

# For Staff Managers

Manager Worklets, p. 1

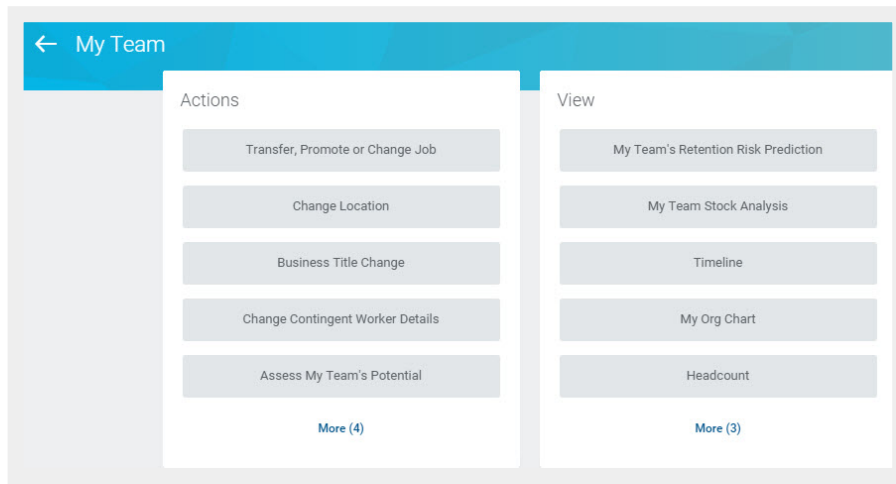
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## Manager Worklets

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.

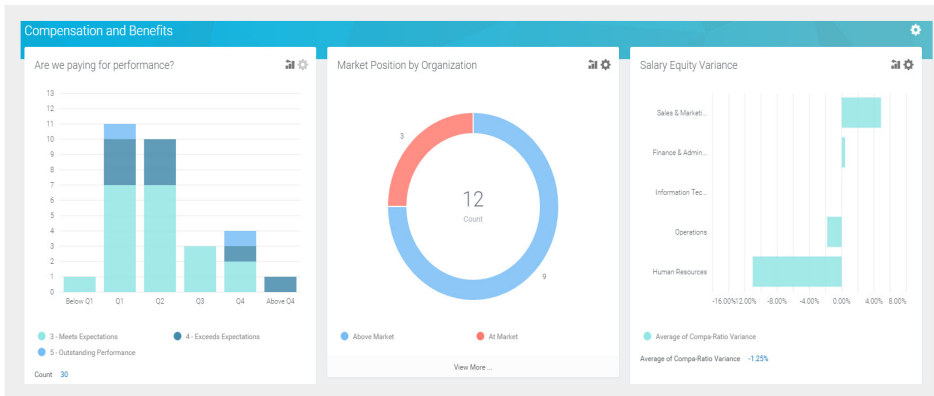


Note: The details you can view about your direct report will be based on your security settings as a manager.

## 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.

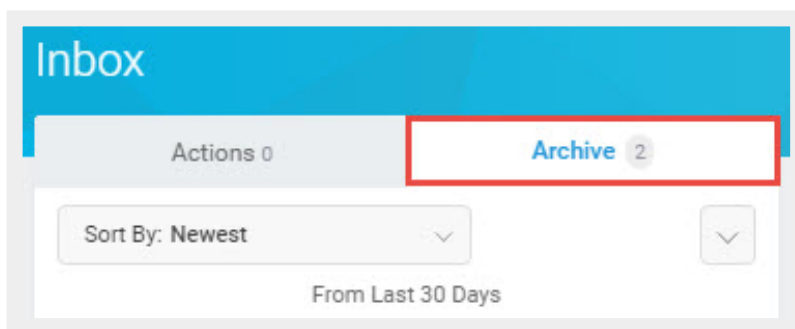
You can drill down into links, Related Actions , and buttons within dashboard worklets to obtain more information or perform additional actions. Chart-based worklets are also configurable; you can change or configure the worklet chart to display the data in a different format.



## 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.

## Access a Worker's Time

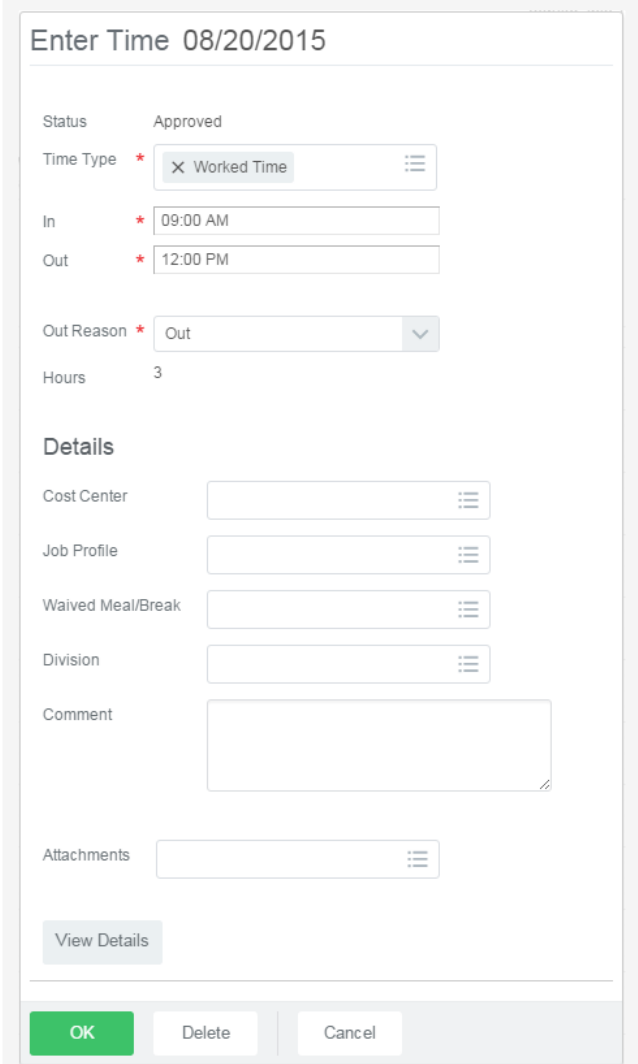
From the My Team worklet:

1. Click the worker's **Related Actions**  > **Time and Leave** > **View Time Clock History**.
2. Enter a Start Date.
3. Click **OK**.
4. Click the **View Time Calendar for Worker** button. You have the option to reset the start date.
5. Click **OK**. The worker's time calendar displays their time block entries.
6. Click a time block to view more information on the event.

## 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.



**Enter Time 08/20/2015**

Status Approved

Time Type \*

In \*

Out \*

Out Reason \*

Hours 3

**Details**

Cost Center

Job Profile

Waived Meal/Break

Division

Comment

Attachments

## 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

More menu options: Add Approvers, Deny, Cancel

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

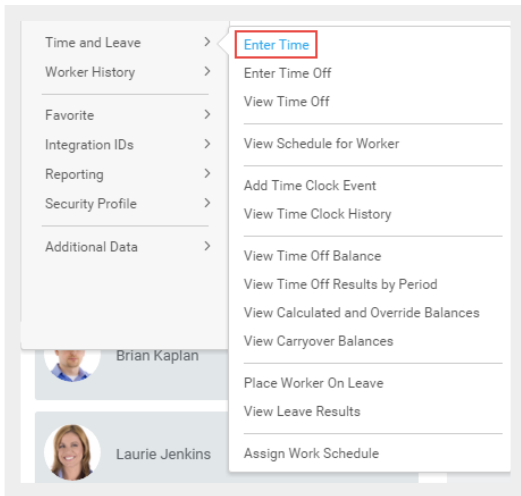
**a.**

**b.** Note: Depending on your organization's configuration of Workday, it may be possible to approve or deny time off requests directly from Outlook email notifications.

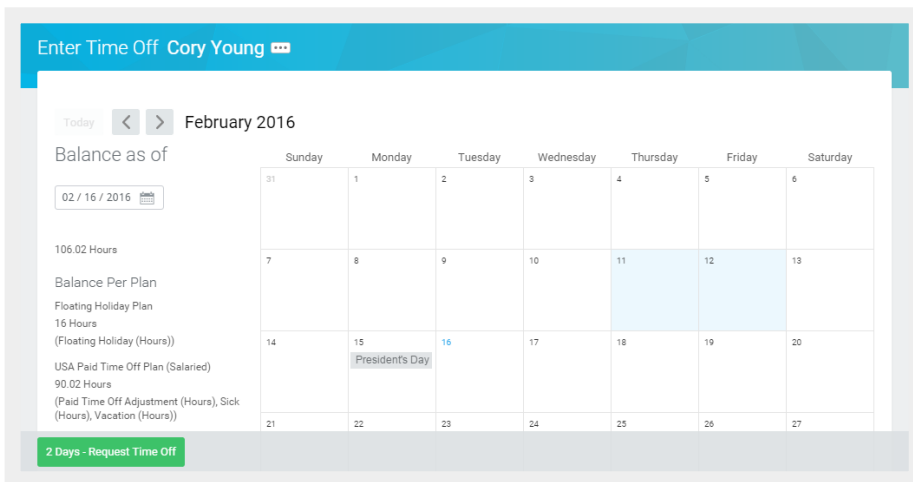
## Enter Time Off for a Direct Report

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**.



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

In order to correct time off for a direct report, you must have the correct permissions enabled for the task. From the Team Time Off worklet:


1. Click **Correct Time Off** under Actions. This option only works after a time off request has been submitted and approved.
2. Select the employee.
3. Click **OK**.
4. Click a time off entry to open the details.
5. Select the days off you want to correct.

Correct Time Off Brian Kaplan ☰

Total  
24 Hours

Monday, March 14, 2016 - Friday, March 18, 2016

Select All  2 selected

5 items 

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Monday, March 14, 2016	Vacation (Hours)	0 Hours
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tuesday, March 15, 2016	Vacation (Hours)	0 Hours
<input type="checkbox"/>	<input type="checkbox"/>	Wednesday, March 16, 2016	Vacation (Hours)	8 Hours
<input type="checkbox"/>	<input type="checkbox"/>	Thursday, March 17, 2016	Vacation (Hours)	8 Hours
<input type="checkbox"/>	<input type="checkbox"/>	Friday, March 18, 2016	Vacation (Hours)	8 Hours

6. Correct a previously approved time off entry by entering the correct number of hours per day. Enter 0 to remove approved time off days.
7. Enter a comment if needed.
8. Click **Continue**.
9. 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.



Organizations Global Support - USA Group Include Managers No

Include Subordinate Organizations No

118 items



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