

Manager Tasks, Viewing Team, & Approvals

This guide shows you how to view your team, manage your tasks, and complete common approvals in Workday. Whether you need to approve a request, view your organizational chart, check headcount, or take action on a team member, this job aid takes you through it step-by-step.

Who is this for: Managers and Business Owners

Time to complete: 5 to 10 minutes

Before You Start

- You have an active Workday account and are logged into Workday
- You have a manager role with direct reports

Common Manager Tasks

Area	Action	View
My Team Management	Business Title Change, Terminate	Compare Team, Organization Directory, My Org Chart, Headcount, Management Chain, Timeline
Team Performance	Add Goal to Employees, Review Ratings, Employee Reviews, My Team's Performance Reviews, My Team's Goals, Start Performance Improvement Plan, Archive Goals, Get Feedback on Worker	

Accessing, Viewing and Managing Team Performance

STEP 1:

From the Workday Homepage, access your team information:

1. Click the **Team** icon in the left sidebar
2. You will see two options: **My Team Management** and **Team Performance**

Your homepage also shows quick access buttons for common tasks: **My Org Chart**, **Learning**, **Jobs Hub**, **Benefit Elections**, and **Manage Job Requisitions**

The screenshot displays the Workday homepage for a user named Michael Scott. The interface includes a top navigation bar with the Ambient logo and user information. A left sidebar contains navigation icons for Home, Organization, Personal, and Team. The Team icon is highlighted with a red box and a red circle labeled '1'. A dropdown menu is open from the Team icon, showing options for 'Team', 'My Team Management', and 'Team Performance'. The 'Team' option is highlighted with a red box and a red circle labeled '2'. The main content area features a large banner with the text 'People For Spaces that Matter' and 'Rooted in our local teams, united by one collective.' Below the banner, there is a greeting 'Good Afternoon, On Behalf of: Michael Scott' and a search bar. Quick access buttons for 'My Org Chart', 'Learning', 'Jobs Hub', 'Benefit Elections', and 'Manage Job Requisitions' are displayed. The 'Awaiting Your Action' section shows two tasks: 'Benefit Change - Home Address Change : Michael Scott on 07/22/2026' and 'Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026'. An 'Announcements' section is also visible on the right.

Accessing, Viewing and Managing Team Performance

STEP 2:

Click Team Performance from the Team section in the left sidebar. Actions available:

- **Add Goal to Employees:** Assign goals to your team members
- **Review Ratings:** View and review annual performance review ratings
- **Employee Reviews:** Access and complete employee performance reviews
- **My Team's Performance Reviews:** View the status of all reviews for your team
- **My Team's Goals:** View goals across your team
- **Start Performance Improvement Plan:** Initiate a PIP for an employee
- **Archive Goals:** Archive completed or outdated goals
- **Get Feedback on Worker:** Request feedback on a team member from others

Team Performance

[Team Performance](#)

 Actions

Add Goal to Employees

Review Ratings

Employee Reviews

My Team's Performance Reviews

My Team's Goals

Start Performance Improvement Plan

Archive Goals

Get Feedback on Worker

Opportunity Graph for Others

Less (6)

Accessing, Viewing and Managing Team Performance

STEP 3:

Click My Team Management to view and manage your team:

Actions: Initiate key changes for your team members

- **Business Title Change:** Update an employee's business title
- **Terminate:** Initiate a separation or termination process

View: Access key team information

- **Compare Team:** Side-by-side comparison of team members
- **Organization Directory:** Browse your organization's directory
- **My Org Chart:** View your team's reporting structure
- **Headcount:** View headcount details for your supervisory organization
- **Management Chain:** View the management hierarchy above you
- **Timeline:** View a timeline of key events for your team

My Team Management

My Team Management

Actions

Business Title Change

Terminate

Start Job Requisition

View

Job Requisitions

Compare Team

Organization Directory

My Org Chart

Headcount

Management Chain

Timeline

Less (4)

Managing Your Tasks and Approvals

STEP 4:

As a manager, tasks requiring your action will appear in your My Tasks:

1. The **"Awaiting Your Action"** card on the homepage also gives you a quick view of what needs attention
2. You can also view you your team in the Team Highlights section which is below the **"Awaiting Your Action"** section
3. Alternatively click the **My Tasks** icon (tray icon) in the top right corner of the screen

On behalf of: Michael Scott

Ambient

Home Organization Personal Team More

Good Afternoon, On Behalf of: Michael Scott

Search

My Org Chart Learning Jobs Hub Benefit Elections Manage Job Requisitions

1 Awaiting Your Action

- Benefit Change - Home Address Change : Michael Scott on 07/22/2026
My Tasks - 2 hour(s) ago
- Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026

Announcements 1 of 1

Welcome to Ambient! We are excited to have you as part of our team. Pleas...

Home Organization Personal Team

2 Team Highlights

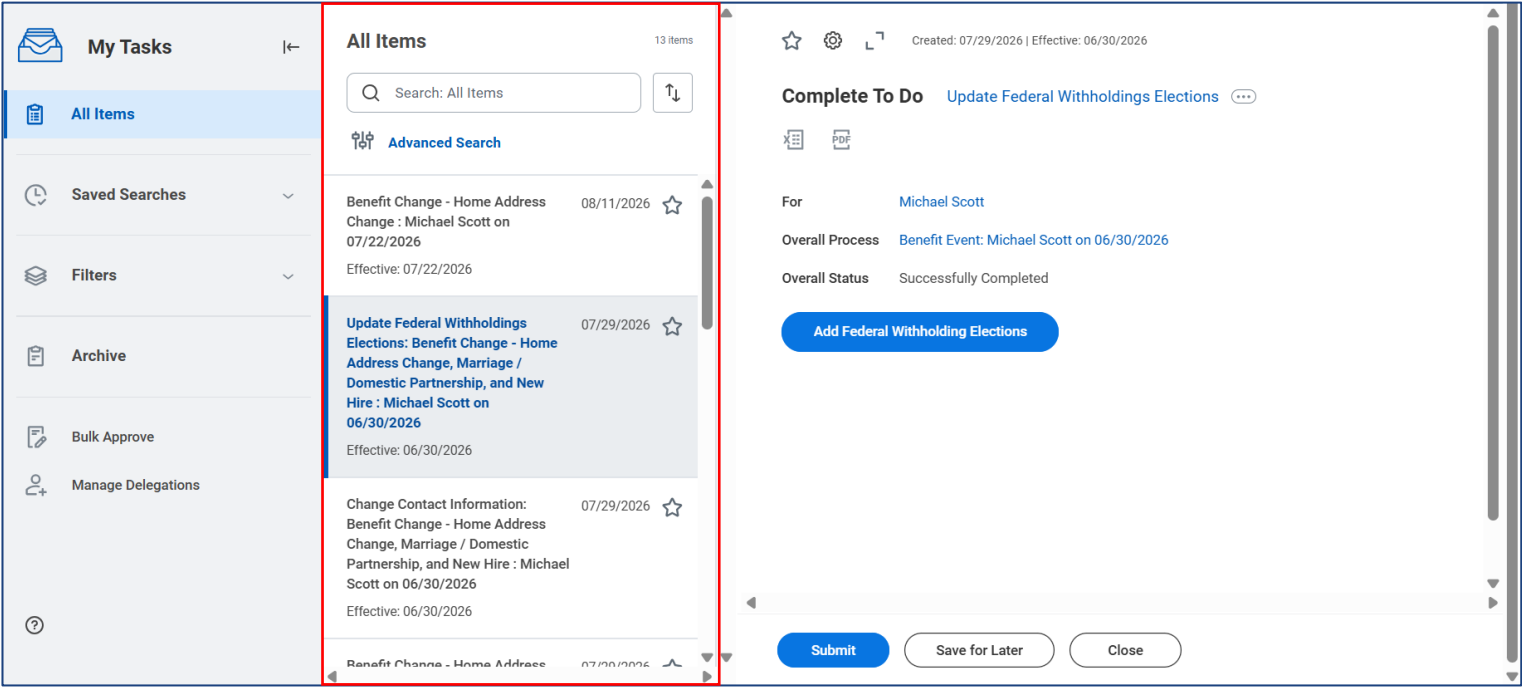
- Amanda Martinez >
- Ross Geller >
- Team Org Chart >

Note: Some approvals may require additional levels of approval after you (e.g., your manager or HR). The task will continue through the workflow automatically.

Managing Your Tasks and Approvals

STEP 5:

On clicking the **My Tasks** icon (tray icon) in the top right corner of the screen you will see all pending tasks including approvals, to-dos, and notifications



Note: Some approvals may require additional levels of approval after you (e.g., your manager or HR). The task will continue through the workflow automatically.

Managing Your Tasks and Approvals

STEP 6:

To approve or action a request:

1. Click on the task from your My Tasks list to open it
2. Review the details (e.g., employee name, dates requested, type of change, reason)
3. Choose your action:
 - **Approve:** Confirms the request and moves it forward in the workflow
 - **Deny:** Rejects the request. You will be asked to provide a reason
 - **Send Back:** Returns the request to the submitter for edits. You will be asked to provide a reason
4. Add a comment if needed, then click your chosen action to submit

The screenshot displays the Ambient HR system interface. On the left, a sidebar contains navigation options: Home, My Tasks (selected), All Items, Saved Searches, Filters, Archive, Bulk Approve, and Manage Delegations. The main content area is divided into two panels. The left panel, titled 'All Items', lists 18 items. A red box labeled '1' highlights a 'Data Change' task for 'Receiving Manager' with a due date of 07/10/2026 and an effective date of 07/12/2026. The right panel, titled 'Review: Receiving Manager', shows the details of this task. It includes a 'Start' section with a 'Start Details' subsection. Under 'Start Details', there are three questions: 'When do you want this change to take effect?' (answered 07/12/2026), 'Why are you making this change?' (answered Change Job Details), and 'Who will be the manager after this change?' (answered Bayardo Abanza). At the bottom of the right panel, there are three buttons: 'Approve' (highlighted with a red box labeled '3'), 'Send Back', and a three-dot menu. A red box labeled '3' also highlights the 'Deny' option in the three-dot menu.

Note: Some approvals may require additional levels of approval after you (e.g., your manager or HR). The task will continue through the workflow automatically.

References

Key Things to Know

- As a manager, you may be responsible for approving job changes, compensation changes, and other tasks routed to you. Monitor your My Tasks inbox daily.
- Timely approvals are critical. Delayed approvals can impact employee pay, time-off, benefits, and process completion.
- You can view your team's details, org chart, and performance information at any time using the search bar.
- Some processes you initiate (e.g., job changes, position requests) will require approval from your manager and/or HR before they are completed.
- If a task was sent to you by mistake, use Send Back to return it rather than leaving it unactioned.
- Always delegate your approvals before going on leave so your team's requests are not delayed.
- Completed tasks move to the Archive section in My Tasks. You can review past actions at any time.
- You can access all manager tasks from both desktop and the Workday mobile app.

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.