

# What Employees, Managers and Executives Do

## What do Employees do?

- Request time off/leave on a computer Request Leave
- Elect, change, add benefits for life events
- Change Personal Information
- Create Spend Authorization
- Submit expense reports on a computer
- Enter time worked or time into projects on computer
- How to add payment election (payroll)
- How to create a requisition
- Employee self service on phone (Enter time, Time off, expense report)
- Edit Withholding Elections
- Run/view reports (which ones?)

## What do Managers do (in addition to their role as employee)?

- Approve time
- Approve expense reports
- Approve resources
- Approves Job reqs and offers (finance partner, global)
- Project Manager review time and expense
- Transfer/demote/promote employee
- Terminate employee
- Demote, promote, transfer contractors
- Request One Time Payment
- Request Compensation Change
- Manager enter time off for employee (Under Absence)

## Job specific functions:

### ○ ***Payroll/Accounting***

- How to adjust various types of pay (salary, one-time payment, rates)
- How to start judgments and/or garnishments
- How to amend judgments and/or garnishments
- How to stop judgments and/or garnishments
- How to delete judgments and/or garnishments
- How to add/edit payment election
- How to change withholding election

### ○ ***Accounts receivable/payable***

- How to create customer

- Create customer contract for software license and maintenance
- How to create project contract
- How to create Billing Schedule for Software license and maintenance
- Create settlement run
- How to create Billing schedule for project contract
- Create Customer Invoice for Billing installment (For software)
- Create Customer Invoice for Billable transaction (Project)
- How to create an supplier invoice with taxable info
- How to amend the contract
- Manager review Time and Expenses
- Credit Memos - Licenses
- Credit Memos - Services
- **HR/Recruiting**
  - How to create job requisitions for regular hires
  - How to transfer employees
  - Request One Time Payment
  - Terminate Employees
  - Create/edit questionnaires
  - Change from Temp to Perm
  - International Location Transfer
  - Change from Hourly to Salary
  - How to create position and requisition for contract hires (agency, temp, 1099)
  - Basic recruitment flowchart from candidate review through ready for hire for regular hires and contractors
  - How to create/modify external career sites
  - How to set up agencies to forward candidates to recruiter/manager
  - How to create job profiles
- **Benefits Coordinator**
  - Elect/change benefits for life events as employee
  - Elect/change benefits for life events as Benefit Partner
  - Initiate birth/adoption as Benefit Partner
  - Change beneficiary as Benefit Partner
  - Initiate Death of Employee as HR Admin
  - How to open/close open enrollment
  - How to edit holiday calendars (*needs Absence Mgr Security*)
- **Project Coordinators**
  - How to create a project
  - Update Project Details
  - Assign/Remove Resources

- Create Resource Forecast
- How to track time posted to a project
- Project Manager Review Time and Expenses (In manager's tutorial)
- **Procurement**
  - Create Supplier
  - How to create Requisition
  - Issue Purchase Order
  - How to create Receipt
  - How to create Supplier Invoice
  - Create Supplier Contract
  - How to Create Purchase Order Schedule for Supplier Contract
  - Create Supplier Invoice schedule for Supplier Contract
- **HRIS functions (human resources info systems)**
  - How to mass hire employees into Workday (company acquisition)
  - How to create/load EIBs
  - Creating supervisory orgs, assigning Managers & moving employees to supervisory orgs.
  - Reassign unassigned tasks
  - WD Security basics
  - Adding/editing or removing document or steps in the onboarding process
  - View/Edit Documentation & Text Blocks
  - Configuring Worklets & visibility for company-wide deployment
  - Maintain Event Categories & Reasons & Text Blocks