Time and Labor (OTL)

Manage Worklist Access & Vacation Rules

DoDEA R12 Work Instructions
Document Control

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**Business Process Description**

**Major Features**

Worklist delegations are necessary in order to allow delegates to review and process any pending notifications in the primary approver’s absence for an indefinite amount of time. Vacation rules are used in order to allow a backup approver to review and process worklist notifications on behalf of the primary approver for a defined time period. All users can establish worklist notification delegations, but this function primarily applies to DoDEA DAI approvers.

**Trigger**

A user needs to establish a worklist delegation or vacation rule.

**Prerequisites**

- The user that is being established as a delegate must have the proper authority to process notifications.
- The user that is being established as a delegate must have the necessary DAI responsibility to perform the approval process.

**Responsibilities**

Worklist delegations and vacation rules can be established through the following responsibilities:

- DoDEA Notifications

**Menu Path**

Use the following menu path(s) to begin this task:

- DoDEA Notifications → Workflow Notifications
Establish Worklist Access

1. Start the task using the responsibility and menu path to view Worklist Notifications:
   - **Responsibility:** DoDEA Notifications
   - **Menu Path:** Workflow Notifications

2. Select the **Worklist Access** link. The **Worklist Access** screen displays.
3. Click the **Grant Worklist Access** button.

   The **Grant Worklist Access** form is used to grant another user access to view and act upon your notifications via the worklist.

4. **a. Name:** *(Required)* Enter the name of the employee to whom you will delegate approval authority or search for the employee in the list of values.
   
   **b. Description:** *(Optional)* Enter a description for the worklist delegation.
   
   **c. Start Date:** *(Required)* Enter the date that the worklist access will be active or accept the default date to activate the delegation immediately.
   
   **d. End Date:** *(Optional)* This field is not required for worklist delegations. It is recommended to leave the End Date field blank. This will allow the backup approver access to your worklist indefinitely.
   
   **e. Grant Access to:** *(Required)* Select **All Item Types** to grant access to all types of your notifications or **Selected Item Types** to only allow access to specific types of notifications.
The **Selected Item Types** function primarily applies to users that will be active in both the OTL and Full Financials components of DAI. It is recommended to select **All Item Types** for OTL Supervisor Approvers.

5. Click the **Apply** button to create the worklist delegation.

6. The worklist delegation was successfully created. Going forward, any employees to whom access has been granted will have the ability to view your worklist as well as approve or reject anything that appears in your worklist.

   Repeat steps 1-5 to establish as many delegations as necessary. You may update or delete the delegation at any time.

   It is recommended that each Approver have at least three backup approvers at all times.

**Result**

Congratulations! You have successfully created a worklist delegation.
Establish a Vacation Rule

1. Start the task using the responsibility and menu path to view Worklist Notifications:
   **Responsibility:** DoDEA Notifications
   **Menu Path:** Workflow Notifications

![Diagram showing the navigation path to DoDEA Notifications and Workflow Notifications]

2. Click on the Vacation Rules link to access the Vacation Rules form.
3. Click the **Create Rule** button. The **Vacation Rule: Item Type** screen displays.

4. Select the type of notifications that will be delegated as part of the vacation rule in the **Item Type** dropdown list. If you would like to delegate all notifications, select **--All--** from the dropdown list.

   Click the **Next** button. The **Vacation Rule Response** screen displays.
5. **a. Start Date: (Required)** Enter the Start Date that will activate the vacation rule or accept the default date to activate the vacation rule immediately.

**b. End Date: (Required)** Enter the End Date that applies to the duration of the vacation rule.

**c. Message: (Optional)** Enter a message that users will receive in response to submitted notifications.

**d. Reassign: (Required)** Enter the name of the employee to whom you will delegate approval authority in your absence or search for the employee in the list of values.

**e. Delegate Your Response:** Select this option if you want to give the user authority to respond to the notification on your behalf, and you want to retain ownership of the notification yourself. For example, a manager might delegate all approval authority to an assistant or transfer notification ownership to the new manager of a specific project.
assistant but wants to maintain ownership of the notification.

f. Transfer Notification Ownership: Select this option if you want to give the user complete ownership of and responsibility for the notification. For example, you received a notification in error and you want to send it to the correct recipient.

Click the **Apply** button.

6. The vacation rule was successfully created. Repeat steps 1-5 to establish as many vacation rules as necessary. You may update or delete the vacation rule at any time.

**Result**

**Congratulations! You have successfully created a vacation rule.**
View and Process Worklist Notifications as a Delegate

1. Start the task using the responsibility and menu path to view Worklist Notifications:
   - **Responsibility:** DoDEA Notifications
   - **Menu Path:** Workflow Notifications

2. Click the Switch User button.
   - You will only see the Switch User button if you have been established as a worklist delegate for another user.
3. Select the radio button of the DAI User’s Name for whom you are the delegate.

   The system shows you as the Current User until you apply the change.

   Click the Apply button. The worklist for the person you selected displays.
4. Select the pending notification that you want to view. Click the Open button.

5. The notification will display. Click the Approve button to approve the timecard notification.
After the notification is processed, the notification is no longer displayed in the Worklist Notifications.

Result

Congratulations! You have successfully reviewed and acted upon a delegated notification.