

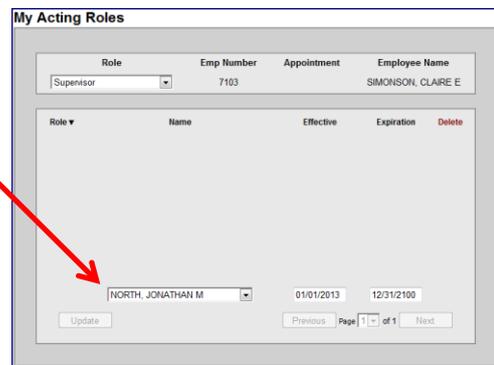
Assigning an Acting (Backup) approver

Acting (Backup) Approvers:



VTI allows you to designate another supervisor as your backup.

1. Click the Admin button and select **My Acting Roles**.
2. Use the pulldown in the blank field at the bottom of the form to select another supervisor. You can assign an 'acting' role only to someone who has the system Supervisor role.
3. You can specify Effective and Expiration dates (optional). Click **[Update]** to save your selection.



Role	Emp Number	Appointment	Employee Name
Supervisor	7103		SIMONSON, CLAIRE E

Role	Name	Effective	Expiration	Delete
	NORTH, JONATHAN M	01/01/2013	12/31/2100	

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4. **To remove an Acting Approver:** open the My Acting Roles form, and click the Delete box on the same row as their name.

PLEASE NOTE: Acting Approvers must have a VTI account *and* be assigned the Supervisor Role. They should also receive Approver training so they know how to complete the task. If the person you want to delegate is not in the system already, please submit a service request to ishelp@ci.stpaul.mn.us and specify TASS in the subject line. You will be contacted for more information about the new user.

How it works: During the Effective period, all your employees' timecards will be available to your Acting Approver on the Document Review screen. All they need to do is select your name in the Supervisor field to retrieve your employee documents.

How Acting Roles work with Inbox: If you want to deliver your employee documents directly into your backup approver's Inbox, go to your own Inbox and click **Forwarding On**.



You will NOT get a notice from VTI when someone designates you to be their Acting Approver, so it is important to communicate directly with your backup approvers.



How to review someone else's documents as their Acting Approver:

From **Who Is In** or **Document Review**: use the pulldown in the Supervisor field to choose who you are 'acting' as: yourself or the time approver who assigned you to be their backup. This will filter your display to show the right employees.

Who Is In

Start	Stop	Role	Supervisor	
01/18/2013	01/18/2013	Supervisor	MOSER, LYNN M	2 exceptions found
			MOSER, LYNN M	
			SIMONSON, CLAIRE E	
			Supervisor	
Name			Location	Star
ORTIZ, JUAN A	0800-1630		01/18 Fri	
RANWEILER, KIMBERLY M	0700-1530		01/18 Fri	

From the **Inbox**: when your Inbox is open, you will see additional black bars with the name(s) of the other supervisors who have chosen you as their backup. Click on those names to expand 'their' Inbox view.

(5)Inbox: Two, Supervisor Forwarding(Off)

-(3) Leave Req
Twelve, Test User 2/1/2013 4:29 PM Supervisor
Twelve, Test User 2/4/2013 4:07 PM Supervisor
Thirteen, Test User 2/5/2013 10:06 AM Supervisor

-(2) Start-Stop
Twelve, Test User 02/08/2013 Supervisor
Fourteen, Test User 02/08/2013 Supervisor

(6)Forwarded Inbox: One, Supervisor

(4)Forwarded Inbox: Three, Supervisor





Document Review / Refining your search:

Save your Search criteria:

The default settings in the Review screen will give you all your employees' timecards. If you want to refine the retrieval, you can modify the search criteria.

You can save those 'custom' searches to re-execute later:

1. Select all the search criteria you want and click [Search]. Remember that you cannot search for Missing documents in a previous pay period.
2. Click your mouse in the Search Description field (far left) and type the name of the search you want to save.
3. Click the [Update] button at the far right.

Caution: The Update button should NOT be used unless you have given the search a new name in step 2. If you do not specify a new name for your new search, you will be modifying your *default* search, and future document review sessions may not retrieve all your employees' timecards. You risk overlooking an employees' timecard if you fail to do a complete retrieval when it is time to do review and approval.

The proper default search criteria are found on page 3 of the handout titled "Timecard Approver-Youth Job Corps Employees."

The screenshot shows a complex search form with multiple sections. On the left, there are dropdowns for Role and Supervisor, a text field for Search Description, a dropdown for Pending count, a dropdown for Error Types, and input fields for Emp ID and Emp Name. In the center, there are dropdowns for Pay Cycles, Duration (Pay Period, Pay Week), and Start/Stop dates. On the right, there are dropdowns for Documents, Workflow Status, Sort Order, and Pay Code. At the bottom right, there are buttons for Update and Delete. A checkbox for 'Search by transaction date' is also visible.

To re-execute a search that you have saved:

1. Click the [Return] button to go back to normal search mode.
2. In the Search Description field, use the pulldown to select the name of the search you want, then click [Search].

To modify a saved search (from advanced search mode):

1. In the Search Description field, use the pulldown to select the name of the search you want
2. Change the search criteria and [Search] to confirm that it is what you want.
3. Click [Update] to save the new criteria over the old name.

To delete a saved search (from normal search mode):

1. In the Search Description field, select the name of the search.
2. Click the [Advanced] button to display advanced search features.
3. Click the [Delete] button to remove the saved search.