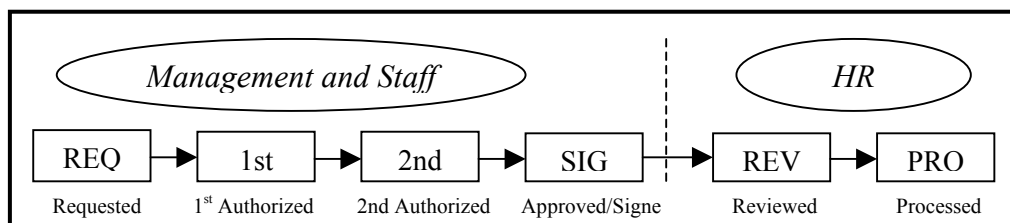


Authorizing and Approving Actions

Chapter 3 Section 4

Introduction



As discussed in the PAR Processing Overview section of this chapter, actions move through EHRP via workflow, a process that is driven by users' roles in the system. While the full path of a request in workflow moves through six standard steps, several different processes are available for management and supervisor staff use as well. Samples of each variation of the six-step workflow path can be found in the Section 1 of the PAR Processing chapter in this guide.



In Section 3 we discussed Requesting an action. The procedure below covers the remaining steps in the above workflow diagram. Specifically, this section covers authorizing and approving actions in EHRP. The Personnel Action Requests that are to be authorized or approved will be routed to management staff via the Worklist functionality of EHRP.

Navigational Tips

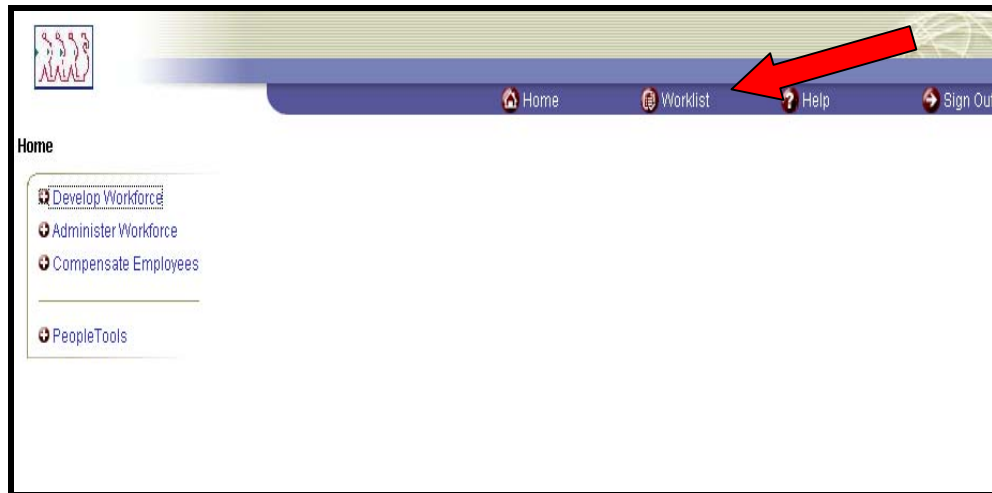


- When accessing a field in EHRP that requires entry, there may be a  button available for use. Clicking this button will open a window with a list of possible entry options for this field.
- When accessing a date field in EHRP (for example, Effective **Date**, etc.), the  button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date.

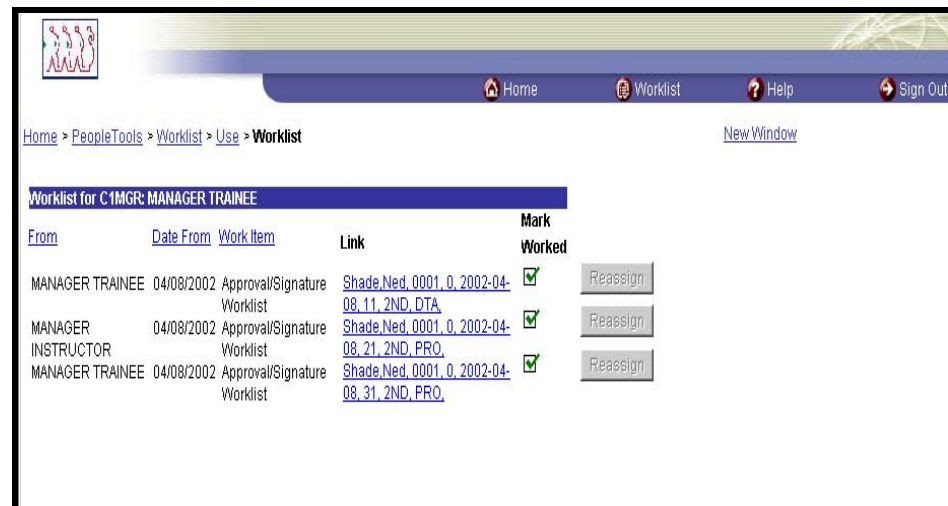
Procedure

The following steps detail the procedure for authorizing and approving a Personnel Action Request in EHRP:

1 Access the worklist the hyperlink on the main menu of EHRP:



The following **Worklist** page appears:



Worklist - fields

The **From** column shows who routed the work item to you. You can sort work items according to this data.

*The **Date From** field indicates when the work item was routed to you. You can sort work items according to this data.*

The **Work Item** indicates the Workflow role under which you have received the action (this is useful for users with multiple roles).

The **Link** contains the employee name, EmplID, Record number, Effective date, transaction/sequence number, Current PAR status, Action Code, and Department ID of the action

3 Click the hyperlink of the item to be worked.

The following **Data Control** page appears:

4 Enter the appropriate **PAR Status**.

*NOTE: By modifying the **PAR Status**, the work item is moved to the stage in the workflow process identified by the status. For example, if the action being worked is the “REQ” stage and the user role is the 1st authorizer role, then they would enter “1st” in the **PAR Status** field.*

5 Enter any other necessary data. The fields which are available for update and modification by Authorizers and Approvers are:

- Effective Date
- Par Status
- Comments (Tracking data hyperlink)
- CAN Code (Accounting hyperlink on **Compensation** page)

6 Click  .

Routing Actions - 1st and 2nd Authorizers

Upon saving the page group, 1st Authorizers and 2nd Authorizers will be prompted to select the specific individual to whom the action should be routed:

Home > Administer Workforce > Administer Workforce (USF) > Use > Supervisor Request


Route to Next Empl ID

Actual Effective Date:	06/03/2002	Proposed Effective Date:	05/31/2002
Transaction # / Sequence:	1 1	Not To Exceed Date:	
Action:	DTA Data Change	PAR Status:	REQ REQUESTED
Reason:	DTA Data Change	Contact Emplid:	

The status of this data requires you to specify the employee to whom to next route the data. Choose an Employee ID below.



Routing Based on: Route for 1st Review:

Route to Next:

Click the button for a list of those to whom the PAR request should be routed. 

Route To: View All First 1-2 of 2 Last

<input type="checkbox"/>	0020	Springs, Kyle
<input type="checkbox"/>	0051	Kingsley, Adam

7 Click the “**Route To**” pushbutton. You will see a list of valid users to whom the action can be routed. The names on the list are based upon Workflow role and Row level security.

8 Click in the appropriate checkbox to select the “Route To” person; then, click OK.

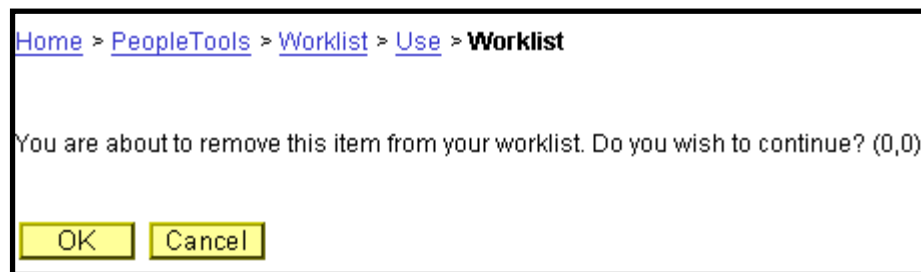
The action has now been routed to the worklist of the user specified.

**Routing
Actions -
Approver**

When an Approver saves an action, it will be routed to every user meeting the relevant criteria for Workflow Role and Row level security. That means the action will go to the worklist of all HR Reviewers and HR Processors who have been established in the Workflow setup to have access to these actions.

**Removing
items from the
Worklist**

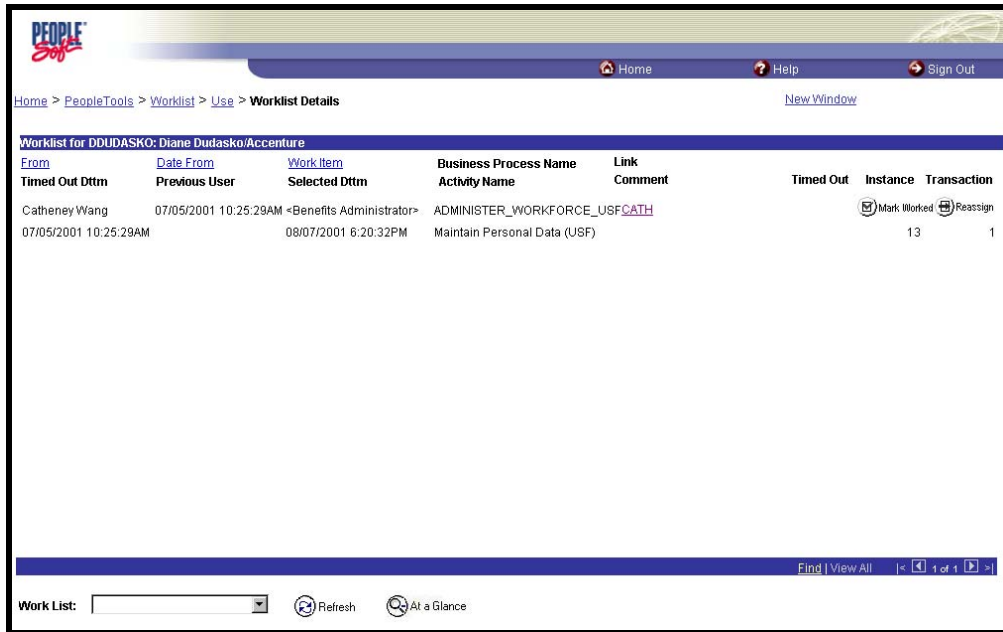
Once an item is worked, you manually delete the worklist item from your worklist by clicking on the **Mark Worked** checkbox. This will generate the following message:



Click OK if you want to remove the item from your worklist; click Cancel if you do not.

**Obtaining
Details**

You can access additional information about the worklist items by clicking on the Detail View hyperlink at the bottom of the Worklist page.



Details - field names	Description of Field
	<p>Timed Out Dttm - Provides the date and time when the item will time out if it isn't worked.</p> <p>Originating User - Identifies whose action triggered this item.</p> <p>Selected Dttm - Provides the date and time the user first selected this item.</p> <p>Comment - Displays comments entered by the previous user.</p> <p>Timed Out - Indicates if the item has timed out.</p> <p>Instance - Unique identifier for each item of the same type.</p> <p>Transaction - Unique identifier for each item in the worklist.</p>

As with the **Worklist** page, clicking the **Link** hyperlink will take the user to where the item needs to be worked.

Clicking **At a Glance** will return the user to the worklist page.