

Timecard Approval Access

Chapter 16

Timecard Approval Access

Section Objectives

At the end of this section, you should be able to:

- Create an Alternate Approver for emergency approval access
- Create temporary approver access
- Create an assigned approver to transfer approval responsibility

Timecard Approval Access

Approvers

There are three situations that could occur in which it may be necessary for a supervisor to set up another person(s) to approve his/her timecard notifications. That person(s) can then act as the supervisor's proxy to handle timecard notifications on the supervisor's behalf.

Alternate Approver for Emergency Approval Access:

- All supervisors MUST create an alternate approver for emergency approval access
- Alternate Approvers are set up by navigating to the *Worklist Access* link
- E-mail notifications are not sent to alternate approvers
- Alternate approvers can act upon notifications by switching users in the Worklist
- At a minimum, each supervisor should grant *Worklist Access* to his/her supervisor

Temporary Approver Access:

- Supervisors or any user can create Vacation Rules to allow another person to approve timecard notifications for a specific period of time, generally while the supervisor or user is out of the office.
- Temporary Approvers are set up by navigating to the *Vacations Rules* link and creating a *Vacation Rule* with start and end dates.
- E-mail notifications will be received by the Temporary Approver during the specified time period.

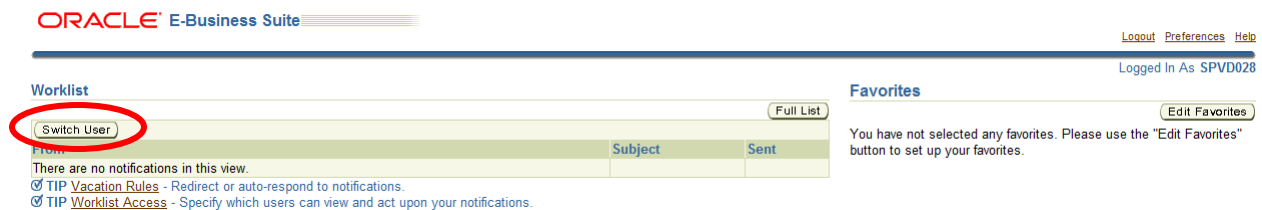
Assigned Approver to Transfer Approval Responsibility:

- A person can be designated by a supervisor to assume responsibility for approving that supervisor's timecard notifications for an unspecified period of time. (An end date can be entered to terminate access on a specific date if needed.)
- Assigned Approvers are set up by navigating to the *Vacation Rules* link, creating a Vacation Rule but not entering an end date.
- E-mail notifications will be automatically forwarded to the Assigned Approver until the access is terminated.

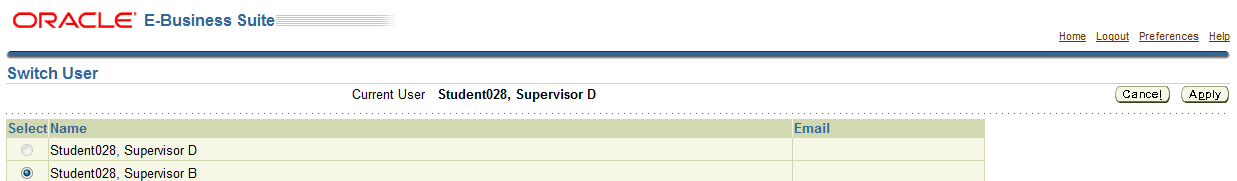
Timecard Approval Access

Viewing the Worklist

- When an Alternate Approver has been granted access to another's Worklist, the Alternate Approver can switch the Worklist to display the other user's notifications. When viewing another user's Worklist, the following actions can be performed:
 - View the details of the user's notifications.
 - Respond (approve or reject) to notifications that require a response.
 - Close notifications that do not require a response.
 - Reassign notifications to a different user.
 - Request more information about a notification from a different user.
 - Respond to a request for more information.
- The user who has been granted access cannot define Vacation Rules for the other user's Worklist being viewed. The user who has been granted access also cannot grant access to that user's Worklist to anyone else



- You can approve timecards on behalf of the supervisors who have given you *Worklist Access* by clicking the *Switch User* button.



- Click the radio button beside the name of the person whose timecards you want to approve and click the *Apply* button
- This will take you to that person's *PRISM Home Page* and their *Worklist Notifications*

Alternate/Assigned Approvers Approving Their Own Timecards

If you Grant Worklist Access to or create a Vacation Rule (Assigned Approver or Temporary Approver) for a subordinate employee, that employee will be able to approve their own timecard.

In this case the subordinate employee should do one of the following:

- Reassign their self-service timecard notification to your supervisor for approval; or

Timecard Approval Access

- Use the *Print Screen* keyboard feature to print out their timecard and submit the paper version to you for your signature. The paper version should be retained in the department files for audit purposes.

Further Information

The intent of this document is to provide a review of the most commonly required information for the purpose of completing PRISM TRKS timecards. Every effort has been made to keep this document up-to-date. However in all cases, the information cited throughout this document is governed by official University Policies, Procedures, and Staff Handbooks located at <http://www.bc.pitt.edu/policies/>.

Lab 1: Create an Alternate Approver for Emergency Approval Access

1. You should still be logged into PRISMTRKS as SPVBXX.
2. Grant Supervisor D emergency approval access beginning on today's date

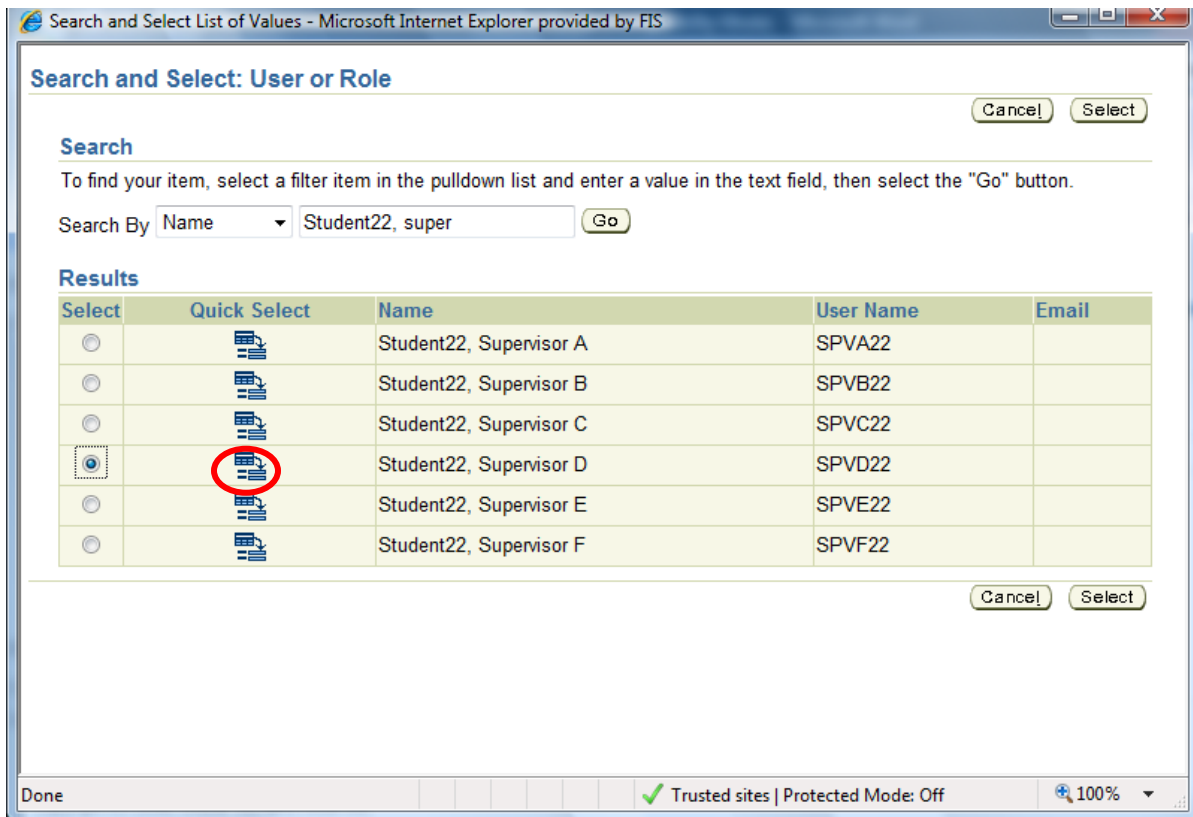
Lab 1 Solutions: Create an Alternate Approver for Emergency Approval Access

- You should still be logged in as SPVBXX
- Click the *Worklist Access* link

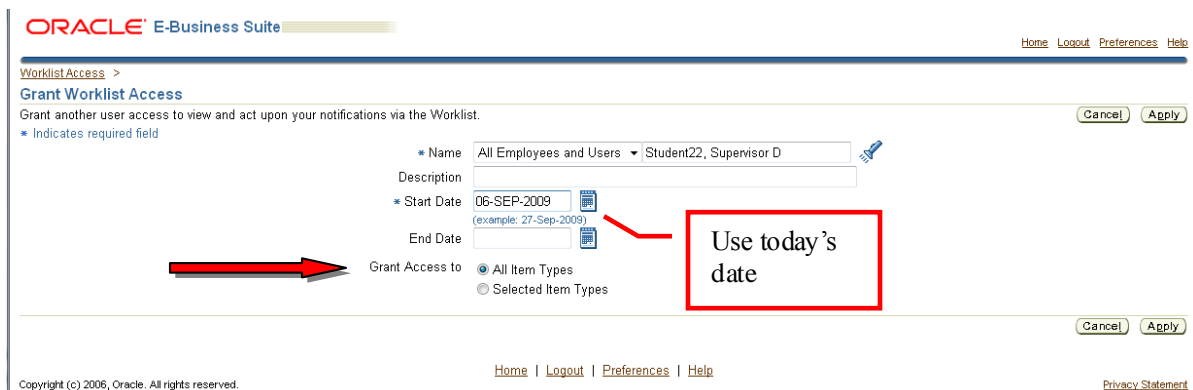
- Click the *Grant Access* button

- In the *Name* field, leave the defaulted value 'All Employees and Users'
- Enter all or part of the alternate approver's (StudentXX, Supervisor D) name and *Tab*

Lab 1 Solutions: Create an Alternate Approver for Emergency Approval Access



- If there are multiple matches, a pick list will appear. Click the *Quick Select* icon beside Supervisor D's name.



- Enter the starting date of the access; do not enter an ending date
- Make sure *Grant Access to All Item Types* is selected
- Click Apply

Lab 2: Create Temporary Approver Access

1. You should still be logged into PRISMTRKS as SPVBXX.
2. Grant temporary Approver access to Supervisor A during Supervisor B's vacation. The vacation period starts today and ends a week or so later (you can pick the end date).

Lab 2 Solutions: Create Temporary Approver Access

ORACLE E-Business Suite

Logout Preferences Help

Logged In As SPVB22

Worklist

From Subject Sent

There are no notifications in this view.

TIP Vacation Rules - Redirect or auto-respond to notifications.

TIP Worklist Access - Specify which users can view and act upon your notifications.

Navigator

PRISM TRKS Supervisor Please select a responsibility.

PRISM TRKS Time

Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- You should still be logged in as SPVBXX
- In the *Worklist*, click the *Vacation Rules* link

ORACLE E-Business Suite

Home Logout Preferences Help

Vacation Rules

Create Rule

Rule Name Item Type Notification Update Delete Status

You have not setup any vacation rules. Please use the Create Rule button to create a new vacation rule.

Return to Worklist

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Click the *Create Rule* button

ORACLE E-Business Suite

Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Item Type

Select the type of notification that will activate this rule.

Item Type OTL Workflows for Employees

If "--All--" is selected, you will skip to Step 3.

Return to Vacation Rules

Step 1 of 3 Next

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- In the *Item Type* field, select 'OTL Workflows for Employees'
- Click the *Next* button

ORACLE E-Business Suite

Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Notification

Indicate the notification format that will activate this rule.

Item Type OTL Workflows for Employees

Notification All

Select

Cancel Back Step 2 of 3 Next

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Make sure the *All* radio button is selected
- Click the *Next* button

Lab 2 Solutions: Create Temporary Approver Access

ORACLE E-Business Suite

Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type: OTL Workflows for Employees

Notification: All

* Start Date: 06-Sep-2009 09:21:22
(example: 13-Oct-2009 09:21:22)

End Date: 30-Oct-2009 09:22:05

Message:

Comments will display with each routed notification

Reassign: All Employees and Users | student22, super

Delegate your response
A manager may delegate all notification approvals to an assistant.

Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Deliver notifications to me regardless of any general rules

Cancel Back Step 3 of 3 Apply

Home Logout Preferences Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Use the calendar to select the *Start* and *End Dates*
- In the *Reassign* field enter all or part of the Temporary Approver's name (Supervisor A)

Search and Select List of Values - Microsoft Internet Explorer provided by FIS

Search and Select: User or Role







Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Name | student22, super | Go

Results

Select	Quick Select	Name	User Name	Email
<input checked="" type="radio"/>		Student22, Supervisor A	SPVA22	
<input type="radio"/>		Student22, Supervisor B	SPVB22	
<input type="radio"/>		Student22, Supervisor C	SPVC22	
<input type="radio"/>		Student22, Supervisor D	SPVD22	
<input type="radio"/>		Student22, Supervisor E	SPVE22	
<input type="radio"/>		Student22, Supervisor F	SPVF22	

Cancel Select

Trusted sites | Protected Mode: Off | 100%

- If there are multiple matches, a pick list will appear. Click the *Quick Select* icon beside Supervisor A's name.

Lab 2 Solutions: Create Temporary Approver Access

ORACLE E-Business Suite [Home](#) [Logout](#) [Preferences](#) [Help](#)

Item Type Notification **Rule Response**

Vacation Rule: Response

* Indicates required field

Item Type: OTL Workflows for Employees
Notification: All

* Start Date: 06-Sep-2009 09:21:22
(example: 13-Oct-2009 09:21:22)

End Date: 30-Oct-2009 09:22:05

Message:

Comments will display with each routed notification

Reassign: All Employees and Users | Student22, Supervisor A

Delegate your response
A manager may delegate all notification approvals to an assistant.

Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Deliver notifications to me regardless of any general rules

Copyright (c) 2006, Oracle. All rights reserved. [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

- Make sure *Delegate your Response* radio button is selected
- Click the *Apply* button

ORACLE E-Business Suite [Home](#) [Logout](#) [Preferences](#) [Help](#)

Vacation Rules

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: Student22, Supervisor A	OTL Workflows for Employees	<All>			Active

[Return to Worklist](#)

Copyright (c) 2006, Oracle. All rights reserved. [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) [Privacy Statement](#)

- The Vacation Rule will display with a *Status* of 'Active'

Lab 3: Delegate the Approval Responsibility to an Assigned Approver

1. Log into PRISM TRKS as SPVDXX.
2. Create a rule to delegate approval responsibility to another approver (StudentXX, TCAdmin A)
3. The rule takes effect as of today's date.

Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver

ORACLE E-Business Suite Logout Preferences Help

Logged In As SPVD22

Worklist Full List

From	Subject	Sent
There are no notifications in this view.		
ⓘ TIP Vacation Rules - Redirect or auto-respond to notifications.		
ⓘ TIP Worklist Access - Specify which users can view and act upon your notifications.		

Navigator Edit Navigator

PRISM TRKS Supervisor Please select a responsibility.
PRISM TRKS Time

Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Login to PRISM TRKS as SPVDXX
- In the *Worklist*, click the *Vacation Rules* link

ORACLE E-Business Suite Home Logout Preferences Help

Vacation Rules

Create Rule →

Rule Name	Item Type	Notification	Update	Delete	Status
-----------	-----------	--------------	--------	--------	--------

You have not setup any vacation rules. Please use the Create Rule button to create a new vacation rule.

[Return to Worklist](#)

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Click the *Create Rule* button

ORACLE E-Business Suite Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Item Type

Select the type of notification that will activate this rule.

Item Type **All** →

If "All" is selected, you will skip to Step 3.

[Return to Vacation Rules](#) Step 1 of 3 **Next**

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- In the *Item Type* field, make sure the value is 'All'
- Click the *Next* button

Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver

ORACLE E-Business Suite

Home Logout Preferences Help

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 06-Sep-2009 09:56:10
(example: 13-Oct-2009 09:56:10)

End Date

Message

Comments will display with each routed notification

Reassign All Employees and Users Student22, tcadmin

Delegate your response
 A manager may delegate all notification approvals to an assistant.

Transfer notification ownership
 A manager may transfer a notification for a specific project to the new manager of that project.

Cancel Back Step 3 of 3 Apply

Home Logout Preferences Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Use the calendar to select the *Start Date*; leave the *End Date* blank
- Make sure the *Reassign* radio button is selected
- Enter all or part of the Approver's name (StudentXX, TCAdmin A) and hit the *Tab* key on your keyboard

Search and Select List of Values - Microsoft Internet Explorer provided by FIS

Search and Select: User or Role

Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Name Student22, tcadmin Go

Results

Select	Quick Select	Name	User Name	Email
<input checked="" type="radio"/>		Student22, TCAdmin A	TCAA22	
<input type="radio"/>		Student22, TCAdmin B	TCAB22	

Results: User or Role

Cancel Select

Trusted sites | Protected Mode: Off 100%

- If there are multiple matches, a pick list will appear. Select the correct approver (A).

Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver

ORACLE E-Business Suite Home Logout Preferences Help

Item Type Notification **Rule Response**

Vacation Rule: Response

* Indicates required field

Item Type All
Notification All

* Start Date 06-Sep-2009 09:56:10 
(example: 13-Oct-2009 09:56:10)

End Date 

Message

Comments will display with each routed notification

Reassign All Employees and Users Student22, TCAdmin A 

Delegate your response
A manager may delegate all notification approvals to an assistant.

Transfer notification ownership
A manager may transfer a notification for a specific project to the new manager of that project.

Cancel Back Step 3 of 3 Apply

Home | Logout | Preferences | Help



Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- Make sure *Delegate your Response* radio button is selected
- Click the *Apply* button

ORACLE E-Business Suite Home Logout Preferences Help

Vacation Rules

[Create Rule](#)

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: Student22, TCAdmin A	<All>	<All>			Active

[Return to Worklist](#)

Home | Logout | Preferences | Help

Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

- The rule will display with a *Status* of 'Active'