

# Manager- Approving Time & Time Off and Team Time

## USER GUIDE


### INTRODUCTION


As a Manager for Marathon County, you will be reviewing and approving employee's time tracking and time off requests in Workday.

Managers should be verifying when extra hours are worked, that appropriate pay codes are used including when overtime is paid, comp time is earned, etc. Plus, when an employee is using time off related to an approved FMLA leave, that the appropriate reason is selected.

**Timecards need to be reviewed and approved by Tuesday at 4:00pm following the end of the Time Period. Refer to your Timecard through the Time App for pay period dates. We recommend that you approve Timecards weekly as you get to know Workday.**

### REVIEW & APPROVE TIME FROM YOUR INBOX.

1. From your homepage, go to your Inbox. 
2. Under **Actions**, you will see **Time Entry** tasks. Click on it and go to the **Entries to Approve** section. Review the submitted time entry.

3. In the **Details** column, select the magnifying glass icon or related action icon  to view more information.

Entries to Approve


Date	Type	Time Block Reported Quantity	Start	In	Out	Out Reason	Workless	Time Block Comment	Details
Nov 11/9	Hours Worked	1.75	Hours	12:02 AM	11:45 AM	Out	Activity: Court Appearance		
Nov 11/9	Hours Worked	0.5	Hours	11:46 AM	12:38 PM	Out	Activity: COVID Coverage		
Nov 11/9	Hours Worked	0.25	Hours	12:21 PM	12:25 PM	Out	Activity: Clinical		

4. Choose from the following:
  - Approve-** Approves the submitted time. All information looks correct and accurate. Updates status on time block as approved.
  - Send Back-** Does not approve submitted time and sends a task back to the employee with reason why it was not approved. (IE- A punch is incorrect or missing.)
  - Close-** Need to review this later.

[\\*Instructions on Unmatched Time- Needs Attention.](#)

5. After Approving, select **View Details** from the pop-up.
6. Click the **Details and Process** arrow.
7. Choose the **Process** tab to verify the submitted information is correct. Select **Done**.

### REVIEW & APPROVE TIME OFF REQUESTS FROM YOUR INBOX.

1. From your homepage, go to your Inbox. 
2. You will see tasks called **Absence Request**. Click on it to review.
3. If the employee is requesting partial time (IE 2 hours), look in the Comment field to see what hours they indicated.
4. Under **Details to Review**, view the date(s) submitted. You should also click **View Balances** to ensure they have the amount of time needed to take off. *You can approve if they are negative, but make sure the employee knows to review the County's PTO policy regarding payback upon termination.*

**Details to Review**

First Day of Time Off 11/23/2022

Last Day of Time Off 11/23/2022

Total 8 hours - PTO

Request Details 1 item



Date	Day of the Week	Type	Requested	Unit of Time	Reason
11/23/2022	Wednesday	PTO	8	Hours	PTO - Scheduled

[View Balances](#)

5. Choose from the following:
  - Approve-** Approves the entered time off and updates status on time block as approved.
  - Send Back-** Does not approve the submitted request. Sends a task back to the employee along with a reason why the request was not yet approved. (IE- Hours requested is more than usual daily work hours.)
  - Deny-** Denies the submitted request and allows you to state the reason for the denial. (IE- Staff shortage)
  - Cancel-** Need to review this later.

[\\*Instructions on Unmatched Time- Needs Attention.](#)

6. Search for **Time Off and Leave Calendar** report to review all submitted requests by your team. This will only show if the employee has initiated the time off request through the Absence App.

-  Grey- Waiting for your approval
-  Green- You have approved

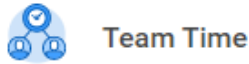
We recommend that you look at this on a frequent basis. County observed holidays will also be listed here.

# Manager- Approving Time & Time Off and Team Time

## USER GUIDE

### TEAM TIME: REVIEW & APPROVE TIME (ACTIONS)

- From the homepage, under **Menu**, find **Team Time** App.




- From here, you have Actions and Views. **Actions** allow you to review, approve or make changes to an employee's time or time off. **Views** allow you to see your Teams schedules, time clock or time off calendars.



### REVIEW TIME

- Under **Actions**, click **Review Time**- this is where you would review your whole team's time. **Review my direct reports only** should be checked.

#### Review Time

Date \* 11/18/2022 

**Review my direct reports only**

Workers (empty)

Show \*  All Workers  
 Workers with Hours to Approve  
 Workers with Unsubmitted Hours

- Select from the following:


**All Workers**- View hours for everyone on your team.  
**Workers with Hours to Approve**- Shows only the hours that have been submitted that you need to approve.  
**Workers with Unsubmitted Hours**- Shows hours that have not yet been submitted by the employee.

- Click **OK**.
- Review the **Time Period Summary**. To view previous or future time periods, click the Previous Period or Next Period icons.

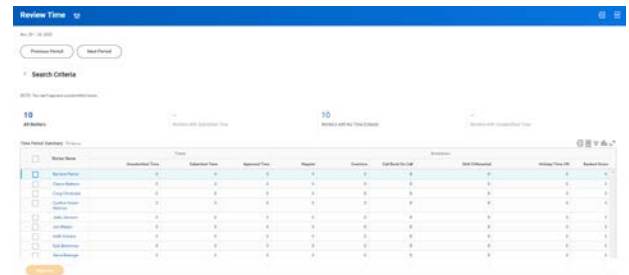
Off this report, you will want to look at the specific fields to see that the correct number of hours is listed.

If the employee is scheduled 40 hours each week, their total of hours should at least be that.

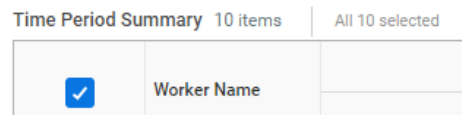
- Prior to approving, if you need to review an employee's time closer, select the employee's name from the table (blue hyperlink). You can view their details and comments under **All Entries**.

If there is a Yellow Flag icon  next to an employee, that means they have unsubmitted time. The employee must go in to review and submit, or you can click on **Enter Time for Worker** and review and submit for them.

Review and select **Approve**, **Enter Time for Worker** or **Send Back**.



- Select the **Checkbox** to the left of all employees you wish to approve time for. To select all employees, click the **Checkbox** on the top row. Click **Approve** on the bottom.



- You can review the approved time by clicking the **Time Approved** arrow. Select **Done**.

[\\*Instructions on Unmatched Time- Needs Attention.](#)

# Manager- Approving Time & Time Off and Team Time

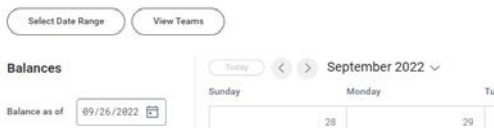
## USER GUIDE

### ENTER ABSENCE

#### ENTERING AN EMPLOYEE'S TIME OFF REQUEST

In rare cases, you may need to enter time for an employee if they are unable to do so before it is due to Payroll.

1. Under Actions, click **Enter Absence**. Click on the report.
2. Enter the employee's name from your team in the **Worker**- hit **Enter** to search. Then click **OK**.
3. On the calendar, find the date(s) you need to enter in for the employee. You can click on the **dates on the calendar** to select the day(s) or click **Select Date Range** for multiple days.



4. Once all selected, click on the bottom of the page for **Request Absence**. This will also show the number of days you selected off.
5. Select the type of absence requested:
  - *Select Time Off*: Bereavement/Funeral, Compensatory, Jury, PTO, Reward or Unpaid. Select **Next**.
6. Select **Edit Quantity per Day**. If taking the same amount each day, enter those hours in **Update All Quantities**. You can choose how many hours, increments starting at 0.25, for each day.
7. Enter in the **Details**: reason for the time off and click **Submit**. As the Manager submitting this request, it is automatically approved.

### CORRECT ABSENCE

#### CORRECTING AN EMPLOYEE'S TIME OFF REQUEST

If an employee has submitted a request that you have already approved but needs to be adjusted, you may do so on their behalf.


1. Under Actions, click **Correct Absence**. Click on the report.
2. Enter the employee's name from your team in the **Worker**- hit **Enter** to search. Then click **OK**.

#### Correct Absence

Worker \*


3. On the calendar, find the date(s) you need to correct and double click on the **PTO box**.



4. This will bring up another screen where you can adjust their Quantity of Hours for the day, Type and Reason of Request or you can remove the date in whole by clicking the Minus icon 

Select All  1 selected

Correct 1 item

	Date	Type	Daily Quantity	Select
	Tuesday, October 18, 2022	PTO	8 Hours	<input checked="" type="checkbox"/>

Type \*

Quantity per Day

Unit of Time

Reason \*

Comment

5. Once completed, hit **Submit**.
6. This change will update the status on time block.

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## USER GUIDE

### ENTER TIME FOR WORKER

In rare cases, you may need to enter time for an employee if they are unable to do so before it is due to Payroll.

1. The **Time Type** will default to Hours Worked. If they are using PTO or another Time Type, click the **X** to clear the selection, click in the search, and click on Absence to see time off options. You will also need to include reason for time off that includes FMLA related.
2. On the calendar, **double click on the date** the employee needs time for. Make sure you enter in AM/PM in times and that the hours calculate correctly.

Enter Time 11/15/2022

Time Type \*

In \*

Out \*

Out Reason \*

Hours \* 8

3. If your department requires the **Details** section to be filled out, do that for the employee as well.
  - a. Activity
  - b. Location
  - c. Cost Center
  - d. Fund
  - e. Grant
  - f. Program

*Details are not required for every employee. This is dependent on your department.*

4. Once done, hit **OK**.

### RETURN WORKER FROM LEAVE



**Note:** For Leave of Absence requests, such as FMLA, contact Sharon Hernandez- Employee Resources Department first for information on your options.

### TEAM TIME: REVIEW & APPROVE TIME (VIEWS)

Actions	View
<input type="button" value="Review Time"/>	<input type="button" value="My Team's Schedule"/>
<input type="button" value="Enter Absence"/>	<input type="button" value="Time Clock History"/>
<input type="button" value="Correct Absence"/>	<input type="button" value="Time Off &amp; Leave Calendar"/>
<input type="button" value="Enter Time for Worker"/>	

### MY TEAM'S SCHEDULE

1. Click on the **Date** you need to review.
2. Enter in one worker or select multiple by clicking **My Team** and using **CRTL + A + Enter**. Click **OK**.
3. From here, select **Day** in the upper right to choose to see your team's Daily, Four Days or Weekly schedule.

Day

Day

Four Days

Week

4. This will show their time off requests along with their work schedule. Use the **arrows** to change the date.
5. On the bottom, you have the option to adjust their schedule. Click **Add Event** to Assign Work Schedule or Enter Time for Worker (Time or Time Off).

6. **Assign Work Schedule**- if the employee's schedule has changed, you can choose the **Worker, Start and End Dates** and the correct **Work Schedule Calendar**.
7. Once completed, hit **OK**.
8. If your employee is missing Time or a Time Off request from the Calendar, you can enter that in using **Enter Time for Worker**. Use the instructions above for this task.


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### TIME CLOCK HISTORY

1. Enter in one worker or select multiple by clicking **My Team** and using **CRTL + A + Enter**. Click **OK**.
2. Enter in the **Date** you want to review the history.
3. You will view the current date but can also go to the previous week or next week. You can also add a time for worker or view their calendar of time.


4. **Add Clock Event**- allows you to enter in a missed Check In or Check Out or Check-Out Meal time for them.

Date \*  

Time \*  Check-in

Time Zone  Check-out



Event Type \*  Check-out (meal)

Event Type \*  

5. **View Time Calendar for Worker**- allows you to see their weekly calendar with time entries. You can make any adjustments here or review and submit their time.


### TIME OFF AND LEAVE CALENDAR

1. **Time Off and Leave Calendar** reviews all submitted requests by your team. This will only show if the employee has initiated the time off request.

-  Grey- Waiting for your approval
-  Green- You have approved

We recommend that you look at this on a frequent basis. County observed holidays will also be listed here.


### UNMATCHED TIME- NEEDS ATTENTION

Unmatched Check-in  
2:04pm  
 Needs Attention

If there is an entry that needs attention, the employee will need to correct that time before submitting. They can click on the Unmatched time on your time block and the Correct Unmatched Event will appear. Correct the missing in/and or out punch. You are also able to do this while reviewing if they need assistance.

#### Examples


1<sup>st</sup> Unmatched Time: Enter in the correct In time missed.

Time Type \*  

In \*

Out \*

2<sup>nd</sup> Unmatched Time: Enter in the correct Out time missed.

Time Type \*  

In \*

Out \*

\*If there is a Time Entry on your calendar below you may need to delete that if it overlaps with your corrected time.

\*\*If there is still an Unmatched Time listed on the day(s) you have corrected, you can leave that on your block.

## Manager- Approving Time & Time Off and Team Time

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## USER GUIDE

### TIME PERIOD LOCKOUT

Time Period Lockout  
11/13/2022 - 11/26/2022

On your calendar, you will notice Time Period Lockout. This is the last day an employee, timekeeper or manager can enter time in Workday for that payroll period.

After that time, only Payroll can make updates until the payroll period is open again for prior period adjustments. When that period is open again, employees, timekeepers or managers can enter prior period adjustments on their time. Any changes made will be picked up during the next payroll processing.

Any questions relate to Prior Period Adjustments need to be emailed to: [payrollquestions@co.marathon.wi.us](mailto:payrollquestions@co.marathon.wi.us)

### ADDITIONAL REPORTING

Along with using Team Time, here are additional reports you can run to ensure time is entered for Payroll.

#### **Alert- Workers with No Time Entered**

*Workers listed have not entered any time. Run for one week only, Sunday-Saturday.*

#### **Alert- Workers with Time Entered but not Submitted**

*Workers listed on this report need to submit their time for approval. Run for one week only, Sunday-Saturday.*

#### **Alert- Workers with Time Submitted but not Approved**

*This report will list employees that need their manager or timekeeper to approve their time. Run for one week only, Sunday- Saturday.*

You can save these reports as Shortcuts. Refer to the Adding Shortcuts aid.