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## EX.010.014 - My System Profile - Alternate User Routing

#### Trigger:

#### Concept

This topic demonstrates how to review the information in the “My System Profile” link in the Core Application and how to specify an Alternate User in the event that you are an approver and you will be on temporary leave.

HRMS (Human Resources Management System) is the official record for Employee information. The Expenses Module pulls employee information such as User ID, Employee ID, home department, hire date, etc., from HRMS so that the information does not have to be duplicated in the Financials Application.

There are two "My System Profile" links which are available, one in the HRMS application and one in Financials. Although the link is named the same, there are different options depending on whether you update the HRMS My System Profile or the Financials My System Profile. The My System Profile link in the Financials Application can be accessed through either the Self-Service or Core portals - it is the same page.

One key difference between the HRMS and the Financials "My System Profile" pages, is the ability to add an alternate user on the Financials My System Profile page. If you are an approver at any level, you can assign your own alternate user to receive your future worklist transactions if you will be out of the office or on vacation for a temporary period of time.

Business Process document ***EX.010.013*** discusses the My System Profile for HRMS and the Finance Self-Service portal. This topic will cover the My System Profile for the Core Financial Application.

**Topic Objectives:**

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

- Identify the purpose of specifying an Alternate User.

- Identify who can specify an Alternate User through their “My System Profile” page.

- Define any special security requirements for the Alternate User.

- Identify the impact of assigning an Alternate User if you are a designated approver for both Expenses and e-Procurement.

- Specify an Alternate User through the “My System Profile” page.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, let’s imagine that you will be out of the office from 3/15/08 through 3/20/08. You need to select “EMPL3” as your Alternate User using the Core Financials Application. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | Click the **My System Profile** link. |
|  | If you need to change your password, you can do so from this page.  This password will sync back to the HR system so that the same password can be used to access both your HRMS information and your Financials system access. |
|  | Please ignore the **Personalizations** section, as we are not using this functionality at this time. |
|  | If you are an Expenses approver and you will be on vacation or some other type of temporary leave, you should route your Worklist transactions temporarily to another employee in your absence. If you need to make a permanent routing change, you should contact your Expenses Administrator, and he/she can 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 approver to specify that his/her future Worklist items should be routed to another employee for a defined period of time. After the time has passed, future tasks are automatically routed back to the original User ID.  The Expenses Administrator also has the ability to assign an alternate user on behalf of an employee (see Business Process EX.020.400) |
|  | For this exercise, imagine that you will be on vacation next week and will not be available to approve your normal Workflow transactions for your department.  The Alternate User section allows you to specify who will be your alternate approver in your absence. |
|  | CAUTION: Assigning an Alternate User will cause both your Expenses and E-Procurement transactions to route to the designated individual in the event that you are an approver for both modules. |
|  | For this exercise, you wish to have the User ID "**EMPL3**" receive your Workflow transactions from 3/15/08 to 3/20/08. |
|  | Enter "**EMPL3**" in the **Alternate User ID** field.  You can also search for a User ID by clicking the Look-up button next to this field.  Due care should be taken to ensure that the individual you assign to be your alternate can make informed and inpartial decisions on your Worklist transactions. |
|  | Enter "**3/15/08**" in the **From Date** field. |
|  | Enter "**3/20/08**" in the **To Date** field. |
|  | Any transaction (whether it be an Expense transaction or an E-Procurement transaction) will now be routed to the Alternate User ID, EMPL3, for this set period of time.  After 3/20/08, subsequent transactions will route back to you. |
|  | For informational purposes, the Alternate UserID and From and To Dates do not disappear from this page whenever the time period for your alternate user has ended.  Thus, even though transactions will stop routing to the alternate, you will still be able to see who the last alternate was that you used, and for which time period. |
|  | **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 her 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”. |
|  | Do not adjust the **Workflow Attributes**. These checkboxes have no functioning at this time. |
|  | Expenses Workflow notifies travelers and approvers through email that the status of a transaction has changed or that an action needs to be taken. Thus, to receive these email notifications, all travelers and approvers must have a valid email address.  This email address is updated on this page. |
|  | An employee can enter/store multiple email addresses on this page, however he/she can select only one Primary Email Account.  This primary email account will receive Expenses Workflow notifications. |
|  | Click the **Save** button. |
|  | Click the **Home** link when you are finished reviewing your My System Profile. |
|  | Congratulations. You have just completed the **My System Profile – Alternate User Routing** topic. Below is a summary of the key concepts of this topic:  - You can change your password through either the HRMS or Financials My System Profile pages. The password change will sync between the two systems, allowing you to use only one password for both applications.  - By specifying an Alternate User when you are away from the office on leave, you temporarily route your Worklist transactions to another employee.  - The Alternate User must have adequate security rights to perform the tasks assigned to them. If the Alternate User does not have the adequate security rights, they will still received the transaction but will be unable to act on it. The Workflow Administrator will need to manually reassign those transactions.  - When using the Alternate User functionality, the system only sends Workflow routings to the immediate Alternate User ID. It does not send routings down multiple levels of alternate User IDs.  - Assigning an Alternate User will cause both your Expenses and e-Procurement transactions to route to the designated individual in the event that you are an approver for both modules.  **End of Procedure.** |