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Session 1200:
Advanced Approval Workflows and
Approval Management in Time & Attendance

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with Time & Attendance

How Do You Feel About Approval Workflows?

Topics

Approval Workflow Best Practices

Auditing and Reporting Tools

Workflow Management Best Practices

Now with BONUS!

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Scenario for all Examples

New Vermaine Public Schools

K-12 school district in New England

Payroll Department

- Irene Hamilton: FMLA approvals
- Bob Parr: OT approvals
- Brenda Torres: Payroll supervisor

Central Elementary School

- Dennis Edwards: Principal
- Carol Andrews: 3rd grade teacher
- Nicole Mason: Custodian

Buildings and Grounds Department

- Melissa George: BG North supervisor
- Julie Kelley: BG South supervisor

Workflow Best Practices

Employee Approval Starts the Process

Approval starts with the employee.

- Submit timecard

- Submit time-off request

The supervisor approval workflow is triggered by the employee's action.

Approvers cannot approve without an active workflow.

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My Pending Approvals is Your "To Do" List

My Pending Approvals ☑   Unsubmitted Timecards ☐
Employee:

Pay Period: 04/29/2024 00:00 - 05/05/2024

There are no pending approvals

Harvey, Chris Salaried Monthly (3015)
Moreno, Sean Salaried Weekly (9485)
Parr, Helen Salaried Bi-weekly (19)
Phillips, Mark Salaried Monthly (9848)
Pierce, Lori Hourly Monthly (5918)
Sims, Samuel Salaried Weekly (6185)
Smith, Ruth Salaried Monthly (1275)

Intended to help approvers focus on what needs attention.

Requests that need approval will display in the list.

When the list is empty there is nothing to do.

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Unsubmitted Timecards Supports Your "To Do" List

Same intent - help approvers focus on what needs attention.

Unsubmitted timecards that will need approval display in the list.

Used to submit the timecard on behalf of the employee.

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Best Practice

Time Processing Settings

Time Processing Settings

UI | UI STYLE | SECURITY | LOGIN CONFIGURATION | TIME PROCESSING | COMMUNICATION | CLOCK POLLING | TIMECLOCK CONFIGURATION

Enter settings values in the list below, then click the Save button or icon to save the settings.

Application Control

Setting	Value
Allow unscheduled time entries	☐
Default start time	08:00
Allow lump-sum time entries	☐
Time entries default to lump-sum	☐
Maximum number of days a time entry/time off request may span without additional confirmation prompt (avoid long transactions to be inadvertently entered)	14
Maximum number of days a time entry/time off request may span without restriction (will not allow any transactions over this threshold)	60
Allow editing of time cards from Supervisor Timesheet Approval	☐
Always default the timesheet from the schedule.	☐
Number of Rows to Default For Timesheet Screen	10
When Processing rules engine transactions with Auto Deduct	*Order last to first when taking out auto deduct time ▼
Include all "append to" paid time in Time Summary totals ⓘ	☐
Scope of pay period drop down entries in years (0 to show all)	0
Enable Amount field.	☑
Enable Unit of Measure in Days for Pay Codes.	☑
Clocking transaction look back hours ⓘ	240
Ignore auto deduct when calculating supplemental time	☐

Don't allow editing of timecards on the Supervisor Time Approvals screen.

Approve All Time Entries on the Timecard

The "ALA" approve entries finished recorder they approve all is export ide for approving.

Approvers Must Wait Their Turn
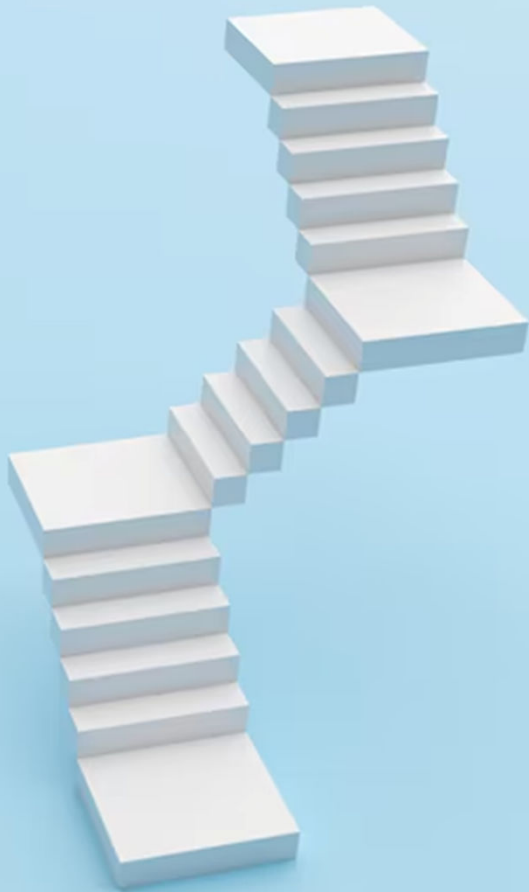
Workflow steps are sequential.

Approvals only count when done for the active step.

Approvers cannot approve early because approvals for a non-active step are ignored.

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Policies That Change Time Entry Attributes

Clocking policies and rule engine policies can change time entry attributes.

Changing attributes can affect the approvers needed to review the timecard.

Planning is important to ensure approvers have proper employee access to support these policies.

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Policies That Change Time Entry Attributes

Job Costing was designed to help track funded or billable activities.

Employees can apply job costing codes to the time entry using Edit Time during clock in/out.

Approvers can be assigned to these attributes.

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Example: Use Job Costing to Track Grant Funding

Example: Use Job Costing to Track Grant Funding

Auditing and Reporting

Workflow Audits

Department level view gives an overview of the system.

Detail view displays each approval with sortable columns.

High counts for failure or idle approvals can indicate issues.

Workflow Reports
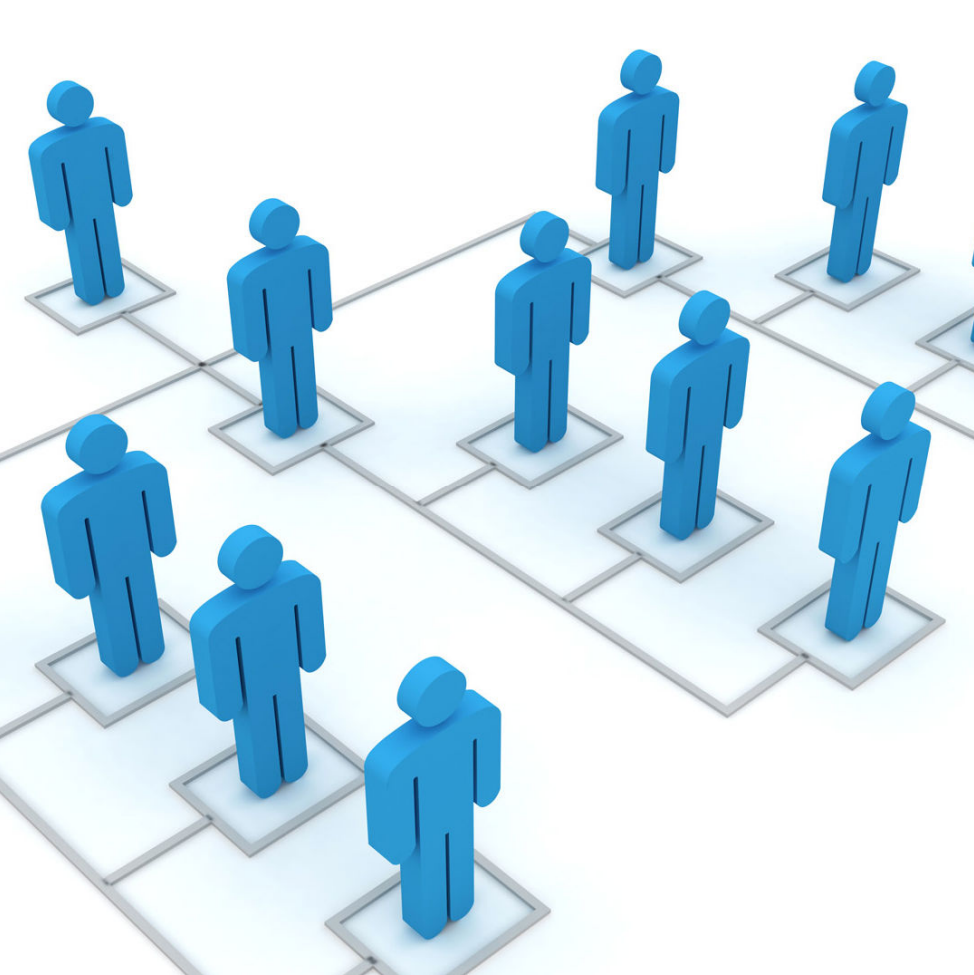
Reports have several filtering options to narrow the data returned.

Master Workflow report shows the approvers and criteria for each employee.

Workflow Status report is like the workflow audit, showing the status of distinct workflows.

Master Workflow Report

Run the Master Workflow report and save the result as an Excel file.

Skip the optional filters to return all approvers for all workflow types.

Master Workflow Report

1	workflow_step_	workflow_step_name	workflow_prim	criteria_company_name	criteria_depa	workflow_crite	workflow_criteria	employee_name
7	Time Approval	Department Approval	Edwards, Dennis	New Vermain Public Schools	Central ES			Bryant, Jean
42	Time Approval	Department Approval	Parr, Bob	New Vermain Public Schools		Pay Code	OT	Bryant, Jean
77	Time Approval	Payroll Approval	Torres, Brenda	New Vermain Public Schools				Bryant, Jean
108	Time Approval	Payroll Approval	Armstrong, Lori	New Vermain Public Schools		Grant Fund Code	Arts Enrichment	Bryant, Jean

In Excel, you can filter by any columns to narrow the results.

This report is very useful for finding who approves an employee.

The Workflow Status report is useful for finding where an approval is stalled.

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Workflow Structure

Remove Complexity
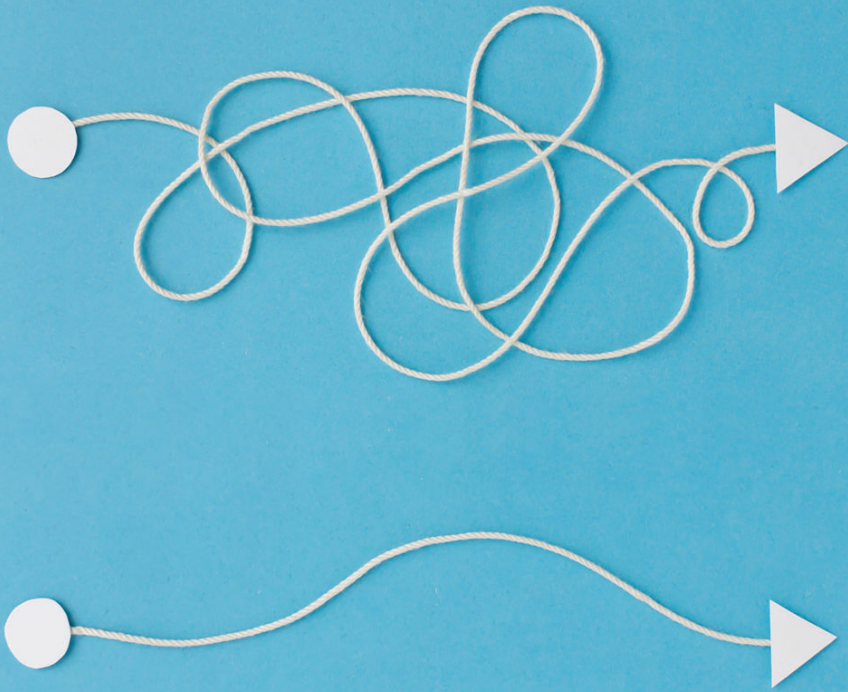
Approvers are assigned to a request based on their approval criteria.

Using granular criteria can reduce transparency into the intent of the rule.

Adding workflow steps can increase the time needed to complete the approval process.

Complex groupings are best split into simpler conditions.

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Remove Complexity

All   One

All required

One required
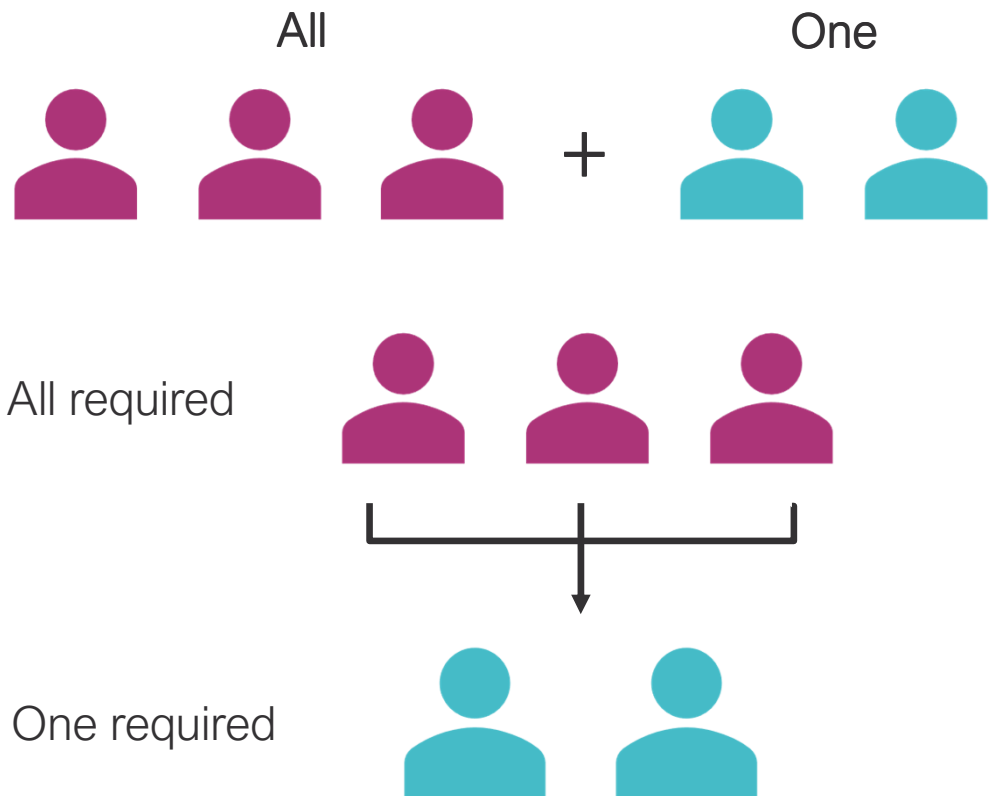
Workflow steps allow two approval conditions:

- ALL: all approvers must respond to complete the workflow step.

- ONE: one approver's response completes the workflow step.

Both conditions cannot be on the same step. Use two steps to simplify the approval.

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Remove Complexity

3 required

1 required
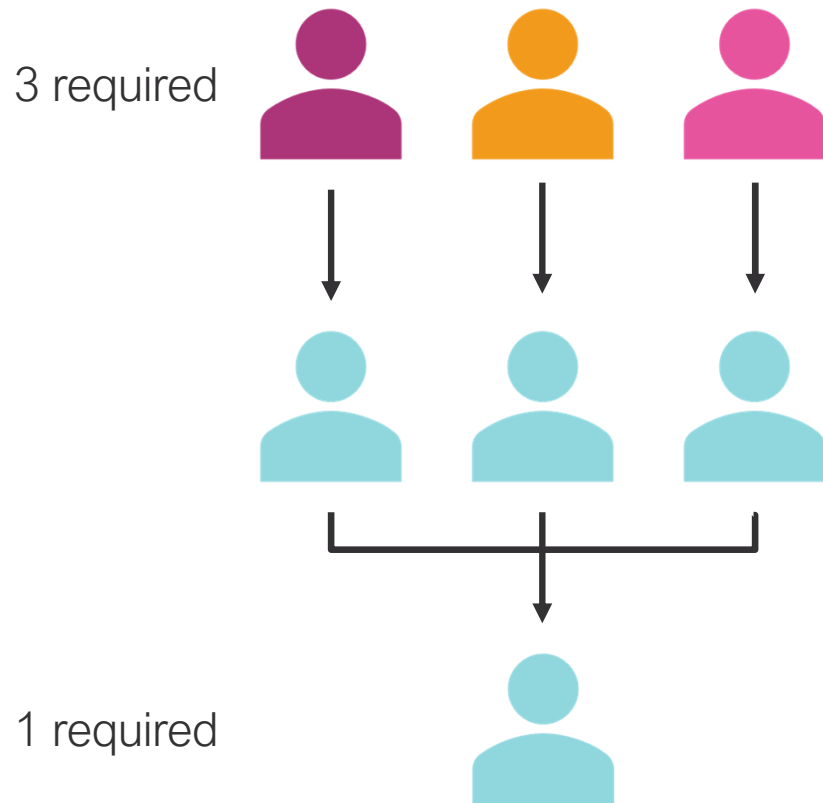
We focus on primary approvers when creating workflows and approval conditions.

Care should be taken with secondary approvers to confirm they do not change the workflow's approval condition.

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Remove Complexity

Step 10
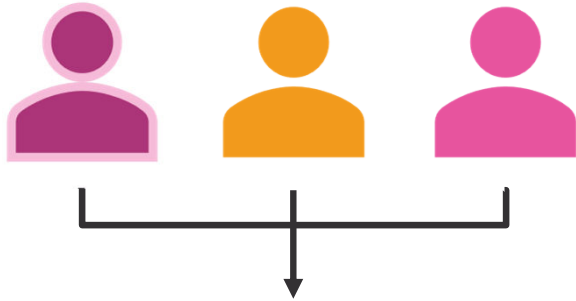
Ideally, approvers should only participate once in a workflow.

Step 20

If an approver participates multiple times they should be approving different groups of employees.

Step 30

Are there options for simplifying the approval process?

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Copying Workflow Approval Configuration

A utility exists to copy the workflow steps, approvers and criteria within an environment and between environments.
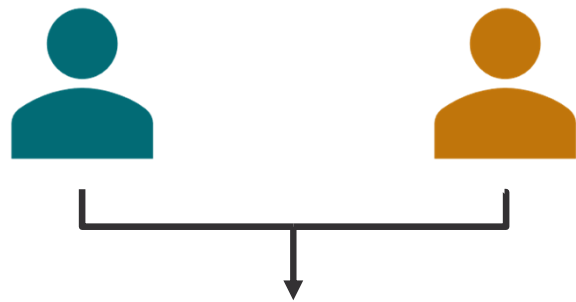
- Copy rules as-is.

- Use timecard approvers for all types.

- Use time-off approvers for time-off and hours requests.

A support request is needed so Technical Services can assist with the copy operation.

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