



Time & Labor (T&L)

Vacation Rules and Manage
Proxy Delegates

R12 Work Instructions



DOCUMENT CONTROL

Change Record

Date	Author	Version	Change Reference
20-Aug-15	Robin Hardy	1.0	New OTL version of Vacation Rules and Worklist Access
02-03-2016	Robin Hardy	1.1	New 12c upgrade Vacation Rules and Manage Proxy Delegates

Reviewers

Name	Position
05-Feb-2016 Bill Mohamed	Workforce Preparation Training Lead

Distribution

Copy No.	Name	Location
1	(OTL)Vacation Rules and Manage Proxy Delegates.	DEPS

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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.

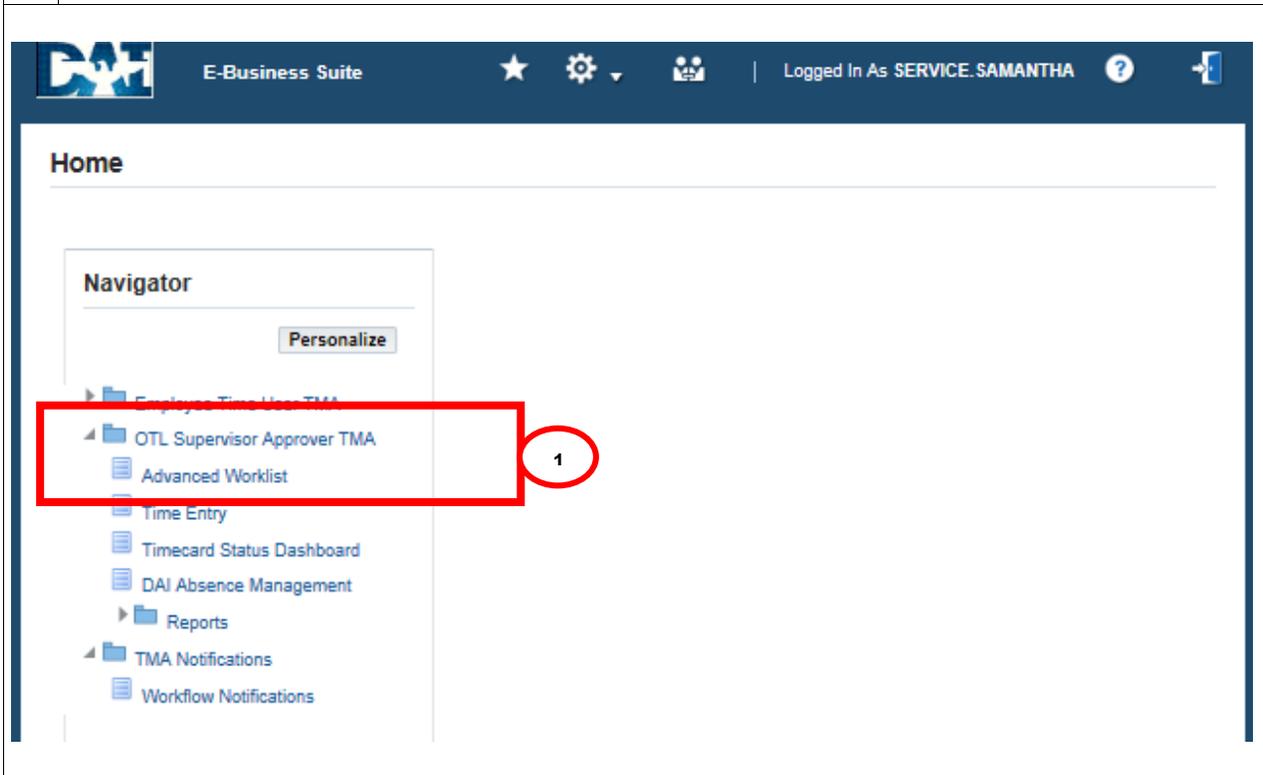
Use the following menu path(s) to begin this task to create and view the Proxy Delegates

- DAI Home Page → Settings Icon

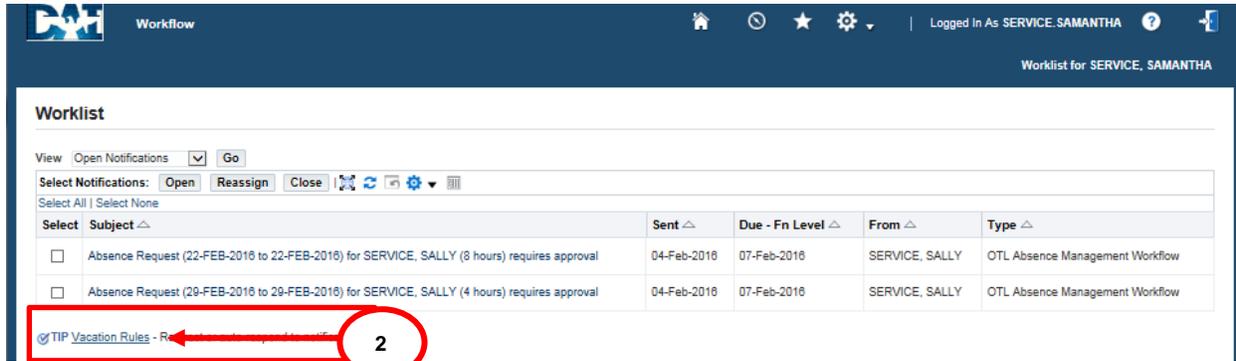


Setting up a Vacation Rule

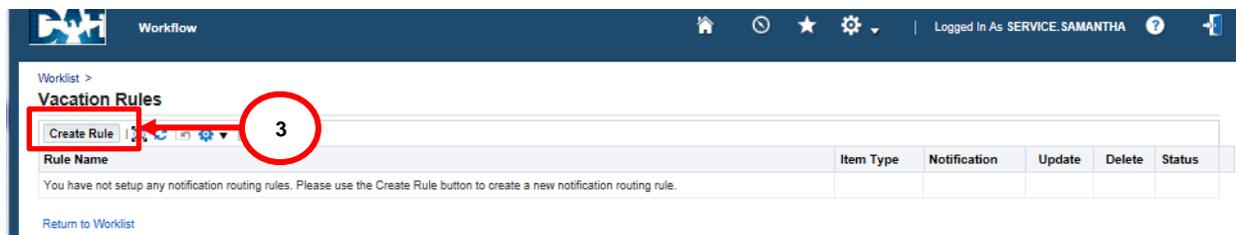
1. Start the task using the following Responsibility and menu path to:
 - **Responsibility:** OTL Supervisor Approver - AGENCY
 - **Menu:** Advanced Worklist



Setting up a Vacation Rule

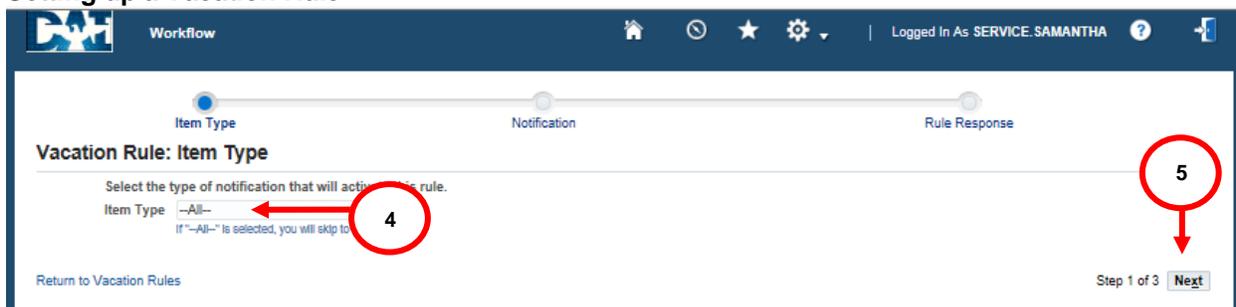


2. Click the **Vacation Rules** link to access the **Vacation Rules** form.



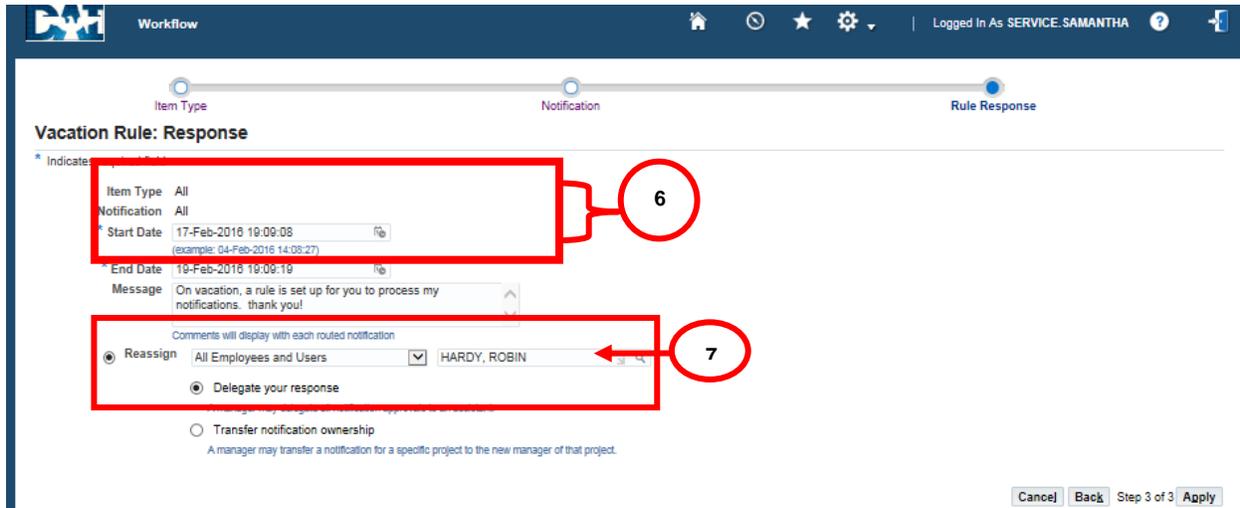
3. Click the **Create Rule** button. The **Vacation Rule: Item Type** screen displays.

Setting up a Vacation Rule



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

Vacation Rule: Response

* Indicates required field

Item Type All
 Notification All

* Start Date 17-Feb-2016 19:09:08
(example: 04-Feb-2016 14:08:27)

* End Date 19-Feb-2016 19:09:19

Message On vacation, a rule is set up for you to process my notifications. thank you!

Comments will display with each routed notification

Reassign All Employees and Users HARDY, ROBIN

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.

Cancel Back Step 3 of 3 **Apply**

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

Vacation Rules

Create Rule

Rule Name	Item Type	Notification	Update	Delete	Status
Delegate: HARDY, ROBIN	<All>	<All>			Inactive

Return to Worklist

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.

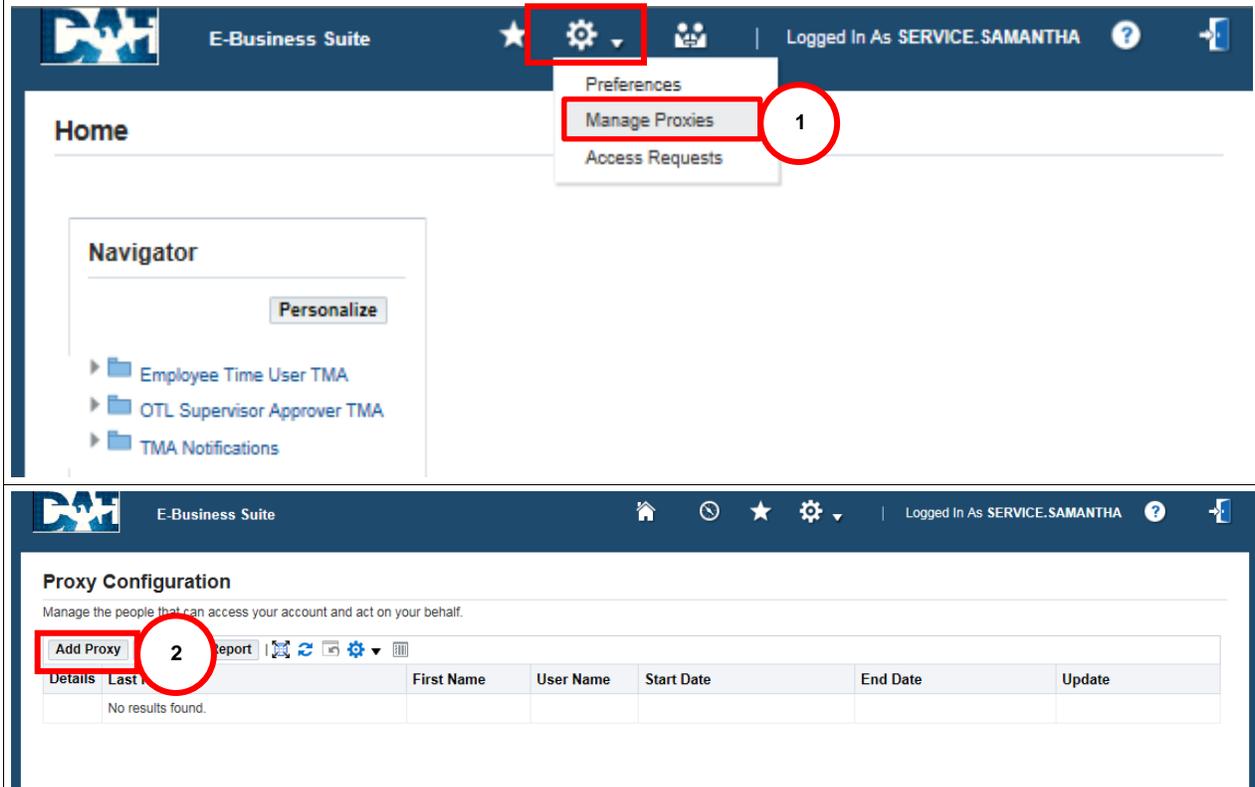
It is not necessary to Switch Users to view notifications as part of a Vacation Rule. All notifications within the duration of the vacation rule will go directly to the reassigned Supervisor's/approver's worklist.

Result

Congratulations, you have successfully created a vacation rule.

Create a Proxy Delegate

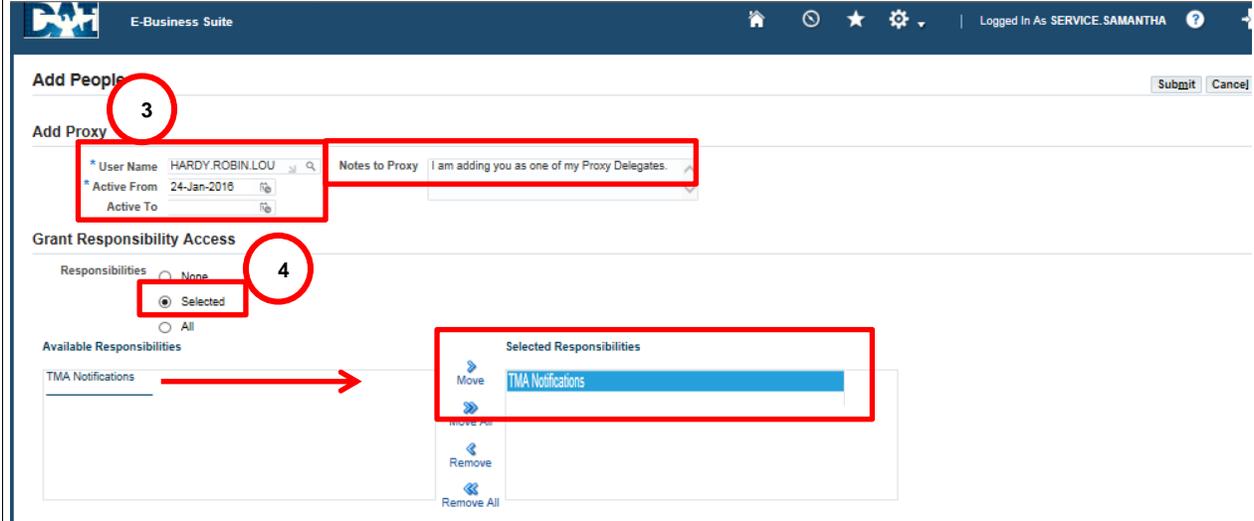
1. Start the task by selecting the drop down arrow beside the **Settings (gear)** icon in the **Home** page toolbar. Select **Manage Proxies**.



The screenshot shows the E-Business Suite interface. In the top navigation bar, the 'Settings (gear)' icon is highlighted with a red box. A dropdown menu is open, showing 'Preferences', 'Manage Proxies', and 'Access Requests'. The 'Manage Proxies' option is highlighted with a red box and a red circle containing the number '1'. Below this, the 'Proxy Configuration' page is shown. The 'Add Proxy' button is highlighted with a red box and a red circle containing the number '2'. The page title is 'Proxy Configuration' and the subtitle is 'Manage the people that can access your account and act on your behalf.' Below the subtitle, there is a table with columns: 'Details', 'Last', 'First Name', 'User Name', 'Start Date', 'End Date', and 'Update'. The table currently shows 'No results found.'

2. Click the **Add Proxy** button.

Setting up a Proxy Delegate



3. ADD PROXY SECTION

- 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.
- 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**.

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

4. GRANT RESPONSIBILITY ACCESS SECTION

- Change the default radio button to **Selected**
- Click on the "Agency" – Notifications option
- Click the Move (right) icon  to place the "agency" notifications verbiage under the "Selected Responsibilities" section.



Setting up a Proxy Delegate

The screenshot shows the 'Setting up a Proxy Delegate' form in the E-Business Suite. The form is divided into several sections:

- Add People:** Includes a 'Submit' button and a 'Cancel' button. A red circle highlights the 'Submit' button, labeled with the number '6'.
- Add Proxy:** Includes fields for 'User Name' (HARDY.ROBIN.LOU), 'Active From' (24-Jan-2016), and 'Active To'. A 'Notes to Proxy' field contains the text 'I am adding you as one of my Proxy Delegates.'
- Grant Responsibility Access:** Includes radio buttons for 'None', 'Selected', and 'All'. Below this are two columns: 'Available Responsibilities' and 'Selected Responsibilities'. The 'Selected Responsibilities' column contains 'ITMA Notifications'. There are buttons for 'Move', 'Move All', 'Remove', and 'Remove All' between the columns.
- Grant Worklist Access:** Includes radio buttons for 'None', 'Selected', and 'All'. A red circle highlights the 'All' radio button, labeled with the number '5'.

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

The screenshot shows the E-Business Suite interface. At the top, there is a navigation bar with the DAI logo, 'E-Business Suite' text, and user information 'Logged In As SERVICE.SAMANTHA'. Below the navigation bar, a yellow confirmation banner reads 'Confirmation: Your changes have been saved successfully.' A red box highlights this banner, and a red circle with the number '7' is placed next to it. Below the banner is the 'Proxy Configuration' section, which includes a sub-header 'Manage the people that can access your account and act on your behalf.' and a table of proxy delegates.

Details	Last Name ^	First Name ^	User Name ^	Start Date	End Date	Update
▶	HARDY	ROBIN	HARDY.ROBIN.LOU	24-Jan-2016 00:00:00		

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

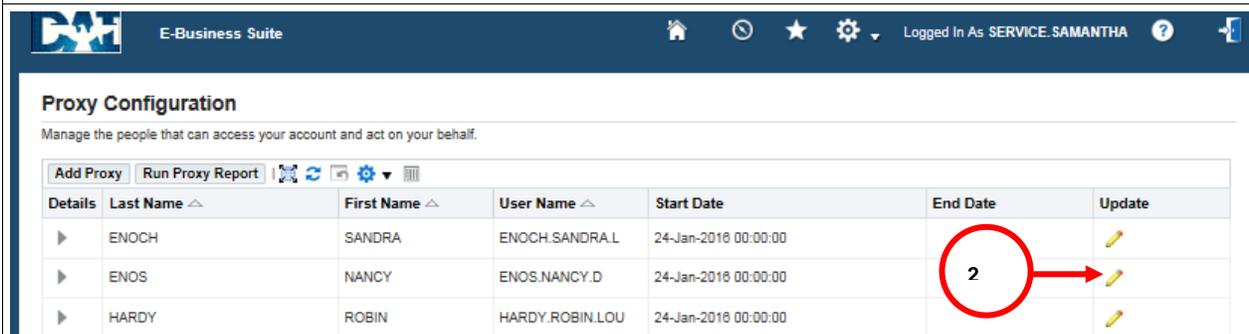
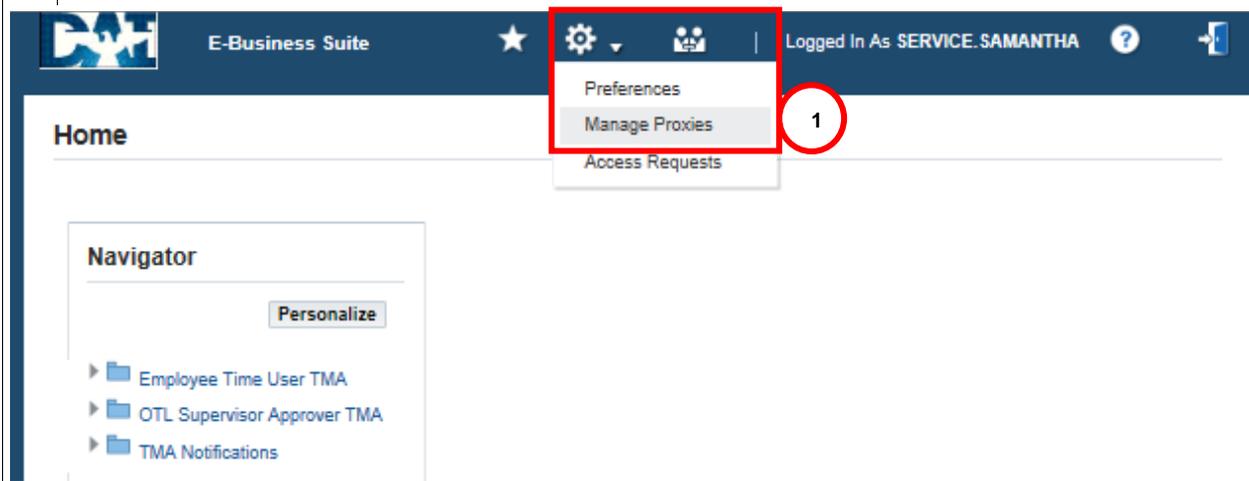
Congratulations! Once you have completed this process three times, you have successfully granted 3 additional Proxy Delegates access to your notifications.

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

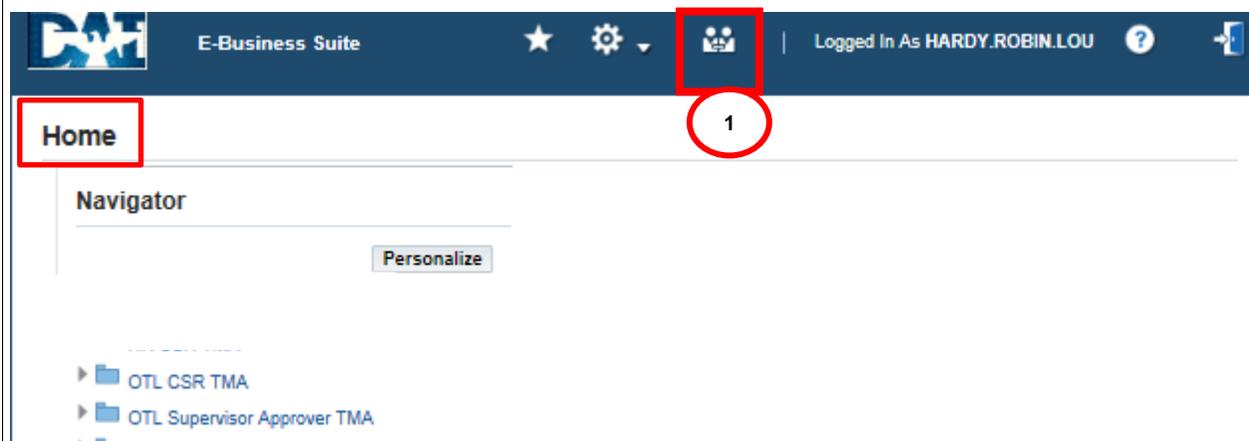
Trigger Events

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.

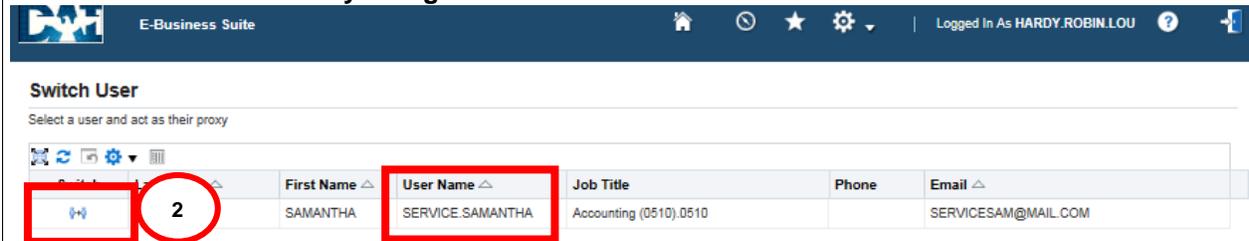
Run the **XXDAI Timecard Approver Delegation Report** to see a listing of the Supervisor's delegates. See the OTL R12 Work Instructions called **Review Timecard Approver Delegation Report** for steps on creating the report output.

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.



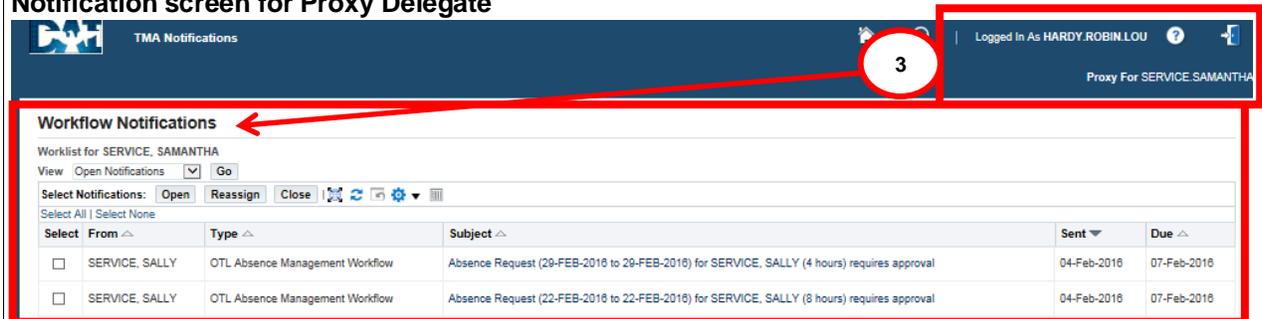
Switch Users to View Proxy Delegates



	First Name ▲	User Name ▲	Job Title	Phone	Email ▲
	SAMANTHA	SERVICE SAMANTHA	Accounting (0510),0510		SERVICESAM@MAIL.COM

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

Notification screen for Proxy Delegate



TMA Notifications

Logged In As HARDY.ROBIN.LOU

Proxy For SERVICE.SAMANTHA

Workflow Notifications

Worklist for SERVICE, SAMANTHA

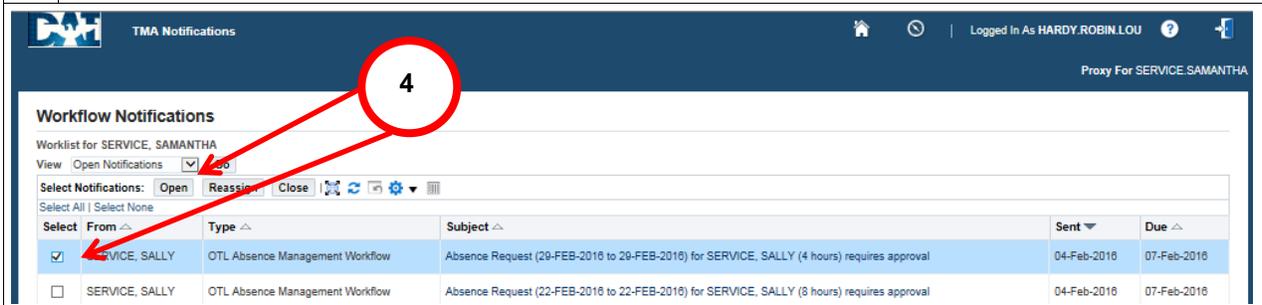
View Open Notifications Go

Select Notifications: Open Reassign Close

Select All | Select None

Select	From	Type	Subject	Sent	Due
<input type="checkbox"/>	SERVICE, SALLY	OTL Absence Management Workflow	Absence Request (29-FEB-2016 to 29-FEB-2016) for SERVICE, SALLY (4 hours) requires approval	04-Feb-2016	07-Feb-2016
<input type="checkbox"/>	SERVICE, SALLY	OTL Absence Management Workflow	Absence Request (22-FEB-2016 to 22-FEB-2016) for SERVICE, SALLY (8 hours) requires approval	04-Feb-2016	07-Feb-2016

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.



TMA Notifications

Logged In As HARDY.ROBIN.LOU

Proxy For SERVICE.SAMANTHA

Workflow Notifications

Worklist for SERVICE, SAMANTHA

View Open Notifications Go

Select Notifications: Open Reassign Close

Select All | Select None

Select	From	Type	Subject	Sent	Due
<input checked="" type="checkbox"/>	SERVICE, SALLY	OTL Absence Management Workflow	Absence Request (29-FEB-2016 to 29-FEB-2016) for SERVICE, SALLY (4 hours) requires approval	04-Feb-2016	07-Feb-2016
<input type="checkbox"/>	SERVICE, SALLY	OTL Absence Management Workflow	Absence Request (22-FEB-2016 to 22-FEB-2016) for SERVICE, SALLY (8 hours) requires approval	04-Feb-2016	07-Feb-2016

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

TMA Notifications | Logged In As HARDY.ROBIN.LOU | Proxy For SERVICE.SAMANTHA

Workflow Notifications >

Absence Request (29-FEB-2016 to 29-FEB-2016) for SERVICE, SALLY (4 hours) requires approval [Approve] [Reject] [Reassign] [More Information Request]

From: SERVICE, SALLY
To: SERVICE, SAMANTHA
Sent: 04-Feb-2016 13:04:24
Due: 07-Feb-2016 13:04:24
ID: 54888804

Employee Details

Employee Name: SERVICE, SALLY | Employee Number: 13121
Email Address: SALSERVICE@MAIL.COM | Business Group: Defense Agencies Initiative Business Group
Supervisor: SERVICE, SAMANTHA | Organization: DHA BUSINESS INTEL ANALYTICS - M333000

Current Absence Details

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

TMA Notifications | Logged In As HARDY.ROBIN.LOU | Proxy For SERVICE.SAMANTHA

Workflow Notifications

Worklist for SERVICE, SAMANTHA

View: Open Notifications [Go]

Select Notifications: [Open] [Reassign] [Close] [Refresh] [Settings] [Filter]

Select All | Select None

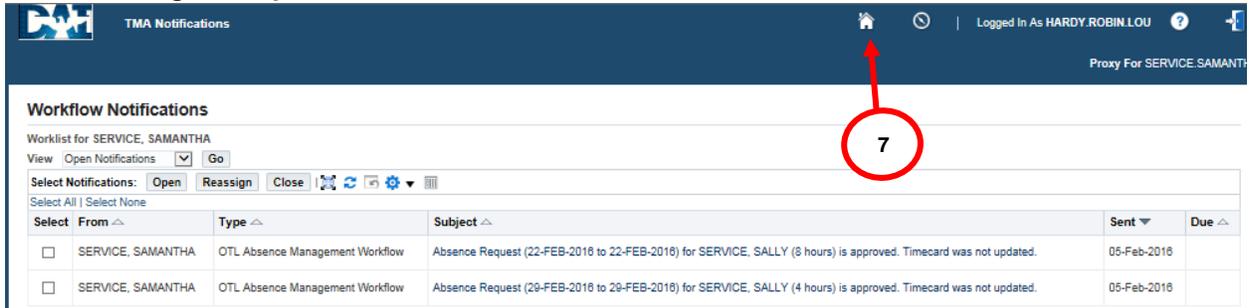
Select	From	Type	Subject	Sent	Due
<input type="checkbox"/>	SERVICE, SAMANTHA	OTL Absence Management Workflow	Absence Request (29-FEB-2016 to 29-FEB-2016) for SERVICE, SALLY (4 hours) is approved. Time card was not updated.	05-Feb-2016	
<input type="checkbox"/>	SERVICE, SALLY	OTL Absence Management Workflow	Absence Request (22-FEB-2016 to 22-FEB-2016) for SERVICE, SALLY (8 hours) requires approval	04-Feb-2016	07-Feb-2016

6. Continue to process all the remaining notifications (see Step 4).

Note: The first notification shows the leave request has been approved.

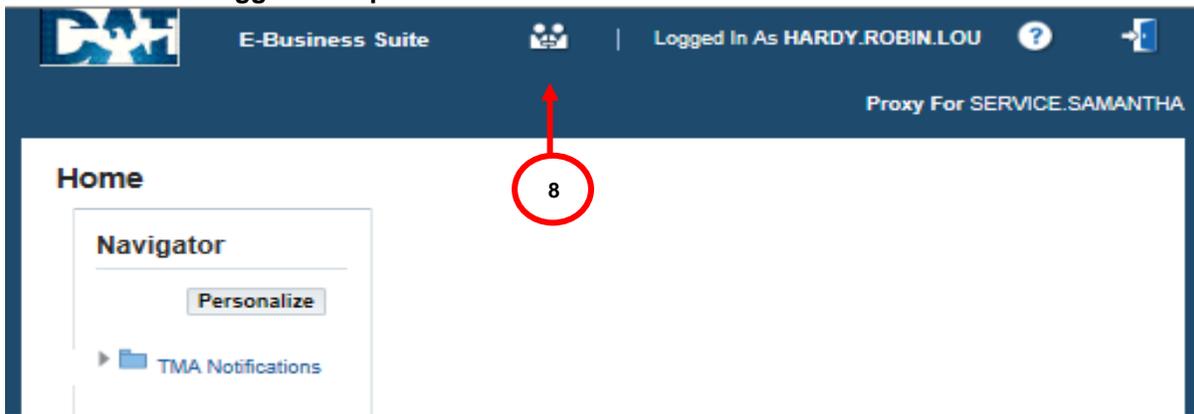


Return to Original Supervisor's notifications.



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.



View Logged In Supervisor's Home Page

Home

Navigator

Personalize

- Employee Time User TMA
- HR CSR TMA
- OTL CSR TMA
- OTL Supervisor Approver TMA
- Projects Budgets ALL TMA
- Super Timekeeper TMA
- Super Timekeeper TMA Ungraded
- TMA Notifications

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. .