

APPROVALS – ADDENDUM ON TIME ENTRY

Project IRIS

Change Management Team

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Approving Time Entry

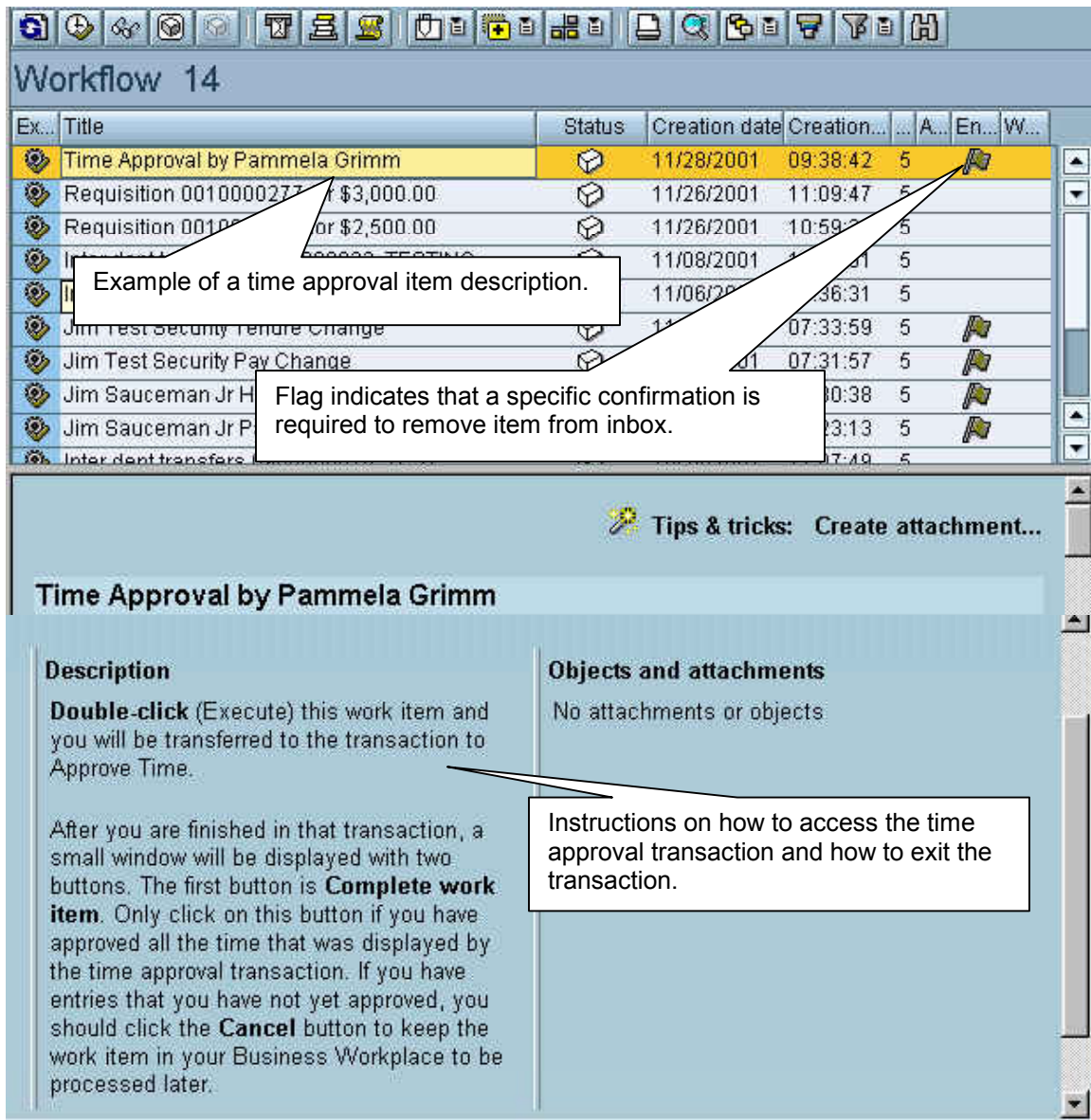
The time entry approvals will appear in your Inbox as a work item. A special program must be run each day to transfer the work items to the Inbox.

If you have correctly set up your email forwarding, you will be sent an email at 4 pm EST each day if there are item to be approved in your workflow inbox. If you need information on how to set up your e-mail forwarding, please refer to the document “Email Forwarding from IRIS” found on the IRIS web site (<http://admin.tennessee.edu/iris>) under the Workflow topic.

The Workflow Item

A sample workflow screen with time approval items is shown below. Note that the item description gives the name of the person expected to approve the time contained in the workflow item.

If you approve time for both cost centers and WBS elements, you will have two separate work items for time approval, one for the cost centers and one for the WBS elements.




The screenshot shows a software interface titled "Workflow 14". At the top is a toolbar with various icons. Below it is a table with columns: Ex..., Title, Status, Creation date, Creation..., A..., En..., W... The first row is highlighted in yellow and contains the text "Time Approval by Pammela Grimm". A callout box points to this row with the text "Example of a time approval item description." Below the table, a detailed view of the selected item is shown. It has a title "Time Approval by Pammela Grimm" and a "Description" section. The description starts with "Double-click (Execute) this work item and you will be transferred to the transaction to Approve Time." and continues with instructions on how to use the "Complete work item" and "Cancel" buttons. A callout box points to the "Double-click" instruction with the text "Instructions on how to access the time approval transaction and how to exit the transaction." To the right of the description is an "Objects and attachments" section which says "No attachments or objects". A callout box points to a flag icon in the table with the text "Flag indicates that a specific confirmation is required to remove item from inbox."

Ex...	Title	Status	Creation date	Creation...	A...	En...	W...
	Time Approval by Pammela Grimm		11/28/2001	09:38:42	5		
	Requisition 0010000277 for \$3,000.00		11/26/2001	11:09:47	5		
	Requisition 0010000277 for \$2,500.00		11/26/2001	10:59:27	5		
	...		11/08/2001	...	5		
	...		11/06/2001	...	5		
	Jim Test Security Pendre Change		11/28/2001	07:33:59	5		
	Jim Test Security Pay Change		11/28/2001	07:31:57	5		
	Jim Sauceman Jr H...		11/28/2001	...	5		
	Jim Sauceman Jr P...		11/28/2001	...	5		
	Inter dent transfers		11/28/2001	...	5		

Time Approval by Pammela Grimm

Description
Double-click (Execute) this work item and you will be transferred to the transaction to Approve Time.
 After you are finished in that transaction, a small window will be displayed with two buttons. The first button is **Complete work item**. Only click on this button if you have approved all the time that was displayed by the time approval transaction. If you have entries that you have not yet approved, you should click the **Cancel** button to keep the work item in your Business Workplace to be processed later.

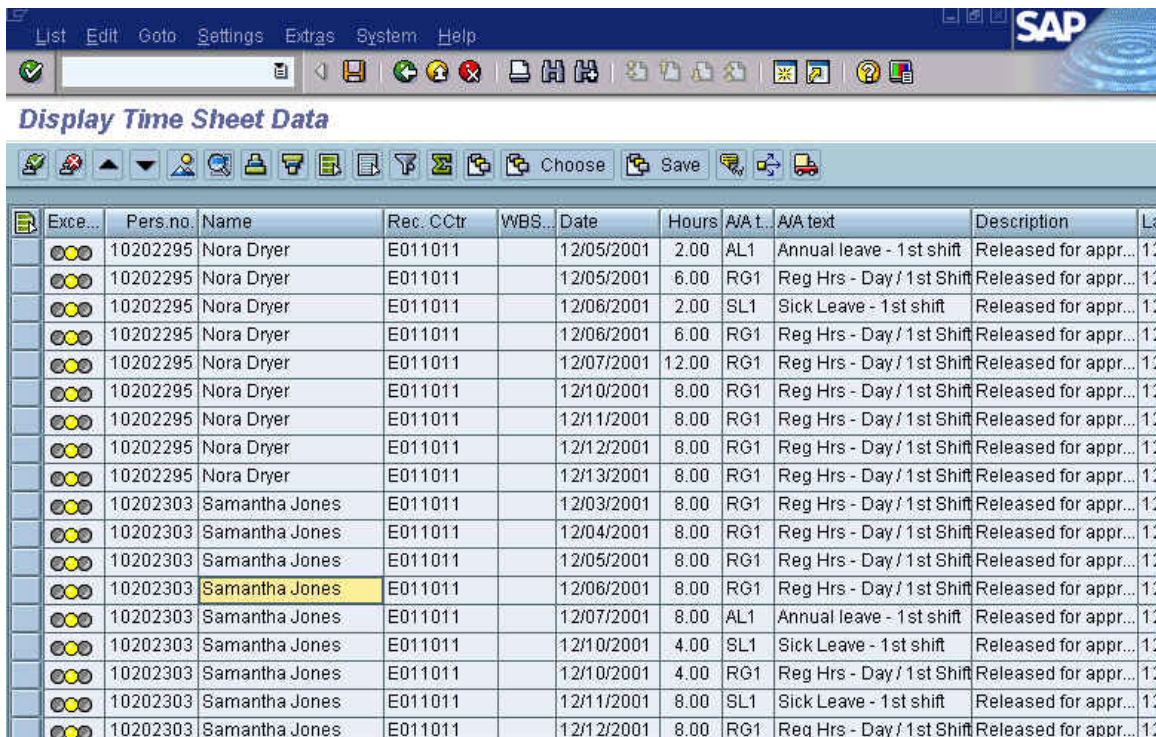
Objects and attachments
 No attachments or objects

To view the screen that will allow you to approve or reject time entry, either double click on the item or single click on the item and then click on the *Execute* icon, .

Remember that the instructions in the lower portion of the screen will tell you the procedures necessary to reach the approval transaction.

The Time Sheet Display Screen

The time approval screen for biweekly employees is shown below. If there are multiple employees to be approved, they will be in numerical order by the personnel number, not alphabetical order by name.



Exce...	Pers.no.	Name	Rec. CCtr	WBS...	Date	Hours	A/A t...	A/A text	Description	L...
	10202295	Nora Dryer	E011011		12/05/2001	2.00	AL1	Annual leave - 1st shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/05/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/06/2001	2.00	SL1	Sick Leave - 1st shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/06/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/07/2001	12.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/10/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/11/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/12/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202295	Nora Dryer	E011011		12/13/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/03/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/04/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/05/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/06/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/07/2001	8.00	AL1	Annual leave - 1st shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/10/2001	4.00	SL1	Sick Leave - 1st shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/10/2001	4.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/11/2001	8.00	SL1	Sick Leave - 1st shift	Released for appr...	12
	10202303	Samantha Jones	E011011		12/12/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...	12



This screen contains all of the basic information you will need to determine if the time should be approved or rejected. The data displayed is from the development system, so no real employee names are shown.



The approval screen will display one line of information for each entry on the employee's IRIS time sheet. Additional lines will also be shown for any changes made after an initial approval.

You can approve or reject the entries one line at a time or you can select and approve or reject all lines simultaneously or you can select all lines and just deselect the lines that you do not wish to approve or reject.

The column content

Before explaining the specific lines on the sample, the content of the columns needs to be defined. Moving from left to right, the columns are:

- **Selection boxes** - The blank squares at the far left of each line are selection buttons. If you click on one, that line will be selected. The line will change color to indicate that it has been selected. Clicking on the icon in the column heading for the selection buttons, , will select all lines.
- **Exec..** - A line of three lights, , in the *Exception* column indicates the status of each item. From left to right: Red indicates that the line has been rejected. Yellow indicates that no action has been taken for this line. Green indicates the line has been approved. If you choose to approve/reject one employee at a time, this feature can insure that you haven't missed anyone.
- **Pers. no.** – Personnel number is the employee ID number that will allow you to verify this is the correct person—if there is any question about a name being duplicated.
- **Name** - The employee name associated with the employee ID number.
- **Rec. Cctr** - The cost center paying for this time (if a cost center is paying).
- **WBS...** - The WBS element paying for this time (if a WBS element is paying).
- **Date** - The date the hours were worked or taken. For biweekly positive input employees, there is at least one line of information for each day in the pay period that the employee worked or took hours. If multiple types of hours were worked or taken on the same day, there will be multiple lines. For example, on a given day an employee worked 6 regular hours but then took 2 hours of sick leave. There will be two lines of data for that day, one for the regular hours and one for the sick leave hours as shown below.

	10202295	Nora Dyer	E011011		12/06/2001	2.00	SL1	Sick Leave - 1st shift	Released for appr
	10202295	Nora Dyer	E011011		12/06/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr

For monthly no-input employees, there will be entries only for deviations from their regular work schedule. For example, if sick leave or annual leave is taken, there will be an entry. If a non-exempt monthly employee works more hours than scheduled, there will be an entry for the “extra” hours. Exempt monthly employees and faculty will have no regular hours.

- **Hours** - The number of hours that were worked or taken on that date for the specific Attendance/Absence type.
- **A/A t...** - The *A/A type* column shows the code for the type of absence or attendance hours being accounted for.
- **A/A text** - A text translation of the type of absence/attendance code. The most typical types of hours are regular work hours, annual leave, sick leave, or compensatory time banked or taken.
- **Description** – An indication of the reason this line is shown. Most descriptions read “Released for Approval,” but some may read “Changed after approval.” The reason for this description is discussed below in the section on *Interpreting the information*.

The following two columns are not shown on the sample screen, but can be viewed on your screen by scrolling the screen to the right.

- **Last change** – The date when the entry in this line was entered or changed.
- **Change** – User ID of the person who entered the line or last changed the line.

REMEMBER: You can approve or reject the entries:

- one line at a time,
- all lines simultaneously,
- all but a few lines (by selecting all lines and deselecting just the few lines that you do not wish to approve or reject).

Interpreting the information

Now look at the contents of specific lines. Another sample screen is shown below. Remember this is for biweekly employees.

Display Time Sheet Data



Exce...	Pers.no.	Name	Rec. Cctr	WBS...	Date	Hours	A/A t...	A/A text	Description
	10202265	William Tell	E011011		12/12/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202265	William Tell	E011011		12/13/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/03/2001	9.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/03/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Changed after appr...
	10202295	Nora Dryer	E011011		12/04/2001	1.00	CTB1	Comp Time Bank - 1s...	Released for appr...
	10202295	Nora Dryer	E011011		12/04/2001	2.00	CTB1	Comp Time Bank - 1s...	Changed after appr...
	10202295	Nora Dryer	E011011		12/04/2001	9.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/04/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Changed after appr...
	10202295	Nora Dryer	E011011		12/05/2001	2.00	AL1	Annual leave - 1st shift	Released for appr...
	10202295	Nora Dryer	E011011		12/05/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/06/2001	2.00	SL1	Sick Leave - 1st shift	Released for appr...
	10202295	Nora Dryer	E011011		12/06/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/07/2001	12.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...
	10202295	Nora Dryer	E011011		12/10/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr...

Most of the lines have a description of “Released for approval.”

Note that some lines do not have a “traffic light” symbol to the left of the line. All of those lines have a description of “Changed after approval.” This indicates that the entry on that line had been approved and then, after the approval, the time had been changed and now the new entry needs to be approved. The lines without the “traffic light” symbol are informational lines only and do not require approval.

The first two lines for Nora Dryer on the screen for 12/03/2001 are shown below.

	10202295	Nora Dryer	E011011		12/03/2001	9.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr
	10202295	Nora Dryer	E011011		12/03/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Changed after ap.



These lines illustrate an employee who was mistakenly shown to work 8 hours on that date, but really worked 9. The correction was made after the 8 hours had been approved, so the system is telling you that this is a second approval because of a correction and it shows what is being corrected. The original hours are described as “Changed after approval.”

The next four lines for Nora, for 12/04/2001, display an example of the employee working 10 hours on that day. They are shown below.

	10202295	Nora Dryer	E011011		12/04/2001	1.00	CTB1	Comp Time Bank - 1s...	Released for appr
	10202295	Nora Dryer	E011011		12/04/2001	2.00	CTB1	Comp Time Bank - 1s...	Changed after ap.
	10202295	Nora Dryer	E011011		12/04/2001	9.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr
	10202295	Nora Dryer	E011011		12/04/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Changed after ap.

Initially the employee wanted to bank the extra hours as comp time. So the initial hours approved were for 8 regular hours and for 2 hours banked as comp time. But then the employee changed her mind and decided that she wanted to get paid for one of those hours, so the entry was changed to 9 regular hours and only 1 hour banked as comp time. Since there were originally two lines entered for this day, the corrections also take two lines, resulting in a total of four lines on that date.

Look at the lines for 12/06/2001. There are two lines shown below because Nora took sick leave for only a partial day.

	10202295	Nora Dryer	E011011		12/06/2001	2.00	SL1	Sick Leave - 1st shift	Released for appr
	10202295	Nora Dryer	E011011		12/06/2001	6.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr


The first is for 2 hours of sick taken on the first day shift. The second is for 6 regular hours worked on the first shift. These two lines illustrate what is meant by the statement, “The approval screen will display one line of information for each entry on the employee’s time sheet.” There are other examples of this shown for 12/04/2001 (comp time) and for 12/05/2001 (annual leave).

If the employee takes leave for a full day, only one line of information is displayed as shown below for Samantha Jones.

	10202303	Samantha Jones	E011011		12/11/2001	8.00	SL1	Sick Leave - 1st shift	
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Overtime

Overtime hours are not entered as a special entry in IRIS. All attendance hours are entered as regular hours as shown in the example below.

	10202295	Nora Dryer	E011011		12/07/2001	12.00	RG1	Reg Hrs - Day / 1st Shift	Released for appr
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The system will evaluate the total hours worked by the employee and the hours taken as absences to determine if overtime should be paid for the pay period. To be eligible for overtime pay, an employee must have worked over forty hours in a single week, including holidays and administrative closing days. (Certain exceptions apply; go to <http://admin.tennessee.edu/hr/policies/445pol.html>) and read Policy 445 on Overtime Compensation).



Important icons


Look at the application tool bar; a portion of the bar is shown below.




There are four icons of particular importance shown in the partial picture above.


The two icons to the far left are the *Approve*, , and *Reject*, , icons.

The two icons to the far right are the *Select all*, , and *Deselect all*, , icons. Please note that the *Select all* icon also appears above the column of selection buttons at the left of the list of times. While the appearance of the icon at the top of the selection buttons does not change, it can be used to quickly toggle back and forth between select all and deselect all.

Note that the *Print*, , icon is active on this screen so—if you wish—you can print a list of the approvals/rejections for your records.

Approving/Rejecting Time Entries

To approve any or all of the times shown, select the lines to approve and click on the *Approve*, , icon. All of the lights to the left of each approved line will turn green.

To reject any or all of the times shown, select the lines to reject and click on the *Reject*, , icon. All of the lights to the left of each rejected line will turn red.

Any lines with the yellow light still showing have not been acted upon.

The screen below shows how rejections and/or approvals will change the display.


Display Time Sheet Data

Exce...	Pers.no.	Name	Rec. CCtr	WBS elem.	Date	Hours	AA t.	AA text	Description	Last chnge	Change
	10202261	Mike Easter	E011011		11/01/2001	1.00	UA	Unpaid Absence	Released for appr...	11/28/2001	SAUCE
	10202261	Mike Easter	E011011		11/02/2001	1.00	UA	Unpaid Absence	Released for appr...	11/28/2001	SAUCE
	10202261	Mike Easter	E011011		11/03/2001	0.00	UA	Unpaid Absence	Approval rejected	11/28/2001	SAUCE
	10202261	Mike Easter	E011011		11/04/2001	0.00	UA	Unpaid Absence	Approved	11/28/2001	SAUCE

The third line has been rejected as indicated by the change in the light and the *Description* reading *Approval rejected*.


The fourth line has been approved as indicated by the change in the light and the *Description* reading *Approved*.

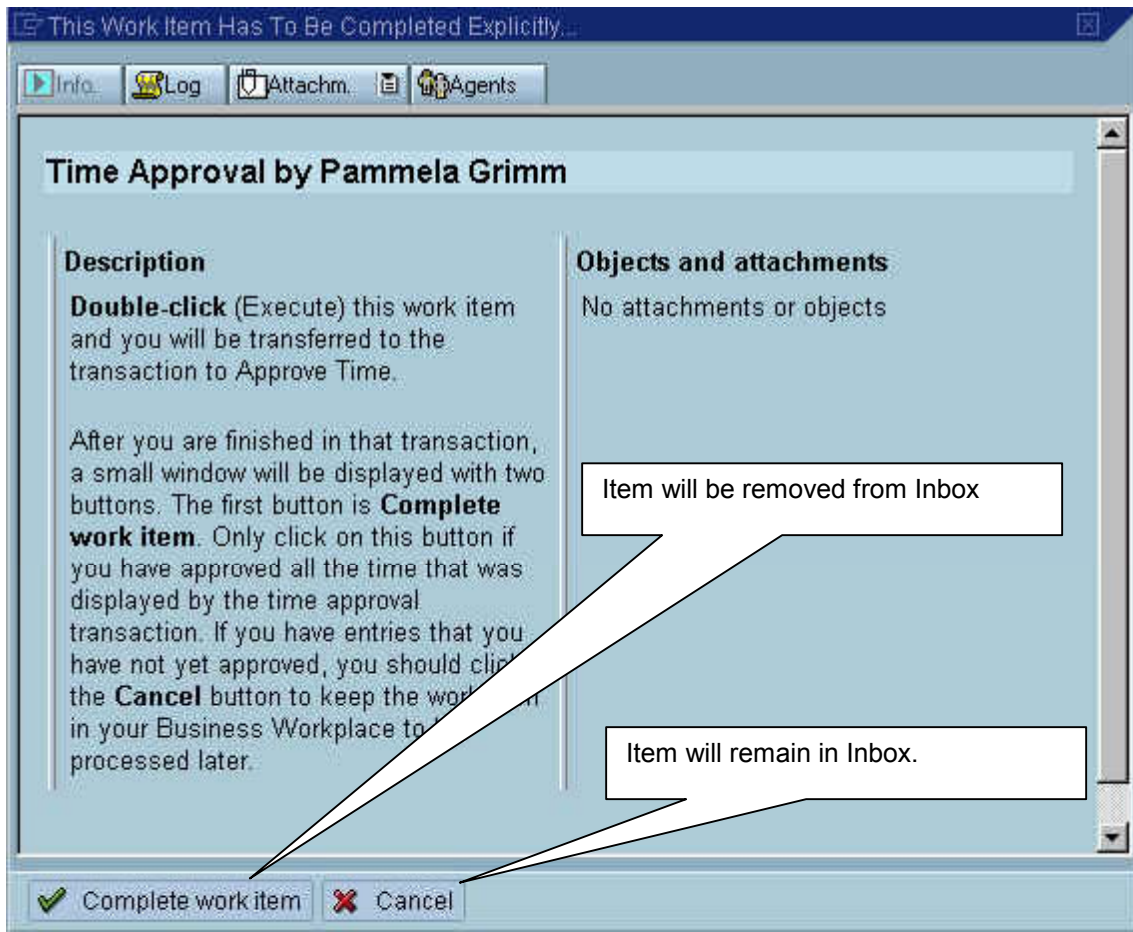
You may approve some lines, reject other lines and leave some lines un-acted upon until you have more information just as the sample screen shows.

If you have approved or rejected any lines on the screen, click on the Save, , icon to store the approvals/rejections. If you have not acted on any of the lines, you do not need to save the item.

If you do not save the transaction, your approvals/rejections will not be registered in the system.

Exiting the Time Sheet Screen

Click on the *Exit*, , icon to leave the *Display Time Sheet Data* screen. The confirmation screen below will appear.



Click the *Complete work item* button **ONLY** after you have either approved or rejected all entries.

If you click on the *Complete work item* button, the approval work item will be removed from your inbox, even if you have not approved all of the time entries.

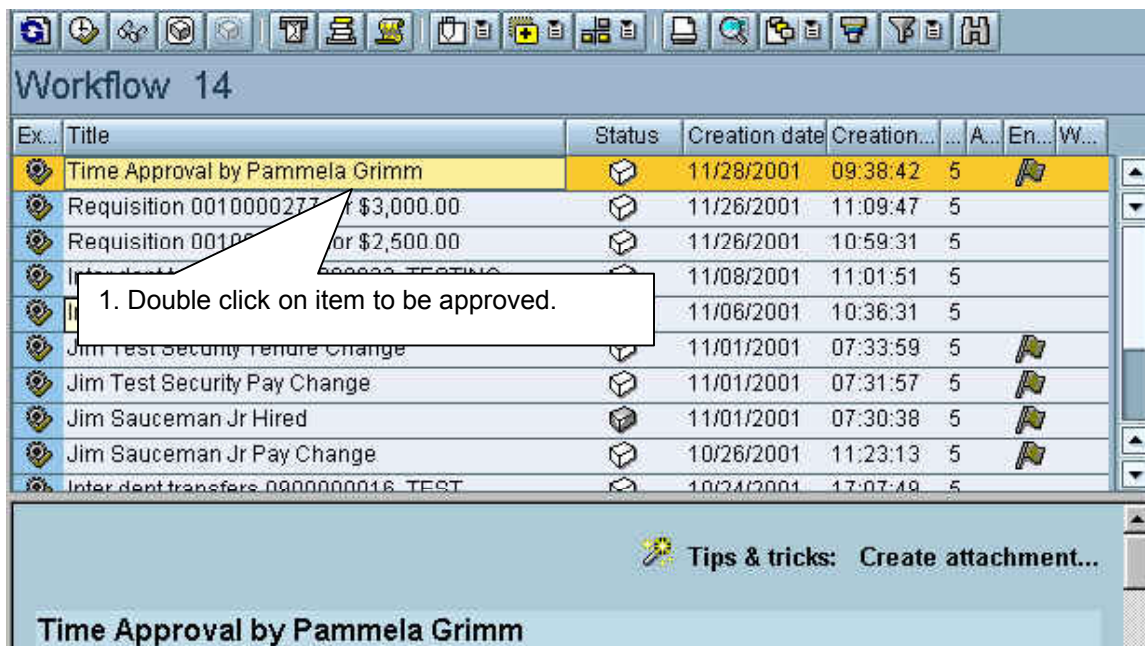
Click the *Cancel* button if you have not finished your work and need to return to it later.

If you click on the *Cancel* button, the times that have not been approved or rejected will remain in your inbox. The lines that have been approved or rejected will be removed from this approval work item.

Summary of Steps for Time Approval

The following summary describes how to approve time entries when all of the information is correct and all lines are to be approved. The prior sections of this manual describe how to interpret the information on the screen and how to approve some lines and reject others.

1. Go to the workflow inbox and double click on the time approval item as shown below.



Ex...	Title	Status	Creation date	Creation...	A...	En...	W...
	Time Approval by Pammela Grimm		11/28/2001	09:38:42	5		
	Requisition 0010000277 for \$3,000.00		11/26/2001	11:09:47	5		
	Requisition 0010000277 for \$2,500.00		11/26/2001	10:59:31	5		
	000000 TESTING		11/08/2001	11:01:51	5		
	11/06/2001		11/06/2001	10:36:31	5		
	Jim Test Security Tenure Change		11/01/2001	07:33:59	5		
	Jim Test Security Pay Change		11/01/2001	07:31:57	5		
	Jim Sauceman Jr Hired		11/01/2001	07:30:38	5		
	Jim Sauceman Jr Pay Change		10/26/2001	11:23:13	5		
	Inter-dept transfers 0000000016 TEST		10/24/2001	17:07:49	5		

1. Double click on item to be approved.

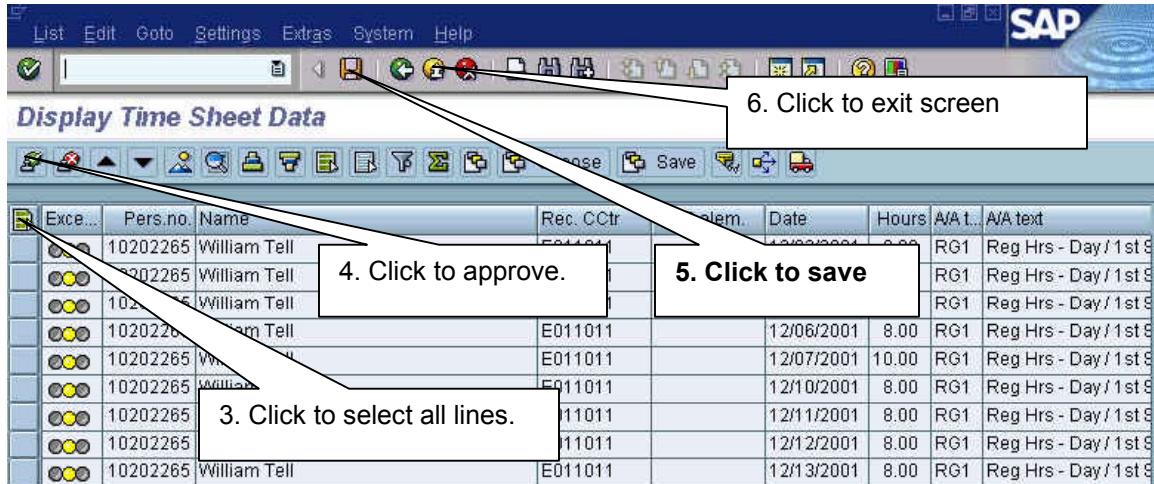
Tips & tricks: Create attachment...

Time Approval by Pammela Grimm

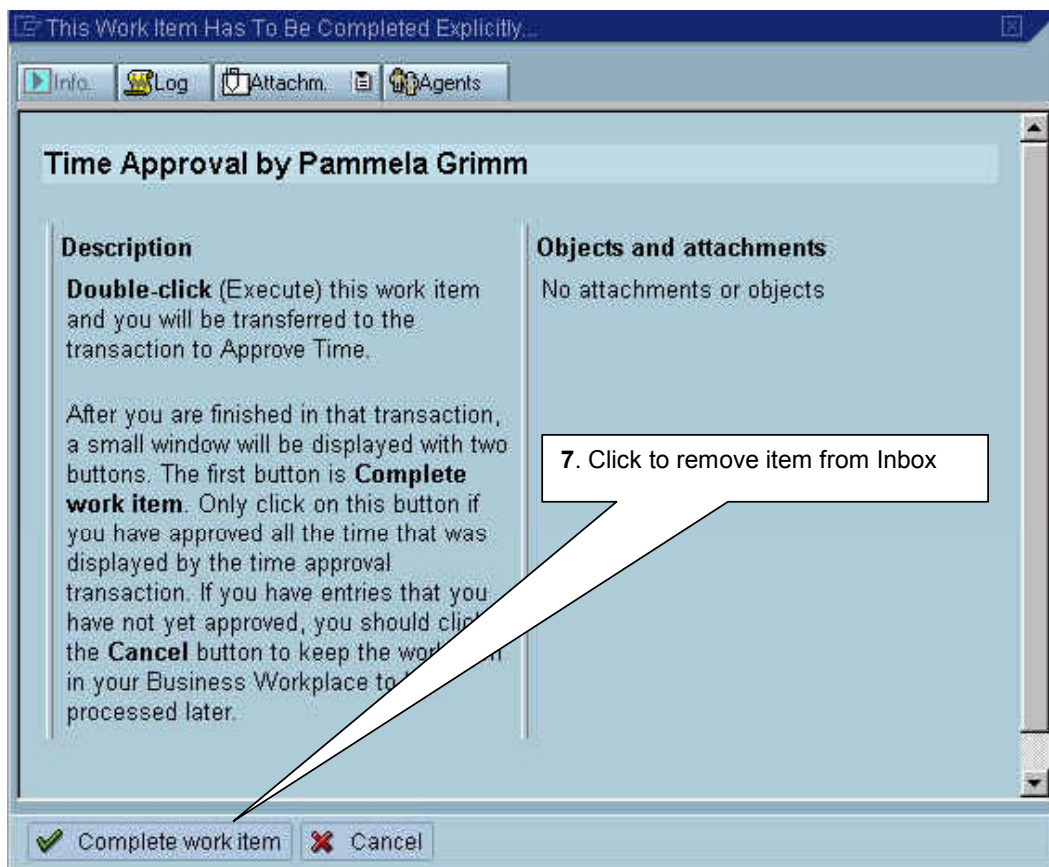
2. Review all entries for accuracy. Some sample entries are shown below.

	10202295	Nora Dryer	E011011	12/11/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/06
	10202295	Nora Dryer	E011011	12/12/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/06
	10202295	Nora Dryer	E011011	12/13/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/06
	10202295	Nora Dryer	E011011	12/14/2001	6.00	UAC1	Unsch Admin Close - 1st	Released for approval	12/06
	10202295	Nora Dryer	E011011	12/14/2001	2.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/06
	10202303	Samantha Jones	E011011	12/03/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/13
	10202303	Samantha Jones	E011011	12/04/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/13
	10202303	Samantha Jones	E011011	12/05/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/13
	10202303	Samantha Jones	E011011	12/06/2001	8.00	RG1	Reg Hrs - Day / 1st Shift	Released for approval	12/13
	10202303	Samantha Jones	E011011	12/07/2001	8.00	AL1	Annual leave - 1st shift	Released for approval	12/13

- 3 – 6. If all lines are correct, select all lines, click on the approval icon, click the save icon to save your approvals, and exit the screen as shown below.



7. Click *Complete work item* button, as shown below, to remove the item from your inbox.



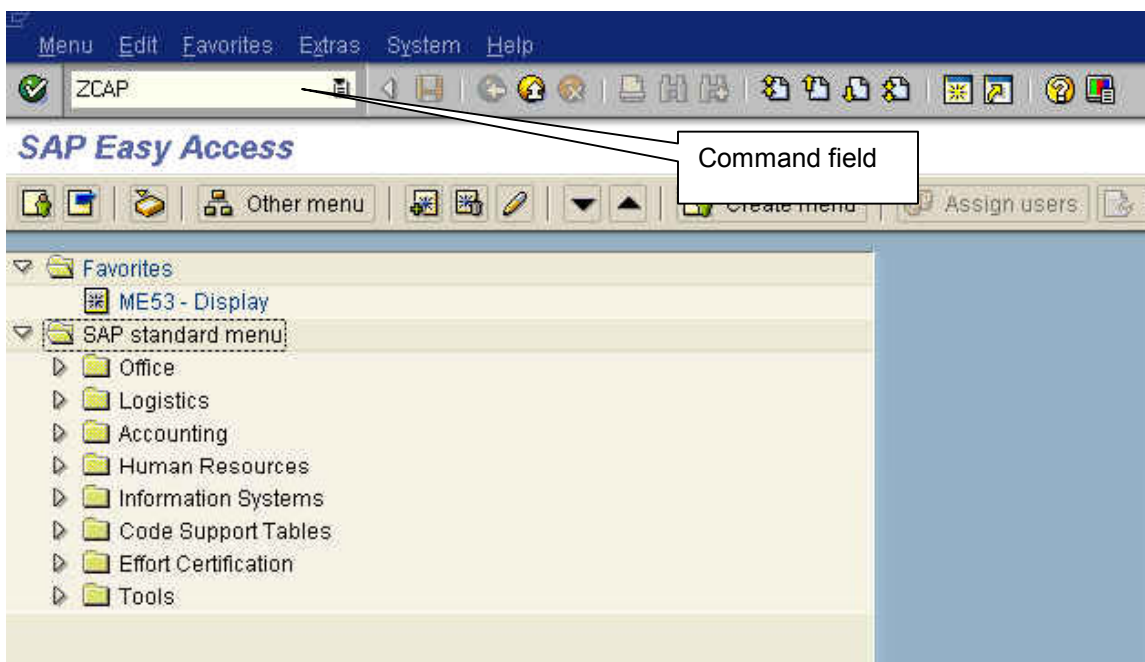
Approving Time Without Using Workflow

The time entry person for your department has entered the time and released it for approval.

You don't want to wait for the approval item to appear in your workflow inbox. You don't have to wait. You can approve time directly following the steps below.

This method also can be used if you have mistakenly clicked the “*Complete work item*” button before you have approved or rejected all of the entries in the item.

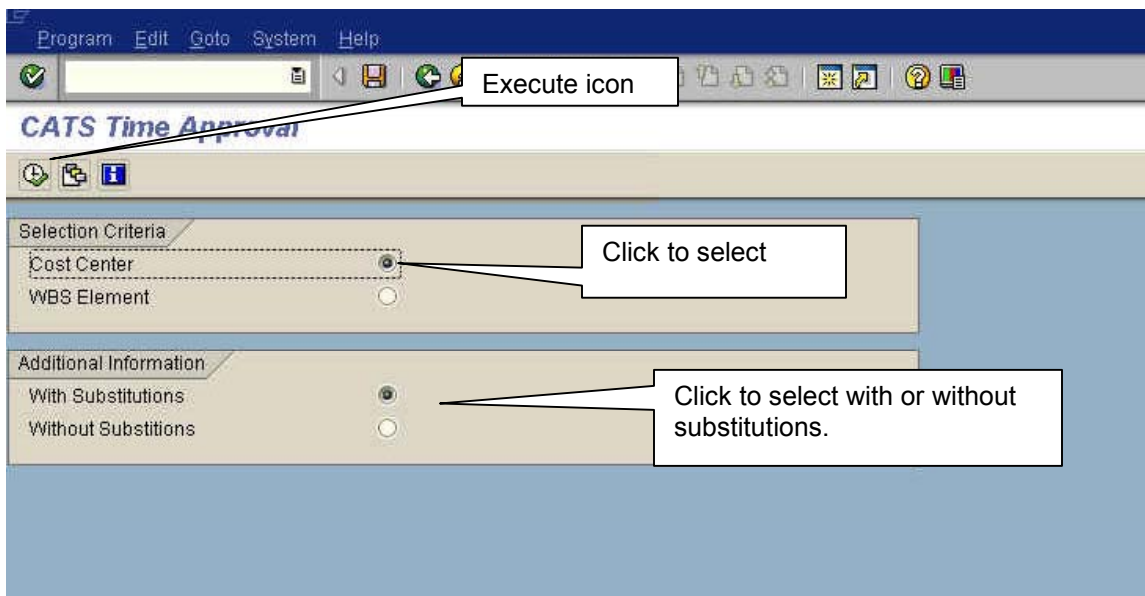
Once you have signed onto IRIS, type ZCAP in the command field on the main menu as shown below. Press *Enter*.



The *CATS Time Approval* screen will appear as shown below. If you approve time for both cost centers and WBS elements, you will need to approve them separately.

Click on the type of funding source you will be approving—cost center or WBS element.

If you are a substitute for someone, you have another choice to make. If you click on the *With Substitutions*, you will see the time approvals for the person you are substituting for as well as any time that comes directly to you. If you click on the *Without Substitutions*, you will only see the time approval items that come directly to you. After you have made your selections, click on the *Execute* icon.



You will see the same *Display Time Sheet Data* screen as you access via Workflow.

When you leave the *Display Time Sheet Data* screen after accessing it via the ZCAP command, you will not see the confirmation screen, but be returned to the *CATS Time Approval* screen.

You may choose another selection or exit the system if you have finished.