Time Summary Review
(Primary Report for Timekeepers)

The Time Summary Review report within Workday makes it extremely easy for Timekeepers to review their department’s biweekly paid employees Unsubmitted Hours, Hours to Approve and Approved Hours in one place.

This report can also be used by Timekeepers to monitor needed actions once timesheets are locked. They can work with managers on approval or pull up the individual employee’s timesheet and submit / approve on behalf of the manager.

Only Timekeepers have the security role to generate this report within Workday.

Timekeepers can approve UnSubmitted Hours directly from the live report (see page 3)

Timekeepers can also use the report to assist Managers with Reviewing & Approving Retro Timesheet Corrections (see page 5)

Steps for a Timekeeper to Generate the Time Summary Review Report for Current Period:

1. Click in the search Bar on the top left of the Workday screen and start typing, Time Summary; you shouldn’t have to type the entire report name – select Time Summary Review – Report from the list that populates.

This is the default request screen to begin report generation:
**Start Date & End Date** are the only 2 mandatory fields. Enter the start date for the pay period under review; enter its ending date. For this example I am changing the default start date to 2.09.2020; the default end date 2.22.2020 is correct and doesn’t need updating.

Employee Type defaults to all selected; you can run with the defaults or you can click an “x” by the type you don’t want to include in your report. Payroll Services recommends leaving the default selections in place to make sure dual-employed staff are picked up. Note if your staff are dual-employed their primary supervisory organization & employee type is listed, even though they may have hours on their secondary position.

The report will bring in results for all the supervisory organizations your security roles allows.

These are partial snips of the report in Workday. The report can be dropped to Excel for filtering, sharing & review / action.
Hours to Approve = hours submitted to manager; manager or timekeeper can review and submit
Unsubmitted Hours = hours entered on timesheet but not submitted to manager
Approved Hours = hours previously approved by manager or timekeeper

**Approving Unsubmitted Hours on Behalf of a Manager**

A. From the live Workday report, right click the “twinkie” to the right of the employees name to see in new window. We are looking at Makayla Hoffpauir – student for this example:
B. Navigate to the employees timesheet for the current period

C. Click the submit button to approve hours on behalf of the manager and submit to payroll services.

Enter a comment – such as approving on behalf of manager – then click OK & Done. You can now see the hours are approved.
As long as a Timekeeper submits on behalf of manager before the current Payroll deadline, the hours should be part of expected pay results. If the report is later refreshed or rerun, the hours have moved from the Unsubmitted Hours column to the Approved Hours column.

**Assisting Managers with Reviewing & Approving Retro Timesheet Corrections**

Employees are able to make corrections to their timesheets up to 3 prior pay periods back from the current period. For example, if the current period is #20-13 (2.09.2020 through 2.23.2020), employees can make corrections for:

- #20-12 (1.26.2020 – 2.08.2020)
- #20-11 (1.12.2020 – 1.25.2020)
- #20-10 (12.29.2019 – 1.11.2020)

**Retro timesheet corrections have earlier deadlines than current timesheets.** These deadlines are noted on each monthly processing calendar highlighted in yellow. If a manager or timekeeper doesn’t approve submitted prior timesheet corrections by the retro deadline, the corrections won’t get picked up for the current period. In this example the retro deadline is 2.20.2020 for the prior hours to be paid with the 2.28.2020 payday. If the retro hours are approved after the 20th, for example on the 21st, they will not pay until the #20-14 – 3.10.2020 biweekly payday.
The Time Summary Report can also be used to see which employees have made retro timesheet corrections. The Timekeeper can monitor & work with the manager on approval or can submit & approve on behalf of a manager.

1. Click in the search Bar on the top left of the Workday screen and start typing, Time Summary; you shouldn't have to type the entire report name – select Time Summary Review – Report from the list that populates.

This is the default request screen to begin report generation:

- Only Return TRS Working Retirees
- Primary Position Pay Group
- Primary Position Company
- Start Date: 02/16/2020
- End Date: 02/22/2020
- Employee Type: Faculty, Graduate Assistant, Staff, Student Worker, Temporary/Casual Staff (Fixed Term)
**Start Date & End Date** are the only 2 mandatory fields. For Retro review – enter the beginning of the period retro correction is still in effect. Enter the end date of the most recent retro period. For our example we will enter the beginning date of #20-10 and the end date of #20-12.

Employee Type defaults to all selected; you can run with the defaults or you can click an “x” by the type you don’t want to include in your report. Payroll Services recommends leaving the default selections in place to make sure dual-employed staff are picked up. Note: if your staff is dual-employed, their primary supervisory organization & employee type is listed, even though they may have hours on their secondary position.

The report will bring in results for all the supervisory organizations your security roles allows.

These are partial snips of the report in Workday. The report can be dropped to Excel for filtering, sharing & review / action.

We note one employee has unsubmitted hours
Right Click the “twinkie” to the right of his name and select “see in new tab”

Open their timesheet at the beginning of the retro period (12.29.20019) and review each week, looking for the unsubmitted time. In this example – I found the 4.00 hours on 1.24.2020:
At this point, if the employee is available, you can request they submit which will then route to their manager for approve or you as timekeeper can submit / approve on their behalf. Note that approval must be done by 5:00pm on the Retro Deadline day. In this example this would be February 20th.

**Payroll Services recommends running the current period report separate from a retro review report.** The reason is that current has a later deadline than retro. Ideally, you will review retro corrections before this deadline, then several business days later you will run the current period to review. If you attempt to run all 4 pay periods (3 retro & current) after the retro deadline has passed, the retro hours approved after deadline will have a further 2-week delay in payment to the employee.

Please email payrollprocessing@tamu.edu if you have any questions about or issues when generating any Time Summary Review report.