

Getting Started in Workday for Managers

Objective: To provide NKU managers with a starting point to view and take actions on behalf of their team, review and approve expense reports and purchase requisitions, initiate job changes, and view important reports. **Note:** For more information on how to enter time and absence for your team, refer to the *Manage Workers' Time & Absence* user guide.

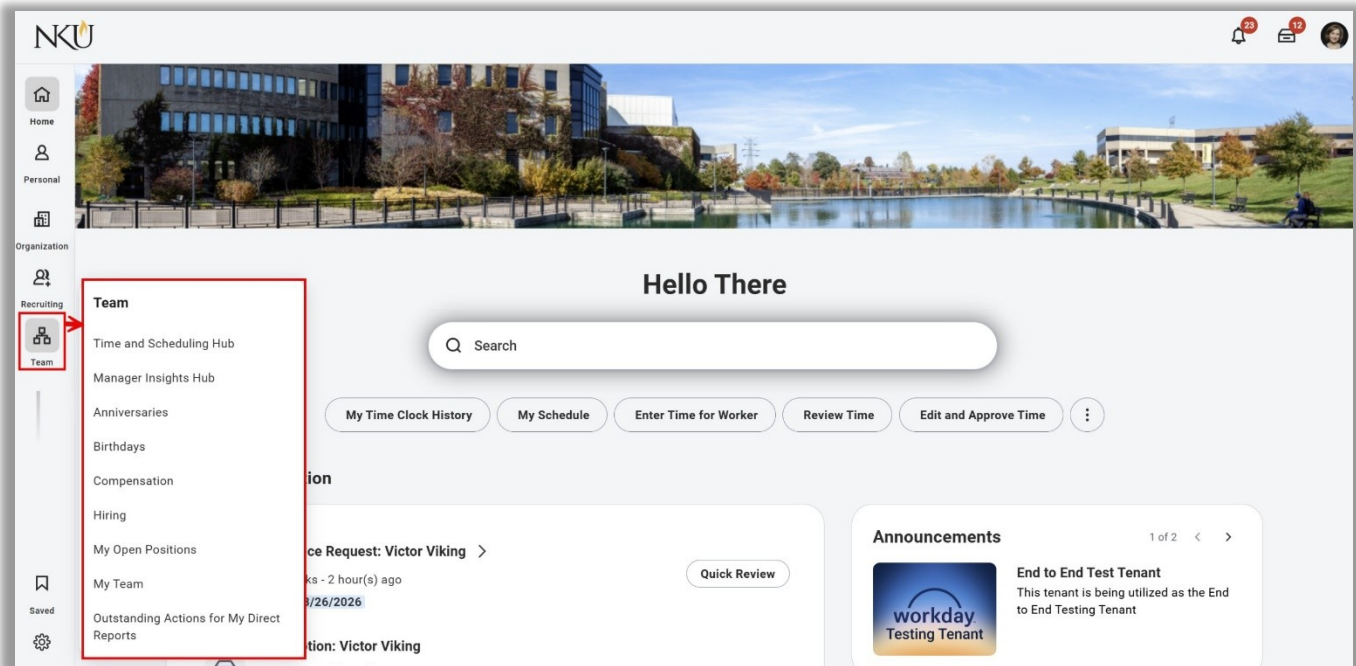
Audience: All managers

Click the required process below to go directly to that portion of the User Guide:

If you want to...
Basic Navigation for Managers
View My Team
Review and Approve Time and Absence Requests
Approve Spend Authorizations, Expense Reports & Purchase Requisitions
Initiate a Job Change (Job Details or Location)
Approve a Job Change
Initiate a Compensation Change
Access Manager Reports

Basic Navigation for Managers

The Workday homepage includes several features designed to help managers easily view important team information and take quick action. Outlined below are Manager-specific menu options and homepage features.



- **Team:** Click the Team Navigation Menu item to access direct links to Manager Hubs, anniversaries and birthdays, compensation info, Hiring & Open Positions, My Team and Outstanding Actions.
- **Awaiting Your Action:** View critical tasks that require your action, including team time off requests and time submittals.


Awaiting Your Action


Expense Report: ER10000103, Victor Viking on 03/03/2026 for \$100.00


My Tasks - 2 day(s) ago


- **Team Highlights:** From the Home page, view direct reports and access their employee profiles or the team org chart.

Team Highlights


[Finn Faculty](#)


[Helga Hourly](#)


[Kara Kiosk](#)


[Victor Viking](#)

[Team Org Chart](#)

- **Important Dates:** From the Home page, view key HR and job-related dates for both self and direct reports.

Important Dates

You have no important dates coming up.

[Go to Team Calendar](#)

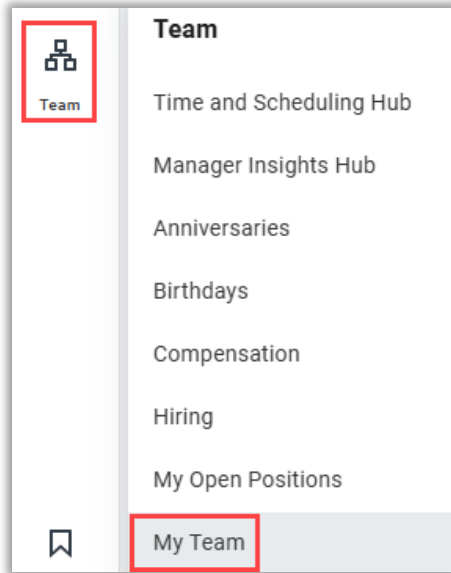
Note: Click **Go to Team Calendar** to access the Time and Scheduling Hub and the Team Absence Calendar.

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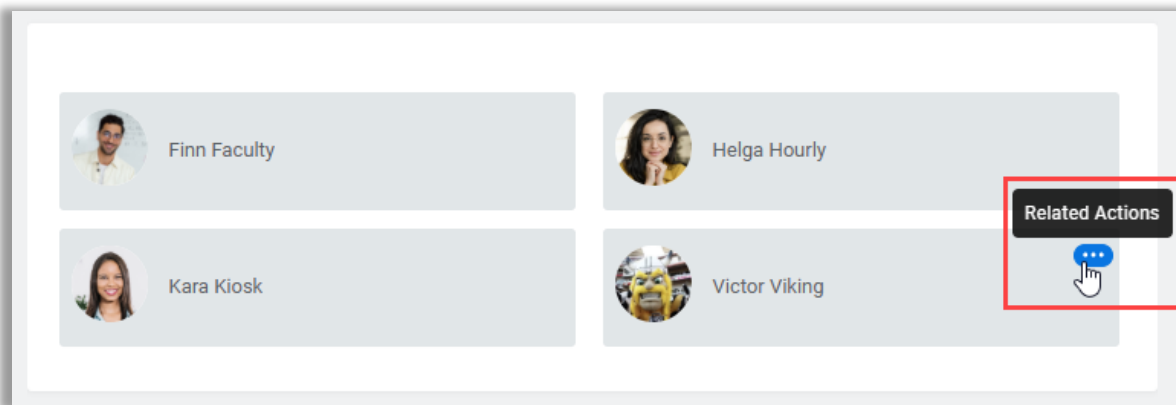
View My Team

The My Team page serves as a launchpad to take action for and view information about a manager's direct reports.

From the Menu on the home page, select **Team > My Team**.



1. Click on a team member's **Related Actions** to view available actions related to the employee.



2. The menu of related actions for your direct reports displays. From here, managers can take various actions on employees.

Worker
Victor Viking

Contact
Work Address
5320 Campus Drive Highland Heights, KY 41099 United States of America

Job

- Organization** Workday Training (Marta Manager)
- Business Title** Specialist, Business Operations
- Manager** Marta Manager
- Location** UNIVERSITY CENTER (UC)
- Time in Position** 1 year(s), 2 month(s), 24 day(s)

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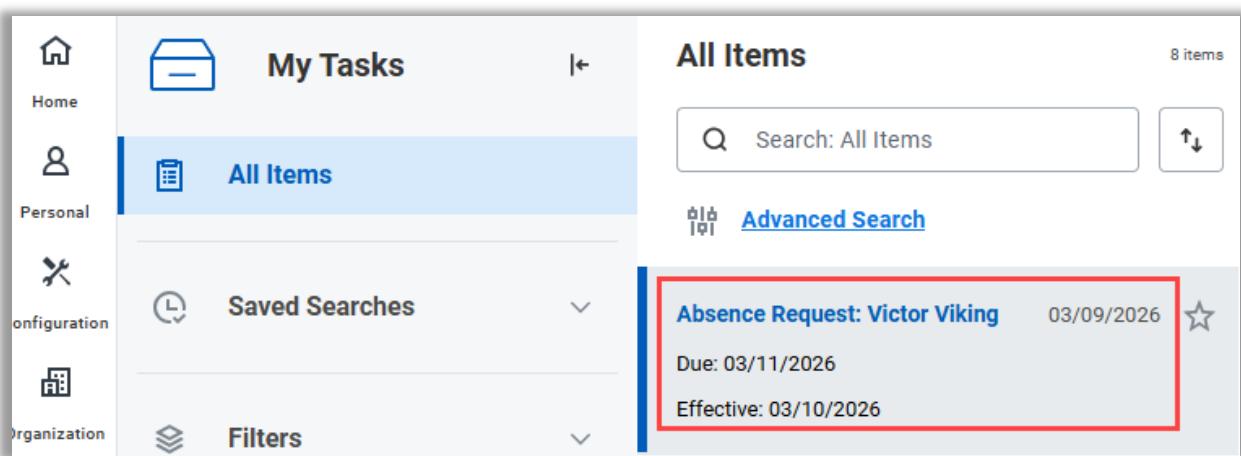
Review and Approve Time and Absence Requests

Time submittals and Absence requests display in the Manager’s My Tasks for easy completion. Time & Absence submittals can also be viewed from **Team > Time and Scheduling Hub > Absence Calendar** or **Review and Approve Time**, respectively.

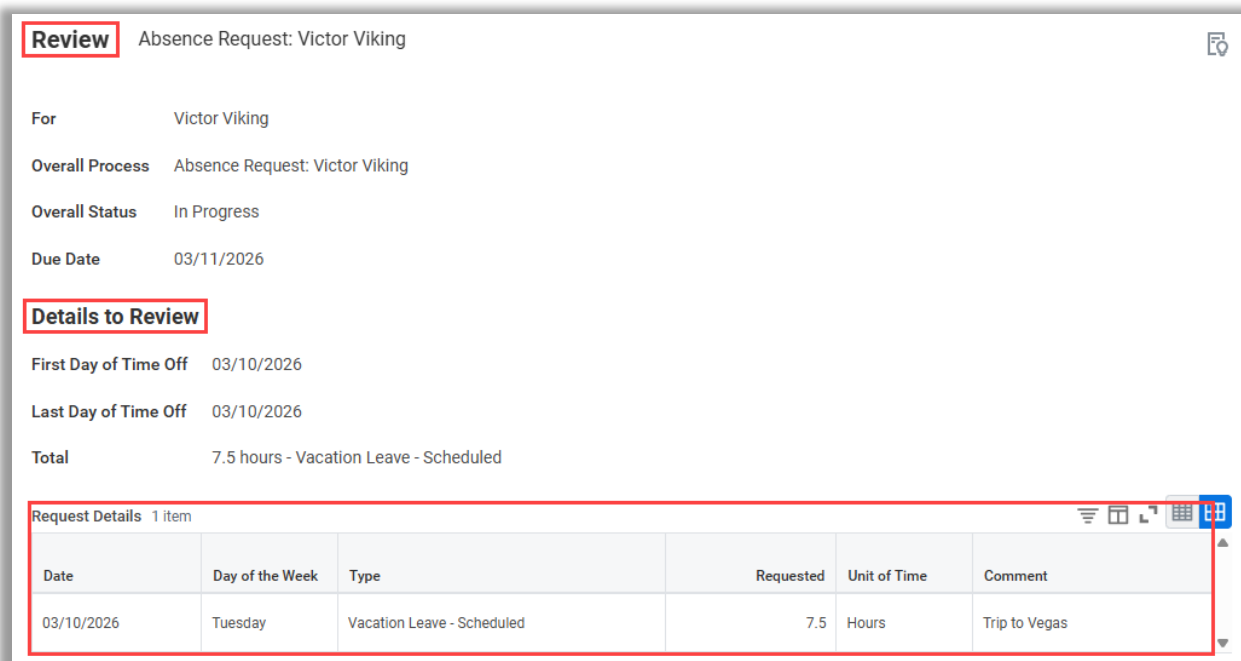
From the Workday homepage, click **My Tasks** in the top-right corner.



1. Locate the required time/absence request.



2. Review details of the time/absence entry.



- (Optional) If reviewing an absence request, click **View Balances** to see the employee's time off balance as of the current date.

Note: Workday will not allow an employee to submit an Absence if they do not have the available time off accrued by the date the Absence is used.

View Balances

Time Off Balance as of Current Date

Balances Tracked in Hours 4 items

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date
Benevolent Bank	Hours	0	0	0	0	0	0	0	0
Sick Leave	Hours	96.99	18.45	0	111.75	3.69	0	0	115.44
Vacation Leave	Hours	136	0	0	136	0	0	0	136
Total:									251.44

- Click one of the following to perform absence actions:



- Approve:** The request is approved.
- Send Back:** There needs to be additional data or incorrect data that needs to be edited.
- Deny:** The request is denied.
- Cancel:** The request page will close, but no action will be taken.

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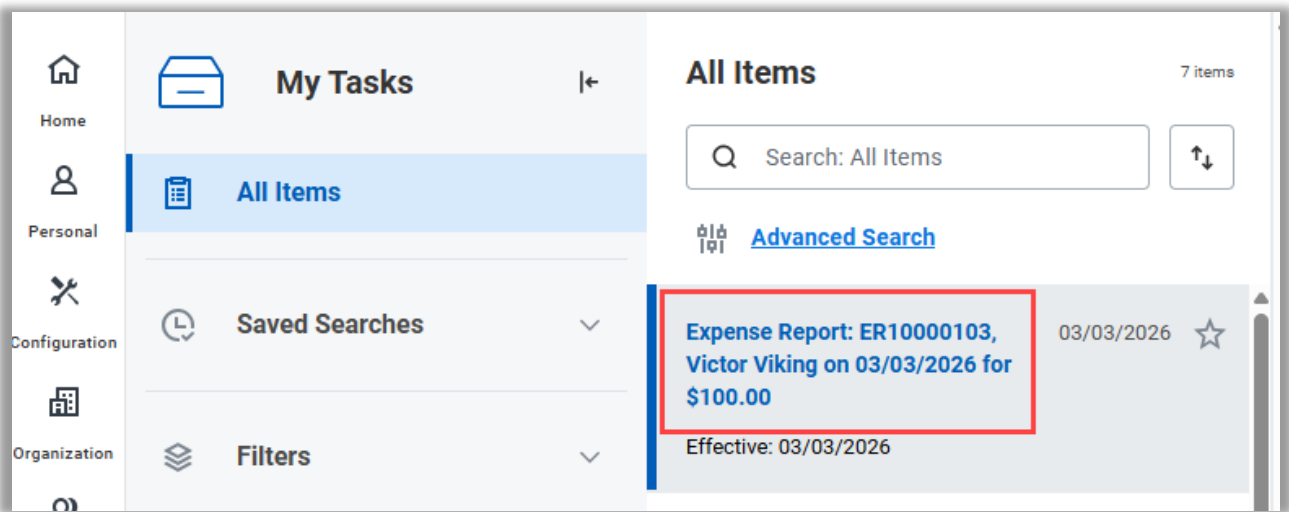
Approve Spend Authorizations, Expense Reports & Purchase Requisitions

Spend Authorizations, Expense Reports and Purchase Requisitions route for approval to Manager and Cost Center Manager. Steps below are specific to Expense Reports; however, the process is similar for both transactions.

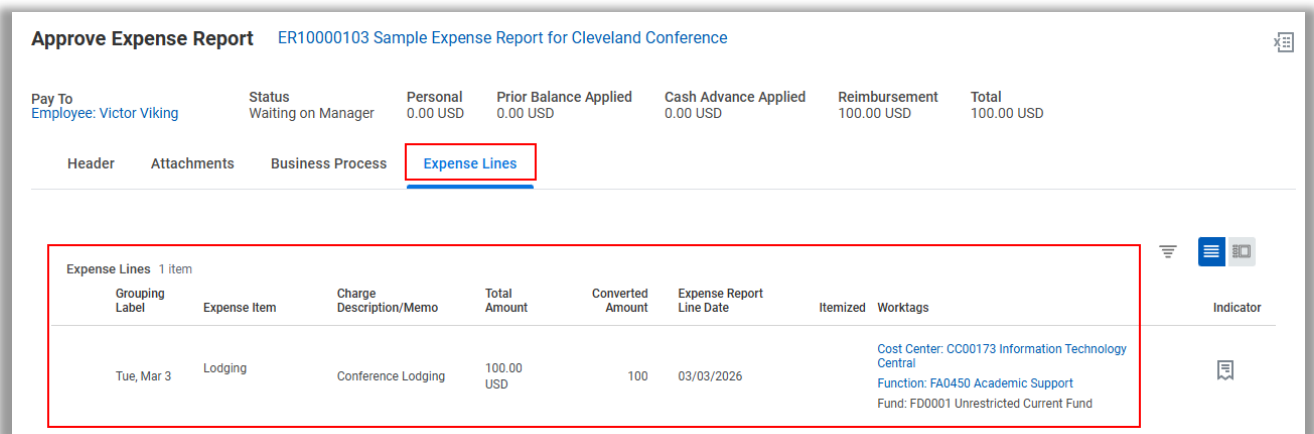
From the Workday homepage, click **My Tasks** in the top-right corner.



1. Locate the appropriate expense report/purchase requisition.



2. Review the details of the expense report/purchase requisition. Expense Reports default to the **Expense Lines** tab, where managers can validate important information including the Expense Item, Total Amount, the associated Cost Center, and more.



3. Click remaining tabs to view more Expense Report detail:

- a. **Header:** View high-level details such as Memo, Business Purpose, and Reimbursement Payment Type.

Header	Attachments	Business Process	Expense Lines
Spend Authorization	03/02/2026 Professional Conference in Cleveland 160.00 USD		
Final Expense Report	Yes		
Expense Report Number	ER10000103		
Memo	Sample Expense Report for Cleveland Conference		
Position	Specialist, Business Operations - Workday Training (Marta Manager), Northern Kentucky University		
Company	Northern Kentucky University		
Expense Report Date	03/03/2026		
Business Purpose	Conference		
Reimbursement Payment Type	Direct Deposit		
Budget Check Status	Pass		

- b. **Attachments:** View any documents attached to the expense report. Some documents may be attached at the individual expense line level and can be viewed by selecting the expense report title and reviewing the expense lines in more detail.

Approve Expense Report		ER10000103 Sample Expense Report for Cleveland Conference				
Pay To Employee: Victor Viking	Status Waiting on Manager	Personal 0.00 USD	Prior Balance Applied 0.00 USD	Cash Advance Applied 0.00 USD	Reimbursement 100.00 USD	Total 100.00 USD
Header	Attachments	Business Process	Expense Lines			

- c. **Business Process:** Displays the entire approval workflow for that expense report, including past, present, and future steps.

Process	Step	Status	Completed On	Due Date	Person (Up to 5)
Expense Report Event	Expense Report Event	Step Completed	03/03/2026 01:28:12 PM	03/10/2026	Victor Viking
Expense Report Event	Check Budget	In Progress		03/04/2026	wd-support
Expense Report Event	Approval by Employee As Self	Not Required		03/10/2026	
Expense Report Event	Approval by Manager	Awaiting Action			Marta Manager (Manager)

- 5. Add comments as required and then click one of the following options:

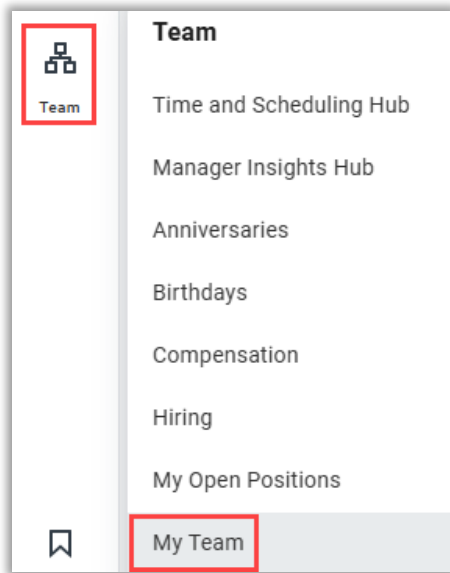
- a. **Approve:** Approves the expense report.
- b. **Send Back:** Returns the expense report back to the employee to make adjustments for resubmission.
- c. **Close:** Closes the expense approval window without taking actions.

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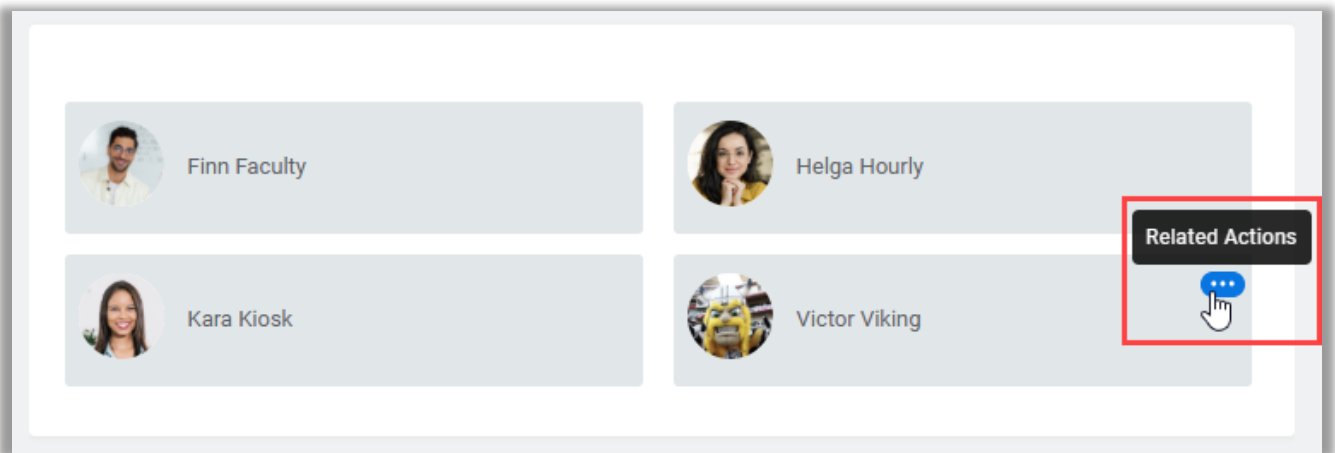
Initiate a Job Change, including Job Details or Location (steps for the initiating Manager)

Managers initiate a Job Change when an employee is promoted, demoted or transferred to a different location, role or department.

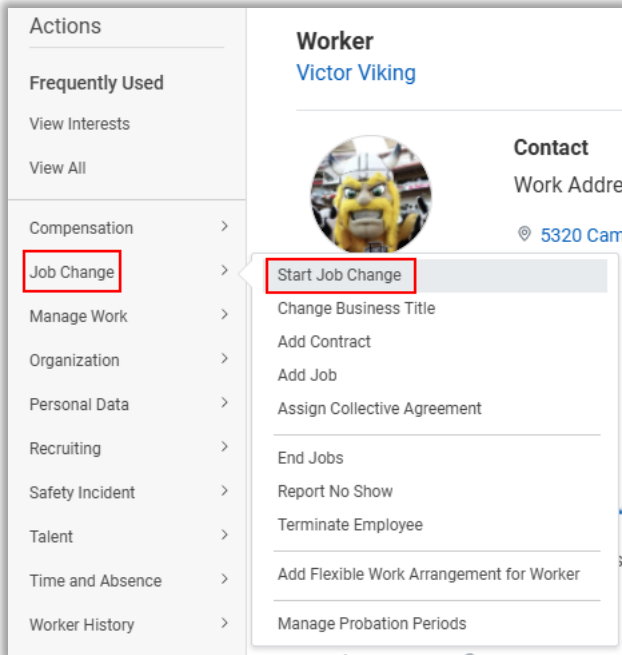
From the Workday homepage, click **Team > My Team**.



1. Hover over the required employee to view and select their **Related Actions** *** .

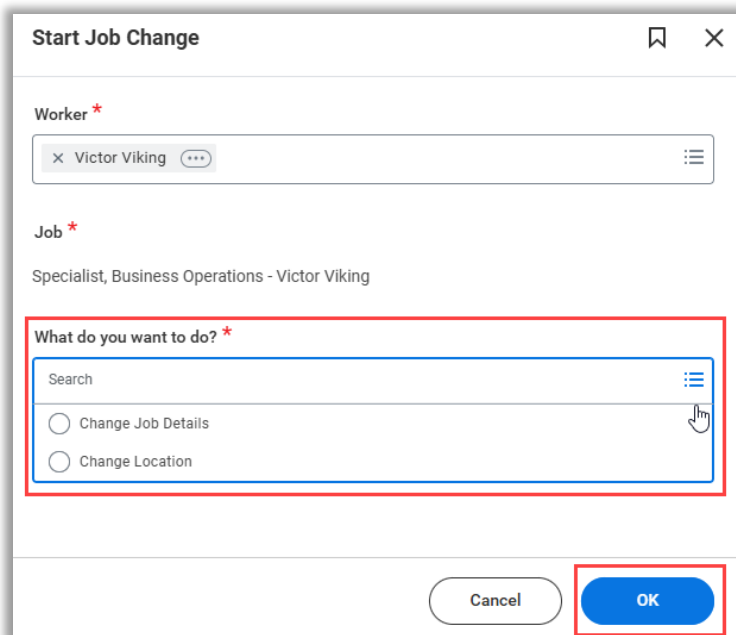


2. Click **Job Change > Start Job Change** to initiate the job change process.



3. Select one of the following options:

- a. **Change Job Details:** Access most job change sections.
- b. **Change Location:** Make a location change.



Note: The Start Job Change window displays, with information pre-populated based on the previous selection.

5. Review the Start Job Change information and click pencil icon to edit, if required.

Start Job Change Victor Viking

Start

Start Details

When do you want this change to take effect? *
03/29/2026

Why are you making this change? *
Change Job Details

Who will be the manager after this change?
Marta Manager

Which team will this person be on after this change?
Workday Training (Marta Manager)

Where will this person be located after this change? *
UNIVERSITY CENTER (UC)

Start Cancel

6. Click **Start**. The Change Job window displays.

The screenshot shows a 'Change Job' window with the following details:

- Job Profile:**
 - Job Profile * (with a pencil icon): Specialist, Business Operations
 - Job Title: Specialist, Business Operations
- Location:**
 - Location * (with a pencil icon): UNIVERSITY CENTER (UC)
 - Scheduled Weekly Hours: 40
 - Work Shift: (blank)
- Compensation:**
 - Employee Visibility Date (with a pencil icon): Employee Visibility Date

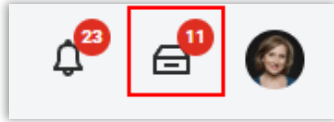
7. Review details in each section and make any required changes by clicking the pencil icon and editing the necessary fields.

8. Click **Submit** to route the job change through the approval process.

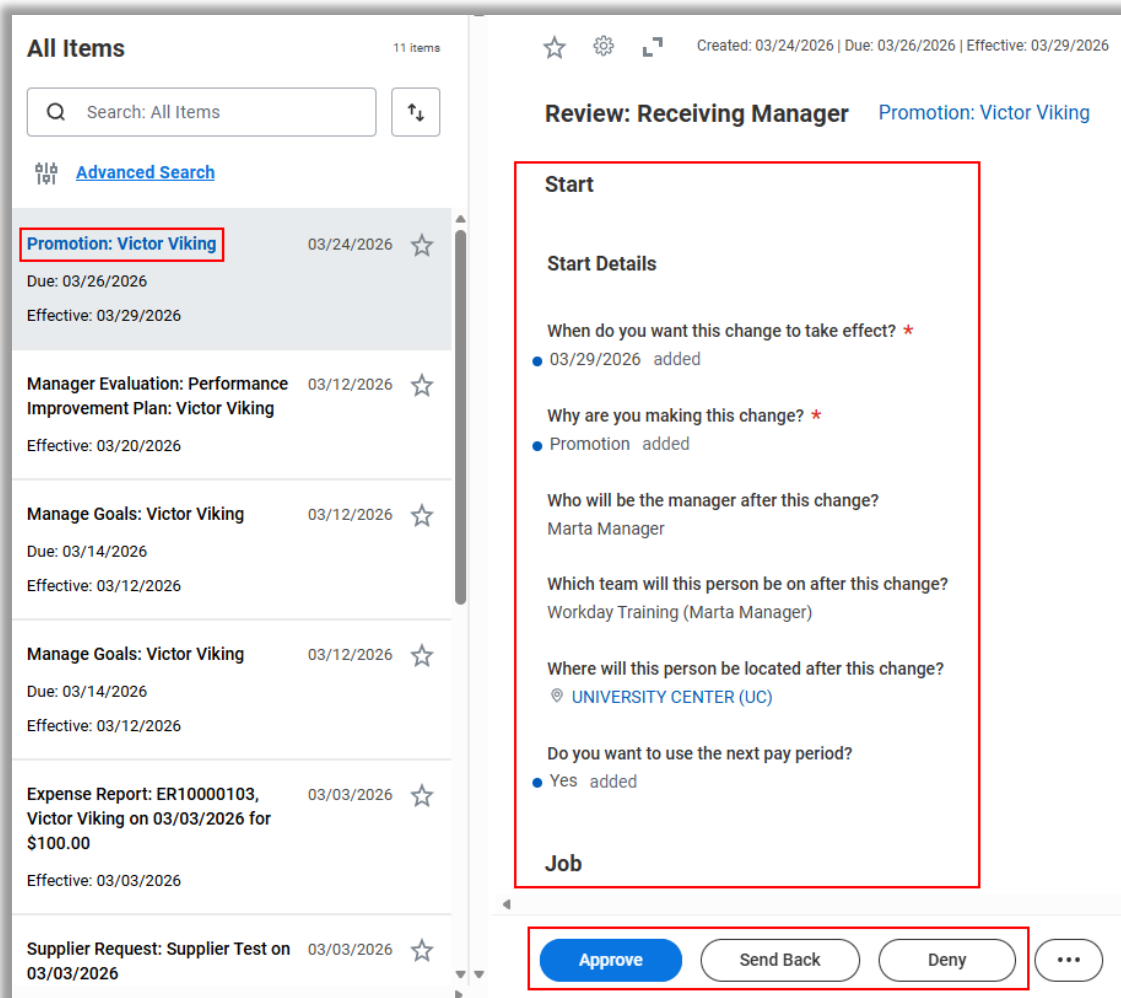
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Approve a Job Change (steps for Manager receiving the Employee being transferred)

From the Workday homepage, click the **My Tasks** icon.



1. Locate the job change item and review the job change details.



2. Select one of the following:

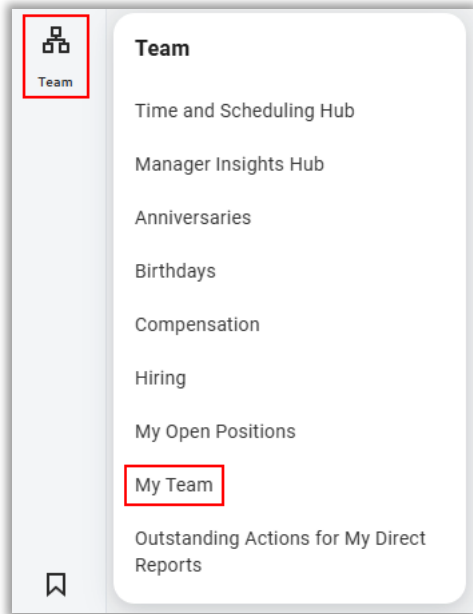
- a. **Approve:** Approves the job change.
- b. **Send Back:** Returns the job change to the initiator to make necessary changes.
- c. **Deny:** Deny the job change.

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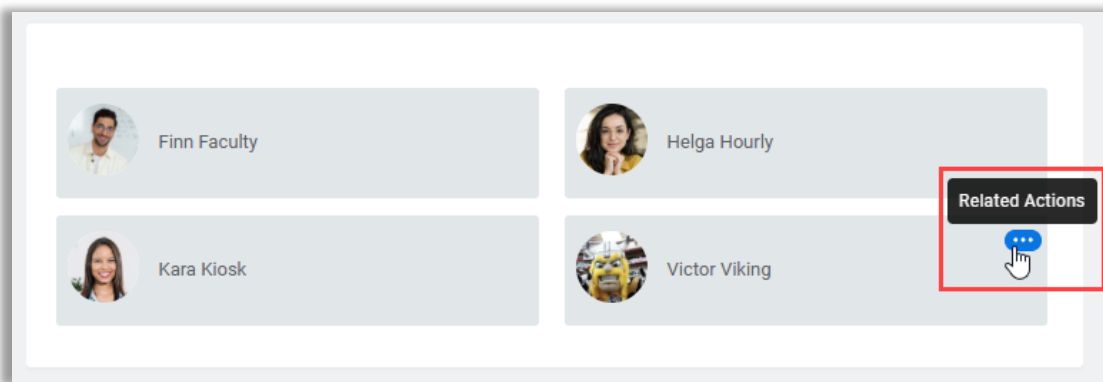
Initiate a Compensation Change

NKU Reviewer, please provide context for this action, including when/what Managers do and how it intersects with HR/Comp's role.

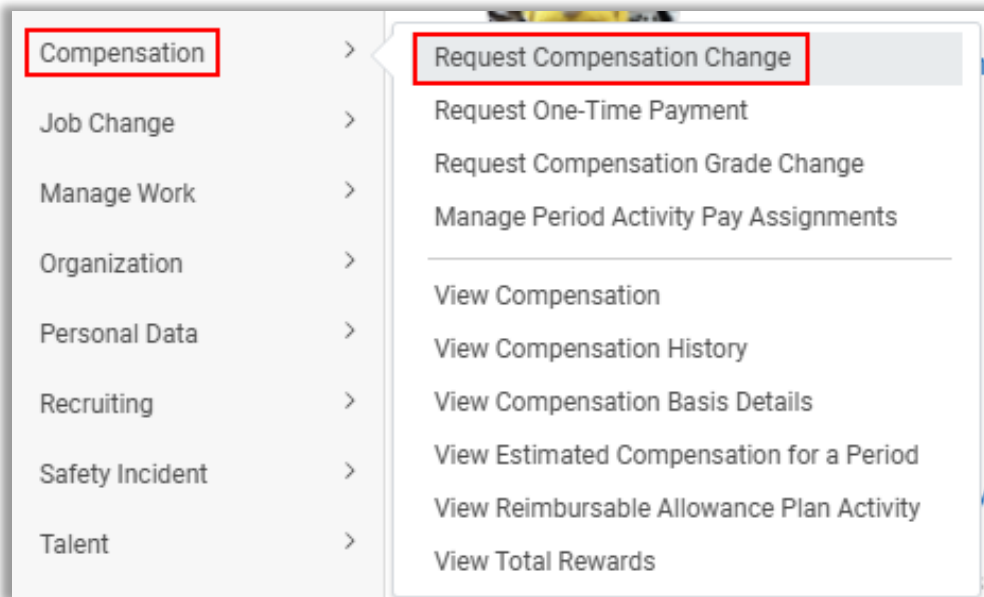
From the Workday homepage, click **Team > My Team**.



1. Hover over the required employee to view and select their **Related Actions** **...** .



2. Click **Compensation** > **Request Compensation Change**. The Request Compensation Change pop-up displays.



3. Select a **Reason** for the compensation change request.

The screenshot shows the 'Request Compensation Change' pop-up window. It contains the following fields: 'Effective Date' with a date picker set to 03/29/2026; 'Use Next Pay Period' with a checked checkbox; 'Employee' with a dropdown menu showing 'Victor Viking'; and 'Reason' with a search dropdown menu. The 'Reason' field is highlighted with a red box. At the bottom, there are 'Cancel' and 'OK' buttons.

4. Click **OK**. The Request Compensation Change page displays.
5. Navigate to the section requiring edits.

6. Click **Related Actions** for the section then click **Edit**.

7. Edit required fields.

8. Click **Save**.

9. Click **Submit** to route the compensation change request through the necessary approval chain.

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Access Manager Reports (Coming Soon)

1.

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Need Help?

If additional support is needed, contact workdaysupport@nku.edu.