

Manager (MSS): Reassign Approval Tasks for Out of Office

For Managers of Direct Reports

Intro

Purpose:	To reassign your approval tasks while out of the office, including: <ol style="list-style-type: none">1. Employee time cards,2. Employee absence requests, and3. Any other approval requests from your direct reports that may be submitted during the reassignment period.
How to Access:	From your Notification bell, click More Details to view drop down list. Select Human Capital Management.
Helpful Hints:	Be sure to keep in mind that... <ul style="list-style-type: none">• Reassignment removes you completely from the approval workflow during the reassignment period.• You may reassign your approvals on a temporary basis only.• Reassignment typically goes to the next level administrator or to the individual acting on a manager's behalf with signature authority.
Procedure:	Follow the steps below to reassign approval tasks...

Reassign Approval Task – For Out of the Office

If managers will be away and unable to respond to employee requests, managers **must temporarily reassign approvals to another appropriate employee**. **Reassignment typically goes to the next level administrator or to the individual acting on a manager's behalf with signature authority.*

Tasks can be reassigned in two ways:

- 1.) Reassignment of **all** time/absence submissions during a temporary timeframe* OR
- 2.) Reassignment of items one by one.

* Reassignment of all time/absence submissions is the recommended way to reassign approvals. *This must be done before employee submittals are received.*

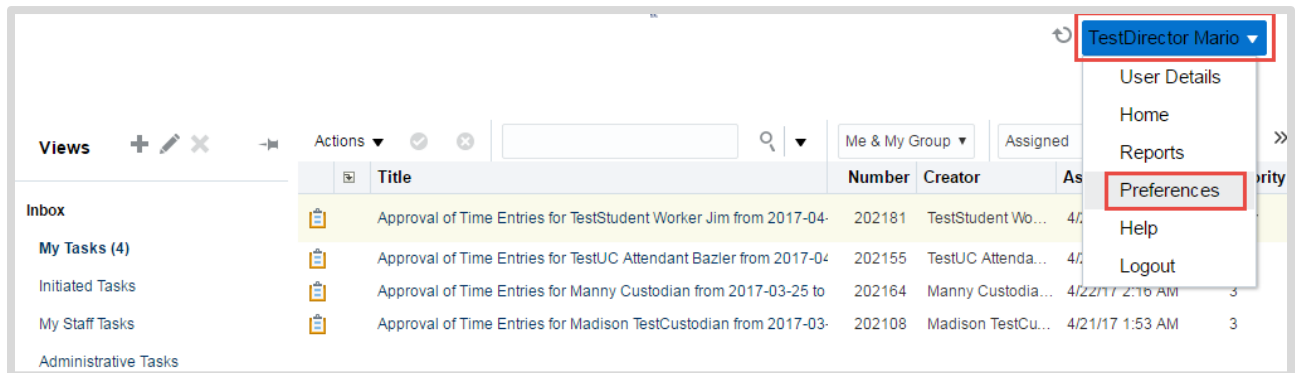
Note! Reassignment **removes you completely from the approval workflow** during the reassignment period. You will have **no visibility on approval status** and **you will lose all access to notifications for all employee submittals** during this period. All Bear Trax submissions by your direct reports during the reassignment period will be seen by the designee only.

Follow these steps to reassign all approvals:

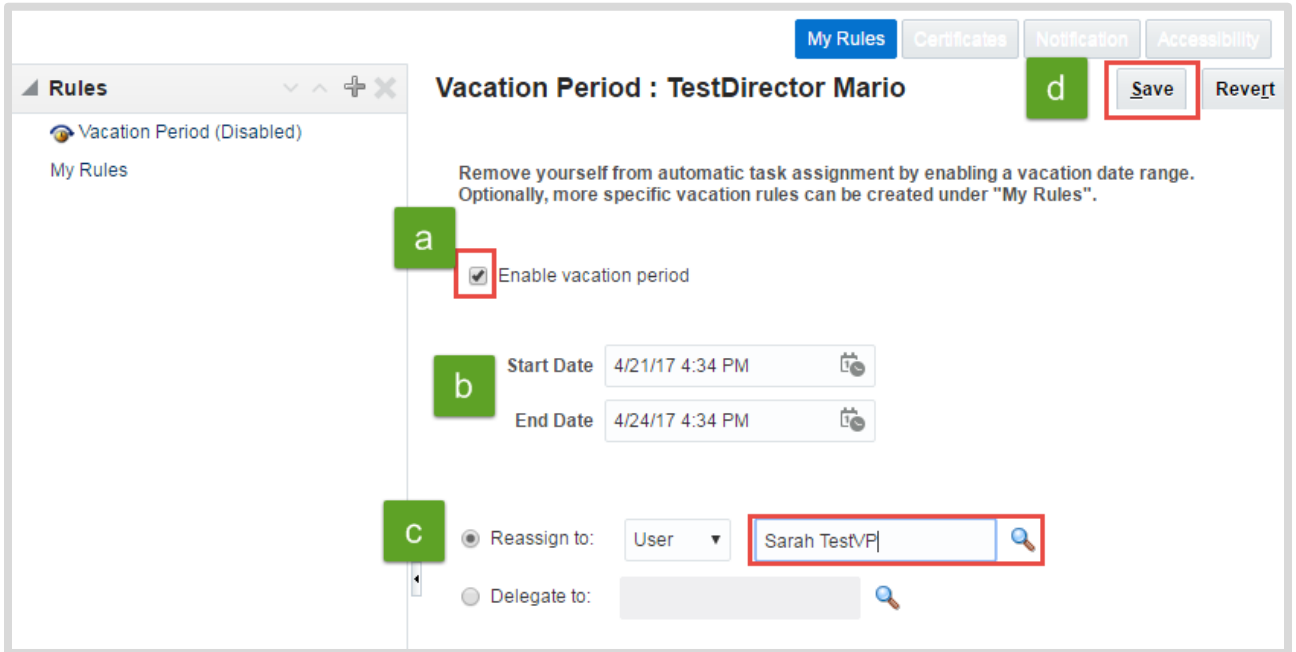
1. Click the Notification Icon. Click on the More Details dropdown arrow.
2. Click the Bell notification > Show All > Worklist



3. Click your name in the upper right-hand corner to view list of dropdown options. Select Preferences



4. Set a rule for your Vacation Period. Note: The option in BearTrax is called Vacation Period, but will work for any Out of Office reason.
 - a. Check the Enable Vacation Period box.
 - b. Enter Start and End Dates
 - c. Select Designee
 - d. Click Save.

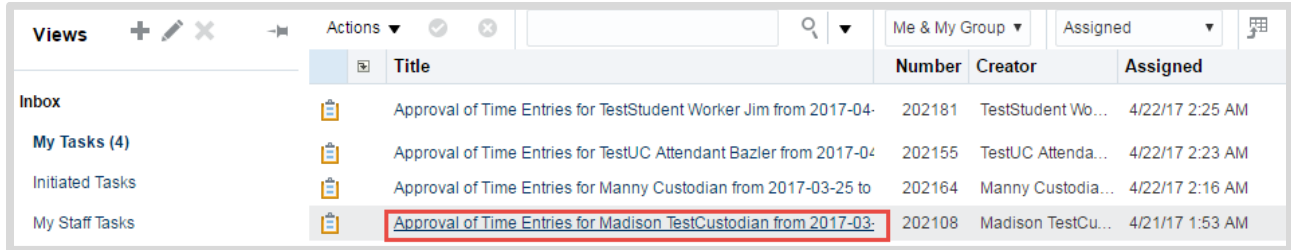


The screenshot shows the 'Vacation Period : TestDirector Mario' configuration page. At the top right, there are tabs for 'My Rules', 'Certificates', 'Notification', and 'Accessibility'. Below these are buttons for 'Save' (highlighted with a red box) and 'Revert'. A green box labeled 'd' is next to the 'Save' button. On the left, a sidebar shows 'Rules' with 'Vacation Period (Disabled)' and 'My Rules'. The main content area has a heading 'Vacation Period : TestDirector Mario' and a description: 'Remove yourself from automatic task assignment by enabling a vacation date range. Optionally, more specific vacation rules can be created under "My Rules"'. Below this, there are three main sections: 1. A checkbox labeled 'Enable vacation period' (highlighted with a red box) with a green box 'a' to its left. 2. Two date pickers: 'Start Date' (4/21/17 4:34 PM) and 'End Date' (4/24/17 4:34 PM), with a green box 'b' to the left of the first one. 3. Two radio buttons: 'Reassign to:' (selected) and 'Delegate to:'. The 'Reassign to:' section has a dropdown menu set to 'User' and a search input field containing 'Sarah TestVP' (highlighted with a red box), with a green box 'c' to the left. The 'Delegate to:' section has an empty search input field.

5. Remember! Task Reassignment must be done in advance of receiving employee submittals or you will need to reassign one by one.

Follow these steps to reassign items one by one:

1. Click the Notification Icon to view items requiring your action.
2. Click on the task title to open the time card or absence request.



Views	Actions	Title	Number	Creator	Assigned
Inbox		Approval of Time Entries for TestStudent Worker Jim from 2017-04-	202181	TestStudent Wo...	4/22/17 2:25 AM
My Tasks (4)		Approval of Time Entries for TestUC Attendant Bazler from 2017-04-	202155	TestUC Attenda...	4/22/17 2:23 AM
Initiated Tasks		Approval of Time Entries for Manny Custodian from 2017-03-25 to	202164	Manny Custodia...	4/22/17 2:16 AM
My Staff Tasks		Approval of Time Entries for Madison TestCustodian from 2017-03-	202108	Madison TestCu...	4/21/17 1:53 AM

3. Click on the Actions dropdown and select Reassign



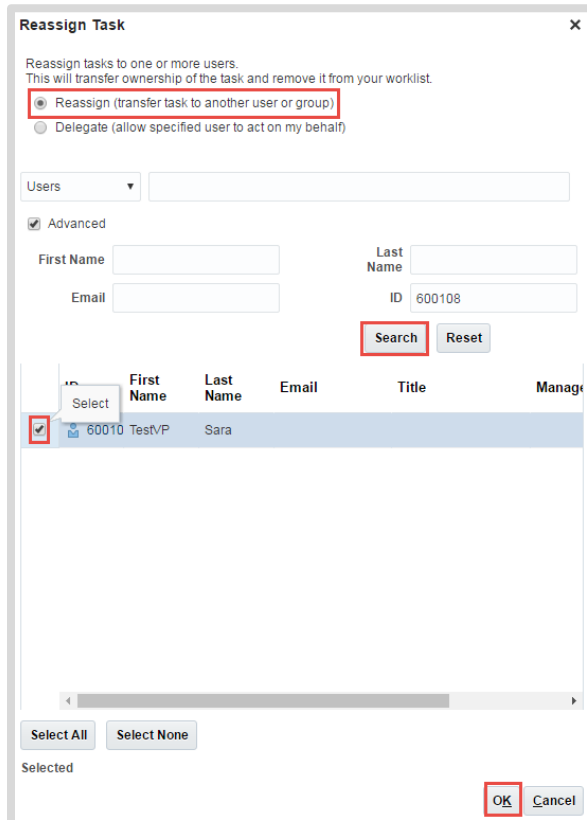
Approval of Time Entries for Madison TestCustodian from 2017-03-11 to 2017-03-24

Details

Assignee: 600100
From: 600081
Assigned Date: 4/21/17 1:53 AM
Task Number: 202108

Actions: Reassign...

4. Select designee for task reassignment and click OK.



Reassign Task

Reassign tasks to one or more users. This will transfer ownership of the task and remove it from your workload.

Reassign (transfer task to another user or group)

Delegate (allow specified user to act on my behalf)

Users: [Dropdown]

Advanced:

First Name: [Text Box] Last Name: [Text Box] ID: 600108

Email: [Text Box]

Search [Text Box] [Search] [Reset]

Select	First Name	Last Name	Email	Title	Manager
<input checked="" type="checkbox"/>	60010	TestVP	Sara		

Select All Select None

Selected

OK Cancel

Closing Notes

By following the instructions in this Job Aid you are able to reassign approval tasks on a temporary basis while you are out of the office.