|  |  |
| --- | --- |
| Security Role |  |
| Responsibility/Role |  |
| File Name |  |
| Version |  |
| Document Generation Date | **12/15/2010** |
| Date Modified | **12/15/2010** |
| Last Changed by |  |
| Status |  |

## EX.020.400 - Assigning an Alternate User (Vacation Routing)

#### Trigger:

#### Concept

This topic demonstrates how an administrator can assign an Alternate User on behalf of an employee. Approvers have the ability to assign their own Alternate Users through the My System Profile link in both the Self-Service and Core portals. See Business Process documents EX.010.013 and EX.010.014 for additional information.

If an Expenses approver is going to be on vacation or some other type of temporary leave, his/her Worklist transactions should be temporarily routed to another employee. If you need to change an approval routing for a more permanent period of time, make this update to the Approver Assignment page instead of using the Alternate User functionality (see Business Process EX.010.012).

The Alternate User functionality allows an administrator to select a User ID from within the system and specify that his/her future Worklist items should be routed to another employee for a defined period of time. After that time has passed, future tasks are automatically routed back to the original User ID.

**Caution:** The Alternate User that is specified must have adequate security rights to perform the tasks that are assigned to him/her. For example, if “Anne” is going on vacation and you reassign his Worklist items to “Bill”, “Bill” must have the approval security role(s) to process the transactions. If “Bill” does not have the appropriate security, the transaction will still be routed to him, however he cannot act on the transaction; the Workflow administrator will need to manually reassign any transactions that are routed to him.

**Note:** When applying an alternate User ID, make note of the fact that the system only sends workflow routings to the immediate alternate User ID. The system does not send routings down multiple levels of alternate User IDs. For example, assume “Andy” specifies “Barbara” as the alternate user ID while he is out of the office. Also assume that “Barbara” happens to be out of the office at a time during user “Andy’s” absence, and “Barbara” has specified “Charles” as an alternate User ID. In this case, the system does not send workflow routings originally intended for “Andy” to “Charles”.

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Identify the purpose of specifying Alternate Users.

- Define where an Alternate User may be defined.

- Identify which transactions are re-routed when an Alternate User is specified.

- Assign an Alternate User.

|  |
| --- |
| Assumptions |
|  |

|  |
| --- |
| Dependencies/Constraints |
|  |

#### Additional Information

#### Procedure

For this topic, let’s imagine that Andrea Harder notified you that she will be on vacation from 3/10/08 through 3/15/08 and has requested that her Workflow transactions from Expenses and e-Procurement be routed to Alice Bray during this time. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | Click the **PeopleTools** link. |
|  | Click the **Security** link. |
|  | Click the **User Profiles** link. |
|  | Click the **Distributed User Profiles** link. |
|  | By using the **Distributed User Profile** page, an administrator with the appropriate security access can assign an Alternate User for any User ID in the system.  As an alternative, approvers can assign an alternate for their own UserID through the **My System Profile** page in either the Self-Service or Core portal. |
|  | For this exercise, imagine that you were notified by Andrea Harder that she will be on vacation from 3/10/08 - 3/15/08. She has requested that her Workflow items from Expenses and E-procurement be routed to Alice Bray, the approver in another department during this period. |
|  | Click the **Search** button to select the User ID who you wish to assign an Alternate User to.  For this example it will be, Andrea Harder. |
|  | Click an entry in the **User ID**column.  For this exercise, we will use the User ID for Andrea Harder. |
|  | The General tab is display only and can be adjusted only by the security administrator. |
|  | Click the **Workflow** tab. |
|  | Notice which employee is listed next to the User ID and Description fields. Any changes you make on this page will effect the Workflow for this user, Andrea Harder. |
|  | The **Workflow Attributes**section is used to re-route future transactions for a temporary period of time.  This section will NOT re-route transactions which are already in the employee's Worklist queue. |
|  | The **Reassign Work To**section is used to re-route transactions which are already in an approver's queue. This action can also be done through the Travel and Expenses navigation (see business process EX.080.105). |
|  | CAUTION: Both the **Workflow Attributes** and **Reassign Work To**components effect both Expenses and Eprocurement Workflow (in the event that a User is an approver for both modules). |
|  | Based on the scenario for this exercise, we need to assign Andrea Harder's transactions to Alice Bray for the period from 3/10/08 - 3/15/08.  Since we know the first few letters of Alice's User ID, we can search for her complete User ID by inputting these letters. |
|  | Enter "**ab**" in the **Alternate User ID** field. |
|  | Click the **Look up Alternate User ID (Alt+5)** button. |
|  | Click an entry in the **User ID** column. |
|  | Enter "**3/10/08**" in the **From Date** field. |
|  | Enter "**3/15/08**" in the **To Date** field. |
|  | Click the **Save** button. |
|  | Any transaction (whether it be an Expense transaction or an E-procurement transaction) will now be routed to the Alternate User ID, ABRAY, for this period of time.  After 3/15/08, subsequent transactions will route back to the original employee, Andrea Harder. |
|  | For informational purposes, the Alternate User ID and Dates will not disappear after the listed From and To Dates have passed. This information will continue to display on this page, so that the next time you wish to view/assign an alternate you can determine the last time you used this functionality and who received the transactions. |
|  | Congratulations. You have just completed the **Assigning an Alternate User (Vacation Routing)** topic. Below is a summary of the key concepts of this topic:  - By specifying an Alternate User when you are away from the office on leave, you temporarily route your Worklist transactions to another employee.  - Approvers can assign their own Alternate User in either the Core or Self-Service Portal. If needed, an Expenses Administrator can complete this on their behalf through the Distributed User Profile page.  - When using the Alternate User functionality, only future transactions will be rerouted for a temporary period of time. Transactions that are already in an employee’s Worklist queue will not be rerouted.  **End of Procedure.** |