Explore

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 *group* 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**
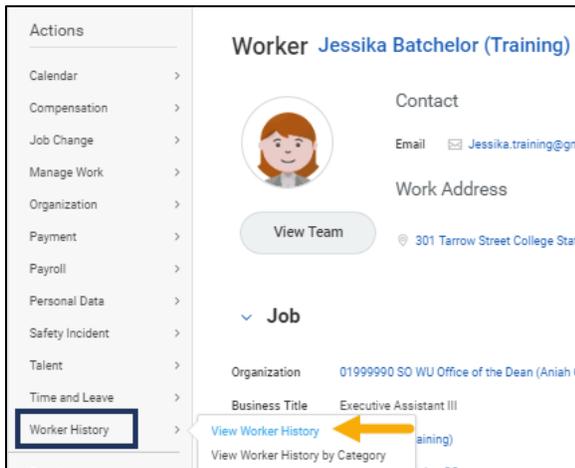
You will see something similar to the following:

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

icon and select **Business Process > Advance Manually**
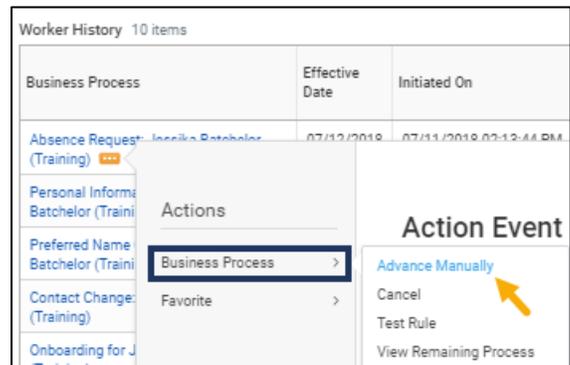
In this case, we are going to manually advance an Absence request Jessika has submitted

4. On the Advance Business Process page, check the box next to the business process to confirm
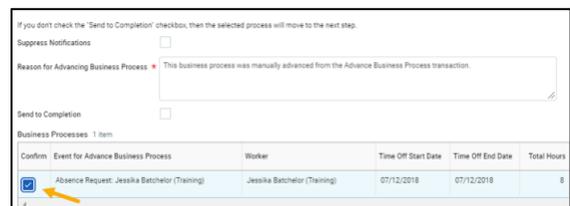
Notes:

- 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

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:

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

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

The **Mass Advance Business Process** screen displays

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

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

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

Business Process Search Filters

Business Process Type   Request Time Off

Period   (empty)

Worker   × Aniah Oren (Training)

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

Select the business processes you would like to manually advance

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