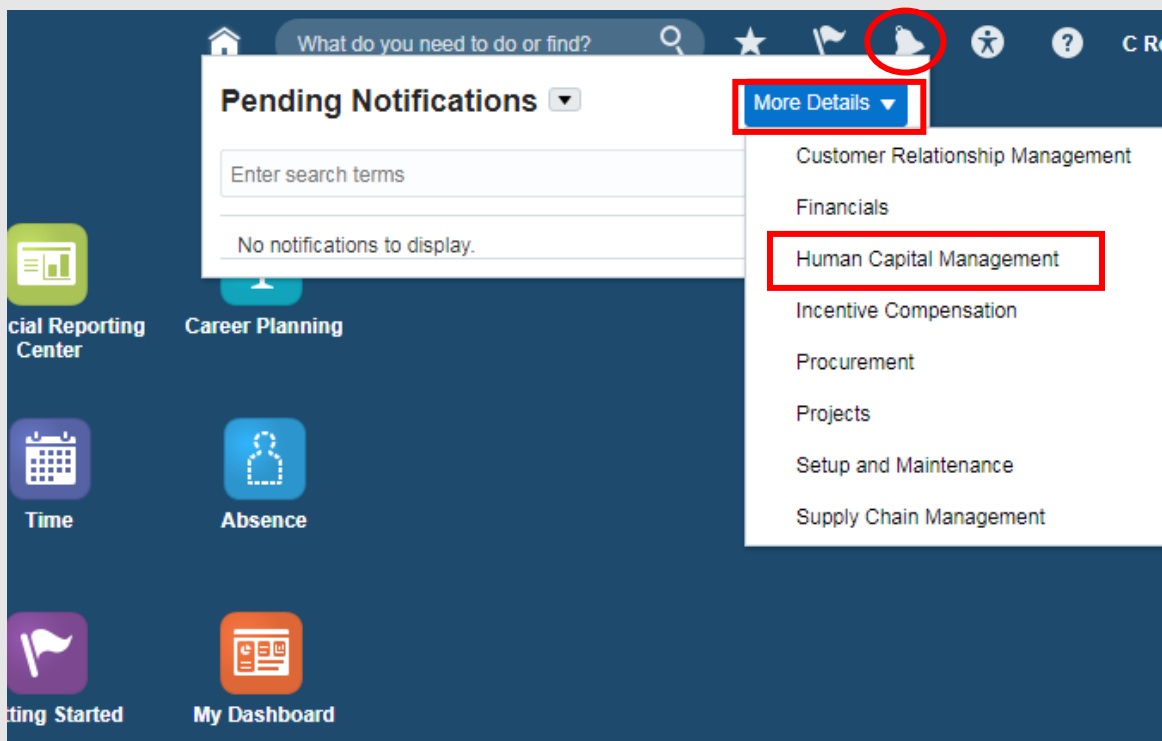


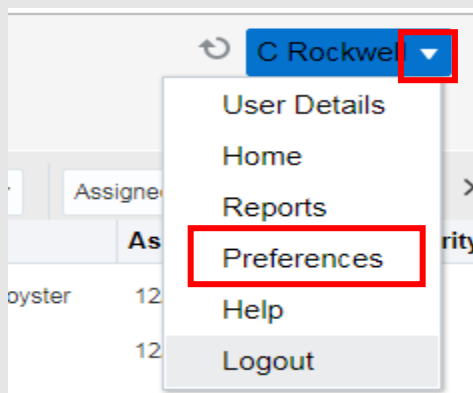
Delegation of Time Card Approval and Rejection

Use: A manager that is out on vacation, or needs to delegate time for any reason, is able to delegate the task of approving/rejecting time cards to another party. Both parties will receive notification of the submitted time cards and both are able to approve/reject the submission.

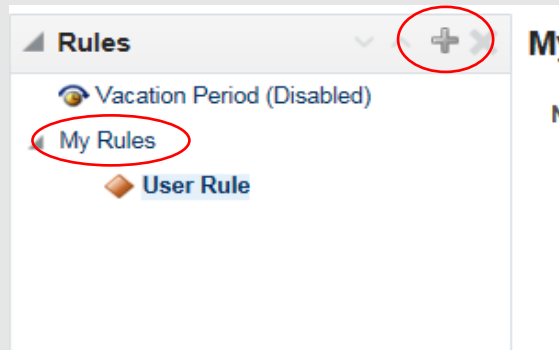
- 1) Log in to Bear Trax → click on the bell notification → click on the “More Details” dropdown → select “Human Capital Management”



- 2) Click on the dropdown arrow by your name → select “Preferences”



- 3) Click on MY Rules and ADD NEW RULE



- 4) The page that appears allows you to delegate specific tasks to the person that you have identified.

A screenshot of the 'My Rule' configuration page. The page has a header 'My Rule' and a sub-header 'Name *'. Below this is a text input field containing 'User Rule'. There is a checkbox labeled 'Use as vacation rule'. Below that is a section titled 'Execute rule only between these dates:' with 'Start Date' and 'End Date' fields. A 'TASKS' section follows, with a dropdown 'Tasks matching these conditions' and a 'Match' section with radio buttons for 'All' and 'Any'. Below this is a 'Task Type' dropdown and a search bar. An 'ACTION' section is at the bottom with radio buttons for 'Reassign to:', 'Delegate to:', 'Set outcome to:', and 'Take no action'. A user selection dropdown is also present.

- 5) Check either USE AS VACATION RULE (if vacation rule already set up) or select EXECUTE RULE ONLY BETWEEN THESE DATES. Enter the Rule Name for future use.

A screenshot of the 'My Rule' configuration page with specific values entered. The 'Name *' field contains 'Time Approval Delegation'. The 'Use as vacation rule' checkbox is unchecked. The 'Execute rule only between these dates:' checkbox is checked. The 'Start Date' field shows '12/11/17 3:57 PM' and the 'End Date' field shows '12/15/17 3:57 PM'. Both date fields have calendar icons.

- 6) Make sure that the tasks dropdown says “Tasks matching these conditions.” Next, click the magnifying glass on the “Task Type” line.

The screenshot shows a configuration window with a 'TASKS' dropdown menu set to 'Tasks matching these conditions'. Below this, there is a 'Match' section with radio buttons for 'All' and 'Any', and a '+' button. The 'Task Type' is set to 'is', and there is a search bar with a magnifying glass icon circled in red. A close button (X) is also visible.

- 7) Either scroll down to find the action that you’d like to delegate or enter something into the search bar.

The 'Task Type Browser' window displays a table of tasks. The search bar is empty, and the 'Search' button is visible. The table lists various task types, process names, descriptions, and outcomes.

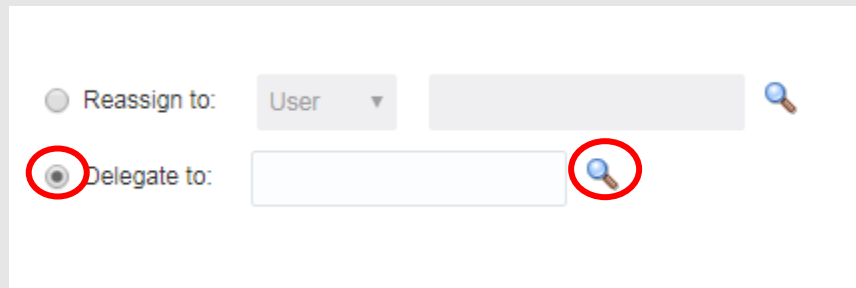
Task Type	Process Name	Description	Outcomes
AbsenceApprovalServic...	HcmEmploymentAbsences...		Ok
AbsenceCaseHumanTask	HcmEmploymentAbsences...		Approve, Rejec
AbsenceCatchAllExcep...	HcmEmploymentAbsences...		Ok
AbsencesApproval	HcmEmploymentAbsences...		Approve, Rejec
AbsencesApprovalsTask	HcmGblAbsencesRecordin...		Approve, Rejec
AddContactApproval	HcmPeopleProcessAddCo...		Approve, Rejec
AddContingentWorkerA...	HcmEmploymentCwkComp...		Approve, Rejec
AddDelegateWkrExcept...	HcmCompWorkbenchDele...		Approve, Rejec
AddDelegateWkrFyi	HcmCompWorkbenchDele...		Ok
AddDelegateWkrTask	HcmCompWorkbenchDele...		Approve, Rejec
AddNewAssignmentAp...	HcmEmploymentManageA...		Approve, Rejec

- 8) For example, in order to delegate time card approval/rejection to someone, just type “time” in the search bar and click search. Select “TimecardApproval” under “Task Type” and then click “OK”

The 'Task Type Browser' window shows the search bar with 'time' entered and the 'Search' button highlighted. The table below shows the results of the search, with 'TimecardApproval' selected. The 'OK' and 'Cancel' buttons are at the bottom right.

Task Type	Process Name	Description	Outcomes
ProjectTimecardApproval	HcmTimeApprovalsCompo...		Approve, Rejec
TimeCardErrorFYI	HcmTimeApprovalsCompo...		Ok
TimecardApproval	HcmTimeApprovalsCompo...		Approve, Rejec
TimecardApprovalFYI	HcmTimeApprovalsCompo...		Approve, Rejec

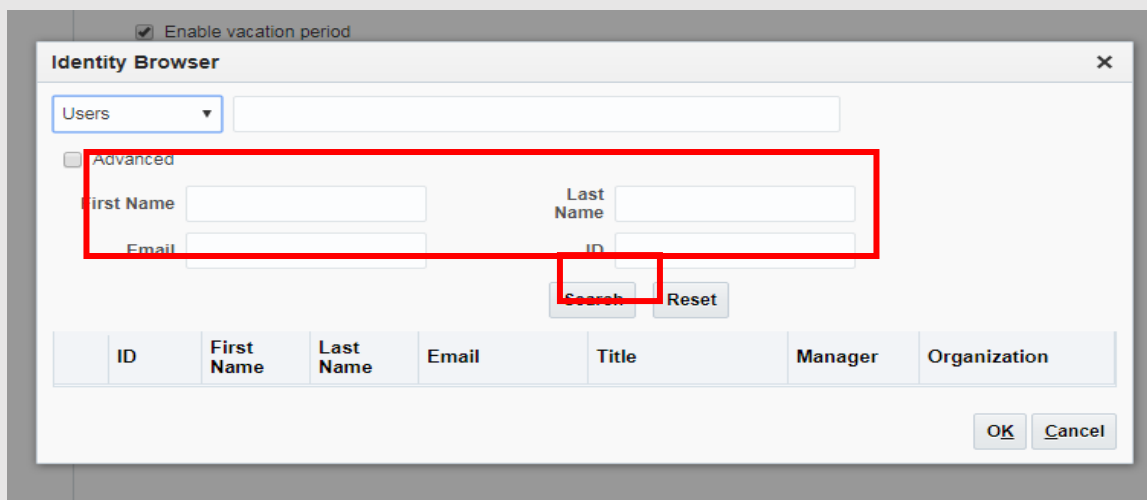
- 9) Next, mark the circle that says “delegate to” and then click on the magnifying glass icon to search for the person that you’d like to delegate the task to.



Reassign to: User [Search Icon]

☒ Delegate to: [Search Icon]

- 10) Type in either the person’s first name, last name, email, or ID number → click “Search”



Enable vacation period

Identity Browser

Users [Search Icon]

Advanced

First Name [Text Box] Last Name [Text Box]

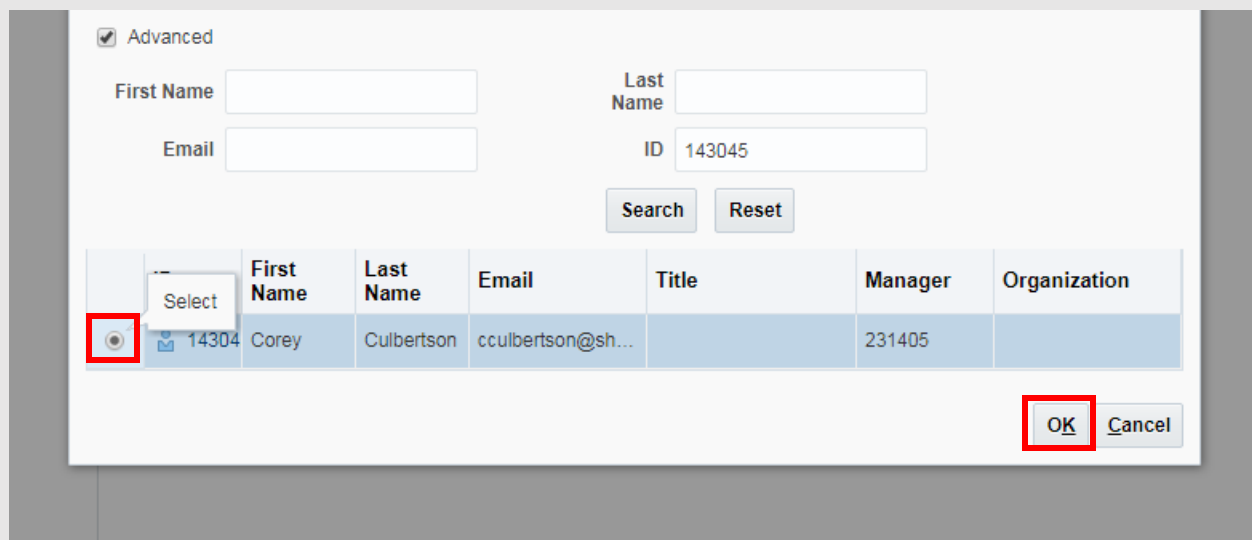
Email [Text Box] ID [Text Box]

Search Reset

ID	First Name	Last Name	Email	Title	Manager	Organization
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OK Cancel

- 11) Once you’ve found the person that you’d like to delegate the task to, mark the circle beside their name and click “OK”



Advanced

First Name [Text Box] Last Name [Text Box]

Email [Text Box] ID 143045

Search Reset

	First Name	Last Name	Email	Title	Manager	Organization
<input checked="" type="radio"/>	Corey	Culbertson	cculbertson@sh...		231405	

OK Cancel

12) Click on “save” at the top right hand corner

