For Union Managers

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Manager Worklets

As a manager, you will have access to additional worklets, such as Recruiting, My Team, and Team Time Off. For each worklet, related tasks or actions are found in the Actions section. Reports are found in the View section.

Note: Open Positions are listed in the Recruiting worklet.

Employee Data

As a manager, you can view specific information about your direct reports.

1. Click the My Team worklet.
2. Click the employee’s name to view their worker profile. From here, you can find information about your direct report, including details about their job, pay, performance, and time off.

Note: The details you can view about your direct report will be based on your security settings as a manager.

Dashboards
Dashboards are pre-configured pages that contain key management information and actionable items related to specific functional areas within Workday. Targeted for managers, dashboards are populated with worklets that are specific to these functional areas.

You can drill down into links, Related Actions, and buttons within dashboard worklets to obtain more information or perform additional actions. Chart-based worklets are also configurable; you can change or configure the worklet chart to display the data in a different format.

Business Process/Task Transaction Status

For each task you perform in Workday, there is a business process that defines required steps. To view the status of a task you performed in Workday:

1. Click your Profile icon > Inbox.

2. Select the Archive tab, which tracks all business processes you have initiated. The Actions tab will contain your business process tasks, approvals, and to-dos.

Inbox and Notifications

To view your Inbox:

1. Click the Profile icon > Inbox.

   The Actions tab will contain your business process tasks, approvals, and to-dos. Actions can be filtered from the pull-down menu.

   The Archive tab displays the process status of any business process you have been involved in.

2. Click Notifications from the Profile icon. Here, you can view configurable alerts (birthdays, anniversaries, time off, etc.) and reporting notifications.
Add Inbox Delegations

From the Profile menu:

1. Click Inbox, then the Actions tab.
2. Click the unlabeled More pull-down menu, and select My Delegations. Here, you can view your current delegations or add new ones.
3. Click the Manage Delegations button.
4. Select Begin and End dates to let the system know how long the delegation will last.
5. Select the person you want to delegate your Inbox to. Typically, this would be someone on your management team or one of your peer managers.
6. Select the business processes you want your delegate to do Inbox tasks on your behalf or select For all Business Processes.
7. Click Submit.
**Approve, Send Back, or Deny Submitted Time**

From your Inbox:

1. Access and review the submitted time entry in the Entries to Approve section.

2. Click the magnifying glass icon’s **Related Actions** under Details to view more information.

3. Click **Approve, Send Back, Deny**, or **Close**. If you deny or send back the request, you will need to enter a reason.

4. Check the Process History section to verify that the time entry was approved.

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**Enter Time for an Employee**

From the Home screen, click the **Time Tracking Reports** worklet to see a dashboard of reports.

1. Next to an employee's name, click the Related Actions button.

2. Select **Time and Leave**, then **Enter Time**.

3. Choose the **Date** and click **OK**.

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*Your screens and processes may vary from those described here.*
4. Enter hours. If necessary, change the Time Type. Click **OK**.

5. Click **Submit**.

6. On the Certification page, click **Submit** again, then click **Done**.

**Modify or Delete a Worker’s Time**

From the worker’s time entry calendar:

1. Click a time block to change details.

2. Click either **OK** or **Delete**.

3. Click **Submit** and verify that the information is accurate.

4. Click Submit again.

5. Click the **Details and Process** arrow and the magnifying glass icon’s **Related Actions** to view more information.

6. Click the **Process** tab to view the approval status.
Approve, Deny, and Send Time Off Requests Back

1. Click the Profile icon.
2. Click the Inbox link.
3. Click the Time Off Request.
4. Click the View Balances button to view an employee’s time off balances (optional).
5. Click Approve, Send Back, Add Approvers (this option may be under the More menu) or More. From the More menu, you can select Deny or Cancel.

6. If approved, click the Detail and Process arrow to view the employee’s time off summary.

Enter Time Off for a Direct Report

From the My Team worklet:

1. Hover over the employee for whom you want to enter time off.
2. Click the employee’s Related Actions icon.
4. Select the day(s) for the time off.

5. Click the **Request Time Off** button.

6. Enter the **Type** of time off requested.

7. Confirm the correct hours in the **Daily Quantity** field. It may default with the employee’s daily scheduled hours based on how it is configured. If so, it can usually be edited.

8. Click **Submit**.

**Correct Time Off for a Direct Report**

From the My Team or Time Tracking Reports worklet:

1. Hover over the employee for whom you want to enter time off.

2. Click the employee’s **Related Actions** icon.
3. Select **Time and Leave > Correct Time Off**.

4. Select the days off you want to correct.

5. Correct a previously approved time off entry by entering the correct number of hours per day. Enter 0 to remove approved time off days.

6. Enter a comment if needed.
7. Click **Continue**.
8. Click **Submit**.

**View an Employee’s Upcoming Time Off**

From the Team Time Off worklet:

1. Click **All Time Off** under **View**.
2. Enter your **Organization**.
3. To include subordinate organizations and/or managers, select the checkbox. You can also select a specific date range if desired.
4. Click **OK** to run the report.
Logging Out

When you’re finished in Workday, click the Profile icon in the upper left and choose **Sign Out**.