Manager Navigator Job Aid

Parts of a Navigator

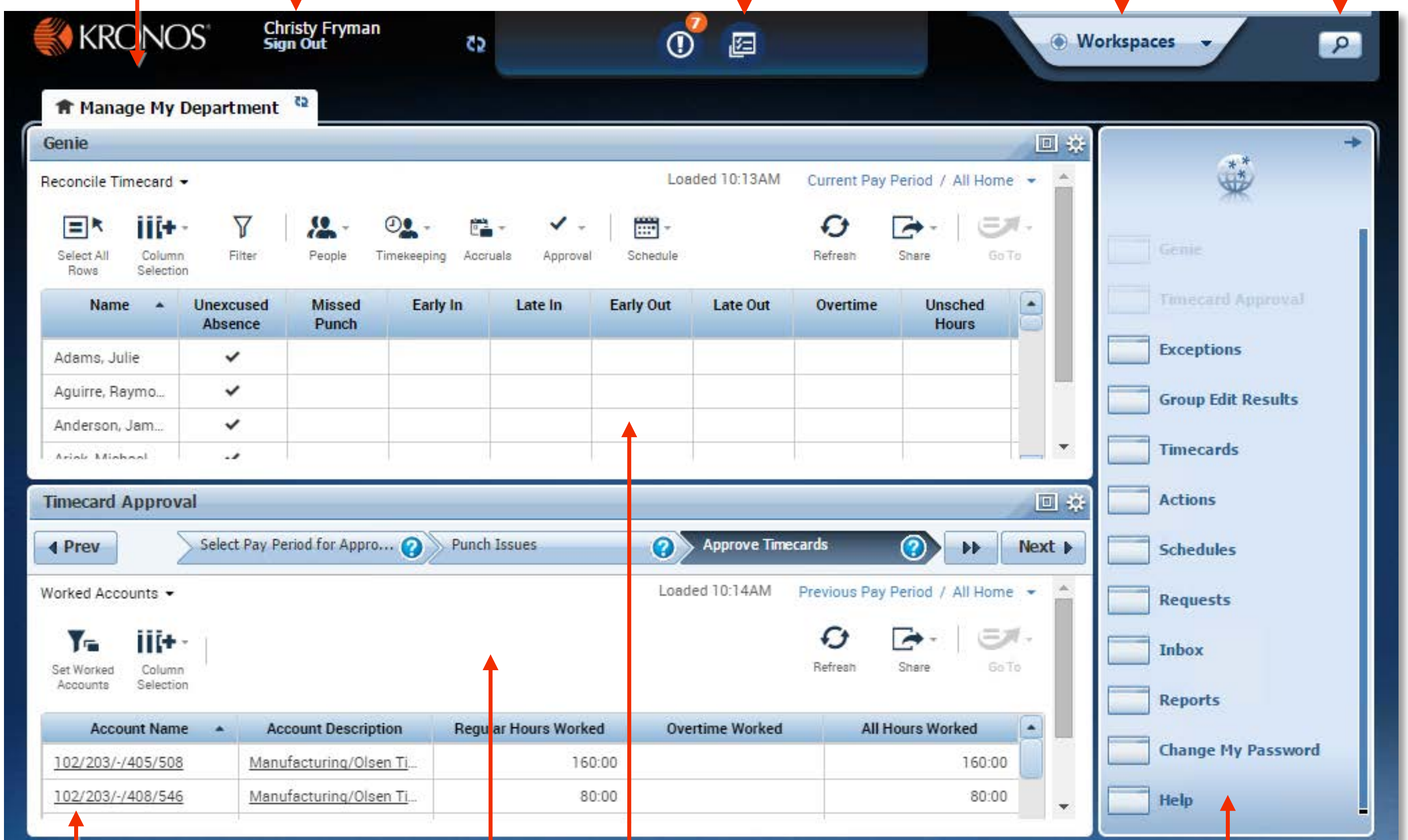
Active Bar
Displays active workspaces; click title to bring a workspace into focus. (Manage My Department is the only one in this example.) Click the Refresh icon next to the title to reload the workspace with its default information.

Name / Sign Out
Identifies user and a link to log out of navigator. Your photo may also appear here.

Alerts
Links, which appear as icons, enabling you to quickly view the type and number of tasks and issues that you need to address. (Note: Alerts are optional)

Carousel
Container for *one* or more workspaces (Note: Carousel appears only if there is another workspace in addition to the home workspace.)

Search
Click to open the Search widget, to locate employees and their information.



Workspace
A work area made up of one or more views and the Related Items pane.

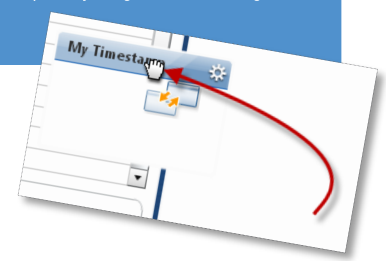
Views and Widgets
A workspace can have one or more pre-sized views. Views are holding areas for widget, which are the task-oriented tools you use to review data and perform actions. In this example, there are two views, and each one currently holds a widget. When you need to work with a different widget, you can swap it into either view, replacing the current occupant.

Related Items Pane
Includes one or more additional widgets for less common tasks; the Related Items pane contains different widgets for each workspace.

Upgrading from a Navigator?

If you are already familiar with the Navigator interface, this icon identifies the features that are most likely new to you: New

Repositioning Widgets
Move a secondary widget into a primary position by clicking the title bar, dragging it over a primary widget, and releasing.



New

Contextual Callouts
Try right-clicking over a cell in a widget. In many cases this will open a callout with detailed information and icons for any actions you might want to perform on that cell.

Navigator layouts vary

Navigators are customized by Administrators and reflect those items needed for a job role. Specific widgets and alerts that are available in your navigator are determined by your access and which applications are in use.

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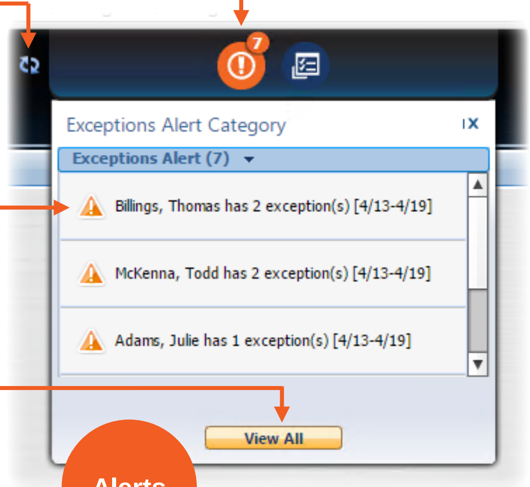
Opening Widgets and Workspaces

Refresh
Click the **Refresh** icon to get immediate updates to your Alerts.

Alert Icons
Each type of alert has its own icon. A number in the icon's corner indicates that there are items you should review. (The significance of the number itself depends on the specific alert.) Click an icon to view details.

Alert Details
Click an item in the details of an alert to open the relevant widget. You can then take whatever actions are needed in the open widget.

View All
Click to open the Alerts and Notifications widget. This provides more room for reviewing alerts, and may also include uncategorized alerts and notifications that are not actionable.

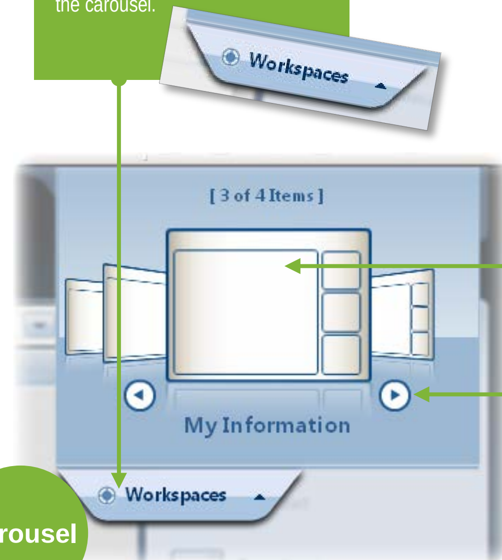


Alerts

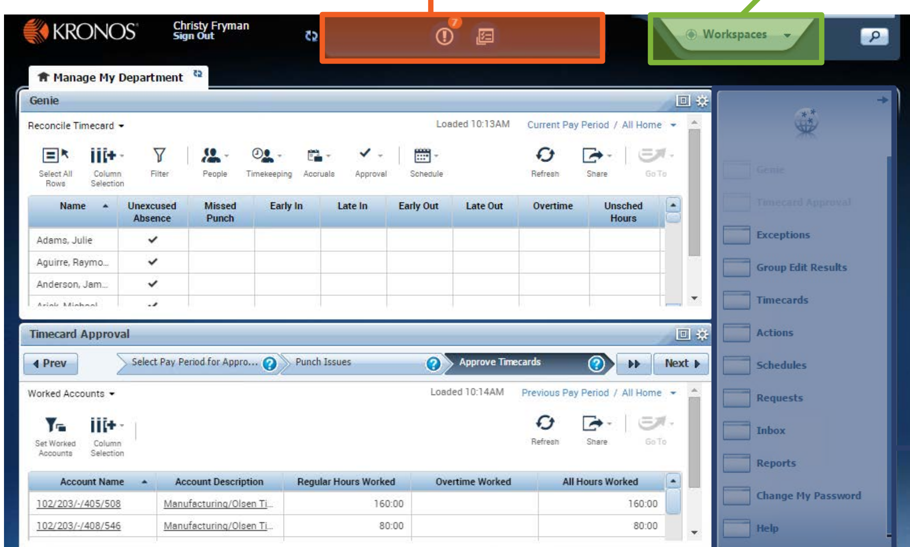
Closing the Carousel
Click the **Workspaces** tab to close the carousel.

Additional Workspaces
Click an item in the carousel to open an additional workspace. To close that workspace later, hover over its tab and click the Close (X) button.

Cycling the Carousel
If there is more than one workspace in the carousel, use the arrows to cycle through the additional workspaces.



Carousel



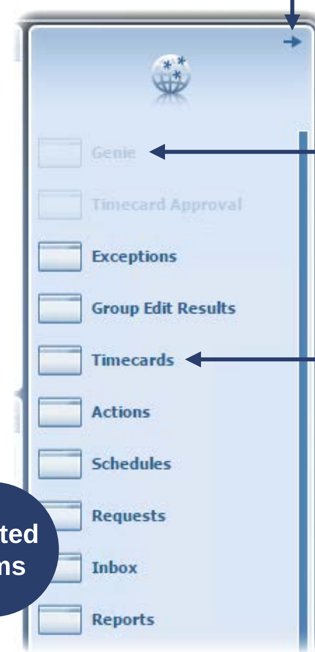
Closing the Related Items Pane
Click the right arrow to close the Related Items pane. When closed, click the left arrow to open it.

Active Widgets
Widgets already in an open workspace appear grayed out in widget list.

Activating a Widget
There are two ways to activate a widget in the Related Items pane.

To add it to the current workspace, drag it out of the pane and release it over a widget in the workspace.

To work with the widget in a temporary workspace, click the widget while it is still in the pane. To close that workspace later, hover over its tab and click the Close (X) button.



Related Items

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Managing the Active Workspace

Primary and Secondary Views

All workspaces have at least one primary view, and some also have one or more secondary views. Normally, to work in a widget you must move it into a primary view. Widgets occupying secondary views often provide useful information, but are not fully functional until moved into a primary view.

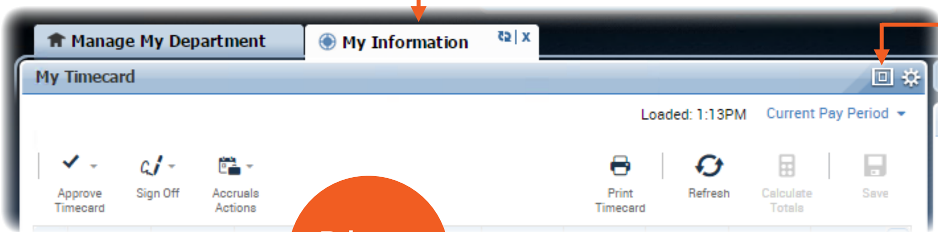
Workspace Tabs
Each active workspace gets its own tab. You can switch back and forth between workspaces by selecting the tab you want to view. You must always have at least one workspace open, but you can close any additional workspaces by hovering over its tab and clicking the Close (X) button.

Gear Icon
Click to view options for moving the widget. Unavailable options will be grayed out. (For example, widgets in the primary view cannot use Close or Pop-out.)

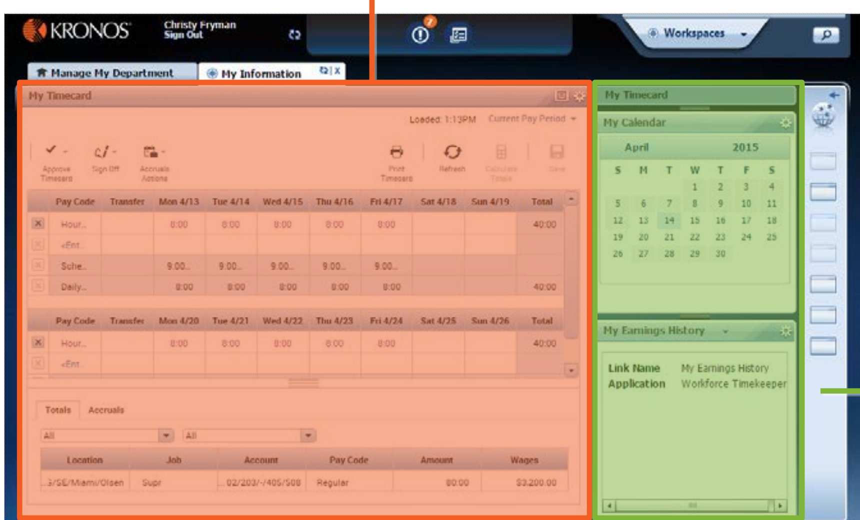
Two Primary Views?

Some workspaces feature two equally-size views in a side-by-side or top-and-bottom layout. In this case, both views act as primary views, and widgets in those views are fully functional.

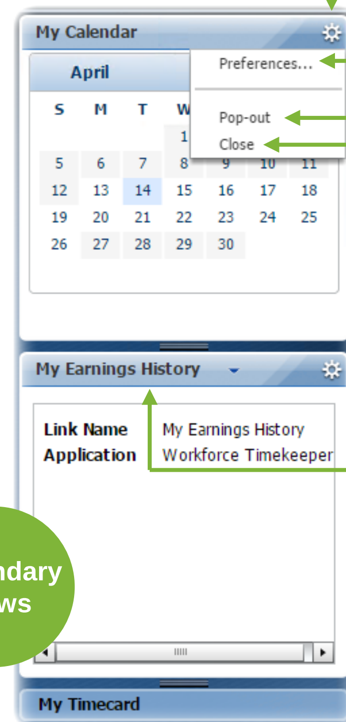
Maximize / Restore Icon
Click to expand a widget in a primary view to its maximum size. (This will temporarily hide any other widgets.) Click again when maximized to restore to the original size.



Primary View



Secondary Views



Preferences Option
Select Preferences to edit settings for a widget, such as time period, and permanenty save the changes. Preferences, if enabled, are saved only for your use in your own widget.

Pop-out Option
Select Pop-out to promote a secondary widget to a primary position.

Close Option
Select Close to send a widget in a secondary view back to Related Items.

Resize Bar
Click and drag the resize bar to reveal more of a particular secondary view.

Title Bar
Click and drag a widget's title bar to swap it with another widget or return it to the Related Items pane.

Usable Widgets in a Secondary View
In most cases widgets in a secondary view are informational only until promoted to a primary view. However, some widgets, such as My Timestamp, have functioning parts even when in a secondary view.

Manager Navigator Job Aid
Using a Wizard

Previous Button
Move back to an earlier step in the wizard.

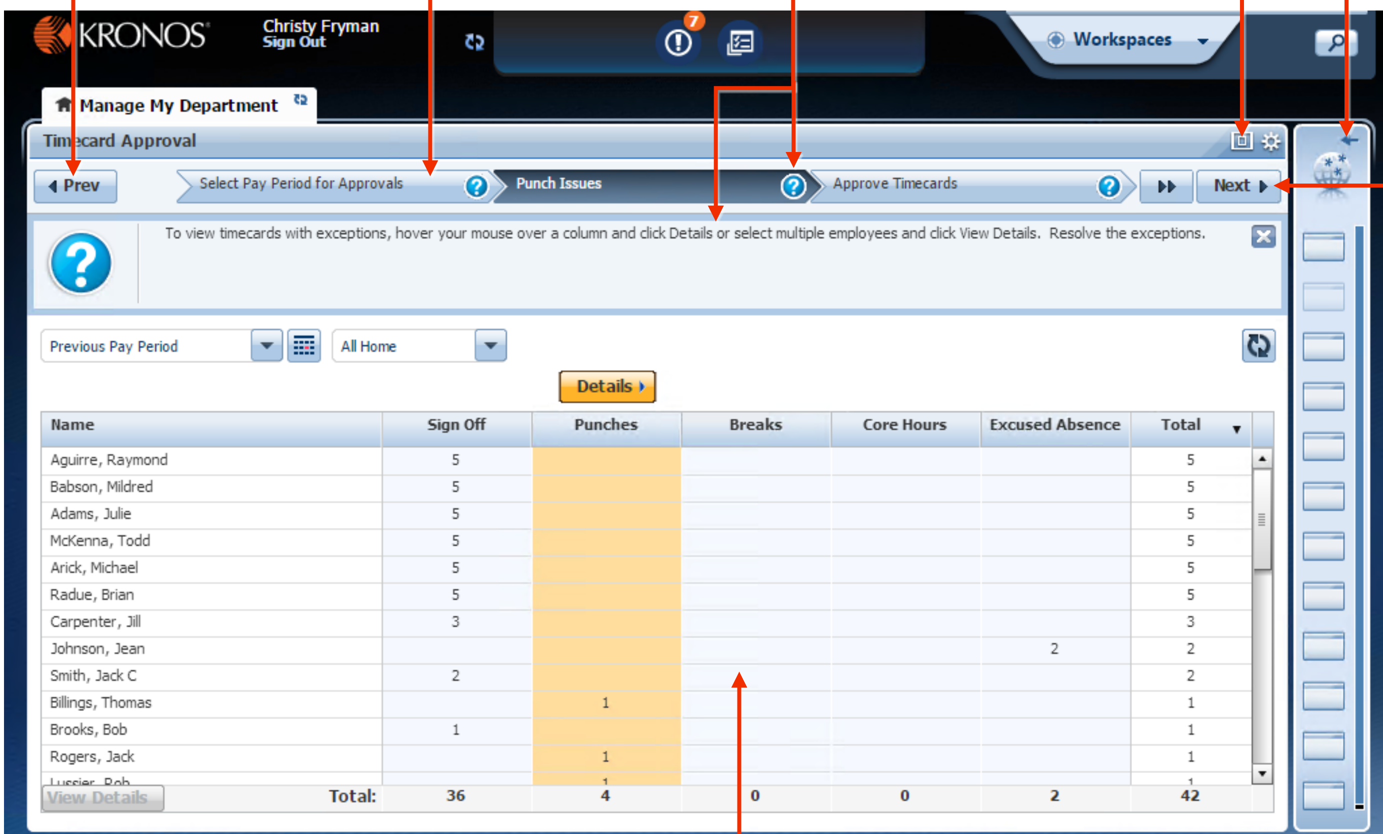
Steps
Each step in the wizard is identified by its own chevron or tab. In some wizards you can click a chevron or tab to go directly to that step.

Information (Question Mark)
Click the question mark icon to display helpful instructions for each step. Click X to close the information.

Maximize / Restore
It is recommended that you increase your work area when using a wizard. Do this by clicking the **Maximize/Restore** icon in the widget, or opening the wizard in its own workspace (as in this example). Closing the **Related Items** pane is also recommended.

What is a Wizard?

A wizard is a specially-designed widget that guides you through a series of steps to perform a business task. Each step presents a Workforce Central page or widget relevant to that step, along with instructions for how to perform that step. A wizard helps you complete a task quickly, easily, and consistently.



Next / Done / Clear
Click **Next** to advance when you are done with the current step. The final step will display either **Done** or **Clear**. Click **Done** or **Clear** to reset the context and return to the initial step. You can then use the wizard again or move on to another task.

Workforce Central Page or Widget
Each step in a wizard contains a Workforce Central page or widget that enables you to complete the step. Perform any required tasks and then click **Next** to continue to the next step. To see helpful information about the current step, click the step's question mark icon.

Manager Navigator Job Aid

Using a Workforce Genie

New

Where are my Genies?

While Genies can be presented individually in their own widget, you may also have a **Genies** widget containing multiple Genies. If you can't find a particular Genie in your Navigator, it might be located in the Genie selector.

New

Sorting/Grouping options
Click the small arrow that appears when you hover over a column header to see your options for how to sort or group the data by that column.

New

Action Icons
These icons provide access to actions you can take on employees, such as viewing People records or accrual balances, approving timecards, and so on. Start by selecting the individual employee rows (or clicking **Select All Rows** to select all employees in the display), then choose the action you want to take.

Context Selector
Displays the current employee set and date range (which, together, are referred to as "context") for the genie. To change this context, click it and select a new one from the resulting drop-down list.

GoTo
Open this drop-down list and select a widget or workspace to navigate to. Your new destination will retain the same context (i.e. set of employees and range of dates) as the one you were just using in the Genie, instead of using its default context. This option is helpful if you would like to perform tasks on the same set of employees and/or the same time period over a series of several widgets.

New

Genie Selector
Open this drop-down list to select a specific Workforce Genie to work with. This is only available if the widget contains more than one Genie.

New

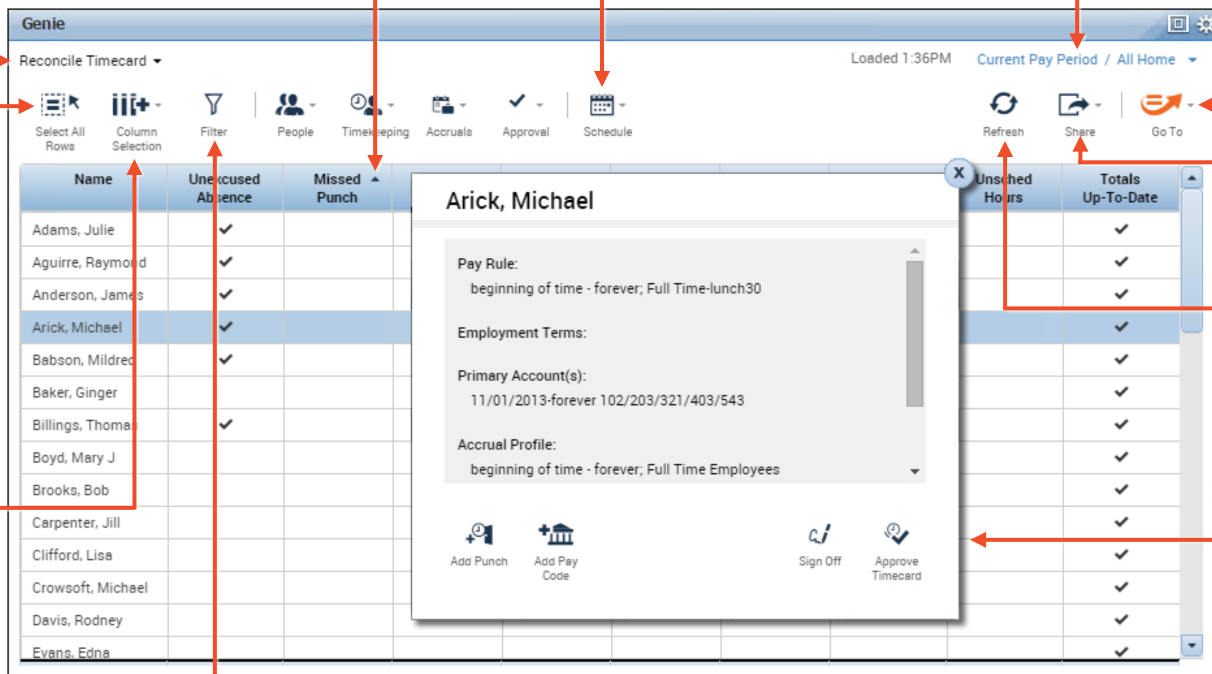
Select/Unselect All Rows
Click this shortcut to select all displayed rows before performing another action. Click again to unselect all rows.

New

Column Selection
Click this icon to open a list of available columns for the genie. You can then selectively turn columns on or off to customize your display. You selections will persist (even between sessions) until you change them.

New

Filter
Toggling this on displays filter fields at the top of any columns that can be filtered. As you type in any of these filter fields, only rows containing the characters you type will remain in the workspace.



Share
Provides options for printing the data displayed in the genie, or exporting it to a spreadsheet format.

Refresh
Discards any unsaved edits in the genie, and then reload the genie with the most current data in the database.

New

Contextual Callouts
Try right-clicking over a cell or person in the genie. In many cases this will open a callout with detailed information and icons for any actions you might want to perform on that cell or person.

How do I save my edits?

When you take action in a genie, it is immediately saved to the database; you do not manually make a save. You can view the Group Edit Results widget to verify that your edits were successful.

Manager Navigator Job Aid

Performing Common Manager Tasks

New Making a group edit in a Workforce Genie

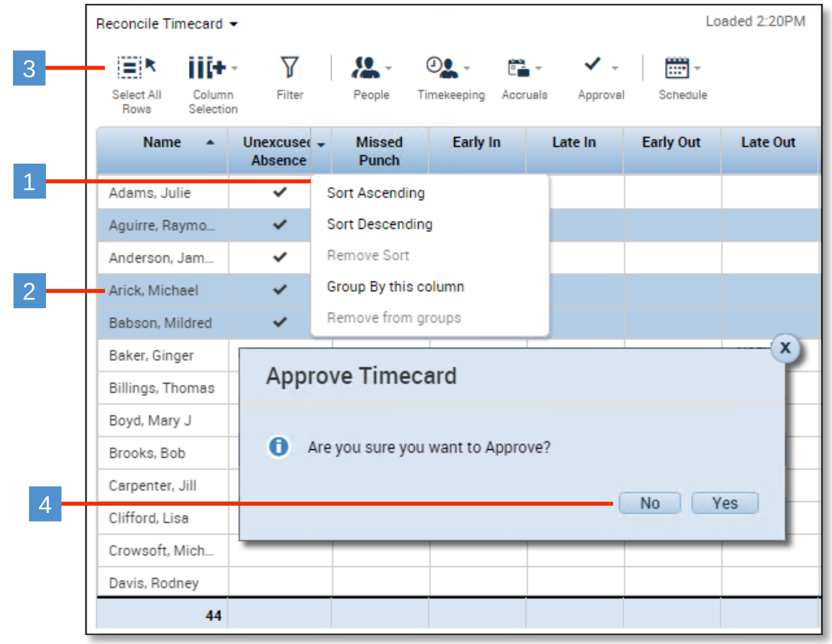
When you are working in a Genie, you can select a group of employees and apply the same edit to all of them simultaneously, saving time and reducing the chance of error.

1 In the Genie, if there is a specific column that will conveniently sort the group of employees you wish to edit, use the column's Sorting/Grouping option to sort by that column. (For example, if you intend to approve only the timecards of employees who have approved their own timecard, you could sort on the Employee Approval column.)

2 Select the employees to whom you want to apply the edit.
- To select individual employees, hold down the Control key while selecting names.
- To select a contiguous set of employees, select the first employee and then hold down the Shift key while selecting the last employee.
- To select all employees, click the **Select All Rows** action icon.

3 With the employees selected, click the action icon related to the edit you want to perform. If a drop-down list with further options appears, select the appropriate action and when prompted provide any further details needed to make the edit.

4 Click **Apply** (or **Yes**) to apply and save the edit.



Using Goto navigation

Goto navigation makes it possible for you to select a specific context (i.e. group of employees and time period) in the widget you are currently viewing, and carry that context with you to another widget. This is convenient if you need to view information and/or perform tasks spread across several widgets, with the same group of employees.

1 In a Genie (or the Search widget) select the group of employees you want to carry over to a new widget, using the same selection approach as you would when making a group edit (see **Making a group edit in a Workforce Genie**).
Note: If you are in a widget that only shows one employee's information at a time (such as the Timecards widget), the context will show that you have a certain number of employees selected. These employees will be carried over.

2 Open the Goto menu (Go To) and select the widget or workspace you would like to move to.

You can continue to move to new widgets with the selected employees (or a subset of those employees, if you choose). To "reset" your selection when you are done working with those employees, click the workspace's Refresh icon. Manage My Department

Using the Search widget

The Search widget enables users to search on a variety of Workforce Central items, such as employees, configuration rules, exceptions, and more. It can return a list of employees for which the search/filter is true, often saving you from having to dig deeper for the information you need.
For example, you could search on the word **over** and select the **Unapproved Overtime** suggestion to view all of your employees who have unapproved overtime.

1 Click the **Search** icon in the upper right corner of Navigator.

2 In the search field, start typing the name of the item (employee, rule, exception, etc.) that you want to search on. As you type a list of suggestions will appear below.

3 If the item you are looking for appears in the list of suggestions, select it and the item's details will appear in the right half of the widget. If you want to perform a task with any of the employees that appear, you can select them and use Goto navigation to carry them into another widget.

4 If your search did not locate what you were looking for, you can clear the search by clicking ✕. You can then enable the Hints (On) option (Hints On Off) and use the items in the drop-down list that appears to help you locate it.