

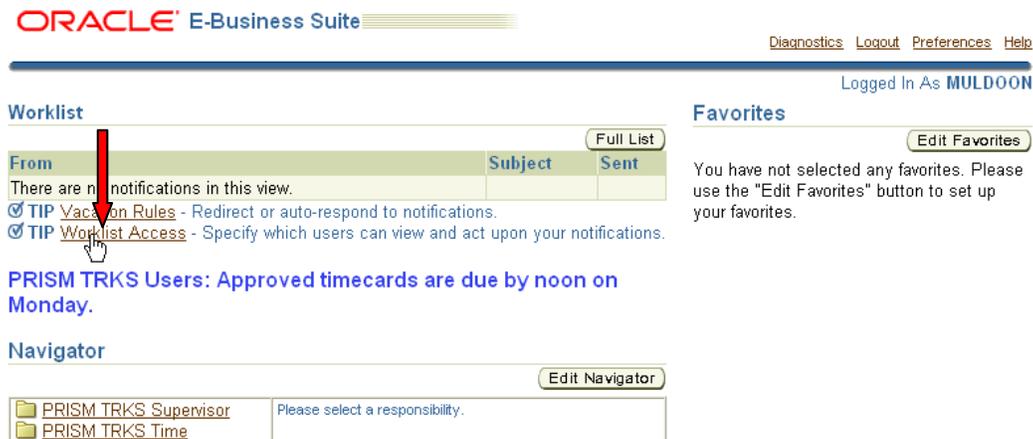
Grant Worklist Access

Use the Grant Worklist Access to set up a backup approver(s). Backup approvers can approve timecards on your behalf if you are not available. Everyone should have at least one backup approver.

Part A. If you have already granted Worklist access to one or more backup approvers, you must delete those rule(s). If you have not already granted Worklist access, skip to Part B.

Steps:

1. From the *PRISM Homepage*, click the *Worklist Access* link



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Diagnostics Logout Preferences Help

Logged In As MULDOON

Worklist

Full List

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.

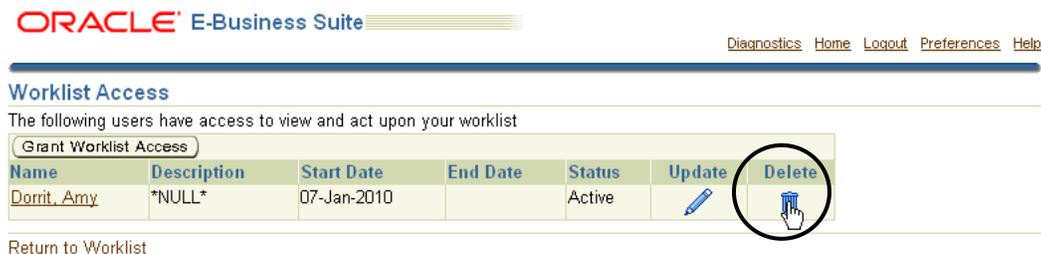
PRISM TRKS Users: Approved timecards are due by noon on Monday.

Navigator

Edit Navigator

- PRISM TRKS Supervisor Please select a responsibility.
- PRISM TRKS Time

2. Click the *Delete* icon to delete the existing rule(s)



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Diagnostics Home Logout Preferences Help

Worklist Access

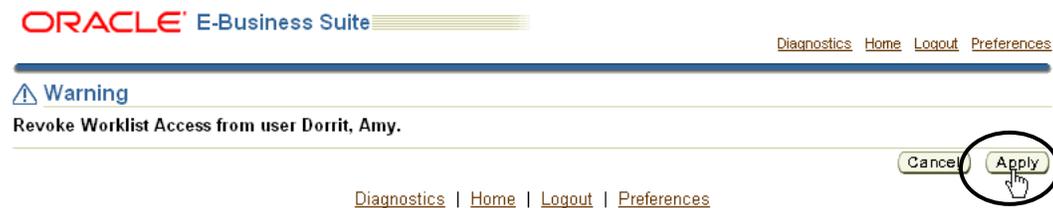
The following users have access to view and act upon your worklist

Grant Worklist Access

Name	Description	Start Date	End Date	Status	Update	Delete
Dorrit, Amy	*NULL*	07-Jan-2010		Active		

[Return to Worklist](#)

3. When the *Warning* message is displayed, click the *Apply* button



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Diagnostics Home Logout Preferences

Warning

Revoke Worklist Access from user Dorrit, Amy.

[Cancel](#) [Apply](#)

Diagnostics | Home | Logout | Preferences

4. Next, complete the steps in Part B.

Part B. If you have not already granted Worklist access (or have just deleted a previously created rule(s))

Steps:

1. One person reporting to you must submit a timecard
2. When you can see the *Timecard Notification*, you can continue with the setup steps

Worklist

From	Subject	Sent
Diaz, Cameron	Timecard (03-JAN-2010 to 09-JAN-2010) for Diaz, Cameron (37.5 hours) requires approval	07-Jan-2010

TIP [Vacation Rules](#) - Redirect or auto-respond to notifications.
 TIP [Worklist Access](#) - Specify which users can view and act upon your notifications.

Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

PRISM TRKS Users: Approved timecards are due by noon on Monday.

Navigator

<input type="checkbox"/> PRISM TRKS Supervisor	Please select a responsibility.
<input type="checkbox"/> PRISM TRKS Time	

- Click on the *Timecard Notification* to open it and approve or reject it

Timecard (03-JAN-2010 to 09-JAN-2010) for Diaz, Cameron (37.5 hours) requires approval

From	Diaz, Cameron	Timecard Dates	03-JAN-2010 to 09-JAN-2010
To	Muldoon, Francis	Description	37.5 total hours (0 premium hours, 0 non worked hours)
Sent	07-Jan-2010 11:15:31	OTL Approval ID	203247#24882
Due	09-Jan-2010 11:15:31		
ID	2133645		

- From the *PRISM Homepage*, click the *Worklist Access* link

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.

Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

PRISM TRKS Users: Approved timecards are due by noon on Monday.

Navigator

<input type="checkbox"/> PRISM TRKS Supervisor	Please select a responsibility.
<input type="checkbox"/> PRISM TRKS Time	

- Click the *Grant Worklist Access* button

Worklist Access

The following users have access to view and act upon your worklist

Name	Description	Start Date	End Date	Status	Update	Delete
No results found.						

[Return to Worklist](#)

- Type the last name of the person you are granting Worklist access to in the field to the right of the *All Employees and Users* field. Then click the *Flashlight* icon.

ORACLE E-Business Suite Diagnostics Home Logout Preferences Help

Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

* Indicates required field

* Name: All Employees and Users 

Description:

* Start Date: 
(example: 23-Dec-2009)

End Date: 

Grant Access to: All Item Types Selected Item Types

Cancel Apply

- If the system finds more than one person with that last name, a select box will be displayed

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

Results

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Student300, Employee A	EMPA300	
<input type="radio"/>		Student300, Employee B	EMPB300	
<input type="radio"/>		Student300, Employee C	EMPC300	
<input type="radio"/>		Student300, Employee F	EMPF300	
<input type="radio"/>		Student300, Employee G	EMPG300	
<input type="radio"/>		Student300, Employee J	EMPJ300	
<input type="radio"/>		Student300, Employee K	EMPK300	
<input type="radio"/>		Student300, Employee N	EMPN300	
<input type="radio"/>		Student300, Employee O	EMPO300	
<input type="radio"/>		Student300, Employee P	EMPP300	

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Cancel Select

- Select the correct person by clicking the *Quick Select* icon beside the person's name

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

Results

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Student300, Employee A	EMPA300	
<input type="radio"/>		Student300, Employee B	EMPB300	
<input type="radio"/>		Student300, Employee C	EMPC300	
<input type="radio"/>		Student300, Employee F	EMPF300	

9. You should see the person's name in the *Name* field. It is also recommended that a description be entered to identify the purpose of the rule.

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Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

* Indicates required field

* Name: All Employees and Users | Student300, Employee C 

Description: Access to Approve Timecards 

* Start Date: 07-Jan-2010 
(example: 23-Dec-2009)

End Date: 

Grant Access to: All Item Types
 Selected Item Types

Cancel Apply

10. Click the *Selected Item Types* radio button

ORACLE E-Business Suite Diagnostics Home Logout Preferences Help

Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

* Indicates required field

* Name: All Employees and Users | Student300, Employee C 

Description:

* Start Date: 07-Jan-2010 
(example: 23-Dec-2009)

End Date: 

Grant Access to: All Item Types
 Selected Item Types 

11. In the *Available Item Types* block, click on *OTL Workflows for Employees* to select it
 - a. NOTE: You must have received at least 1 timecard notification before this value will appear in the list. This is why one person reporting to you must have submitted a timecard to you.

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Diagnostics Home Logout Preferences Help

Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

• Indicates required field

• Name: All Employees and Users Student300, Employee C

Description: _____

• Start Date: 07-Jan-2010 (example: 23-Dec-2009)

End Date: _____

Grant Access to: All Item Types Selected Item Types

Available Item Types

- Expenses
- OTL Workflows for Employees**
- PO Approval
- PO Requisition Approval

> Move

>> Move All

< Remove

<< Remove All

Selected Item Types

Selected Item Types Cancel Apply

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12. Click the *Move* button to move *OTL Workflows for Employees* into the *Selected Item Types* block

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Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

• Indicates required field

• Name: All Employees and Users Student300, Employee C

Description: _____

• Start Date: 07-Jan-2010 (example: 23-Dec-2009)

End Date: _____

Grant Access to: All Item Types Selected Item Types

Available Item Types

- Expenses
- OTL Workflows for Employees**
- PO Approval
- PO Requisition Approval

> Move

>> Move All

< Remove

<< Remove All

Selected Item Types

Selected Item Types Cancel Apply

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13. You should see the *OTL Workflows for Employees* item type in the *Selected Item Types* box. Click the *Apply* button

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Worklist Access >

Grant Worklist Access

Grant another user access to view and act upon your notifications via the Worklist. Cancel Apply

* Indicates required field

* Name: All Employees and Users Student300, Employee C

Description: [Empty]

* Start Date: 07-Jan-2010 (example: 23-Dec-2009)

End Date: [Empty]

Grant Access to: All Item Types Selected Item Types

Available Item Types

- Expenses
- PO Approval
- PO Requisition Approval

> Move

>> Move All

< Remove

<< Remove All

Selected Item Types

- OTL Workflows for Employees

Cancel Apply

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14. The Worklist rule will be displayed

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Diagnostics Home Logout Preferences Help

Worklist Access

The following users have access to view and act upon your worklist

[Grant Worklist Access](#)

Name	Description	Start Date	End Date	Status	Update	Delete
Student300, Employee C	*NULL*	07-Jan-2010		Active		

[Return to Worklist](#)

15. Once the rule is created (or becomes Active if you entered a Start Date that is in the future), the person you granted Worklist access to will see a *Switch User* button at the top of their *Worklist*
- a. NOTE: In the screen shot below, Employee C does not have any notifications in their *Worklist*.

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Diagnostics Logout Preferences Help

Logged In As EMP300

Worklist

[Switch User](#) [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.

PRISM TRKS Users: Approved timecards are due by noon on Monday.

Navigator

[Edit Navigator](#)

PHR Employee Self-Service	Please select a responsibility.
PRISM TRKS Time	

Favorites

[Edit Favorites](#)

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

16. When they click the *Switch User* button, they will click the *Select* radio button beside your name and then click the *Apply* button

ORACLE E-Business Suite

Diagnostics Home Logout Preferences Help

Switch User

Current User Student300, Employee C

Cancel Apply

Select Name	Email
<input checked="" type="radio"/> Muldoon, Francis	kbird@bc.pitt.edu
<input type="radio"/> Student300, Employee C	

Cancel Apply

17. They will now be looking at your *Worklist*

ORACLE E-Business Suite

Diagnostics Logout Preferences Help

Logged In As EMPC300

Worklist

Full List

Switch User

From	Subject	Sent
Barrymore, Drew	Timecard (03-JAN-2010 to 09-JAN-2010) for Barrymore, Drew (37.5 hours) requires approval	08-Jan-2010

Favorites

Edit Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

18. To return to their own *Worklist*, they should click the *Switch User* button again and click the *Select* radio button beside their own name and click the *Apply* button.

ORACLE E-Business Suite

Diagnostics Home Logout Preferences Help

Switch User

Current User Muldoon, Francis

Cancel Apply

Select Name	Email
<input type="radio"/> Muldoon, Francis	kbird@bc.pitt.edu
<input checked="" type="radio"/> Student300, Employee C	

Cancel Apply

19. Now they will be back to their own *Worklist*.

ORACLE E-Business Suite

Diagnostics Logout Preferences Help

Logged In As EMPC300

Worklist

Full List

Switch User

From	Subject	Sent
There are no notifications in this view.		

Favorites

Edit Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

[TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

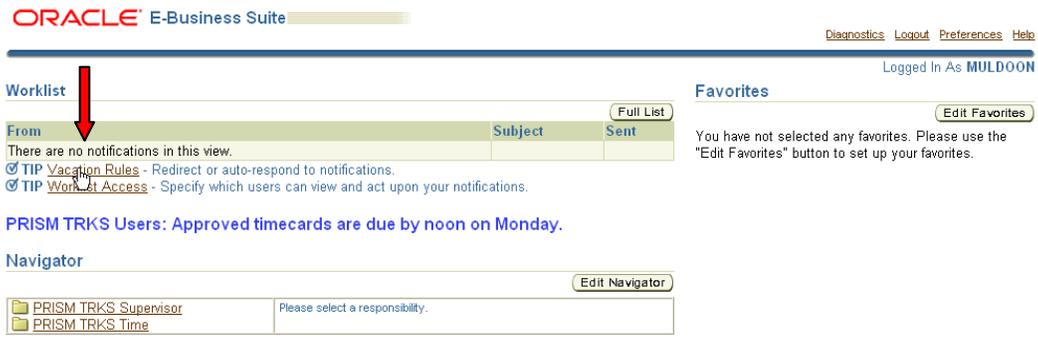
Vacation Rules to Delegate Approval Authority on a Temporary or Permanent Basis

Use vacation rules to allow someone else to approve your timecards on a temporary basis while you are out of the office for a period of time for vacation or other reason. Use vacation rules to permanently assign approval responsibility to someone else. You can have only one active vacation rule at a time.

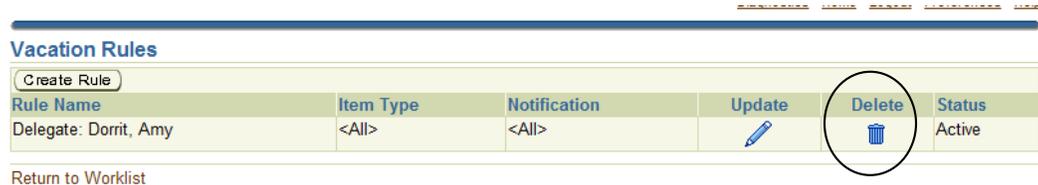
Part A. If you have already created a Vacation Rule for a permanent or temporary approver. If you have not already created a Vacation Rule, skip to Part B.

Steps:

1. From the *PRISM Homepage*, click the *Vacation Rules* link



2. Click the *Delete* icon to delete the existing rule



3. When the *Warning* message is displayed, click the *Yes* button



4. Next, complete the steps in Part B.

Part B. If you have not already created a Vacation Rule for a permanent or temporary approver (or have just deleted a previously created rule)

Steps:

1. One person reporting to you must submit a timecard
 - a. If this was already done to complete the Grant Worklist Access steps in the above section, it is not necessary to do it again.
2. When you can see the *Timecard Notification*, you can continue with the setup steps

Worklist

From	Subject	Sent
Diaz, Cameron	Timecard (03-JAN-2010 to 09-JAN-2010) for Diaz, Cameron (37.5 hours) requires approval	07-Jan-2010

TIP Vacation Rules - Redirect or auto-respond to notifications.
 TIP Worklist Access - Specify which users can view and act upon your notifications.

Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

PRISM TRKS Users: Approved timecards are due by noon on Monday.

Navigator

<input type="checkbox"/> PRISM TRKS Supervisor	Please select a responsibility.
<input type="checkbox"/> PRISM TRKS Time	

3. Click on the *Timecard Notification* to open it and approve or reject it
 - a. NOTE: You must take action on any *Timecard Notifications* that you see in your *Worklist*. Any vacation rules you set up will not affect *Timecard Notifications* you have already received. The rules will only affect timecards that are submitted **AFTER** a rule is created/active.

Timecard (03-JAN-2010 to 09-JAN-2010) for Diaz, Cameron (37.5 hours) requires approval

From	Diaz, Cameron	Timecard Dates	03-JAN-2010 to 09-JAN-2010
To	Muldoon, Francis	Description	37.5 total hours (0 premium hours, 0 non worked hours)
Sent	07-Jan-2010 11:15:31	OTL Approval ID	203247#24882
Due	09-Jan-2010 11:15:31		
ID	2133645		

4. From the *PRISM Homepage*, click the *Vacation Rules* link

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.

Favorites

You have not selected any favorites. Please use the "Edit Favorites" button to set up your favorites.

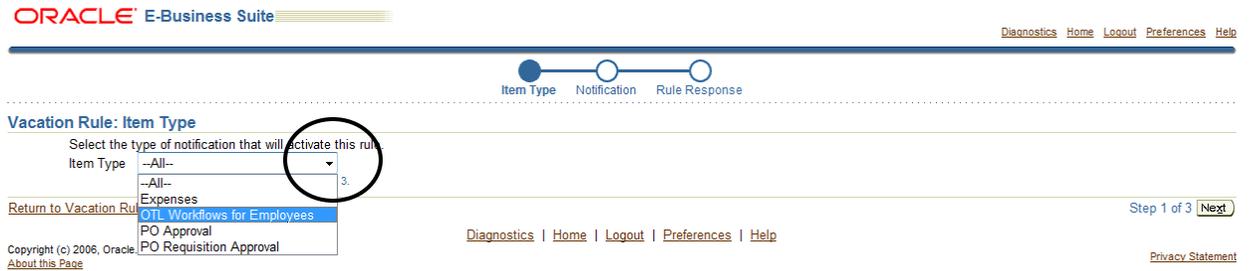
5. Click the *Create Rule* button

Vacation Rules

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.					

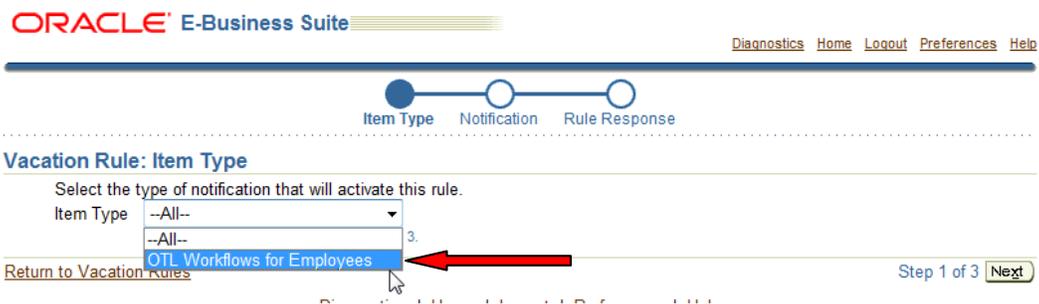
[Return to Worklist](#)

- Click the down arrow in the *Item Type* list



- Select 'OTL Workflows for Employees'

- NOTE: You must have received at least 1 timecard notification before this value will appear in the list. This is why 1 person reporting to you must have submitted a timecard to you.
- NOTE: You must take action on any *Timecard Notifications* that you see in your *Worklist*. Any vacation rules you set up will not affect *Timecard Notifications* you have already received. The rules will only affect timecards that are submitted **AFTER** a rule is created/active.



- Click the *Next* button



- Click the *Select* radio button



- Enter a '%' symbol in the field to the right of the *Select* radio button and click the *Flashlight* icon.



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

11. In the Results box, click the Quick Select icon to the left of the 'TIMECARD_APPROVAL_INLINE' row

- a. You might not see both lines as displayed in the screen shot below. There may be only one line or there may be multiple lines. Be sure to select TIMECARD_APPROVAL_INLINE.

Search and Select: Select

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. Advanced Search

Search By Display Name % Go

Results

Select	Quick Select	Name	Display Name	Subject
<input type="radio"/>		TIMECARD_APPROVED	Timecard Approved	&APR_NAME approved timecard for period &APP_START_DATE - &APP_END_DATE
<input checked="" type="radio"/>		TIMECARD_APPROVAL_INLINE	Inline Timecard Approval	Timecard (&APP_START_DATE to &APP_END_DATE) for &TC_OWNER (&TOTAL_TC_HOURS hours) requires approval

[About this Page](#)

Cancel Select

12. You should now see 'Inline Timecard Approval' in the Select field



Vacation Rule: Notification

Indicate the notification format that will activate this rule

Item Type OTL Workflows for Employees

Notification All

Select

Inline Timecard Approval 

Cancel Back Step 2 of 3 Next

13. Click the Next button



Vacation Rule: Notification

Indicate the notification format that will activate this rule

Item Type OTL Workflows for Employees

Notification All

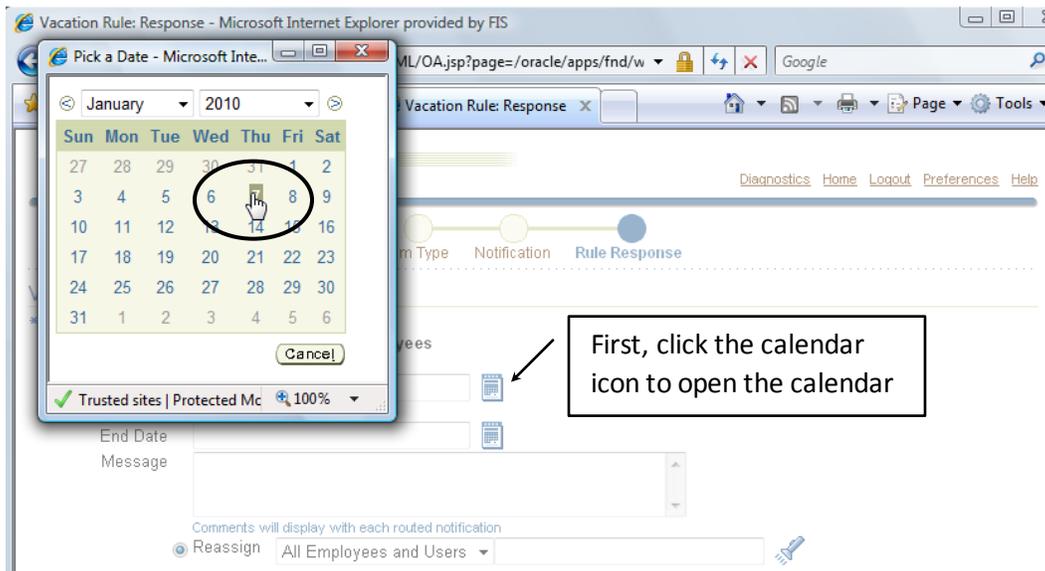
Select

Inline Timecard Approval 

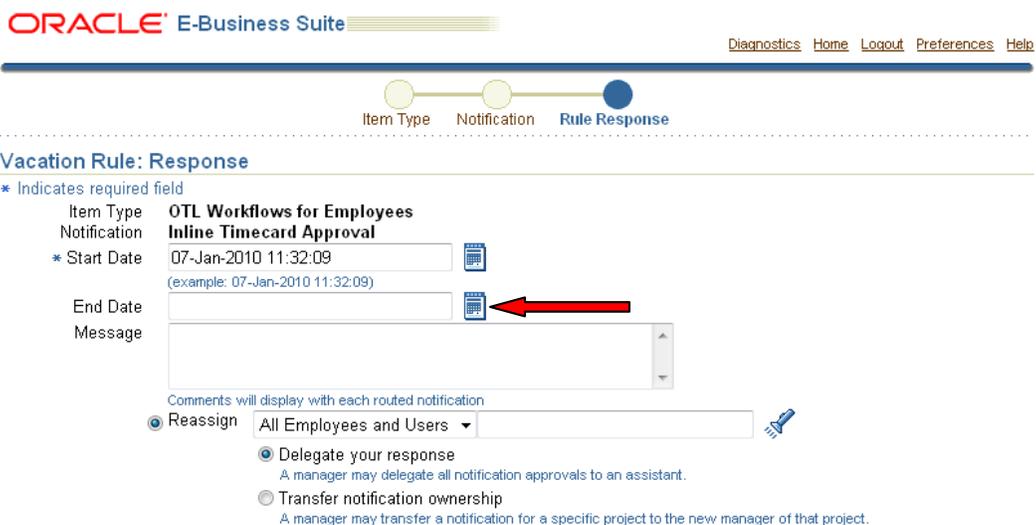
Cancel Back Step 2 of 3 Next

14. Select the Start Date from the Calendar icon

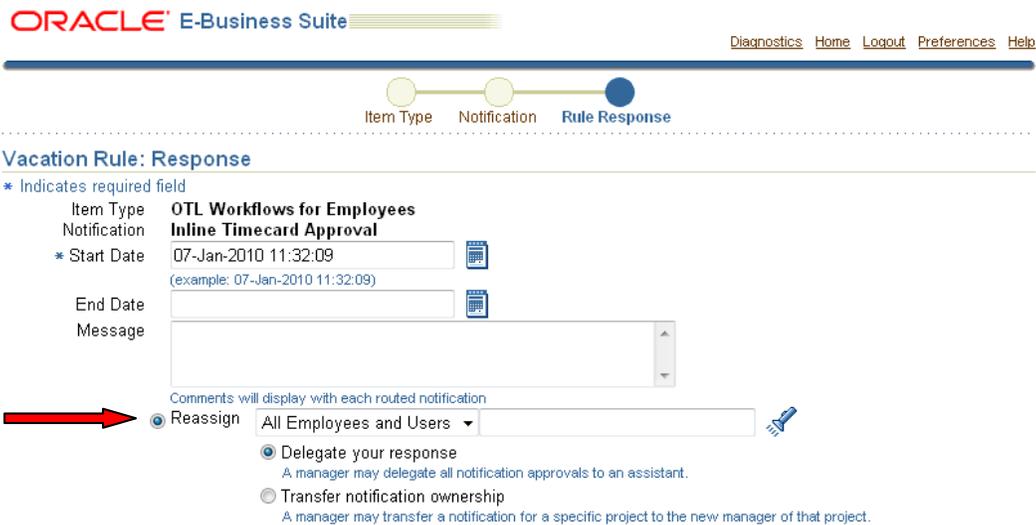
- a. You can select the current date or a date in the future. You should not select a date in the past



15. If you are creating a temporary rule, select an *End Date*. If you are creating a permanent rule for an Assigned Approver, leave the *End Date* blank



16. The *Reassign* radio button should be selected



17. In the blank field to the right of the *All Employees and Users* field, type the last name of the person you are delegating authority to and tab or click the *Flashlight* icon.



Vacation Rule: Response

* Indicates required field

Item Type **OTL Workflows for Employees**
 Notification **Inline Timecard Approval**
 * Start Date 07-Jan-2010 16:32:11
(example: 07-Jan-2010 16:32:11)
 End Date
 Message

Comments will display with each routed notification

Reassign All Employees and Users

Delegate your response

18. If the system finds more than one person with that last name, a *Search Results* box will be displayed

Search and Select: User or Role

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

Results

Previous 1-10 Next 10

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Student300, Employee A	EMPA300	
<input type="radio"/>		Student300, Employee B	EMPB300	
<input type="radio"/>		Student300, Employee C	EMPC300	
<input type="radio"/>		Student300, Employee F	EMPF300	
<input type="radio"/>		Student300, Employee G	EMPG300	
<input type="radio"/>		Student300, Employee J	EMPJ300	
<input type="radio"/>		Student300, Employee K	EMPK300	
<input type="radio"/>		Student300, Employee N	EMPN300	
<input type="radio"/>		Student300, Employee O	EMPO300	
<input type="radio"/>		Student300, Employee P	EMPP300	

Previous 1-10 Next 10

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19. Select the correct person by clicking the *Quick Select* icon to the left of the person's name

Search and Select: User or Role

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

Results

Previous 1-10 Next 10

Select	Quick Select	Name	User Name	Email
<input type="radio"/>		Student300, Employee A	EMPA300	
<input type="radio"/>		Student300, Employee B	EMPB300	
<input type="radio"/>		Student300, Employee C	EMPC300	
<input type="radio"/>		Student300, Employee F	EMPF300	

20. You should see the person's name in the *Reassign* field. Do not change any of the other fields on this screen below the *Reassign* field.



Vacation Rule: Response

* Indicates required field

Item Type **OTL Workflows for Employees**
 Notification **Inline Timecard Approval**
 * Start Date 07-Jan-2010 16:32:11
(example: 07-Jan-2010 16:32:11)
 End Date
 Message

Comments will display with each routed notification

Reassign All Employees and Users

- 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.

Respond
 Note

Result

Deliver notifications to me regardless of any general rules

21. Click the *Apply* button



Vacation Rule: Response

* Indicates required field

Item Type **OTL Workflows for Employees**
 Notification **Inline Timecard Approval**
 * Start Date 07-Jan-2010 16:32:11
(example: 07-Jan-2010 16:32:11)
 End Date
 Message

Comments will display with each routed notification

Reassign All Employees and Users

- 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.

Respond
 Note

Result

Deliver notifications to me regardless of any general rules

22. The Vacation rule will be displayed

Vacation Rules

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: Student300, Employee C	OTL Workflows for Employees	Timecard (&APP_START_DATE to &APP_END_DATE) for &TC_OWNER (&TOTAL_TC_HOURS hours) requires approval			Active

[Return to Worklist](#)

Remember: You must take action on any *Timecard Notifications* that are in your *Worklist*. The rules you have just created will not affect timecards that have already been submitted. The rules will only affect timecards submitted **AFTER** the rule is created/active.