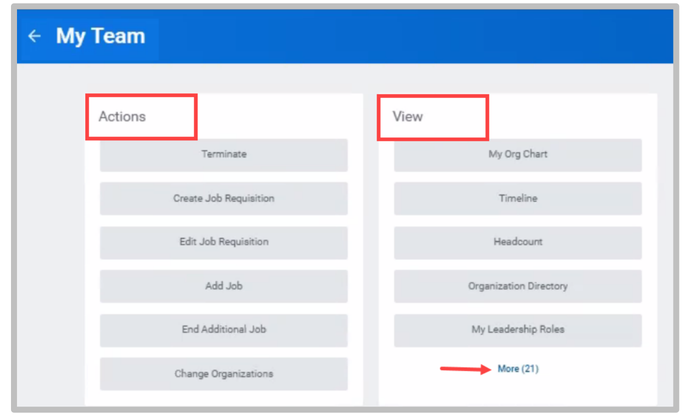
My Team Worklet

This job aid includes instructions to help familiarize Managers with the **My Team** worklet, including: 1) View Interactive Organizational Chart; 2) View/Update Employee Information; 3) Initiate Employee Action; and 4) View Team Time Off and Leave Calendar.

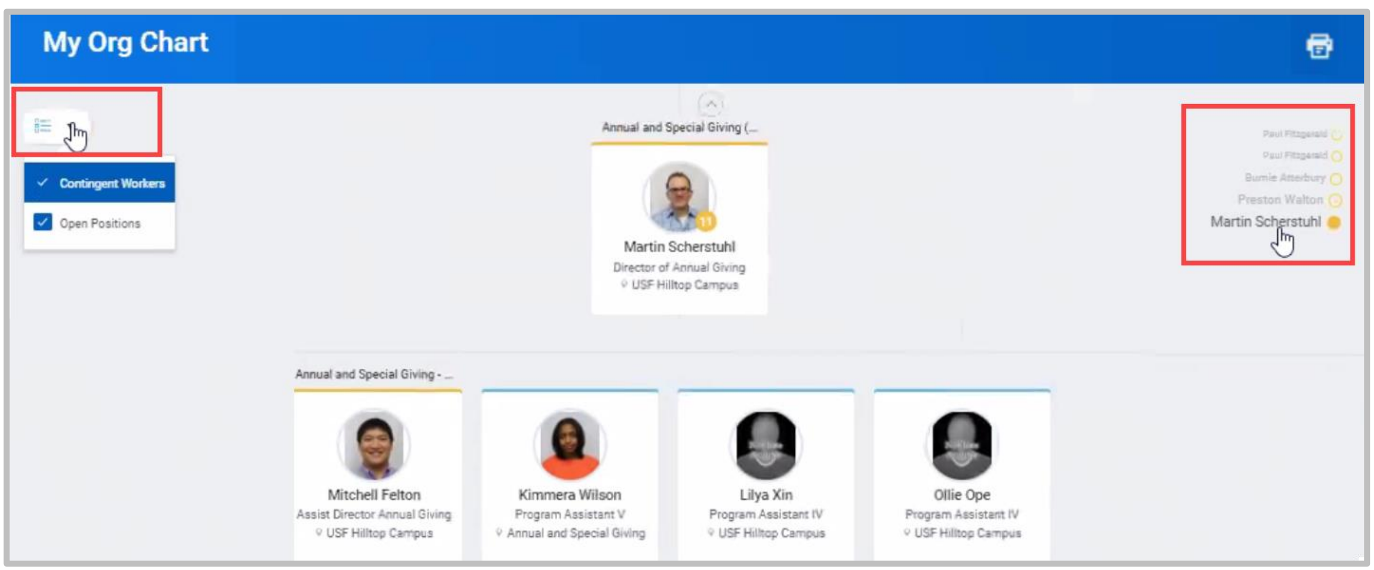
When you click the **My Team** worklet, the top half of the page contains common **Actions** you may take related to your team, as well as some information that you can **View**. If there is a "More" option, click it to reveal an expanded list.



VIEW INTERACTIVE ORG CHART

1. From the Home Page, click the **My Team** worklet.
2. In the View column on the right, click **My Org Chart**.

   Your organization will appear, including information about your team.
3. Click the names in the top right corner to navigate through your management chain.
4. Click the pull-down menu in the top left to view your org chart with or without contingent workers, or open positions.



EXPORT YOUR ORG CHART TO EXCEL

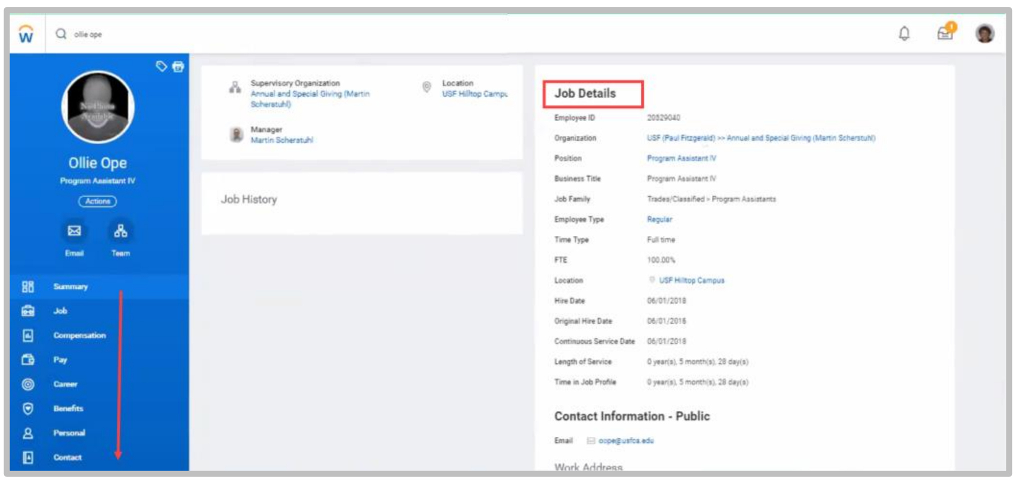
1. From the Org Chart, click the **Printer** icon in the top right corner. 
2. Select Excel as the File Format.
3. Select how many Levels of your org chart you'd like to print.
4. Optionally, select **Include Pictures**. The pictures will download as a .zip file.
5. Click **Print**.

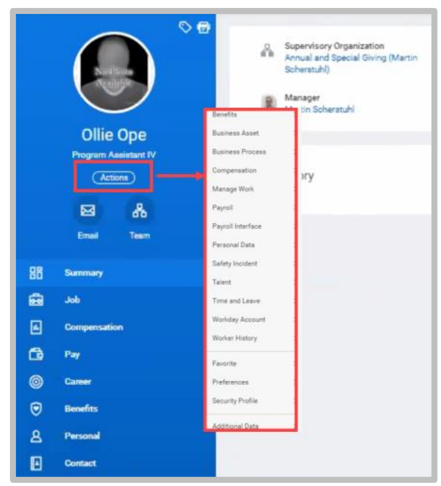
VIEW EMPLOYEE INFORMATION

1. From the Org Chart, click an employee name.

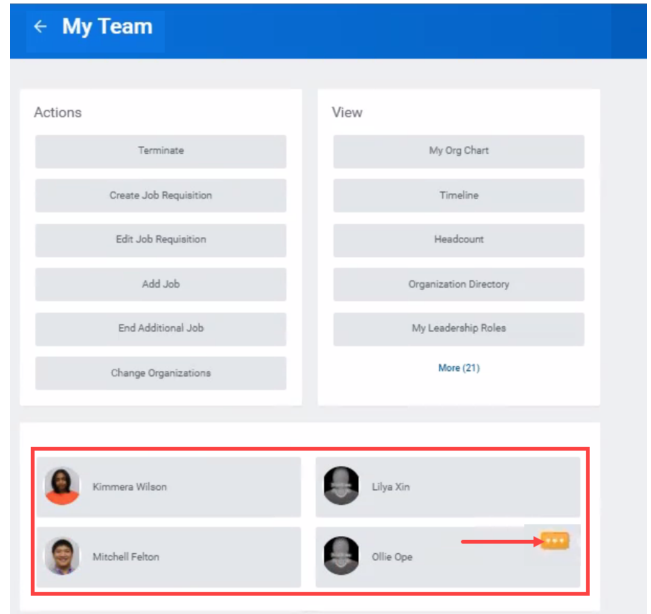
   The employee's **Profile** page will open displaying Job Details on the right, and links on the left to additional information: Compensation, Career, Benefits, Time Off, Personal, Contact information, and more.

2. Click the **Actions** button under the photo to reveal the list of actions you can take regarding the employee including job changes, compensation, or time and leave.





INITIATE EMPLOYEE ACTION



Another way to get to employee actions, is from the **My Team** worklet.

1. From the Home Page, click the **My Team** worklet.

   The lower half of the page contains a box for each of your Direct Reports. Hover your cursor in the upper right corner of the employee's box, and a *Related Actions* icon will appear.

2. Click the **Related Actions** button to reveal a list of actions you can take regarding the employee, including Promote or Change Job; Change Location; Terminate, etc.
3. Select the desired action. A page will open where you can enter the *effective date*, and other details to complete the action. Red asterisks denote required fields.
4. Click the **Edit** (pencil) icon to enter or modify existing details.
5. Click **Next** to move through the various sections.
6. Once all edits are made, click **Submit**.

   You will get a confirmation that your request has been submitted. If additional approvals are required after initiating the change, this will appear under **Up Next.**

   To view additional details and next steps, you can expand the *Details* and *Process* sections. Expand the *Process Tab* to see the request you submitted.

   Note: After you hit *Submit*, expand the **Details and Process** sections, and navigate to the **Process** tab to view next steps in the business process. In the *Status column*, you will be able to see whether there are any required actions or steps to remaining before the change is complete.

VIEW TEAM TIME OFF AND LEAVE CALENDAR

As a manager, you will also have the ability to view all of your team members' absences at-a-glance. This will help you to make decisions on time-off and absence requests that come into your Inbox.

1. From the Home Page, click the **My Team** worklet.

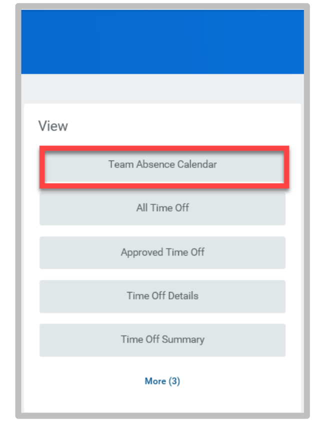
2. Under the *View* column, select **Team Absence Calendar** (you may need to click **More** to expand the list of options and scroll down until you see the Team Absence Calendar).

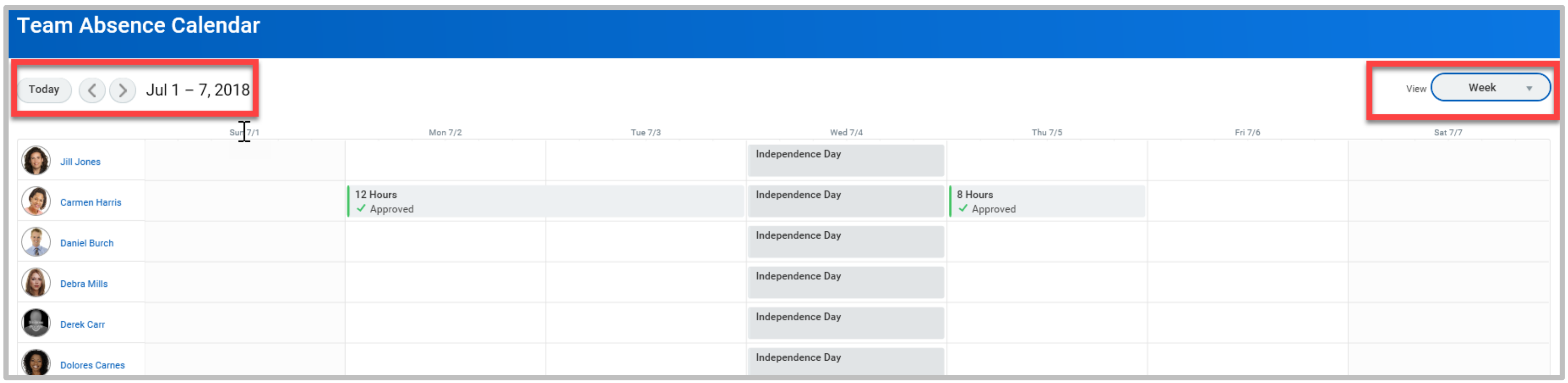
   Your Organization will default in.

3. Select the **Employees** whose absence you want displayed in the calendar.

4. Click **OK**.

   The unified absence calendar will display. Employee absence requests are indicated with the employee's name. Approved time will be marked with a **green** check mark. Requests that have been submitted but not approved will be marked with a **grey** check.





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5. On the right side of the screen, the Time-Off Calendar view can be adjusted by clicking the down arrow in the *View* field.

6. On the left, you can move the date forward or backwards by clicking the left and right arrows. The view will default to the current month and day.