workday.

WORKDAY TIME AND ABSENCE GUIDE FOR MANAGERS AND TIMEKEEPERS

Henry Schein Inc.

Workday Time and Absence for Managers & Timekeepers

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INTRODUCTION

Workday is a state-of-the-art Human Capital Management System. It allows 24/7 web-based access and will be the single system of record for tracking global TSM workforce data. Workday supports Henry Schein's strategy of continued growth and commitment to innovation.

Workday, Inc. was founded in 2005 by Dave Duffield, the founder and former CEO of PeopleSoft, and former PeopleSoft chief strategist, Aneel Bhusri. Workday helps organizations adopt a more strategic approach to human resources, using leading, "best of breed" technologies to deliver complex transformation and talent management solutions globally, in multiple languages and in local and constant currencies. Data is protected utilizing world-class, application security. Workday is currently used by 800+ organizations world-wide.

This guide covers how to use the Time and Absence areas within Workday.

As a manager/timekeeper, you are responsible for reviewing and approving TSMs' timecards and time off requests in a timely fashion.
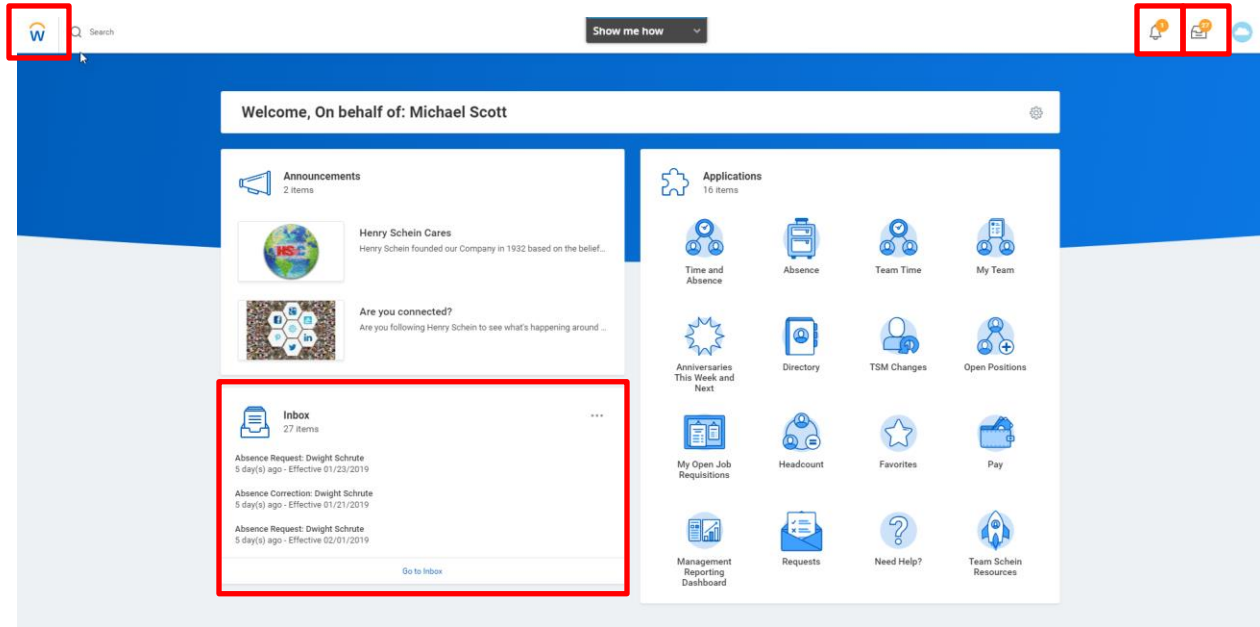
> TSMs will be requesting their time off through Workday and you will approve these requests. Why is this so great? Once you approve their request, it automatically feeds onto their absence calendar, without having to do anything else. You will also be able to review the requested time off for all your TSMs on one calendar in Workday.

Workday Time and Absence for Managers & Timekeepers

THE BASICS

THE WORKDAY HOMEPAGE:

Here's what the Workday **HOMEPAGE** looks like. If at any point you want to return to this homepage, click the Workday logo in the upper left-hand corner. w

In the upper right-hand corner, you will see your **NOTIFICATIONS** and your **INBOX**

NOTIFICATIONS are the e-mails you have received from Workday.

In your **INBOX** you will see any outstanding tasks you need to complete. *NOTE: you can also see a preview of your inbox tasks in the lower left-hand corner.

The **APPLICATIONS** section gives you quick access to everything you might need to do for yourself and your TSMs.

Specifically, the **TIME AND ABSENCE** Time and Absence application provides access to all the tasks and reports you need for tracking and reviewing anything related to your TSMs' time and absence data.
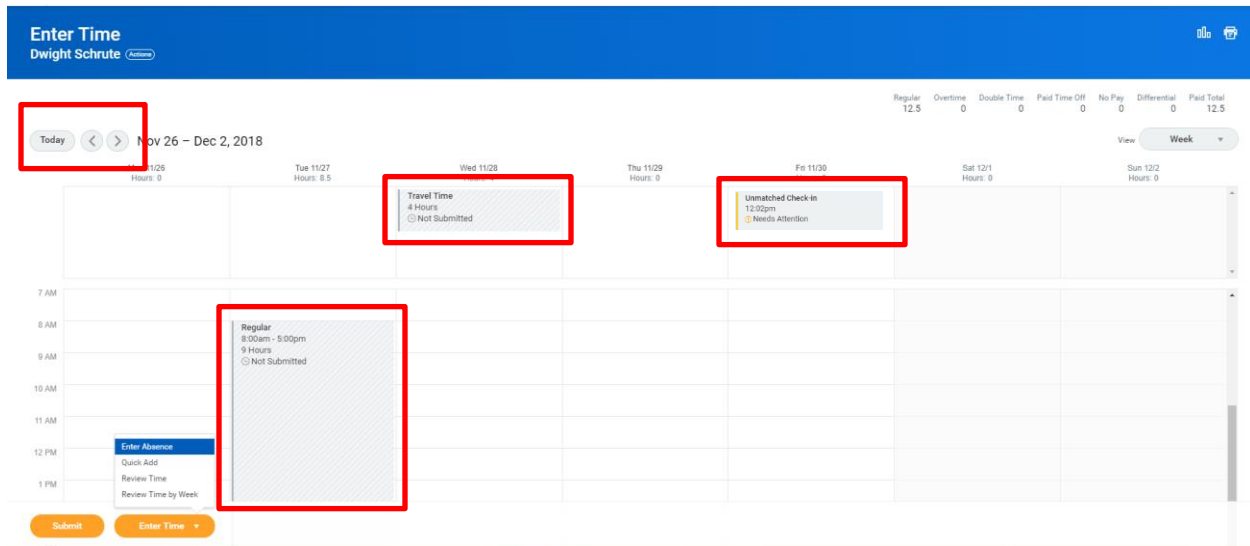
THE HELP TOOL – WALKME   Show me how ˅

When you access Workday from your desktop computer, you will see a **Show me How** tool bar located on your screen. If you click on this tool bar, you can choose what you're looking to do from the list. Once you choose an option, the browser add-on WalkMe will literally walk you through the steps! It's THAT easy! Please note this functionality is not currently available on the Workday Mobile app.
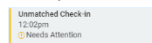
THE TIME AND ABSENCE CALENDARS:

In Workday there is a **Time Calendar** and an **Absence Calendar**. The Time Calendar is where you can enter *hours worked* and the Absence Calendar is where you can enter time for *hours not worked*. Sometimes they are connected – for example, you can see approved time off on the Time Calendar.

Here is a screenshot of the Time Calendar. This is what pops up when you use the **Enter Time for a Worker** task…
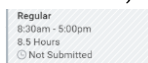

You can navigate to other weeks using the navigation arrows at the top. You can also see the time that has been entered for the TSM for that week. These are called **time blocks**. The time block will show on the bottom of the calendar if it was time checked in or out - because it has a corresponding start and end time. It will show at the top of the day if it was a flat number of hours entered for that day (i.e. hours adjustment, travel time.)
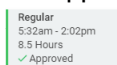
If the TSM has an unmatched time block you can see it here too. That time block will have a yellow bar and a status of "Needs Attention."
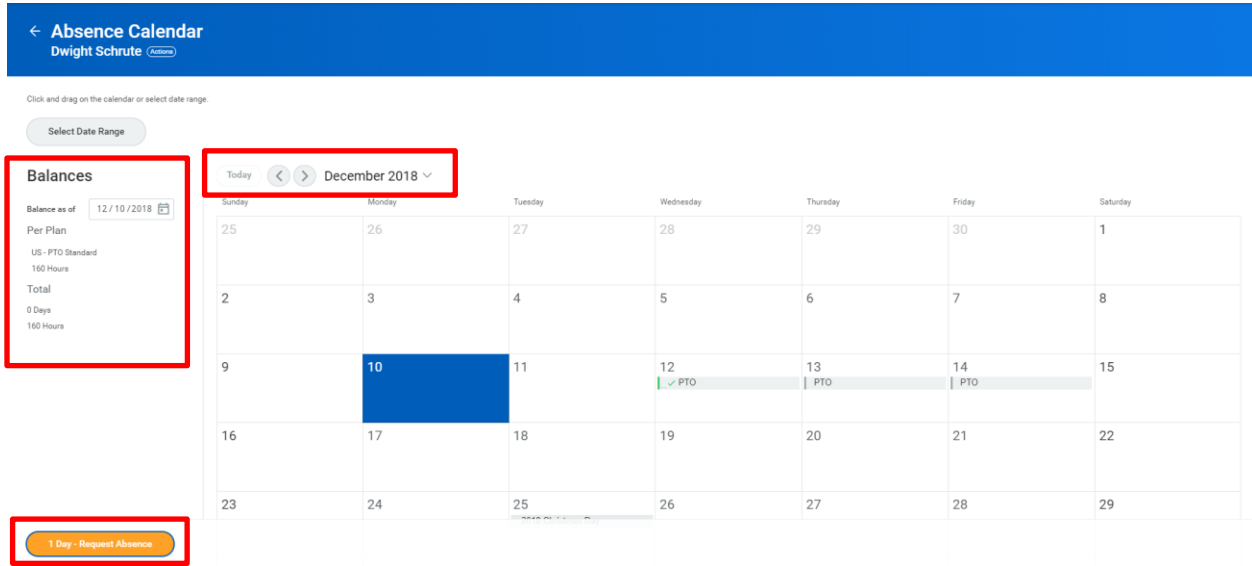
If the time block is not yet submitted, it will show with a gray bar to the left of the time block and a status of "Not Submitted."

Once the time is approved, it will show with a green bar to the left of the time block and a status of "Approved."

The **Absence Calendar** is where you can enter days off and see the time off balance. You are brought to the absence calendar when you click **Request Absence, Enter Absence or Correct Absence**. Here is a screenshot of the Absence Calendar…
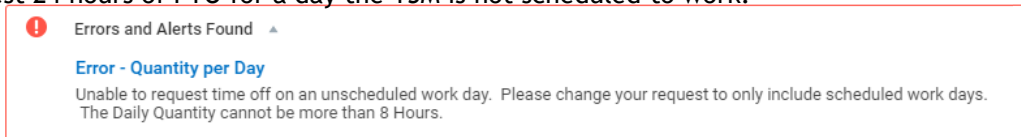

Again, you can navigate to other weeks/months using the navigation arrows at the top. On the left, you can see the TSM's current balance or see their balance as of a specific date. You can see the time already requested off on the calendar. If it has not yet been approved it will show in gray. If the time has been approved it will show with a green checkmark. When the TSM requests an absence, it will come to you to approve first. You will receive an e-mail from Workday asking you to approve. You will see these requests in your inbox. Multiple requests will appear in the order they are received.

ERRORS/ALERTS:

Workday validates the information you enter and will show an error or an alert if something is potentially wrong.

An **ERROR** shows in red and means that the information you have entered will not be completed until the error is rectified and it is re-submitted. As an example, below is an error received when trying to request 24 hours of PTO for a day the TSM is not scheduled to work.

An **ALERT** shows in yellow and means that what you have entered can be submitted, however it is important that you read the alert first. Depending on what the alert says, you may want to update the information you entered, or after reading the alert you have decided no change is needed and choose to proceed. Below is an alert received when trying to submit time on a day that has more hours than the TSM's scheduled hours that day. This might be an exception and you might want to bypass the alert and still submit their time.

UPDATING A TSM'S WORK SCHEDULE

In Workday, a TSM's work schedule is important. It doesn't just indicate the days and hours they work, but also ensures they get paid the right holiday hours. Correct schedules also allow you to report on whether a TSM checked out early or late. Here are the steps for updating a TSM's work schedule…

IF THE TSM IS A NEW HIRE: (A default schedule will be assigned and must be changed by the manager)

1. Go to your **inbox** in the upper right-hand corner

2. Navigate to the **To Do** task for the new hire in your inbox

3. Click **Assign Work Schedule** from the Task

4. You will be prompted to enter:

    1. **Worker's** name – search for their name

    2. Enter the **start date**, for a new hire this should be their hire date

    3. The new **Work Schedule Calendar** – Click in the box, then click **All** to see your options.

        NOTE: Schedules include the total number of scheduled hours (i.e. 40.0), the days of the week the TSM will work (i.e. **M**onday-**F**riday), and length of the unpaid meal break (i.e. 30 **M**inute **L**unch)

    *If the schedule is not there, please put in a request to have it created.

5. Click **OK**

6. Go back into your **inbox**

7. Navigate to the **To Do** task

8. Click **Submit**

IF THE TSM IS NOT A NEW HIRE:

1. In the search box in the upper left-hand corner, search for the task **Assign Work Schedule**

2. You will be prompted to enter:

    1. **Worker's** name – search for their name

    2. Enter the **start date**, or when the schedule is effective

    3. The new **Work Schedule Calendar** – Click in the box, then click **All** to see your options.

        NOTE: Schedules include the total number of scheduled hours (i.e. 40.0), the days of the week the TSM will work (i.e. **M**onday-**F**riday), and length of the unpaid meal break (i.e. 30 **M**inute **L**unch)
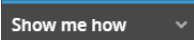
    *If the schedule is not there, please open a ticket in Service Now to have it created.

3. Click **OK**

*PLEASE NOTE: If the TSM is also reducing/increasing their hours, this must also be updated on the TSM. Please click here for directions.

ENTER TIME FOR A TSM

As a manager/timekeeper, there will be times when you need to enter time for a TSM. For example, if they are working offsite and can't check in or out. Here are steps for how to enter time for your TSM...
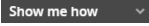
FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the **Show me how** *icon and choose this option.*
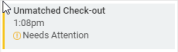
HOW TO...

1. Click on **Time and Absence** under Applications from your Workday homepage

2. Under the Tasks section, click the **Enter Time for Worker** button

3. You will be prompted to enter the TSM's name and a date, then click OK

4. You will be brought to the TIME calendar

5. Click on the day you would like to enter time

6. A box will pop-up – please note that red asterisks indicate mandatory fields

7. Add a **Time Type** (Time Code)

   A. If the Time Type is Regular, you will be prompted to enter an In/Out time (Use only if punch times are known. For adjustments, or if you don't know the exact start and end times, use Hours Adjustment)
   B. All other time codes will ask only for the number of hours (Hours Adjustment, Travel, Worked Through Lunch, etc.)

8. Under the Details section, choose a comment from the correct section. *A comment is not always required, however is helpful to include to provide additional details on the change.*

   A. If you are adding a check in/out - choose a comment in the **In Comment/Out Comment** section

   B. If you are adding an Hours Adjustment – choose a comment in the **Hours Adjustment Comment** section

   C. If you are adding a Worked Through Lunch – choose a comment in the **Worked Through Lunch Comment** section

   D. You can add an additional comment in the Comment section.

9. Click OK

CORRECTING TIME PUNCHES

A TSM might forget to check in or check out resulting in unmatched clock events. Here are steps for how to correct a check in/check out for a TSM...
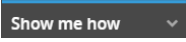
FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the [Show me how ⌄] *icon and choose this option.*

1. Click on **Time and Absence** under Applications

2. Under the Tasks section, click the **Enter Time for Worker** button

3. You will be prompted to enter the TSM's name and the date you would like to correct, then click OK

4. You will be brought to the TIME calendar

5. Click on the day and the time block you would like to correct

   > Unmatched Check-out
   > 1:08pm
   > ⓘ Needs Attention

6. A box will pop up

7. Add the missing In/Out time

8. Under the Details section, choose an In Comment or an Out Comment

9. Click OK - The unmatched time block will no longer appear at the top of the calendar and will align with the time area of the calendar

   *Note that the time block now shows a status of Not Submitted, it will need to be approved again prior to going to payroll.

CORRECTING TIME FOR A TSM

As a manager/timekeeper, there will be times when you need to correct time that was already entered for a TSM. Here are steps for how to correct time for your TSM…
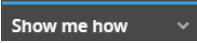
FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the `Show me how` *icon and choose this option.*
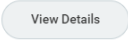
1. Click on **Time and Absence** under Applications

2. Under the Tasks section, click the **Enter Time for Worker** button

3. You will be prompted to enter the TSM's name and a date, then click OK

4. You will be brought to the TIME calendar

5. Click on the day and the time block you would like to correct

6. A box will pop up

7. Edit the necessary details – Please note: Time punches should not be altered unless there is a duplicate entry. For adjustments to time, use "Hours Adjustment" with a mandatory reason code.

8. Click OK

   *Note that the time block now shows a status of Not Submitted, it will need to be approved again prior to going to payroll.

VIEWING CALCULATED TIME

Workday takes the time that was entered for a TSM and updates it to what should actually be paid to the TSM. An example of this is overtime. A TSM might work over 40 hours in a week and therefore be owed overtime. Workday automatically takes time that was checked in or entered as "Regular," and determines how many of those "Regular" hours should be changed to Overtime hours. You can review these calculations on a TSM's time block. Here's how...

FIRST: *Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the* [Show me how ▼] *icon and choose this option.*

1. Click on **Time and Absence** under Applications

2. Under the Tasks section, click the **Enter Time for Worker** button

3. You will be prompted to enter the TSM's name and the date you would like to review, then click OK

4. You will be brought to the TIME calendar

5. Click on the day and the time block you would like to review

6. Click the **View Details** button at the bottom of the pop-up box [View Details]

Time Block 8.5 Hours on 02/11/2019 (Actions)

Worker	Dany Targaryen
Date	02/11/2019
Status	Approved

Reported   Calculated   History

Reported Quantity	8.5 Hours
Time Entry Code	Regular
In	02/11/2019 08:30 AM GMT-05:00 Eastern Time (New York)
Out	02/11/2019 05:00 PM GMT-05:00 Eastern Time (New York)
Out Reason	Out
Source	User Entered
Comment	(empty)

[Close]

- The **Reported** Tab shows you what was entered by the TSM or you
- The **Calculated** Tab shows you what the reported time was calculated into for payroll (i.e. regular hours turn into overtime hours once the threshold is met)
- The **History** tab shows you the history if this time block

7. Click **Close** when done reviewing
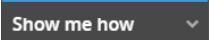
APPROVING TIMECARD(S)

As the manager/timekeeper, you are responsible for reviewing and approving the time entered for a TSM before payroll pays the time. If you have any questions regarding when you need to approve time for a TSM, please reach out to your Payroll Partner.

What's even cooler with Workday? You can do this from your smart phone! See **Tips and Tricks** later in the guide to see how!

Here are steps for how to do this from your desktop/laptop…

BEFORE YOU START: You can only approve a timecard once it has been submitted. TSMs' time is automatically submitted immediately following the last day of the pay period (Monday AM). If you always approve time on Mondays, then the time will always already be submitted. If you want to approve time prior to the time being automatically submitted, see option C below…

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the Show me how *icon and choose this option*
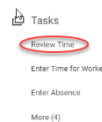
IF TIME HAS BEEN SUBMITTED

OPTION A- ONE TSM AT A TIME:

1. Go to your inbox in the upper right-hand corner

2. Click on the **Time Entry** task in your inbox for your TSM

3. Review the time entered

4. Click **Approve**

OPTION B- ONE OR MORE TSMs AT A TIME

1. Click on **Time and Absence** under Applications

2. Under the Tasks section, click the **Review Time** button

3. Choose the date you are reviewing time for (it will bring up the whole period for that date, not just that one day)

4. The **View My Direct Reports only** checkbox is available for managers to see only their direct reports. If you are a timekeeper please choose who you would like to review time for in the **Workers** box.

   If you are a manager and want to specify who you would like to review time for, please deselect the checkbox and choose the TSMs in the **Workers** field.

   TIP: If you need to select everyone that comes up you can click the first TSM's name then hold down the Shift key on your keyboard and click on the last TSM's name. This will select them all.

5. Under **Show** choose whether you want to see All Workers you have access to, only the Workers with Hours you need to Approve, or only the Workers with Unsubmitted Hours (if a worker has unsubmitted hours you will not be able to approve – hours will be submitted automatically each pay period by a specific day, enabling you to approve)

6. Click **OK**

7. The **Review Time** screen will populate with summary information for the team members you selected

8. You can drill into additional detail for each TSM by selecting the TSM's name. You can review and then approve each individual TSM and scroll to the next TSM.

    *You can go back to the main summary screen at any time by click the back arrow

9. If you want to approve from the summary screen, select the checkbox next to the workers you would like to approve. If you would like to approve all of them you can select the very first checkbox.

10. When ready, click **Approve**

11. The next screen will show you if your approval was successful. If there are any workers under the **Time Not Approved** section, then their time was not approved. You can see the reason why under the reason column in the chart to the right.
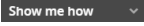
IF TIME HAS NOT YET BEEN SUBMITTED:

OPTION C – ONE TSM AT A TIME ONLY:

1. Click on the **Time and Absence** app

2. Under the **Tasks** section, click **Enter Time for Worker**

3. Enter the TSM's name in the **Worker** field

4. In the **Date** field, enter the day you would like to submit time for

5. Click **OK**

6. Click **Submit** in the bottom left-hand corner

7. Click **Submit** again

8. This has automatically approved the TSM's time

VIEWING TSM'S TIME OFF BALANCE

In Workday, you can view a TSM's time off balance as of a specific date. This means you can forecast balances. Here are steps on how to view a TSM's time off balance…

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the `Show me how` *icon and choose this option.*

1. Click on **Time and Absence** under Applications

2. Click **Enter Absence** under **Tasks**

3. Enter the TSMs name when prompted, hit OK

4. You will now see the Absence Calendar for your TSM

5. To the left, you will see their balances

6. You can adjust the date to see their balance as of a point in time

*NOTE: Historic balance data will not be available earlier than March 2019

<u>TIP</u>: Here you can forecast your TSMs' time off by entering a date in the future!

APPROVING TIME OFF

In Workday, TSM's will be requesting time off for your approval. You will need to approve their requests in a timely fashion. Workday allows you to review their balances and see who else has already requested time off that day, prior to approving the request. Here's how to approve a time off request for your TSM…

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the `Show me how` *icon and choose this option.*
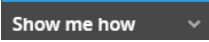
1. Go to your inbox in the upper right-hand corner ✉

2. Click on the **Absence Request** for your TSM in your inbox

3. Here you will see the type of time they requested and when they requested it

4. You can click on the **View Balances** button to review their balance prior to approving

   TIP: *You can see who else is scheduled to be out that day by going to **My Team** under Applications on your homepage and selecting the Team Absence Calendar button. You can also see a calendar view by going to **Time and Absence** under Applications from your homepage and selecting the Time Off & Leave Calendar task.*

5. You can click **Approve**, **Send Back**, or **Deny** and a notification will be sent to the TSM

   - Clicking **Approve** will automatically place this day on their Time Calendar
   - Clicking **Send Back** allows you to comment and send the request back to the TSM to revise
   - Clicking **Deny** ends their request all together
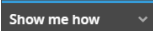
ADD TIME OFF FOR A TSM

As a manager/timekeeper you can add a time off request on behalf of a TSM. If you add it, it is automatically approved. Once approved, it will automatically feed to the TSM's time/absence calendar.

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the [Show me how ⌄] *icon and choose this option.*

1. Click on **Time and Absence** under Applications

2. Click **Enter Absence**

3. Enter the TSMs name when prompted, hit OK

4. You will now see the Absence Calendar for your TSM

5. Click on the day(s) you would like to add time off

6. When those days are highlighted, click the **Request Absence** button to the bottom left

7. You will be prompted to enter a **Type** of time off

8. Click Next

9. The TSM's scheduled hours for that specific day will default in. If you would like to edit the amount of hours, click the **Edit Quantity per Date** button, edit the number of hours, then click **Done**.

10. Click **Submit**
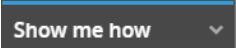
ADDING SICK/UNSCHEDULED TIME OFF FOR A TSM

If a TSM calls in sick or calls out unexpectedly, someone will need to enter that into their timecard. The TSM can put through a request for you to approve (from their mobile phone!) or you can enter it on their behalf. If you add it, it will automatically be approved. Either way, once approved, it will automatically feed over to the TSM's time/absence calendar.

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the Show me how *icon and choose "Add Time Off for a TSM."*

1. Click on **Time and Absence** under Applications

2. Click **Enter Absence**

3. Enter the TSMs name when prompted, hit OK

4. You will now see the Absence Calendar for your TSM

5. Click on the day(s) you would like to add time off

6. When those days are highlighted, click the **Request Absence** button to the bottom left

7. You will be prompted to enter a **Type** of time off (i.e. Unscheduled PTO, Sick)

8. Click Next

9. The TSM's scheduled hours for that specific day will default in. If you would like to edit the amount hours, click the **Edit Quantity per Date** button, edit the number of hours, then click **Done**.

10. Click **Submit**

CANCELLING A TIME OFF REQUEST

You may need to cancel a time off request for a TSM. The steps vary based on if the time off request has or has not been approved. Here are the steps…

FIRST: Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the **Show me how** *icon and choose this option.*

IF IT HAS NOT YET BEEN APPROVED:

1. Go to your inbox in the upper right-hand corner

2. Click on the **Absence Request** for your TSM

3. Click **Deny** and a notification will be sent to the TSM

IF ITS ALREADY BEEN APPROVED:

1. Click the **Time and Absence** Application on your homepage

2. Click Correct Absence under the **Tasks** section

3. You will be prompted to enter the TSM's name, then click **OK**

4. Navigate to the day off you are looking to cancel

5. Click on the gray line on that day

6. Click on the minus sign in the chart

4. Click **Submit** and a notification will be sent to the TSM

CORRECTING A TIME OFF REQUEST

You may need to correct a time off request for a TSM. The steps vary if the time off request has or has not been approved. Here are the steps…

FIRST: *Did you try the WalkMe walk through? It will show you step by step how to complete this change, while you're doing it! Just click on the* Show me how ⌄ *icon and choose this option.*

IF IT HAS NOT YET BEEN APPROVED:

1. Go to your inbox in the upper right-hand corner

2. Click on the **Absence Request** for your TSM

3. Click **Send Back**

4. Enter a comment so the TSM knows why you're sending it back

5. Click **Submit** and a notification will be sent to the TSM

5. The TSM will have the opportunity to edit and return to you via a task in your inbox

IF ITS ALREADY BEEN APPROVED:

1. Click the **Time and Absence** Application on your homepage

2. Click **Correct Absence** under the **Tasks** section

3. You will be prompted to enter the TSM's name, then click **OK**

4. Navigate to the day off you are looking to cancel

5. Click on the gray line on that day

6. Make any adjustments to the day off that you need

6. Click **Submit** and a notification will be sent to the TSM
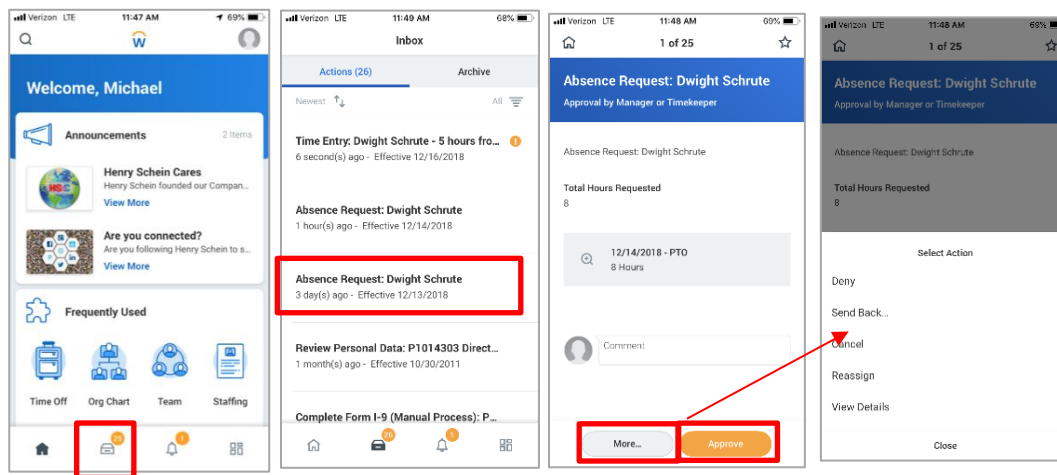
WANT TO SEE THE TIME OFF CALENDAR FOR YOUR ENTIRE TEAM?

1. Click the **My Team** app from your homepage
2. Click **Team Absence Calendar** from the **View** section
3. Under **Organizations**, choose your team
4. Under **Workers** you can choose if you want to view time for specific people on your team
5. Check **Include Self** if you want to include your own time to compare
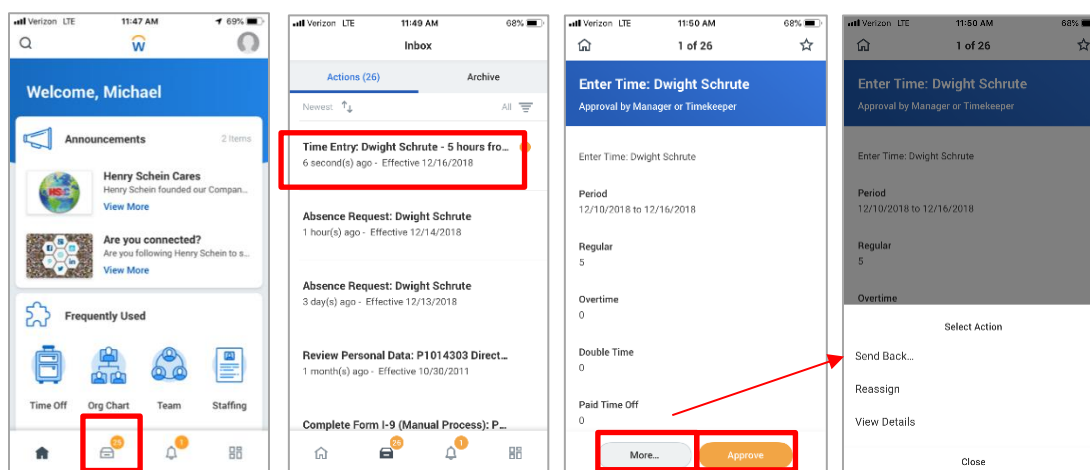6. Click **OK**

DOWNLOADING THE MOBILE APP

Having the app allows you to have quick, easy access to the tasks you will need to approve for TSMs. Go to www.henryscheinworkday.com and click on Mobile App in the upper righthand corner for directions!

APPROVING TIME OFFS FROM THE MOBILE APP:

APPROVING TIMECARDS FROM THE MOBILE APP:

REPORTING

To see the reports available to you as a manager, click on the **Time and Absence** Application from your homepage.

Here you will see a list of reports that you can run for your team under the **Manager Time/Absence Reports** section.

Just click on the report you would like to run, enter the criteria and click **OK**. Remember an organization = a team in Workday. Including "Subordinate Organizations" means it will run for all teams that roll up to you.