



Workday Finance, configured by a Chartered Accountant.

ABHAYJAISWAL.COM

■ WORKDAY FINANCE · STEP BY STEP

Review Approved Time Tracked to Projects & Approve Time

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■ Purpose

This guide provides step-by-step instructions for a Project Manager to Review Approved Time Tracked to Projects and Approve Submitted Time for Projects in Workday. Reviewing approved and submitted time for Projects serves several key functions:

- Ensures that time logged against projects is accurate and aligns with the project goals and budgets.
- Enables project managers to approve time for workers who may not be in their supervisory organization, facilitating better project oversight.
- Allows the approval of project time entries for multiple workers at once, streamlining the approval process compared to reviewing each entry individually.

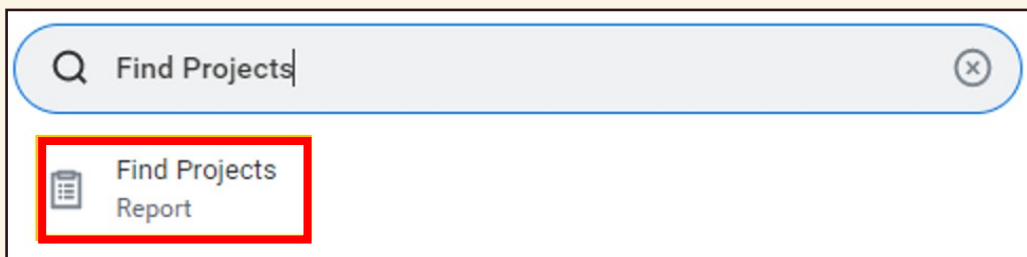
■ Prerequisites

Before Reviewing Approved and Submitted Time for Projects, ensure the following:

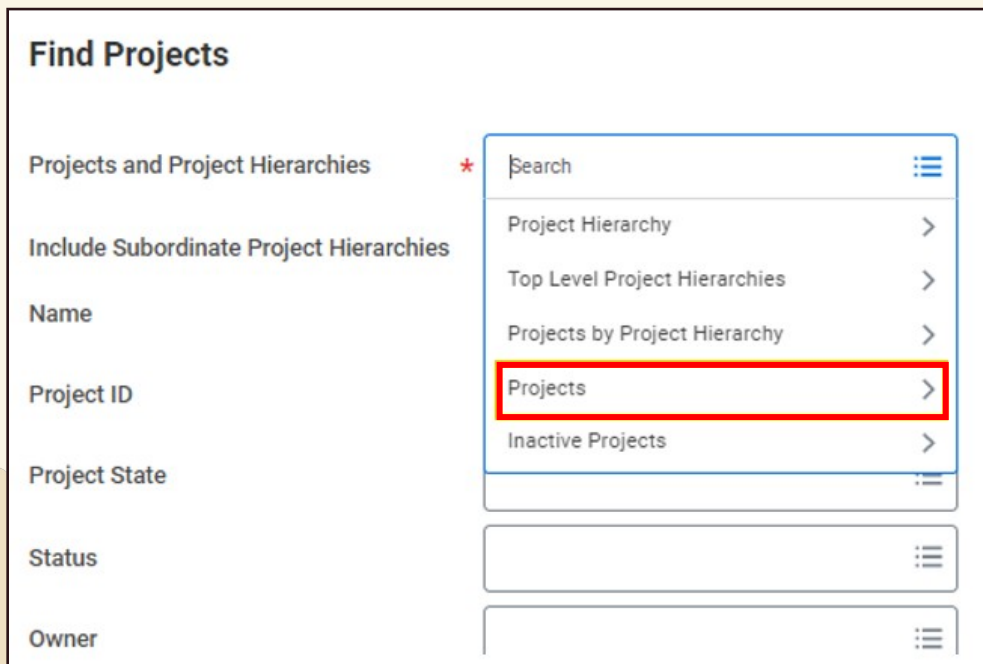
- You have the appropriate Workday security role (e.g., Project Manager)
- Set up project time entry, including calculation tags.
- Enable the "Create Independent Events" option on relevant time entry templates. This allows Workday to create separate approval events for each project when workers enter time against multiple projects.
- Access and configure the **Edit Project Time Approval Settings** task to set up the Review Project Time report.

■ Review Approved Time Tracked to Projects

- Type Find Projects into the search bar and select the related report.



- Populate report filters to find the relevant project.





- Navigate to the relevant project. Click the Financials Tab. Click the Contract / Billing sub tab. Find the Review Billable Transactions column and click Review Transactions to review billable transactions for a given contract line Scroll all the way to the right on the contract line and click the 'Review Transactions' button.

Overview

Resources

Project Plan

Financials

Summary

Plan

Capitalization

Contract / Billing

Customer Invoices

Project Billing Work Area

Project Billing Work Area

Contract / Billing 2 items

Turn off the new tables view

it	Contract Line Amount	Project Transaction Source	From Date	To Date	Bill-To Customer	Billing Schedule	Standard Rate Sheet	Contract Rate Sheet	Billing Currency	Billed Amount	Scheduled, In Progress, and Ready to Bill Amount	Amount to Bill for Scheduled, In Progress, and Ready to Bill	# Transactions Awaiting Review	# Unbillable Transactions	Review Billable Transactions
customer 03/01/2022	120,000.00		03/01/2022	06/31/2022	TESTCustomer	Testing T&E TESTCustomer 03/01/2022 Spread Even			USD	120,000.00	0.00	0.00	0	0	
customer 05/11/2022	1,000,000.00	Time			TESTCustomer	Testing T&E Time TESTCustomer 05/11/2022			USD	1,600.00	0.00	3,110.00	0	0	Review Transacti...



- Select all lines ready to bill and then change the billing status from Awaiting Review to Ready to Bill. You can optionally change the number of hours to bill, and the rate applied. If so, enter a reason for change.

4 items 1 selected									
Billing Review Project Transfer Add									
☐	Billable Transaction	Project	Project Plan Task	Customer	Worker	Project Role	Billable Amount	Billing Status	Transact Date
☒	Q	Testing T&E	Testing T&E > Production > FULL Project (01/01/2022 - 06/01/2022)	TESTCustomer	Wael ilayan	Time Tracker	0.00	✖ Ready To Bill	01/09/2

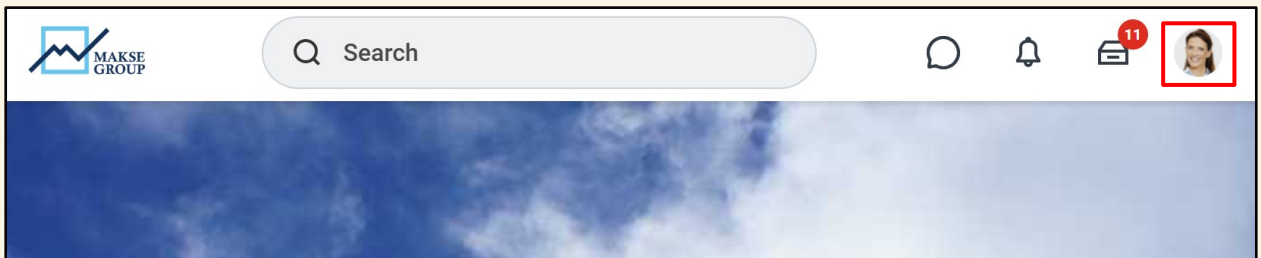
- Optional: WD allows you to edit the Hours to Bill and Rate to Bill columns. If changes are made you must also provide a Reason for Change.

Billing Review Project Transfer Additional Details												
Status	Transaction Date	Billable Hours	Hours To Bill	Billable Rate	Rate To Bill	Zero Amount to Bill	Recalculate	Billable Amount	Amount To Bill	Billing Currency	Revenue Adjustment Reason	Reason for Change
Ready To Bill	01/09/2022	8	5	0.00	150.00	☐		0.00	750.00	USD		
Ready To Bill	05/18/2022	2	2	0.00	100.00	☐		0.00	200.00	USD		

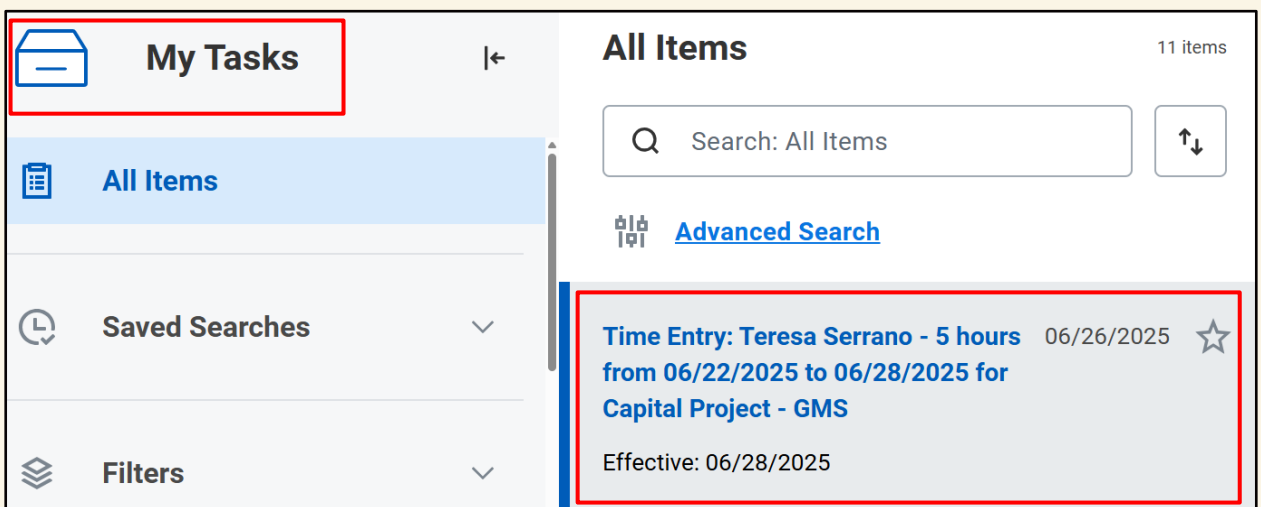
- Click Submit.

■ Approve Submitted Time for Projects

- Navigate to your inbox via the *Go to inbox* shortcut on the home page or the inbox icon in the top right corner of the window



- Find the relevant time entry awaiting approval under the *My Tasks* tab





- Review the *Time Entry Approval* inbox task. Sub-sections include *Entries to Approve* and *All Current Time*

Worker Teresa Serrano

Daily Totals 1 item

Date	Type	Hours
Mon, 6/23	Project Time	5

Entries to Approve

1 item

Date	Type	Time Block Reported Quantity	Units	Worktags	Time Block Comment
Mon, 6/23	Capital Project - GMS > Execution Plans > Design (06/01/2025 - 07/01/2025)	5	Hours	Cost Center: 34000 Facilities	

All Current Time

enter your comment

Approve

Send Back

- Fields for review include *Date*, *Type*, *Time Block Reported Quantity*, *Units*, *Comment*, and *Details*

Date	Type	Time Block Reported Quantity	Units	Worktags	Time Block Comment	Details
Mon, 6/23	Capital Project - GMS > Execution Plans > Design (06/01/2025 - 07/01/2025)	5	Hours	Cost Center: 34000 Facilities		🔍



- Based on review, use one of the following selections to act on the *Time Entry Approval*
 - **Approve:** approve the time entry
 - **Send Back:** send back to worker to revise time
 - Required Fields:
 - To
 - Send back Reason
 - Click Submit when required fields have been populated
 - **Deny:** deny time entry
 - Required Fields:
 - Reason
 - Click Submit when required fields have been populated
 - **Close:** close the inbox task for review later

Deny

Selecting Deny may terminate the entire business process.

Reason *

Testing

Submit

Cancel

■ Common Errors and Resolutions

Issue	Description	Resolution
Ineligible Time Entries	Time entries may not be eligible for approval due to incorrect tagging or missing information	Ensure that time calculation tags are correctly set up and that all necessary information is included in time entries
Misalignment of Supervisory Organizations	Project managers may struggle to approve time for workers outside their supervisory organization.	Use the Review Project Time report, which allows project managers to approve time for workers outside their supervisory organization.
Filter Configuration Errors	Saved filters may not display the correct data if not updated properly.	Regularly update the Date field when running saved filters to ensure accurate data display.
Total Approved Hours Calculation	The Total Approved Hours field may not return the expected values if time blocks or transactions fall outside the project's start and end dates.	Ensure that all time blocks and ad hoc project transactions are within the defined project start and end dates. Adjust the project start and/or end dates as necessary to encompass all relevant transactions.

■ Best Practices

- Ensure that **time calculation tags** are created and applied to all project time entries. This is essential for the Review Project Time report to function correctly.
- Determine whether to use the **Review Time report** or the **Review Project Time report** based on the relationship between the approver and the workers. Managers in the same supervisory organization should use the Review Time report, while project managers in different organizations should use the Review Project Time report.
- Configure the system to create **independent approval events** for each project. This prevents the approval status of one project from delaying others.
- When reviewing time, always select a **Period Schedule** to ensure that the report displays all eligible workers for the chosen timeframe. This helps in organizing approvals effectively.



Thank You

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