Approval Paths - Employee Requests

When an employee submits a request for time off, this action is recognized as a standard activity that may require approval by a manager or supervisor. You can ensure that the request is sent to the appropriate person by identifying an appropriate approval path and making sure it is assigned to this activity.

Important: If a workflow is not assigned to the Employee - Time Off Request activity, the approval process will by bypassed and the request will be approved automatically.

Assignee Types

Most approvals for time off requests can be defined in one step, and any of the following Assignee Types indicate who can approve the request within that step.

Specific User - The name of the person who can approve the request.

Work Group - Work groups are defined on the Setup > Approval Process > Enhanced Activity Configuration.

Up Submitter Manager Hierarchy - This assignee type and the level are based on the **Reports To** hierarchy of the person submitting the request. For more information see "Identifying a Typical Approval Path - Employee Requests (Myself)" on page 2 and "Setting Up an Approval Path for Employee - Time Off Requests (Myself)" on page 3.

Up Affected Employee Manager - This assignee type and the level are based on the **Reports To** hierarchy of the person for whom the request is made.This assigned type can be used for requests submitted by a Manager on behalf of an employee. For more information see "Approval Paths - Manager Requests (My Team)" on page 4.

Troubleshooting Tips

All requests that have been submitted by an employee are listed on the List of Requests page. The following rules can also help you locate a request that is missing or pending.

- **Reports To Hierarchy** - This must be in place for successful workflows.
- **Effective Dating** - The As Of Date of an effective dated change to Reports To information will impact Reports To relationships and control who will receive the Time Off Request in the future. However, if the date on which the request was submitted is earlier than the date of the Reports To change, the request could be sitting in the Message Center for the original approver.
- **Email** - Managers, practitioners, and supervisors must have email addresses in ADP Workforce Now.
- **Assignees** - If multiple steps exist for an approval path, the assignee must be unique for each consecutive step.
- **Assignee Types** - An assignee type of "Up Submitter Manager Hierarchy" cannot follow a work group or specific user assignee type, because Up Submitter Manager Hierarchy is based on the Reports To hierarchy of the person submitting the activity.

Training and Documentation

For detailed information on setting up workflows and approval paths, see the following resources posted on the ADP Workforce Now Support Center:

- Workflow Management for ADP Workforce Now   (Course #80341)

In addition, you can refer to the online Help within ADP Workforce Now for detailed instructions on workflow and approval tasks.

Identifying a Typical Approval Path - Employee Requests (Myself)

Follow these steps to identify a typical approval path for a time off request submitted from the **Myself** menu.

1   Select **Setup > Approval Process > Enhanced Activity Configuration**.

2   On the Standard Activities tab, click the **Employee - Time Off Request** activity.

3   Note the path name selected in the **Default Approval Path** field.

   Tip: If no approval path is selected, note the name of any approval paths that are available for selection. If no approval path is listed for selection, see "Setting Up an Approval Path for Employee - Time Off Requests (Myself)" on page 3.

4   Select **Setup > Approval Process > Enhanced Activity Configuration**.

5   Click the **Path Name** noted in Step 3.

6   If the Assignee Type is **Up Submitter Manager Hierarchy**, and the Assignee is **One Level**, determine the name of the approver.

If the Employee's Position Is	Look at this Field
Tracked in Time and Attendance	People - Employment - Time Position Info - **Time and Attendance Supervisor**
Not tracked in Time and Attendance	People - Employment - Employment Profile - **Position** tile **- Reports To**

Important: If an approval path is not set up, a time off request submitted by an employee is approved automatically and can be seen on the **Time Off - List of Requests** page.

Setting Up an Approval Path for Employee - Time Off Requests (Myself)

These basic settings ensure that a time off request submitted by an employee will be sent to a manager or supervisor for approval.

Before You Begin: Make sure that every employee has a Reports To manager assigned on the Position page.

1   Select **Setup >Approval Process >Enhanced Activity Configuration**.

2   Click **Add**.

3   Enter or select the required information, as shown:

Path Name	Description *
Employee - Time Off Requests Path	Activity: Employee - Time Off Requests

Define Steps in Path

ASSIGNEE TYPE	ASSIGNEE	STEP TYPE
Up Submitter Manager Hierarchy	One Level	Approval

4   Click **Save**.

5   Select **Setup > Approval Process > Enhanced Activity Configuration**.

6   Select **Employee** at the top.

Display the standard activities for: ● Employee   ○ Manager   ○ Practitioner

7   In the Activity column, click **Employee - Time Off Requests.**

8   Select **Employee - Time Off Requests Path** for the Default Approval Path.

9   Click **Save**.

Approval Paths - Manager Requests (My Team)

When a manager (My Team) submits a time off request on behalf of an employee, the request is approved automatically if no approval path is assigned to the Manager - Time Off Request activity in Enhanced Activity Configuration. If your company needs a specific approval process for managers who share approvals for one or more employees, follow the steps below.

Setting Up an Approval Path with Multiple Managers

This setup applies when an employee has more than one manager or supervisor who can submit requests for him. The setup ensures that the employee's second-level manager has the opportunity to approve a time off request submitted by any manager on behalf of that employee.

1   Select **Setup >Approval Process >Enhanced Activity Configuration**.

2   Click **Add**.

3   Enter or select the required information, as shown:

Path Name Manager Submitting for EE Path	Description * Activity: Manager - Time Off Requests	
Define Steps in Path		
ASSIGNEE TYPE	ASSIGNEE	STEP TYPE
Up Affected Employee Manager Hierarchy	Two Levels	Approval

4   Click **Save**.

5   Select **Setup > Approval Process > Enhanced Activity Configuration**.

6   Select **Manager** at the top.

Display the standard activities for: ◯ Employee   ● Manager   ◯ Practitioner

7   In the Activity column, click **Manager - Time Off Requests.**

8   For the Default Approval Path select **Manager Submitting for EE Path**.

9   Click **Save**.

Rerouting a Time Off Request

If an approver is unavailable for a pending request or event and the request must be processed without delay, the practitioner can reroute the request.

1   Select **Process > Workflow Administration > Manage Message Center**.

2   On the Current tab, select the check box next to the pending request.

3   Click **Other Actions** and select **Reroute**.

4   Select an individual from the list or select a previously created work group.

The pending request will be routed to the Message Center of the person or group selected, and it will be available for approval.

Escalating a Pending Request

You can create an escalation path in the event that an approver in a workflow does not process a pending request/event in a timely manner.

1 Select **Setup > Approval Process > Enhanced Activity Configuration**.

2 On the Standard Activities tab, click the **Employee - Time Off Request** activity.

3 In the **Escalation** section, select the number of days of inactivity that can elapse before a reminder email is sent to the original approver.

4 Select how many days of inactivity can elapse before the request is reassigned. The request can be reassigned to an individual or a previously defined work group.

5 Select an additional approver.

6 Click **Save**.

Delegating Approval Duties

If an approver (supervisor, manager, or practitioner) is going to be on vacation or otherwise away from work, he or she can delegate Time Off approval duties to a peer. This is typically done for a specific time period but can also be set up as Indefinite.

Before You Begin: Make sure that the approver or group is set up to do this task on the **Setup** - **Access Permissions** page. For more information, see **About Profiles** in the online Help. For assistance, contact your ADP service team.

1 Select **Process > Workflow Administration > Delegate Approvals**.

2 Click ➕ (**add**). and select the **Activity,** such as **Employee - Time Off Request**.

3 Select the **Delegation Type**.

If You Select	Then
Number of Days	Enter the number of days after which the activity will be sent to the delegated approver.
Date Range	Enter the From and To dates during which you want the activity to be sent to the delegated approver.

4 Select who you want to assign the activity to.

If You Select	Then
Up One Level	No further entry is needed.
Work Group	Select the specific work group.
Specific User	Select the specific approver. Click the **Lookup** icon to show a list of available people, or enter a minimum of three characters to filter results.
	Tip: If a lookup field already contains a value, you must clear the field and re-select the **Lookup** icon to show the complete list again.

5 Click **Done**.

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