Timecard Approval Access

Chapter 16

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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

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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 appprover for emergency approval access
- Alternate Approvers are set up by navigating to the *Worklist Acess* 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.

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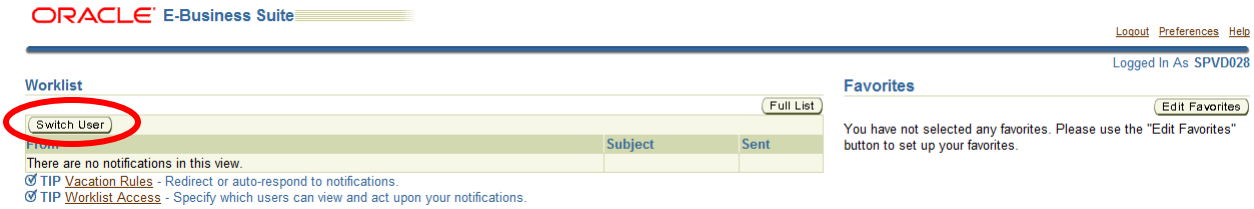
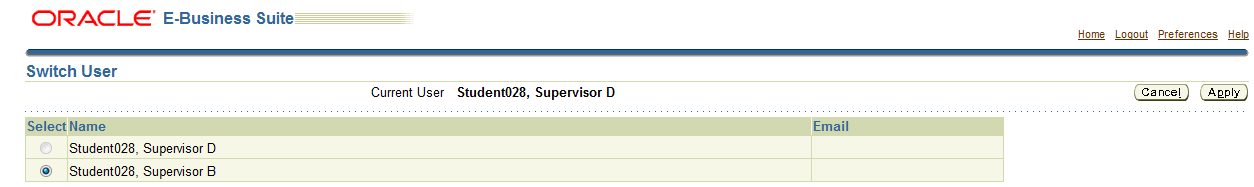
Viewing the Worklist

- 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

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- 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 i governed by official University Policies, Procedures, and Staff Handbooks located at http://www.bc.pitt.edu/policies/.

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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

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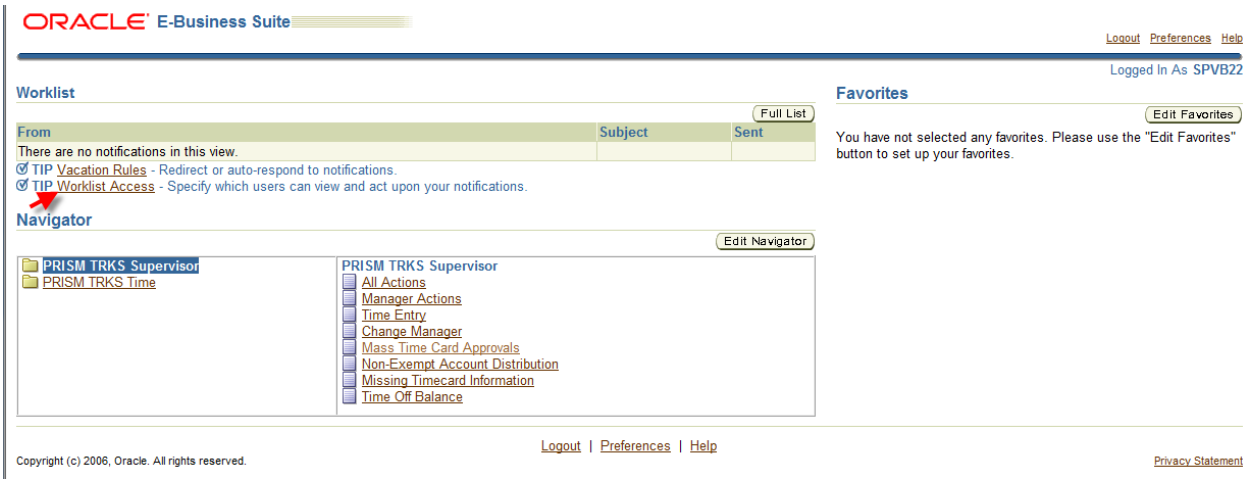
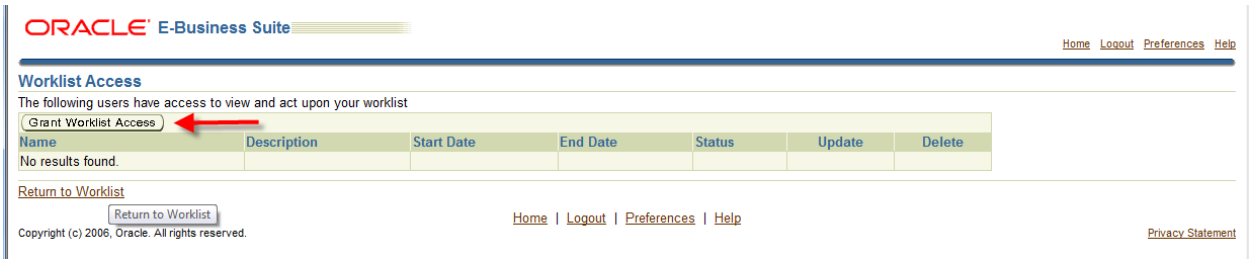
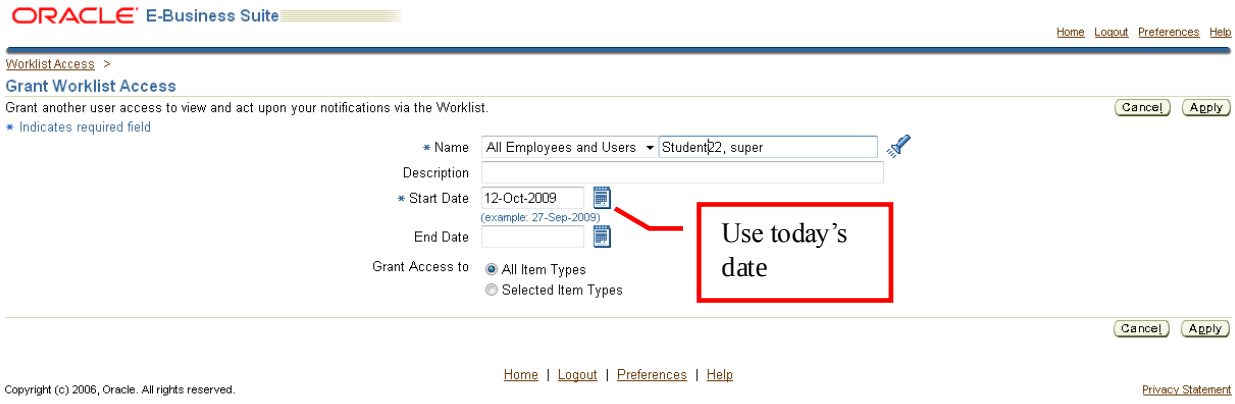
Lab 1 Solutions: Create an Alternate Approver for Emergency Approval Access



- 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*

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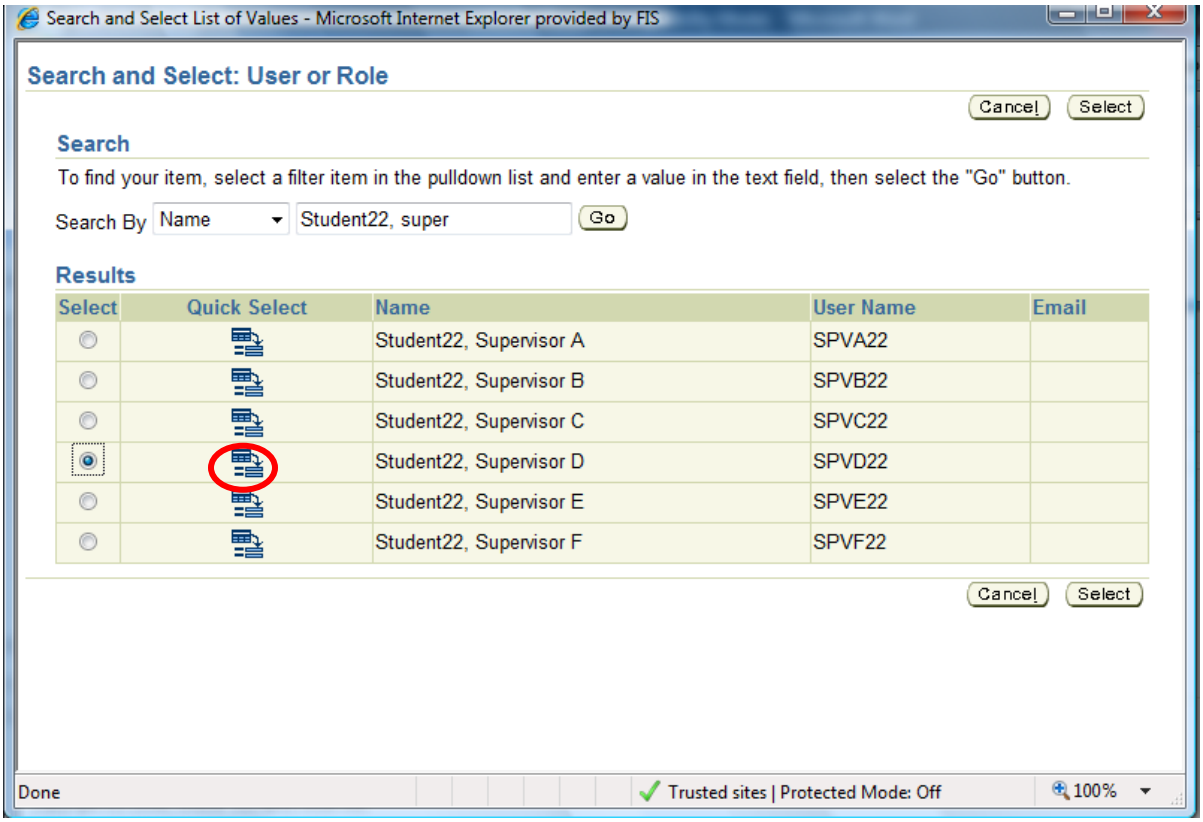
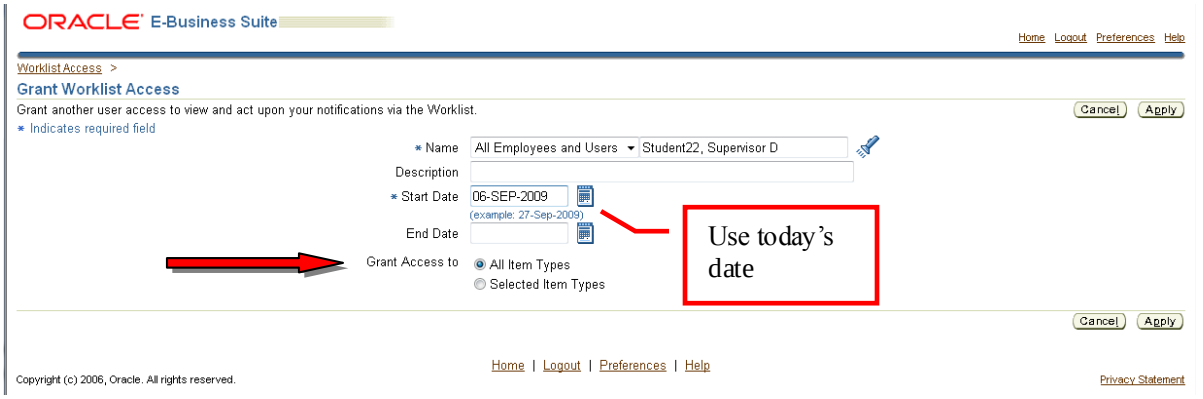
Lab 1 Solutions: Create an Alternate Approver for Emergency Approval Access



- 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

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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).

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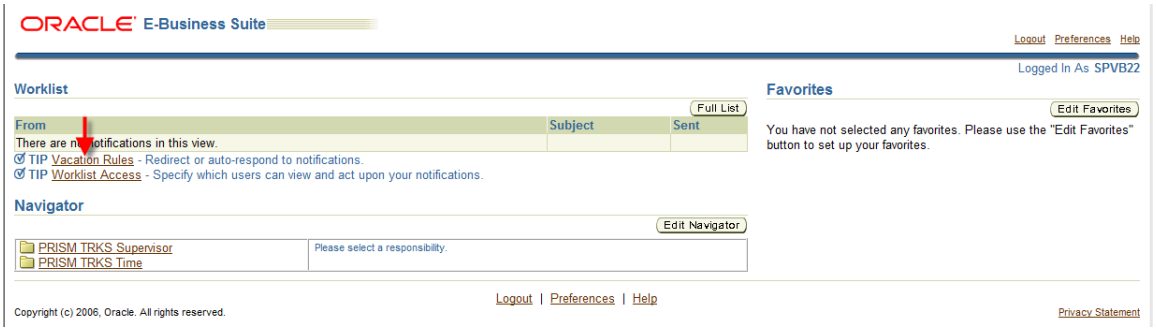
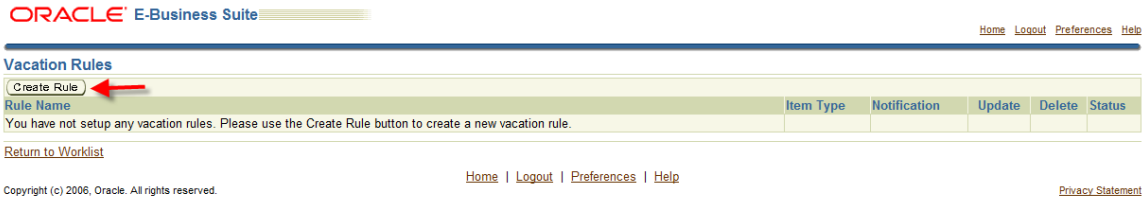
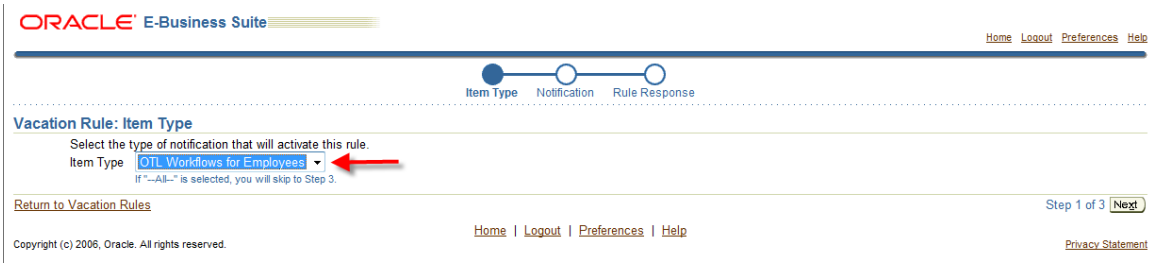
Lab 2 Solutions: Create Temporary Approver Access



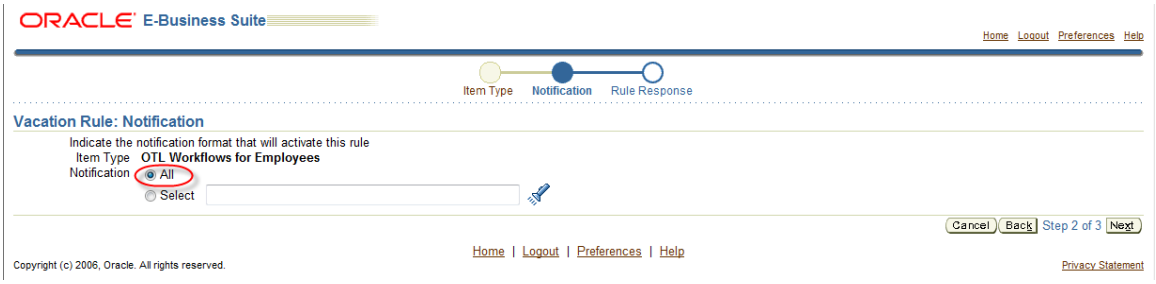
- You should still be logged in as SPVBXX
- In the *Worklist*, click the *Vacation Rules* link



- Click the *Create Rule* button



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



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

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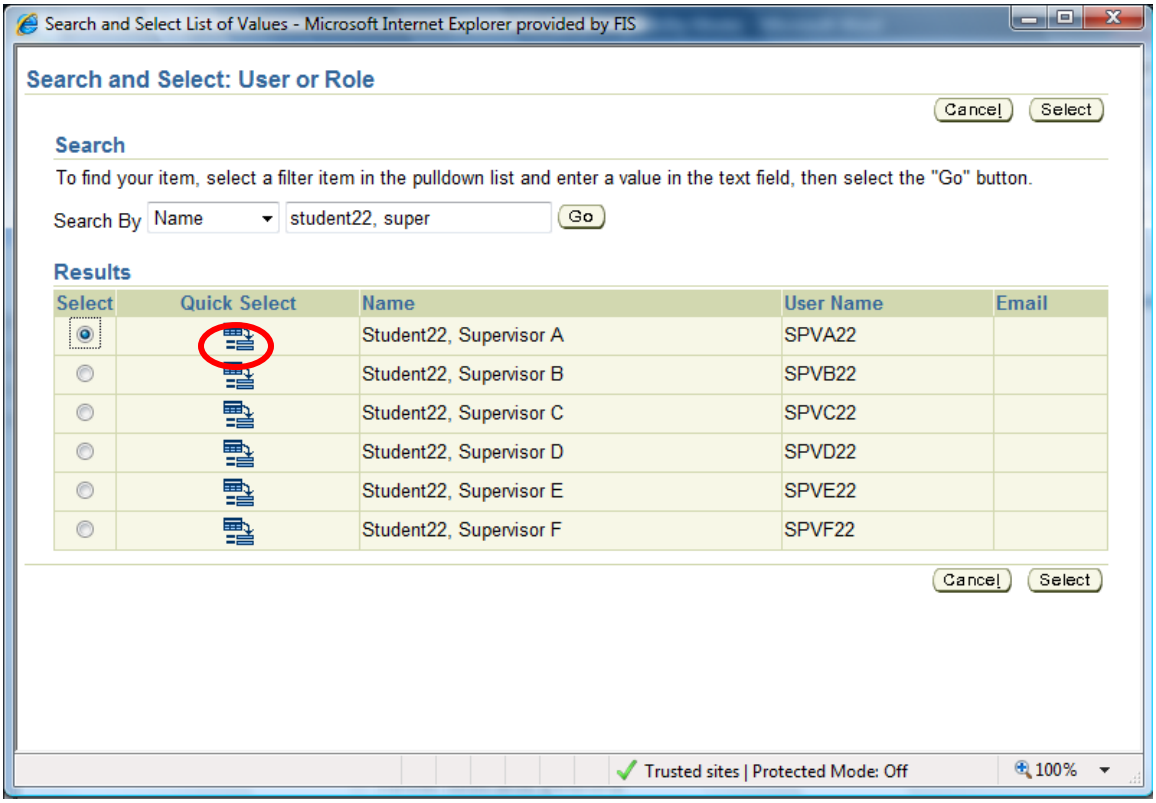
Lab 2 Solutions: Create Temporary Approver Access

- 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)



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

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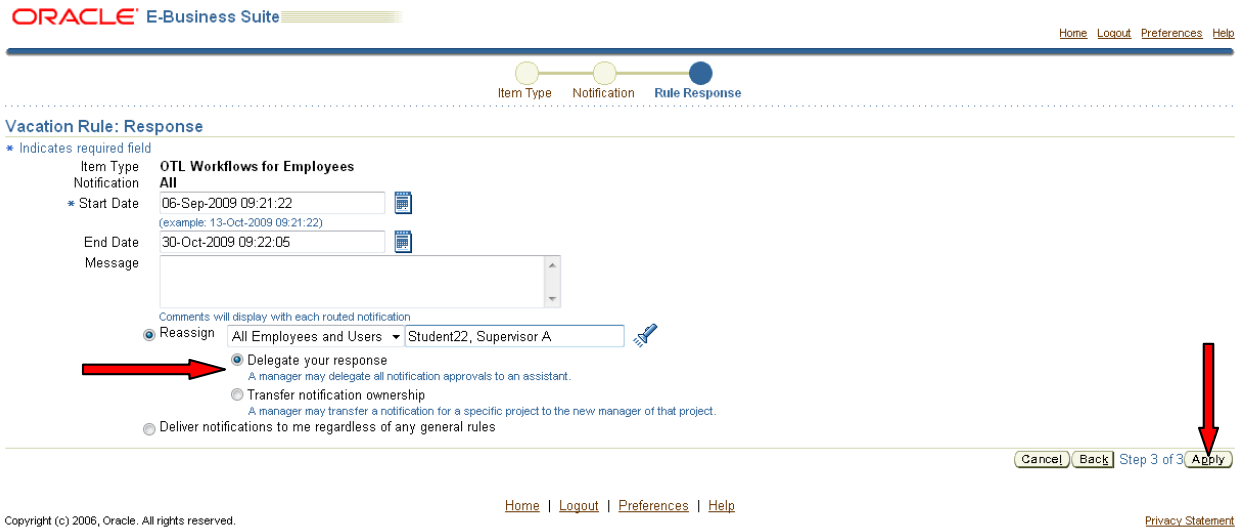
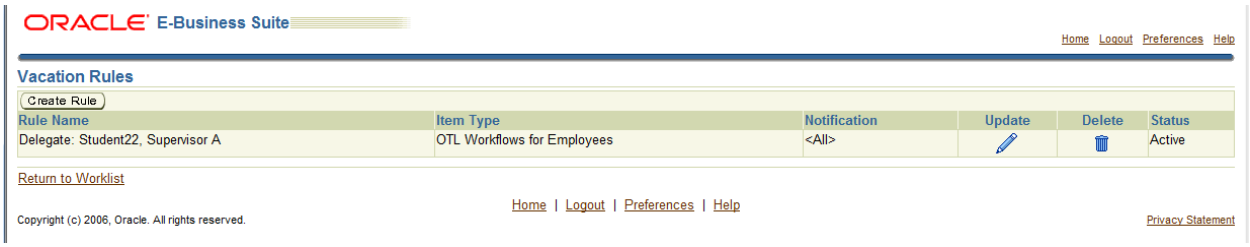
Lab 2 Solutions: Create Temporary Approver Access



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



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

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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.

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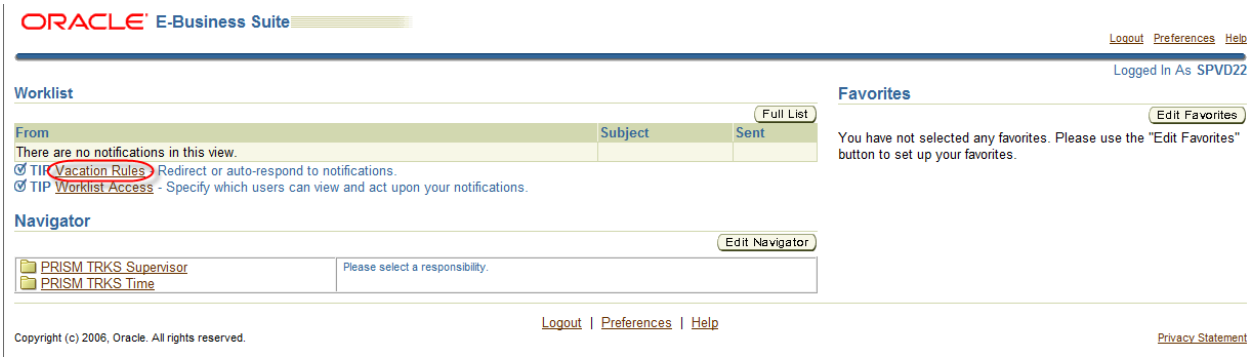
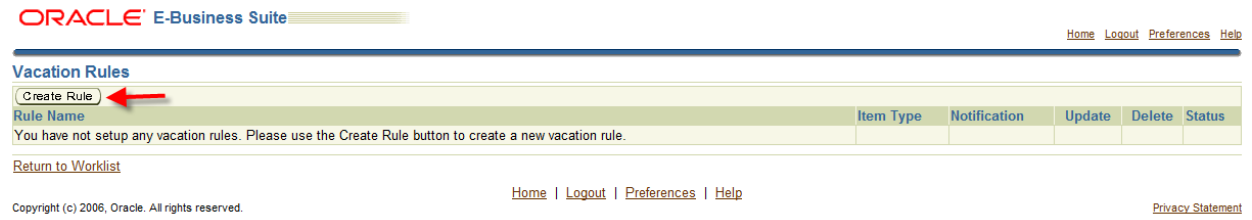
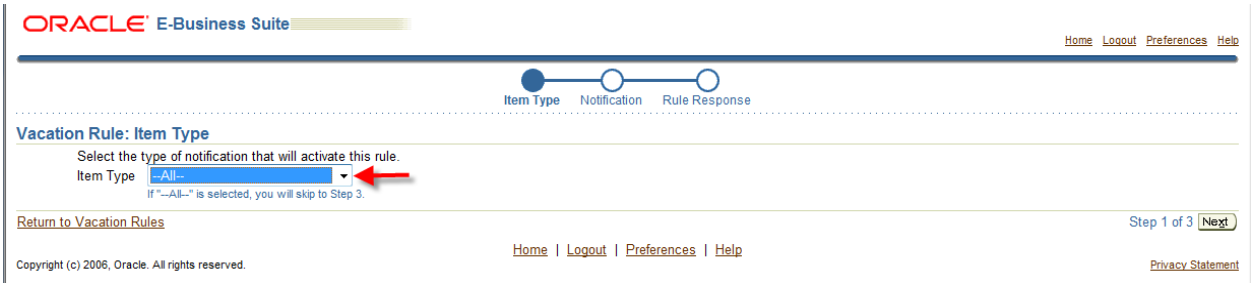
Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver



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



- Click the *Create Rule* button



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

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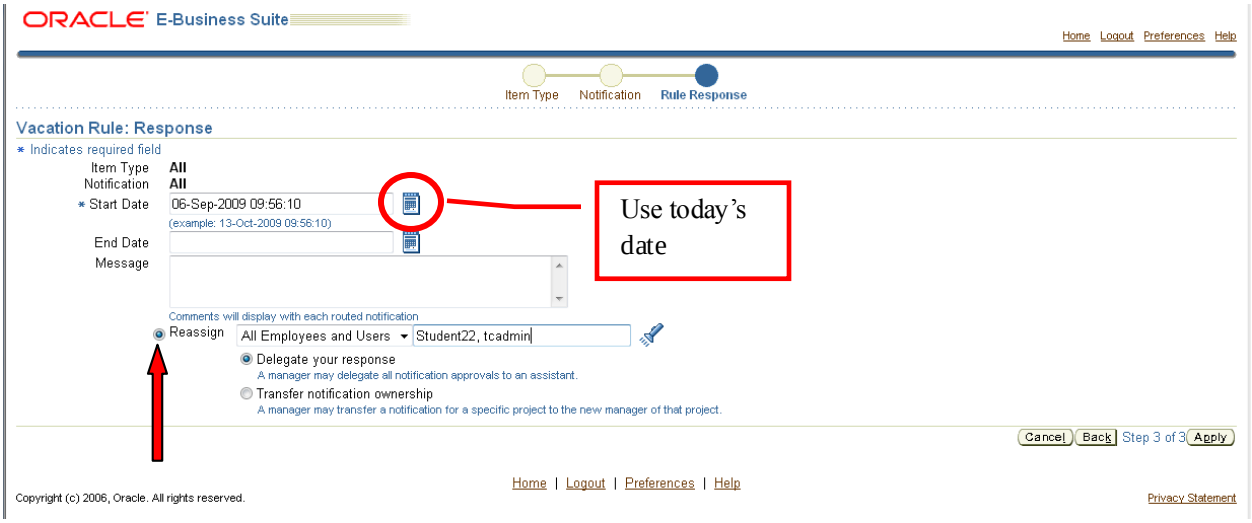
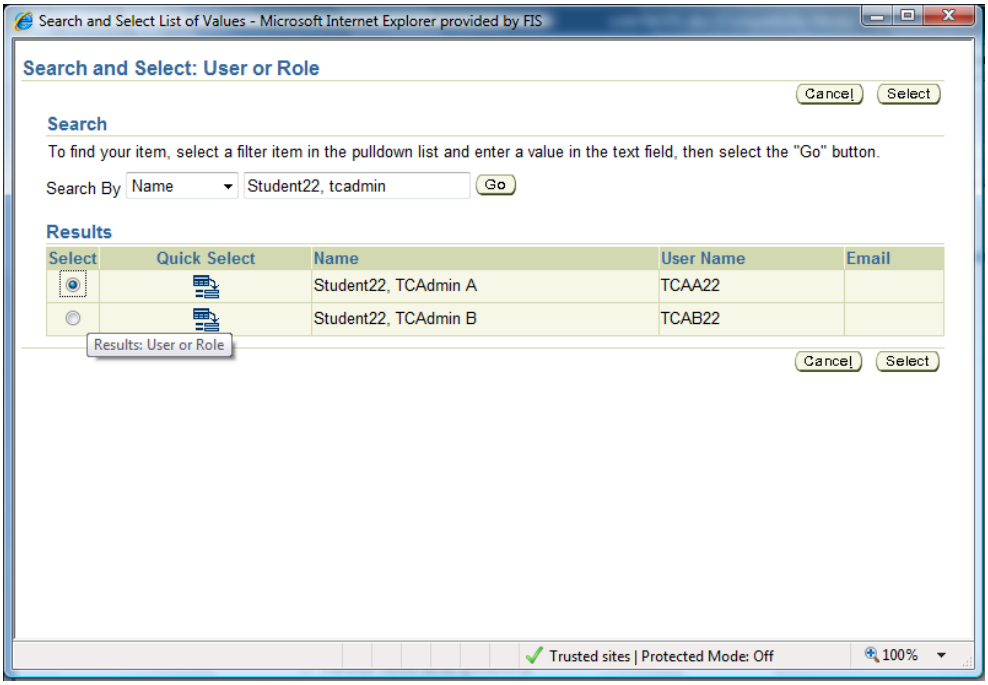
Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver



- 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



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

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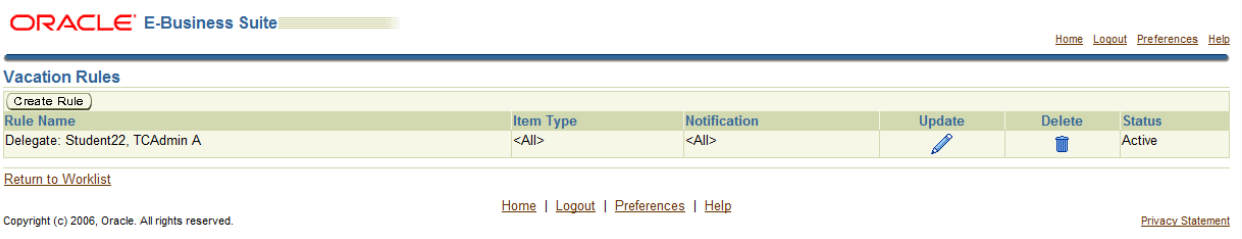
Lab 3 Solutions: Delegate the Approval Responsibility to an Assigned Approver

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



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

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