

Manual or Mass Advance

Overview

This job aid describes how Timekeepers and Absence Partners can manually advance a business process (Enter Time and Request Time Off) for worker(s) they support

Prerequisites: N/A

Important Information:

- Use the Employee's Worker History to manually advance a single transaction (Enter Time or Request Time Off) for an Employee
- Use the Mass Advance Business Process task to manually advance a <u>group</u> of transactions (Enter Time or Request Time Off) for Employee(s)

Steps

Manual Advance (For one Employee)

- 1. Search for the Employee in Workday
- 2. From the Employee's Related Actions, hover over Worker History and click View Worker History

Actions		Worker Jessika Batchelor (Training)
Calendar	>	
Compensation	>	Contact
Job Change	>	Email 🖂 Jessika.training@gm
Manage Work	>	Work Address
Organization	>	
Payment	>	View Team
Payroll	>	
Personal Data	>	
Safety Incident	>	000
Talent	>	Organization 01999990 SO WU Office of the Dean (Aniah 0
Time and Leave	>	Business Title Executive Assistant III
Worker History	<u> </u>	View Worker History View Worker History by Category

You will see something similar to the following:

View Worker History by Category								
Worker History 10 items								
Business Process	Effective Date	Initiated On	Due Date	Completed On	Status			
Absence Request: Jessika Batchelor (Training)	07/12/2018	07/11/2018 02:13:44 PM	07/13/2018		In Progress			
Personal Information Change: Jessika Batchelor (Training)		06/10/2018 11:20:53 AM			In Progress			
Preferred Name Change: Jessika Batchelor (Training)		06/10/2018 11:20:53 AM			In Progress			
Contact Change: Jessika Batchelor (Training)	01/01/2018	06/10/2018 11:20:53 AM			In Progress			

3. Locate the business process you need to move forward. Click on the **Related Action**

icon and select Business Process > Advance Manually



In this case, we are going to manually advance an Absence request Jessika has submitted

 On the Advance Business Process page, check the box next to the business process to confirm

If you don't check the "Send to Completion" checkbox, then the selecte Suppress Notifications	d process will move to the next step.					
Reason for Advancing Business Process * This business process was manually advanced from the Advance Business Process transaction.						
Business Processes 1 item						
Confirm Event for Advance Business Process	Worker	Time Off Start Date	Time Off End Date	Total Hours		
Absence Request. Jessika Batchelor (Training) Jessika Batchelor (Training) 07/12/2018 07/12/2018 8						

Notes:

• You will notice that you can suppress notifications. We do not recommend selecting this option as it is helpful for







configured notifications to initiate as they would typically

- Send to Complete will manually advance the business process all the way to completion, auto-completing any future steps in the business process. In the case of Enter Time and Request Time Off, there is only one additional step needed after initiation by the Employee, the approval of the Worker's Manager. This means it is not necessary to check the Send to Completion box
- 5. Click OK
- 6. Click Done

The Worker History will now display the business process as Successfully Completed

ſ	Worker History 10 items						
	Business Process	Effective Date	Initiated On	Due Date	Completed On	Status	
	Absence Request: Jessika Batchelor (Training)	07/12/2018	07/11/2018 02:13:44 PM	07/13/2018	07/12/2018 12:01:24 PM	Successfully Completed	

View Worker History by Category

In the event it is difficult to locate the business process you need to manually advance, you can view the history by category to help sort the business processes

After completing Step 2 from above, click **View Worker History by Category**. You will see something similar to the following:

View Worker History							
Staffing Hire History	Staffing Organization Personal Data Compensation Time Off and Leave Payroll						
Business P	rocess	Initiated On		Start Date	Status	Reason	
Hire: Jessi	ka Batchelor (Training)	06/10/2018	8 11:19:00 AM	01/01/2018	Successfully Completed	Hire > Ne Hire	

Note: The categories you see here are based on this worker. More categories will most likely be available such as benefits

Select the category within which the business process you are looking for would fall. In our scenario, we would select Time Off and Leave to look for the Absence request

Staffing	Organization	Personal Data	Compensation	Time Off and	Leave Pa	eyroll
Time Off Hi	istory 2 items					
Business P	rocess	Initiat	ed On	Time Off Start Date	Time Off End Date	Status
Absence R (Training)	lequest: Jessika Batch	elor 07/12	2/2018 12:20:49 PM	07/13/2018	07/13/2018	In Progress
Absence R (Training)	lequest: Jessika Batch	elor 07/11	/2018 02:13:44 PM	07/12/2018	07/12/2018	Successfully Completed

You will now follow the same steps outlined above in Step 3 to select the business process and manually advance

This completes the **Advance Manually** business process

Mass Advance (For Multiple Employees)

1. Search for the Mass Advance business process in Workday

Q	mass advance
Ma	ass Advance Business Process - Task

The Mass Advance Business Process screen displays

 Select your desired Business Process Type in the Business Process Type field (e.g. Enter Time, Request Time Off)



 On the Mass Advance Business Process – Filter page you will filter by Time Period or Worker

Business Process Search Filters						
Business P	rocess Type Request Time Off					
Period	× 07/01/2018 - 07/31/2018 (Monthly)					
Worker	(empty)					

Note: Here we selected the current monthly Time Period automatically removing the **Worker** option







Note: Here we have selected all employees who report to this Manager automatically removing the **Period** option

- 4. Next you will filter for business processes that were initiated within a certain time frame. Enter the date and time for the time frame you need
 - From Moment. This is the beginning date and time
 - **To Moment.** This is the ending date and time

Initiated in Date Range					
From Moment ★	09/07/2017	02:00:00 AM			
To Moment 🔸	12 / 06 / 2017	10:55:16 AM			

Notes:

- The **Initiated in Date Range** section will pull up all transactions for the selected business process type that were initiated during the time range that is specified in this section
- The additional options available such as Include Subprocesses, Include Completed Events etc. are not necessary, but can also filter results
- 5. Click the OK button
- 6. The Mass Advance Business Process Refine Results screen displays with the filters you selected and the business processes that qualified based on the criteria you input

Suppress Select Al Reason f	s Notifications	idvanced from the Advance Business Pro	cess transaction.	h	
Send to (Busines	s Processes 3 items				
Select	Event for Advance Business Process	Worker	Time Off Start Date	Time Off End Date	Total Hours
	Absence Request: Esther Gutierrez (Training)	Esther Gutierrez (Training)	07/16/2018	07/16/2018	8
	Absence Request: James Bishop (Training)	James Bishop (Training)	07/13/2018	07/13/2018	8
	Absence Request: Sam Gallaway (Training)	Sam Gallaway (Training)	07/17/2018	07/17/2018	1

Select the business processes you would like to manually advance

Busines	lusiness Processes 3 items					
Select	Event for Advance Business Process	Worker				
~	Absence Request: Esther Gutierrez (Training)	Esther Gutierrez (Training)				
~	Absence Request: James Bishop (Training)	James Bishop (Training)				
	Absence Request: Sam Gallaway (Training)	Sam Gallaway (Training)				

Notes:

- You can choose Select All if you would like to include all business processes listed in the table
- You will notice that you can suppress notifications. We do not recommend selecting this option as it is helpful for configured notifications to initiate as they would typically
- Send to Completion will manually advance the business process all the way to completion, auto-completing any future steps in the business process. In the case of Enter Time and Request Time Off, there is only one additional step needed after initiation by the Employee, the approval of the Worker's Manager. This means it is not necessary to check the Send to Completion box
- 7. Click OK
- 8. Click Done

This completes the **Mass Advance** business process

