

EX.020.400 – ASSIGNING AN ALTERNATE USER (TEMPORARY LEAVE)

<p>Purpose</p>	<ul style="list-style-type: none"> • To identify the purpose of specifying Alternate Users. • To define where an Alternate User may be defined. • To identify which transactions are re-routed when an Alternate User is specified. • To assign an Alternate User.
<p>Description</p>	<p>The Alternate User functionality allows an Expenses Approver to select a User ID from within the system and specify that future worklist items route to another employee for a defined period of time.</p> <p>After that time has passed, future worklist transactions are automatically routed back to the original User ID. Also when using the Alternate User functionality, only future transactions will be rerouted for a temporary period of time and transactions that are already in an employee’s worklist queue will not be re-routed.</p> <p>If an Expenses Approver is going to be away from the office on temporary leave, his/her worklist transactions should be temporarily routed to an Alternate User. Expense Approvers can assign their own Alternate User in either the Core or Self-Service Portal. For more information, see EX.010.014 – My System Profile – Alternate User Routing.</p> <p>If an approval routing needs to be changed for a more permanent period of time, make this update to the Approver Assignment page instead of using the Alternate User functionality. For more information, see EX.010.012 – Establishing Approver Assignments.</p> <p>If needed, an Expenses Administrator can complete this on their behalf through the Distributed User Profile page.</p> <p>Caution: The Alternate User specified must have adequate security rights to perform the assigned tasks. If the Alternate User does not have the appropriate security the transaction will route to the original User ID, but the original user cannot act on the transaction; the Expenses Administrator will need to manually reassign any transactions that are routed to the original User ID.</p>

	<i>Note: When assigning 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.</i>
Security Role	
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step-by-step instructions on how to assign an alternate approver.

For this example, an employee notified you that she will be on vacation from 8/10/24 through 8/15/24 and has requested that her Workflow transactions from Expenses and e-Procurement be routed to another employee during this time.

Step	Action
1.	Click the PeopleTools link.
2.	Click the Security link.
3.	Click the User Profiles link.
4.	Click the Distributed User Profiles link.
5.	By using the Distributed User Profile page, an Expenses 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.
6.	Click the Search button to select the User ID to assign an Alternate User.
7.	Click an entry in the User ID column.
8.	The General tab is display only and can be adjusted only by the security administrator.
9.	Click the Workflow tab.

Step	Action
10.	Notice which employee is listed next to the User ID and Description fields. Any changes made on this page affect the Workflow for this user.
11.	The Workflow Attributes section is used to re-route future transactions for a temporary period of time. However, this section will not re-route transactions already in the Expense Approver's worklist queue.
12.	The Reassign Work To section is used to re-route transactions which are already in an Expense Approver's queue. This action can also be done through the Travel and Expenses navigation.
13.	Enter the new approver's initials in the Alternate User ID field.
14.	Click the Look up Alternate User ID (Alt+5) button.
15.	Click an entry in the User ID column.
16.	Enter " 8/10/24 " in the From Date field.
17.	Enter " 8/15/24 " in the To Date field. After 8/15/24, subsequent transactions will route back to the original Expenses approver.
18.	Click the Save button.
19.	<p>Any transaction, whether it be an Expense transaction or an eProcurement transaction, will now route to the Alternate User ID for this period of time.</p> <p><i>Note: 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.</i></p>