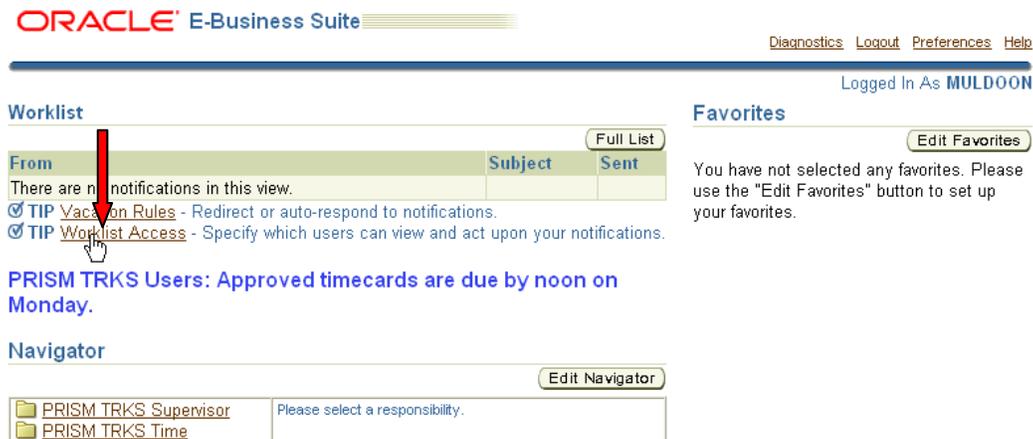# Grant Worklist Access

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

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

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

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

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

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

5. Click the *Grant Worklist Access* button

6. 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.

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

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

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.

10. Click the *Selected Item Types* radio button

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.

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

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

14. The Worklist rule will be displayed

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*.

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

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

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.

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

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
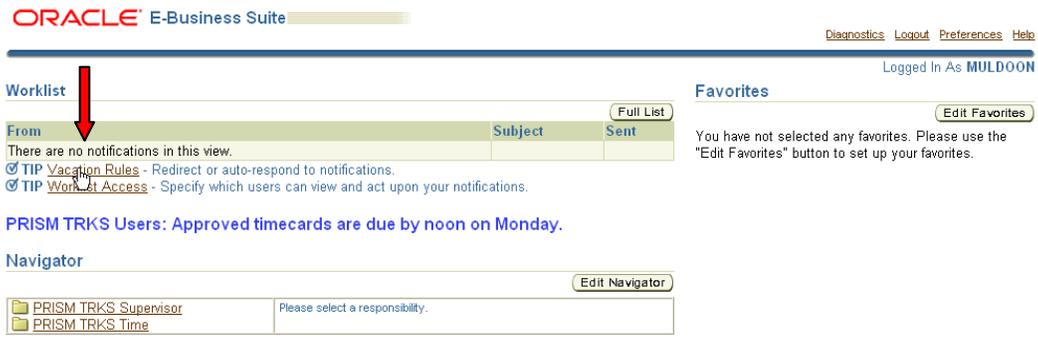
2. Click the *Delete* icon to delete the existing rule
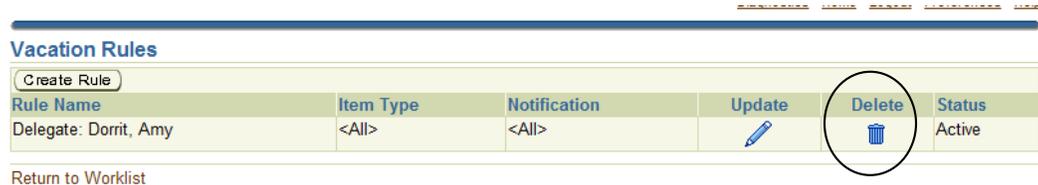
3. When the *Warning* message is displayed, click the *Yes* button

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

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.

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

5. Click the *Create Rule* button

6. Click the down arrow in the *Item Type* list

7. Select 'OTL Workflows for Employees'
   a. 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.
   b. 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.
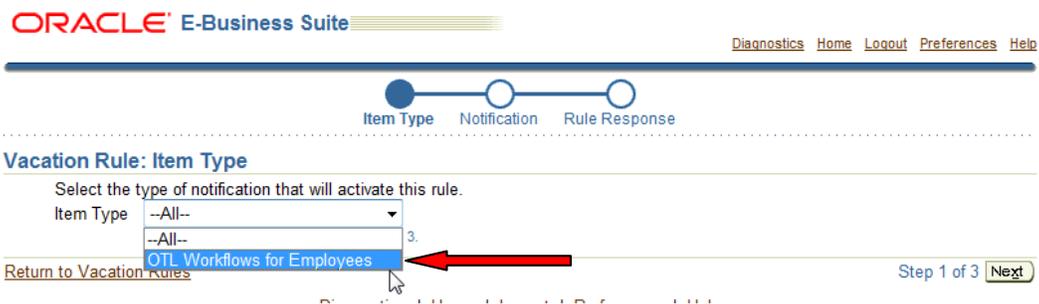
8. Click the *Next* button

9. Click the *Select* radio button

10. Enter a '%' symbol in the field to the right of the *Select* radio button and click the *Flashligh*t icon.

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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

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   Advanced Search
"Go" button.

Search By   Display Name ▼   %   Go

Results

Select	Quick Select	Name	Display Name	Subject
○	📇	TIMECARD_APPROVED	Timecard Approved	&APR_NAME approved timecard for period &APP_START_DATE - &APP_END_DATE
○	📇	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

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Diagnostics   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   Inline Timecard Approval

Cancel Back Step 2 of 3 Next

13. Click the *Next* button

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Diagnostics   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   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

First, click the calendar icon to open the calendar
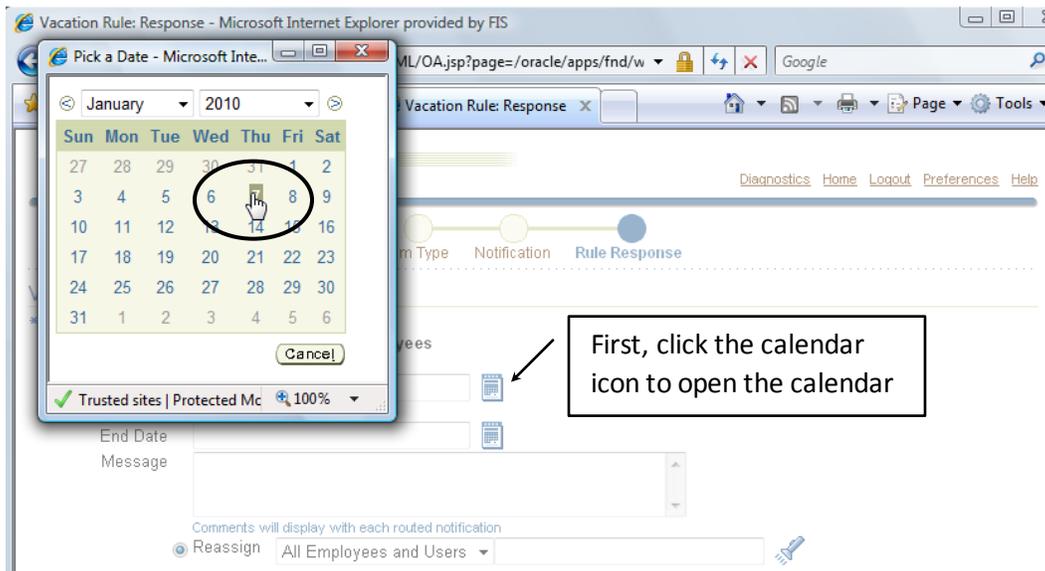
15. If you are creating a temporary rule, select an *End Date*. If you are creating a permanent rule for an Assigned Approver, leave the *End Date* blank
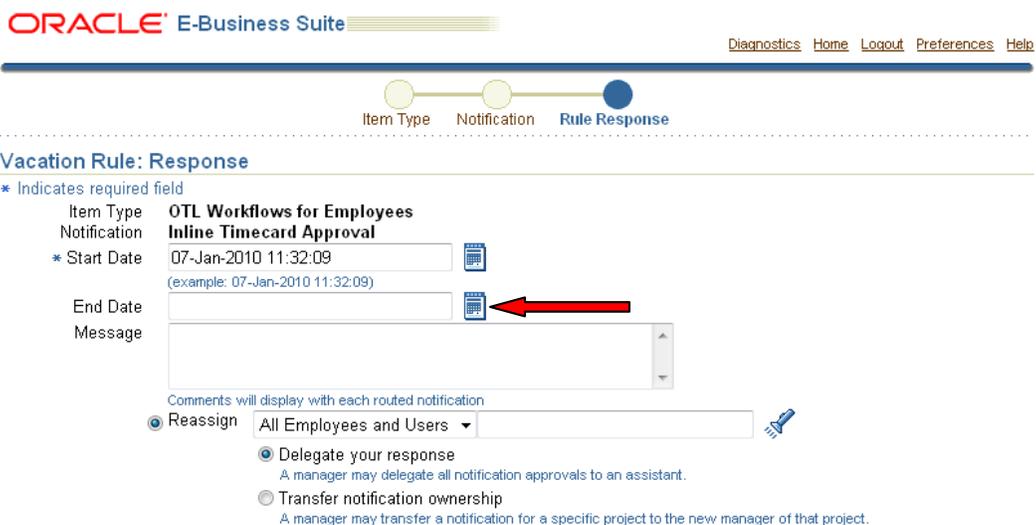
16. The *Reassign* radio button should be selected
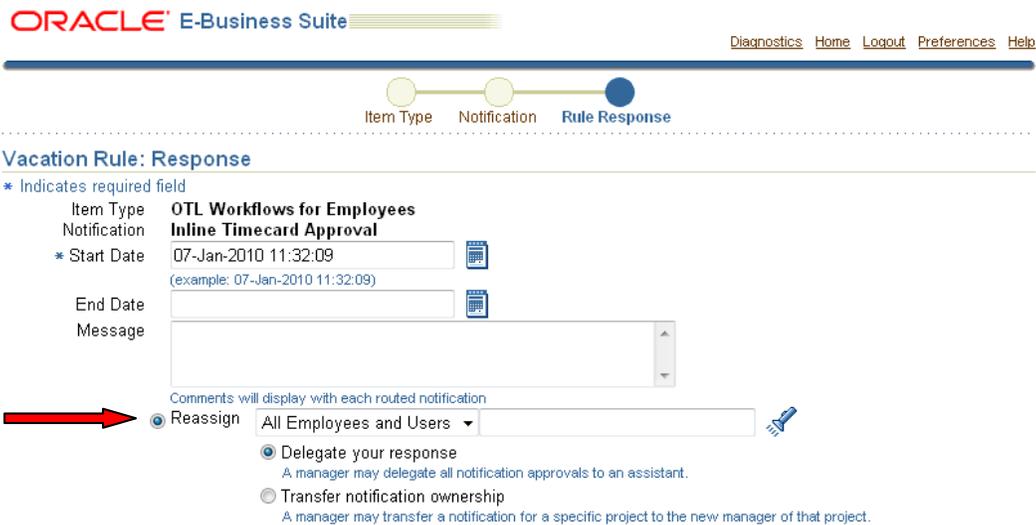
17. In the blank field to the right of the *All Employees and Users* field, type the last name of the person you are delegating authority to and tab or click the *Flashlight* icon.

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

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

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.

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   ○───────────○───────────●
Item Type    Notification    Rule Response
```

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 ▼   Student300, Employee C   ⬅ 🖉

    ⦿ 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

Cancel   Back   Step 3 of 3   Apply

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21. Click the *Apply* button

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```
   ○───────────○───────────●
Item Type    Notification    Rule Response
```

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 ▼   Student300, Employee C   🖉

    ⦿ 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

Cancel   Back   Step 3 of 3   **Apply**

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22. The Vacation rule will be displayed

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Vacation Rules

Create Rule

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.