Timecard Notifications

Chapter 8
Timecard Notifications

Section Objectives

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

- Understand how to view notifications in the Worklist
- Understand the components of a timecard notification
- Review and approve timecards
- Review and reject timecards
- Review timecards and request information
- Review and reassign timecards
- Review and approve reassigned timecards
Timecard Notifications

E-mail Notifications

- Notifications that require action will be received through e-mail and will have a similar appearance as discussed below under the Components of a Timecard Notification.

- The above e-mail message is opened by clicking on PRISM Workflow Mailer.

- You can take action on a submitted timecard e-mail notification by clicking the Click here to Respond link at the bottom left corner of the e-mail message.
Timecard Notifications

PRISM Home Page will appear.
Username and Password can be entered to login.
Notification will then open and it will be possible to choose an action such as to Approve, Reject, Reassign or Request Information.
An employee who submitted a timecard will receive an e-mail notification once the timecard has been approved, rejected or if more information is requested.

Viewing Notifications

The Worklist can be accessed from the PRISM Home Page after logging into PRISM. The notifications that generated the e-mails are found here and include the following fields:

- **From:** Employee who sent notification
- **Subject:** Timecard (with time period) and name of employee (with hours) that requires approval
- **Sent:** Date notification was sent

Notifications may be viewed five at one time or all may be viewed by clicking on Full List.
The **Worklist** displays all of the Open Notifications as the default type of notifications.

Other views are listed below and can be chosen by selecting the View pull-down menu and clicking on Go button:

- FYI Notifications
- To Do Notifications
- All Notifications
- Notifications From Me
Timecard Notifications

The Worklist shows the following information for each notification:

- **From:** This role is from which the notification was sent. This column is displayed when viewing notifications sent to you

- **To:** The role to which the notification was sent. This column is displayed when viewing notifications sent from you

- **Type:** Display name of the item type to which the workflow process that sent the notification belongs

- **Subject:** A description of the notification

- **Sent:** Date when the notification was delivered

- **Due:** Date by which the notification must be completed before it times out to the approver’s supervisor

- **Status:** Open, closed, or canceled status of the notification. This column is displayed when viewing all notifications

- **End Date:** Date when the notification was closed or canceled - displayed when viewing all notifications

- The full details of any notification may be viewed by clicking on the notification's Subject link or by selecting the notification and then choosing Open
Timecard Notifications

Components of a Timecard Notification:

A Timecard Notification consists of the following sections:

- The notification header: Displays From, To, Timecard Dates, Descriptive, Sent (date) and Due (date).
- Timecard Entries block: Displays Comments, Hours Type(s), Hours each day, and Totals fields.
- Audit blocks: Displays individual days with number of Hours, Hours Type and Comments for Previous Submitted Entry and Current Submitted Entry fields.
- Time Details block: Displays the system calculation of how the Time Entries will be processed through Payroll including but not limited to any Comp or Overtime for Non-Exempt employees.
- Action History block: Displays the workflow history of the timecard including Action Date, Type of Action, From and To.
- Response block: Optional Note section where a message may be entered and submitted when a timecard is rejected or reassigned or when additional information is requested.
- Approve, Reject, Reassign and Request Information button areas at the top and bottom right corners of the page.
- Return to Worklist link.

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: View Worklist Notifications, Review and Approve Submitted Timecards

1. Login to PRISMTRKS as SPVBXX

2. View the PRISM TRKS Timecard notifications in the Worklist

3. View the Timecard approval notification for Employee A and approve the Timecard.
Lab 1 Solutions: View Worklist Notifications, Review and Approve Submitted Timecards

- Login to PRISM
- On the PRISM Homepage, view the Timecard Approval Notifications in the Worklist
- Click the Next 5 link to view the next 5 notifications

- Click the Full List button to view all of the notifications
Lab 1 Solutions: View Worklist Notifications, Review and Approve Submitted Timecards

- Click on Employee A’s *Timecard Notification* to open it
Lab 1 Solutions: View Worklist Notifications, Review and Approve Submitted Timecards

- View Timecard Entries, Daily Audit Blocks, Time Detail, and Action History
- Click the Approve button
- The notification will be removed from the worklist
Lab 2: Review and Approve Timecards with Comp and Overtime

1. You should still be logged into PRISMTRKS as SPVBXX
2. View the PRISM TRKS Timecard notifications in the Worklist
3. View the Timecard Approval Notification for Employee Z and Approve the Timecard.
Lab 2 Solutions: Review and Approve Timecards with Comp and Overtime

- Login to PRISM

- Find the *Timecard Notification* for Employee Z (you might have to click on the *Full List* button to find it)

- Click on the *Notification* to open it
Lab 2 Solutions:  Review and Approve Timecards with Comp and Overtime

- Review the **Timecard Entries** to see how the Timecard was completed

- Review the **Timecard Details** section to see how the comp and overtime have been calculated

- Click the **Approve** button
Lab 3: Approve a Timecard that Includes Vacation Time and Comments

1. You should still be logged into PRISMTRKS as SPVBXX
2. View the PRISM TRKS Timecard notifications in the Worklist
3. View the Timecard Approval Notification for Employee N and Approve the Timecard.
Lab 3 Solutions: Approve a Timecard that Includes Vacation Time and Comments

- Login to PRISM
- Find the *Timecard Notification* for Employee N (might have to click on the *Full List* button to find it)
- Click on the *Notification* to open it
Lab 3 Solutions: Approve a Timecard that Includes Vacation Time and Comments

- Review the Comments above the Time Entries block

You approved the Vacation Time back in July
Lab 3 Solutions: Approve a Timecard that Includes Vacation Time and Comments

- Review the Timecard Entries and Details sections
- Click the Approve button
Lab 4: Review and Reject a Timecard

1. You should still be logged into PRISMTRKS as SPVBXX

2. View the PRISM TRKS Timecard notifications in the Worklist

3. View the Timecard Approval Notification for Employee U.

4. Reject the Timecard, including a note advising the employee to adjust their Timecard for the ½ vacation day taken on Monday.
Lab 4 Solutions: Review and Reject a Timecard

- Login to PRISM
- Find the **Timecard Notification** for Employee U (if necessary, click on the **Full List** button to find it)
- Click on the **Notification** to open it
Lab 4 Solutions: Review and Reject a Timecard

- Review the Timecard Entries and Details sections
- Enter a response in the Note box: You took ½ a vacation day on Monday. Please adjust and resubmit.
- Click the Reject button
Lab 5: Review a Timecard and Request Information

1. You should still be logged into PRISMTRKS as SPVBXX

2. View the PRISM TRKS Timecard notifications in the Worklist

3. View the Timecard Approval Notification for Employee S.

4. Request additional information. Ask the employee if he worked or did he take his pre-approved ½ vacation day on Friday.
Lab 5 Solutions: Review a Timecard and Request Information

- Login to PRISM
- Find the *Timecard Notification* for Employee S (if necessary, click on the *Full List* button to find it)
- Click on the *Notification* to open it
Lab 5 Solutions: Review a Timecard and Request Information

- Review the Timecard Entries and Details sections
- Click on the Request Information button
Lab 5 Solutions: Review a Timecard and Request Information

- Select Employee S from the drop-down list in the field next to *Workflow Participant*

- Enter the requested information in the *Information Requested* box

- Click the *Submit* button
Lab 6: Review and Reassign Timecards

1. You should still be logged into PRISMTRKS as SPVBXX
2. View the PRISM TRKS Timecard notifications in the Worklist
3. View the Timecard Approval Notification for Employee B.
4. Reassign the Timecard to Supervisor A.
Lab 6 Solutions: Review and Reassign Timecards

- Login to PRISM
- In the Worklist, find the Timecard Notification for Employee B (if necessary, click on Full List to find it)
- Click on the Notification to open it
Lab 6 Solutions: Review and Reassign Timecards

- Review the Time Entries and Details blocks
- Click the Reassign button

- Accept the default in the Assignee field
- Type all or part of Assignee’s name (StudentXX, Supervisor A) and Tab
- If there is more than one match, a list of names will pop open
Lab 6 Solutions: Review and Reassign Timecards

- Click the Quick Select icon next to Supervisor A's name
- Ensure that the Delegate your response radio button is selected
- Enter a message to the new assignee in the Comments box
- Click the Submit button
- The timecard will no longer appear in the Worklist