- Type in the employee's name from the search.
- Select the employee's name to navigate to their Workday profile.
- Select the **Actions** button.
- Navigate to Time and Leave > View Time Off Balance.
- Enter the **As Of** date.
- Click **Ok**.
- This lists all time-off requests that are approved, pending, denied, canceled, submitted, or not submitted as of a certain date.

3. Time Off Results by Period

- Type in the employee's name from the search.
- Select the employee's name to navigate to their Workday profile.
- Select the **Actions** button.
- Navigate to Time and Leave > View Time Off Results by Period
- Select the **Time Off Plans**.
- Select the **Periods**.
- Click **Ok**.
- This displays a historical view of an employee's balances grouped by pay periods.



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7. View Time Off Reports

Many reports are available to view your team's time off.

1. Click on the **Team Absence** application from the Workday Home Page to bring up the following tasks:
 - Team Absence Calendar
 - a. Select the **Organizations, Workers**, whether to include self (checkbox), then click **Ok**.
 - b. The **Team Absence Calendar** displays the time off for all employees selected within a specific period.
 - c. Change the period displayed by clicking the View dropdown on the top-right of the page.
 - Time Off & Leave Calendar
 - a. This displays all time off and leave requests in a calendar format.
 - b. Change the period displayed by clicking the View dropdown on the top-right of the page.
2. Click on the **Team Time** application from the Workday Home Page to bring up the following tasks under the View section:
 - Time Off & Leave Calendar
 - a. This report is also duplicated in the **Team Absence** application above.
 - My Team's Schedule
 - a. Select the **Date** and the **Workers** then click **Ok**.
 - b. This displays the schedule of the employees you selected during a period.
 - c. Change the period displayed by clicking the View dropdown on the top-right of the page.
 - d. You can add an Event, Assign a Work Schedule, or Enter Time for Worker by clicking the **Add Event** button at the bottom of the page.
 - Time Clock History
 - a. Select the **Worker** and the **Start Date**. Then click **Ok**.
 - b. This displays the Clock Events for the employee you selected during a period.
 - c. Change the period displayed by clicking the View dropdown on the top-right of the page.



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Change Log				
Revision Number	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK