Time & Labor (T&L)

Vacation Rules and Manage Proxy Delegates

R12 Work Instructions
**DOCUMENT CONTROL**

**Change Record**

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
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<tbody>
<tr>
<td>20-Aug-15</td>
<td>Robin Hardy</td>
<td>1.0</td>
<td>New OTL version of Vacation Rules and Worklist Access</td>
</tr>
<tr>
<td>02-03-2016</td>
<td>Robin Hardy</td>
<td>1.1</td>
<td>New 12c upgrade Vacation Rules and Manage Proxy Delegates</td>
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**Reviewers**

<table>
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<tr>
<th>Name</th>
<th>Position</th>
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<tbody>
<tr>
<td>05-Feb-2016</td>
<td>Bill Mohamed</td>
</tr>
<tr>
<td></td>
<td>Workforce Preparation Training Lead</td>
</tr>
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**Distribution**

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<td>(OTL) Vacation Rules and Manage Proxy Delegates</td>
<td>DEPS</td>
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**Note to Holders:**

If you receive an electronic copy of this document and print it out, please write your name on the equivalent of the cover page, for document control purposes.

If you receive a hard copy of this document, please write your name on the front cover, for document control purpose.
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Business Process Description

Due to the importance of approving notifications for Timecards, Leave Requests and for Tour of Duty Requests on a timely basis, a Supervisor Approver must maintain additional Supervisors who can access their Worklist to process notifications within DAI. These Supervisors will be referred to within the documentation as “Proxy Delegates”. Emergencies and other situations will occur when an approver needs to have “previously established” list of proxy delegate’s setup to approve notification(s) on his/her behalf. DAI provides two different mechanisms to facilitate this process. The first method is “Vacation Rule”. It is set up normally in advanced of the Supervisor being off duty and will focus on temporary situations, such as when an approver is on leave. The second method is “Manage Proxies”. It allows the Approver to create a list of proxy delegates, who can process notifications on behalf of the “unavailable” Approver at any given time.

Trigger

- In the case of the approver being on leave, the Supervisor should use the Vacation Rules capability. In Vacation Rules, all approval actions are delegated to another Supervisor for a limited period of time. These notification actions will only appear in the worklist of the proxy delegated approver established in the Vacation Rule and not in the original Supervisor’s worklist.

- Manage Proxies delegation establishes a backup hierarchy. These individuals will have permanent access to your worklist. These proxy delegates will login to DAI as themselves and then “access” the other Supervisor’s worklist to process any pending notifications.

Throughout this document, you will run into many data fields that can be populated via a List of Values (LOV); either by clicking on the magnifying-glass icon, a drop-down arrow, or a calendar icon. Whenever a required (or optional) data field has an LOV associated with it, you should use it, rather than attempting to manually type in the information – regardless of how short the input or response.

Prerequisites

- There are no prerequisites.

Responsibility

- OTL Supervisor Approver – Agency

Menu Path

Use the following menu path(s) to begin this task to see the vacation rules link

- OTL Supervisor Approver – Agency → Advanced Worklist → Vacation Rules link.

Use the following menu path(s) to begin this task to create and view the Proxy Delegates

- DAI Home Page → Settings Icon
Setting up a Vacation Rule

1. Start the task using the following Responsibility and menu path to:
   - **Responsibility**: OTL Supervisor Approver - AGENCY
   - **Menu**: Advanced Worklist
Setting up a Vacation Rule

2. Click the Vacation Rules link to access the Vacation Rules form.

3. Click the Create Rule button. The Vacation Rule: Item Type screen displays.

4. Ensure All is selected in the Item Type drop down list.

5. Click the Next button. The Vacation Rule Response screen displays.
Setting up a Vacation Rule

6. Complete the following:
   - **Start Date** – the date the vacation rule begins. The current date displays but may be modified. This is a Required Field.
   - **End Date** – the date the user plans to return from vacation. This is a Required Field.
     Optionally, you can enter a comment in the Message field that will display with each routed notification.

   **Note:** Setting the End Date will stop the automatic forwarding of your notifications.

7. In the Reassign field, enter the name (Last Name, First Name) of the employee to whom you want to delegate this responsibility. You may also search for the employee’s name in the list of values. The actual notifications will now be routed directly to the person who has been set up in the Reassign field for only the duration of the Vacation Rule.

   The following radio buttons specify how you want to reassign the notification:
   - **Delegate your response** – Select this option in order for the delegated Supervisor to process the notifications received within the duration of the vacation rule.
   - **Transfer notification ownership** – do not use this option.
Setting up a Vacation Rule

8. Click the Apply button to save the vacation rule.

9. All Vacation Rules will remain within DAI until they are deleted. Once established, the Update icon (pencil) can be used to modify the existing Vacation Rule. The Trash Bin can be used in order to delete the Vacation Rule. It is not necessary to delete a rule as the rule contains a specific end date.

If the Vacation Rule starts in a future date, the status will show Inactive, but will activate on the set Start Date. In this example the start date is in the future and will not show active until Feb. 17th 2016.

It is not necessary to Switch Users to view notifications as part of a Vacation Rule. All notifications within the duration of the vacation rule will go directly to the reassigned Supervisor/approver’s worklist.

Result

Congratulations, you have successfully created a vacation rule.
Create a Proxy Delegate

1. Start the task by selecting the drop down arrow beside the Settings (gear) icon in the Home page toolbar. Select Manage Proxies.

2. Click the Add Proxy button.
Setting up a Proxy Delegate

3. **ADD PROXY SECTION**

   a) Enter the proxy delegate’s user name in the **User Name** field. Alternatively, use the magnifying glass icon to search for and select the desired employee name.

   b) Change the **Active From** date to the first day of the active payroll period. The system defaults to the current date. Leave the **Active To** date blank, as this person should be active to process your notifications until they are no longer a viable resource.

   **Note**: Please refer to the table of contents on how to **End Date a Proxy Delegate**.

   c) Optionally, you can add a note to the new proxy delegate.

4. **GRANT RESPONSIBILITY ACCESS SECTION**

   a) Change the default radio button to **Selected**

   b) Click on the “Agency” – Notifications option

   c) Click the Move (right) icon to place the “agency” notifications verbiage under the “Selected Responsibilities” section.
Setting up a Proxy Delegate

5. **GRANT WORKLIST ACCESS SECTION**
   
a) Change the default radio button to **All**.

6. Click the **Submit** button.

   **Repeat this process TWO additional times to complete a list of 3 mandatory Supervisors who you will want to have access to your notifications.**
### Submit a Proxy Delegate

<table>
<thead>
<tr>
<th>Confirmation</th>
<th>Your changes have been saved successfully</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proxy Configuration</td>
<td>Manage the people that can access your account and act on your behalf.</td>
</tr>
<tr>
<td>Add Proxy</td>
<td>Run Proxy Report</td>
</tr>
<tr>
<td>HARCY</td>
<td>ROBIN</td>
</tr>
</tbody>
</table>

7. Review the **Confirmation** screen for accuracy.

**Repeat this process TWO additional times to complete a list of 3 mandatory Supervisors who you will want to have access to your notifications.**

### Result

Congratulations! Once you have completed this process three times, you have successfully granted 3 additional Proxy Delegates access to your notifications.
How to End Date a Proxy Delegate

Trigger Event

A Proxy Delegate is no longer in a position to help you manage your worklist notifications; you need to replace this proxy delegate. You must end date the active proxy delegate and then add a new delegate to your list.

1. Start the task by selecting the drop down arrow beside the Settings (gear) icon on the Home page toolbar. Select Manage Proxies.

2. Click the Update (pencil) icon that corresponds to the name of the person to be end dated from the list of Proxy Delegates.
3. Enter the Active To date in the DD-MMM-YYYY format or click the calendar icon and select the appropriate end date.
4. Click the Submit button.

5. Review the Confirmation screen for accuracy.

Note: Be sure to maintain 3 proxy delegates for your account.

Result
Congratulations, you have successfully end dated a proxy delegate.
Switch User – To Allow the Proxy Delegate to Access Notifications

**Trigger Events**
A Supervisor is on vacation and forgot to set up a Vacation Rule, or this Supervisor had an emergency. The OTL CSR responsibility can run a Proxy Delegation report if you are not aware of which proxy delegates are set up for the Supervisor who is unavailable.

Run the **XXDAI Timecard Approver Delegation Report** to see a listing of the Supervisor’s delegates. See the OTL R12 Work Instructions called **Review Timecard Approver Delegation Report** for steps on creating the report output.

1. The currently logged in Supervisor is going to process notifications for Samantha Service. Samantha has previously set up this Supervisor as a Proxy Delegate.

   Start the task on the **Home** page. Click on the **Switch User** icon to display the **Proxy Delegates** that have been set up.

2. Click the **Switch** button to view the notifications list for this Supervisor.

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**Switch Users to View Proxy Delegates**

1. **Home**
2. **Switch User**

<table>
<thead>
<tr>
<th>First Name</th>
<th>User Name</th>
<th>Job Title</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAMANTHA</td>
<td>SERVICE SAMANTHA</td>
<td>Accounting (0510)</td>
<td>0510</td>
<td>SERVICESAMANTHACLASSIC.COM</td>
</tr>
</tbody>
</table>
3. View the upper right hand side of the screen and see that the Supervisor is logged in as herself, yet is viewing the notification of another proxy delegate Supervisor.

4. Click the **Select** button and then the **Open** button to view the notifications requiring processing.

   **Note:** The Proxy Delegate has access to process any type of notification on behalf of another Supervisor who had delegated authority.
Processing a Notification

5. Click one of the processing buttons on this notification. Once the action is completed the screen will return to the original notification list or will move on to additional notifications if multiple notifications were selected.

Returned Notification screen

6. Continue to process all the remaining notifications (see Step 4).
   
   Note: The first notification shows the leave request has been approved.
Return to Original Supervisor's notifications.

7. Click the Home icon to return to the Home page.

Switch Back to Logged In Supervisor

8. Click the Switch User button to return to the “Logged In” Supervisor's Home page.
Vacation Rules and Manage Proxy Delegates

Defense Agencies Initiative

View Logged In Supervisor's Home Page

Result

Congratulations, you have used the Switch User button to view another Proxy Delegate’s notification list in order to process their pending notifications and returned to your DAI Home page.