

For Union Managers

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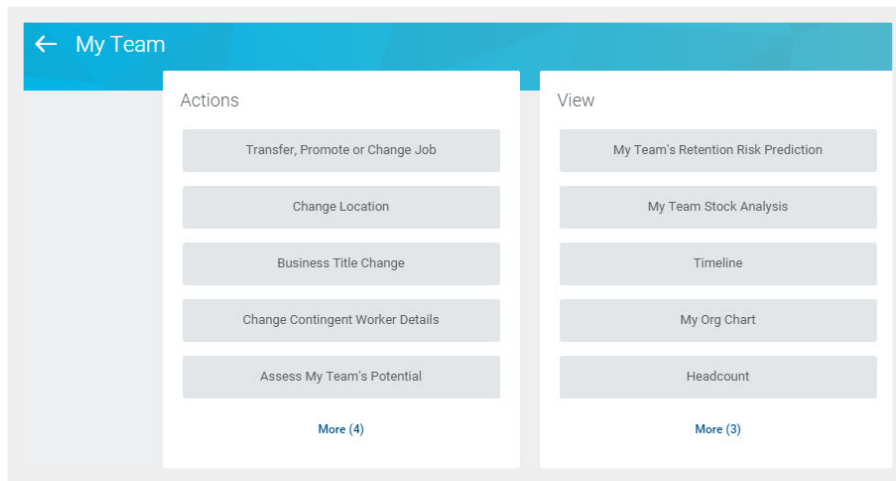
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Manager Worklets

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.

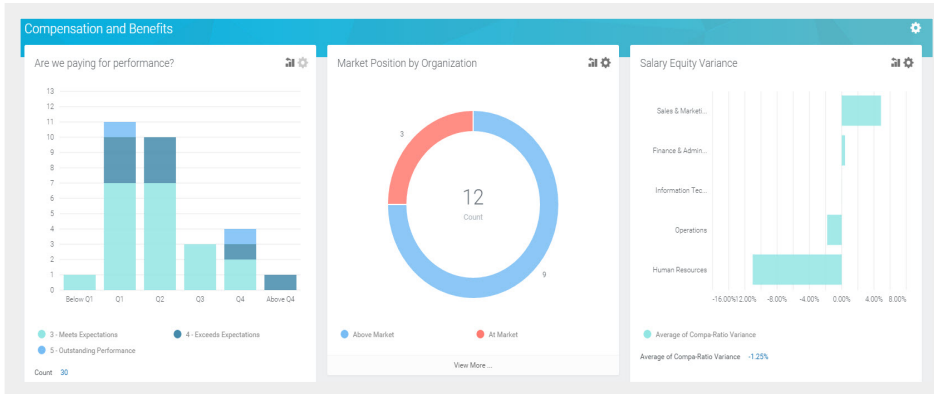


Note: The details you can view about your direct report will be based on your security settings as a manager.

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.

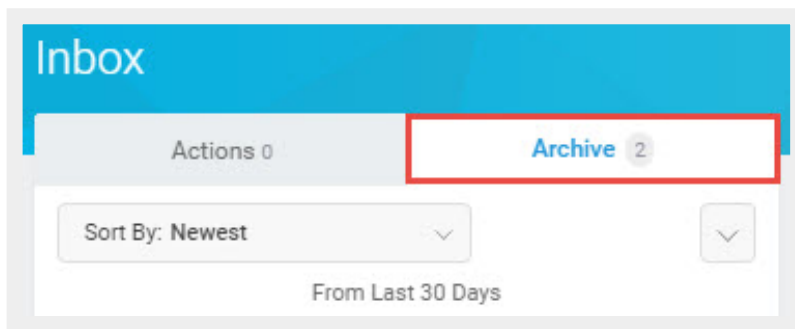
You can drill down into links, Related Actions , and buttons within dashboard worklets to obtain more information or perform additional actions. Chart-based worklets are also configurable; you can change or configure the worklet chart to display the data in a different format.



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**.

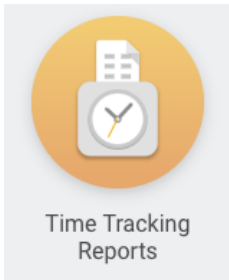
Approve, Send Back, or Deny Submitted Time


From your Inbox:

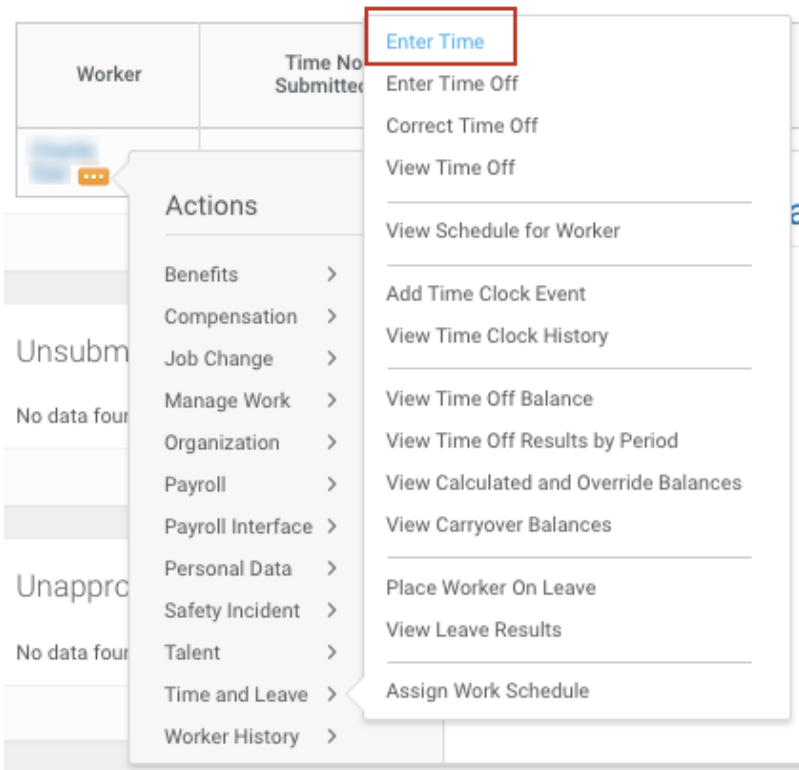
1. Access and review the submitted time entry in the Entries to Approve section.
3. Click the magnifying glass icon's **Related Actions** under Details to view more information.
4. Click **Approve**, **Send Back**, **Deny**, or **Close**. If you deny or send back the request, you will need to enter a reason.
5. Check the Process History section to verify that the time entry was approved.

Enter Time for an Employee

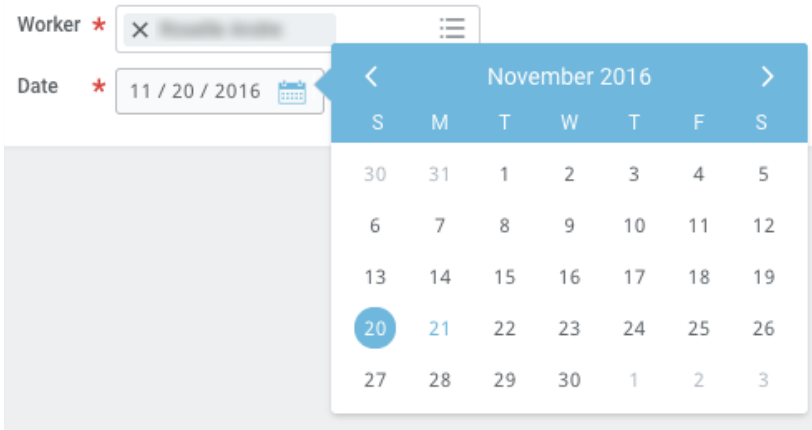
From the Home screen, click the **Time Tracking Reports** worklet to see a dashboard of reports.



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**.



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**.

Review Time Off Request: Betty Liu ...

44 second(s) ago - Due 08/14/2016; Effective 08/15/2016

For Betty Liu

Overall Process Time Off Request: Betty Liu

Overall Status In Progress

Due Date 08/14/2016

Details to Review

2 items

Date	Day of the Week	Type	Requested	Unit of Time
08/15/2016	Monday	Vacation (Hours)	8	Hours
08/16/2016	Tuesday	Vacation (Hours)	8	Hours

View Balances

Approve Send Back More

- Add Approvers
- Deny
- 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.
3. Select **Time and Leave > Enter Time Off**.

Time and Leave > Enter Time

Worker History > Enter Time Off

Favorite > View Time Off

Integration IDs > View Schedule for Worker

Reporting > Add Time Clock Event

Security Profile > View Time Clock History

Additional Data > View Time Off Balance

View Time Off Results by Period

View Calculated and Override Balances

View Carryover Balances

Place Worker On Leave

View Leave Results

Assign Work Schedule

Brian Kaplan

Laurie Jenkins

4. Select the day(s) for the time off.
5. Click the **Request Time Off** button.

Enter Time Off Cory Young

Today < > February 2016

Balance as of 02 / 16 / 2016

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31		1	2	3	4	5	6
7		8	9	10	11	12	13
14		15 President's Day	16	17	18	19	20
21		22	23	24	25	26	27

106.02 Hours

Balance Per Plan

Floating Holiday Plan
16 Hours
(Floating Holiday (Hours))

USA Paid Time Off Plan (Salaried)
90.02 Hours
(Paid Time Off Adjustment (Hours), Sick (Hours), Vacation (Hours))

2 Days - Request Time Off

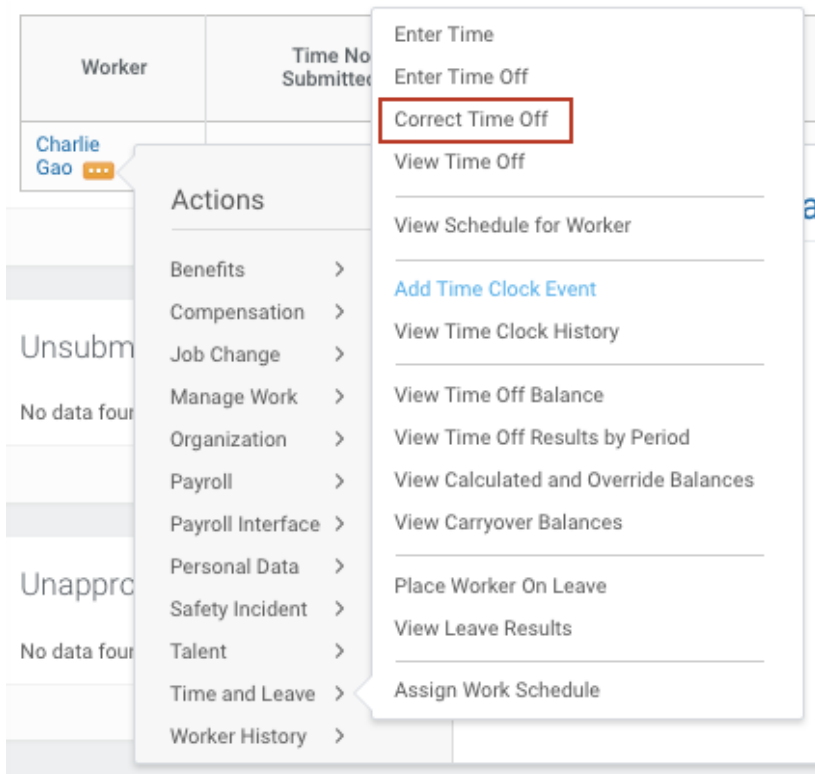
6. Enter the **Type** of time off requested.
7. Confirm the correct hours in the **Daily Quantity** field. It may default with the employee's daily scheduled hours based on how it is configured. If so, it can usually be edited.
8. Click **Submit**.

Correct Time Off for a Direct Report

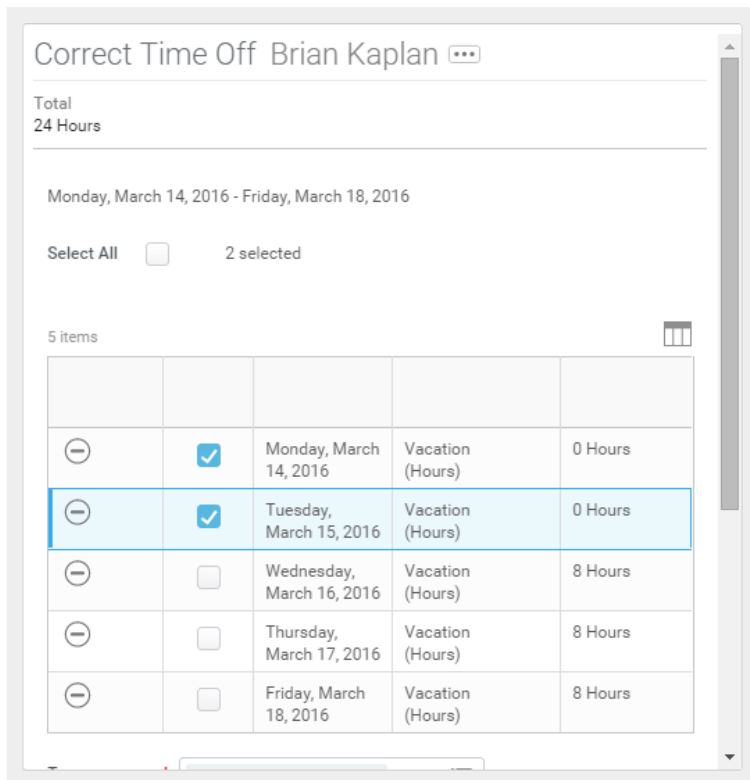
From the My Team or Time Tracking Reports worklet:

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.

Time Off Entry	Supervisory Organization	Worker	Request Type	Time Off	Type	Unit of Time	Time Off Date
Q	Global Support - USA Group	Brian Kaplan	Time Off Request	USA Vacation Time Off (Salaried)	Vacation (Hours)	Hours	12/27/2011
Q	Global Support - USA Group	Cory Young	Time Off Request	USA Vacation Time Off (Salaried)	Vacation (Hours)	Hours	12/27/2011
Q	Global Support - USA Group	Brian Kaplan	Time Off Request	USA Vacation Time Off (Salaried)	Vacation (Hours)	Hours	12/28/2011

Logging Out

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

