

W E L C O M E T O
CONNECT





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!

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

A photograph of a person's hand using a black computer mouse on a desk. The background is blurred, showing a computer monitor and some greenery. A teal banner is overlaid across the middle of the image.

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.

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.

Unsubmitted Timecards Supports Your “To Do” List

My Pending Approvals Unsubmitted Timecards

Employee: Day, Carolyn Salaried Monthly (7340)

Pay Period: 04/01/2024 00:00 - 04/30/2024

Regular	Overtime	Benefits	Deduction	Rounding	Other	Amount	Total
168.00	0.00	0.00	(0.00)	0.00	0.00	0.00	168.00

Approval Type: Initials: Comment:

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.

Best Practice

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

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

Approve All Time Entries on the Timecard

My Pending Approvals Unsubmitted Timecards
 Employee:

Pay Period: 04/01/2024 00:00 - 04/30/2024

Regular	Overtime	Benefits	Deduction	Rounding	Other	Amount	Total
165.00	0.00	0.00	(0.00)	0.00	0.00	0.00	165.00

Submitted: 05/06/2024 12:20:33 Last Approved: 05/06/2024 17:23:45

Approval Type: Initials: Comment:

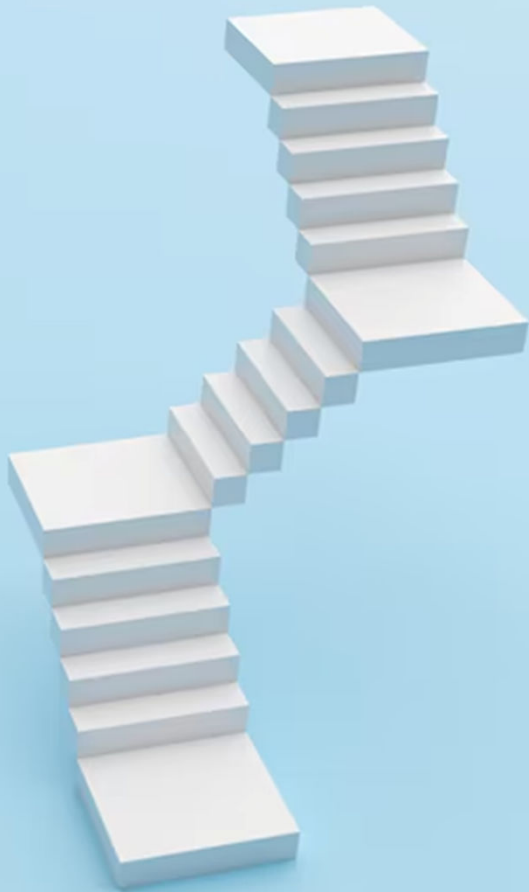
Pay Period Approval		
Regular Time	Employee	Approvers
165.00	OBH	DBE BT

Page 1 of 3 at 10 per page, 22 total records

All	Rules	Day	Date	In	Out	Type	Time Logged	Daily Total	Weekly Total	Time Total	Amount	Position	Schedule	Shift	Work Order	Job	Project	GeoData	Comment	Employee	Approvers	
<input checked="" type="checkbox"/>		Mon	04/01/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	7.50	7.50	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Tue	04/02/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	15.00	15.00	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Wed	04/03/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	22.50	22.50	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Thu	04/04/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	30.00	30.00	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Fri	04/05/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	37.50	37.50	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Mon	04/08/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	7.50	45.00	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Tue	04/09/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	15.00	52.50	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Wed	04/10/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	22.50	60.00	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Thu	04/11/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	30.00	67.50	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Fri	04/12/2024	07:30	15:00	RG (Regular Time)	7.50	7.50	37.50	75.00	0.00	Secretary (Secretary)									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The "ALA" approved identifies the records as approved and is marked with a green checkmark.

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.

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.



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.



Example: Use Job Costing to Track Grant Funding

WORK ORDER JOB PROJECT GRANT FUND CODE GRANT ACTIVITY CODE PLANNING # ACCOUNT # SELECTION FIELD 1 SELECTION FIELD 2 SELECTION FIELD 3 SELECTION FIELD 4 CUSTOM TIER 1 CUSTOM TIER 2 CUSTOM TIER 3

← Edit Grant Fund Code

* Name
Arts Enrichment

Description
grant funded activities

Grant Activity Code
2 options selected

- Art Club (arts enrichment)
- Drama club (arts enrichment)
- Coding club (technical enrichment)
- Cooking club (vocational enrichment)
- Robotics club (technical enrichment)

Example: Use Job Costing to Track Grant Funding

WORKFLOW APPROVALS

CURRENT PERIOD PREVIOUS PERIOD HISTORY

My Pending Approvals Unsubmitted Timecards

Employee:

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

Regular	Overtime	Benefits	Deduction	Rounding	Other	Amount	Total
39.50	0.00	0.00	(0.00)	0.00	0.00	0.00	39.50

Submitted: 05/07/2024 12:56:01 Last Approved: 05/07/2024 13:56:26

Approval Type: Initials: Comment:

Pay Period Approval		
Regular Time	Employee	Approvers
39.50	DHE	DHE BHT

Showing 10 per page; 7 total records

All	Rules	Day	Date	In	Out	Type	Time Logged	Daily Total	Weekly Total	Time Total	Amount	Position	Schedule Shift	Grant Fund Code	Grant Activity Code	GeoData	Comment	Employee	Approvers
<input type="checkbox"/>	<input type="checkbox"/>	Mon	04/29/2024	08:00	15:30	RG (Regular Time)	7.50	7.50	7.50	7.50	0.00	K6 Teacher						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mon	04/29/2024	15:30	16:30	IO (Clock in/out)	1.00	8.50	8.50	8.50	0.00	K6 Teacher		Arts Enrichment (grant funded activities)	Art Club (arts enrichment)			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Tue	04/30/2024	08:00	15:30	RG (Regular Time)	7.50	7.50	16.00	16.00	0.00	K6 Teacher						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Wed	05/01/2024	08:00	15:30	RG (Regular Time)	7.50	7.50	23.50	23.50	0.00	K6 Teacher						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Wed	05/01/2024	15:30	16:30	IO (Clock in/out)	1.00	8.50	24.50	24.50	0.00	K6 Teacher		Arts Enrichment (grant funded activities)	Art Club (arts enrichment)			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Thu	05/02/2024	08:00	15:30	RG (Regular Time)	7.50	7.50	32.00	32.00	0.00	K6 Teacher						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Fri	05/03/2024	08:00	15:30	RG (Regular Time)	7.50	7.50	39.50	39.50	0.00	K6 Teacher						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

A close-up photograph of a person's hand with light-colored nail polish clicking a black computer mouse. The background is a blurred office environment with a computer monitor and a window showing greenery. A teal banner is overlaid across the middle of the image.

Auditing and Reporting

Workflow Audits

WORKFLOW APPROVALS WORKFLOW CONNECTIVITY WORKFLOW STATUS AUDIT

Showing 10 per page; 3 total records Idle only

Actions	Department	Successful	Failed	Idle	Cancelled
	BG North (BG North)	5	0	1	0
	Central ES Staff (Central Elementary Staff)	19	0	15	0
	Central ES Support (Central Elementary Support)	3	0	1	0

Showing 10 per page; 3 total records

Andrews, Carol	Supervisor Pay Period Approval	Successful	03/02/2024 21:31	Edwards, Dennis Hourly Bi-weekly Torres, Brenda Hourly Bi-weekly
Andrews, Carol	Employee Approve And Submit	Successful	03/02/2024 21:31	Andrews, Carol Hourly Weekly
Fox, Harry	Time Off Approval	Successful	03/04/2024 12:20	
Bryant, Jean	Employee Approve And Submit	Successful	05/06/2024 12:20	Bryant, Jean Salaried Weekly
Sims, Samuel	Supervisor Pay Period Approval	Idle	05/06/2024 12:20	
Andrews, Carol	Supervisor Pay Period Approval	Successful	05/06/2024 16:46	Edwards, Dennis Hourly Bi-weekly Torres, Brenda Hourly Bi-weekly

Page: 1 of 4 at 10 per page; 37 total records

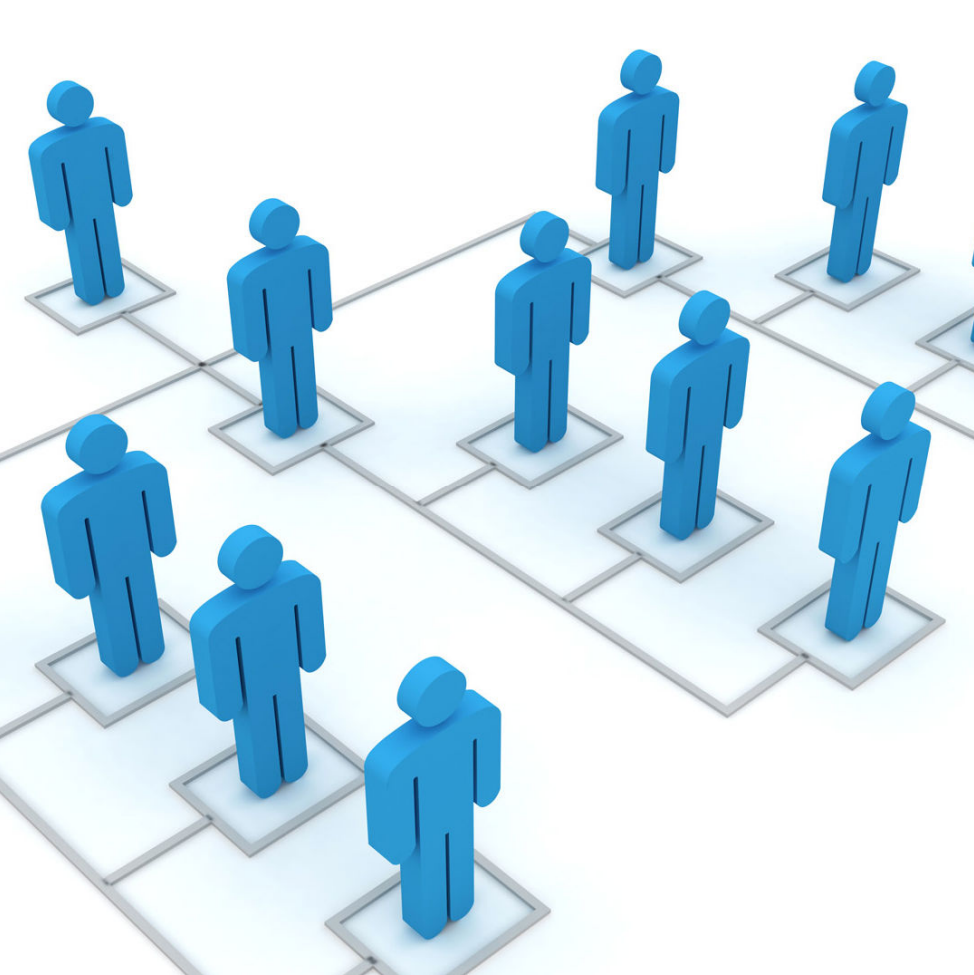
[Return to Status Audit](#)

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



Master workflow 

Report provides data on current workflow configuration.

 PDF  CSV  Excel  Word



Required



* Organization type
Company 



* Organization unit
New Vermaine Public Schools (NVPS)  

Optional

Include terminated employees

Workflow approver type  

Workflow primary approver  

No workflow secondary approver available  

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.

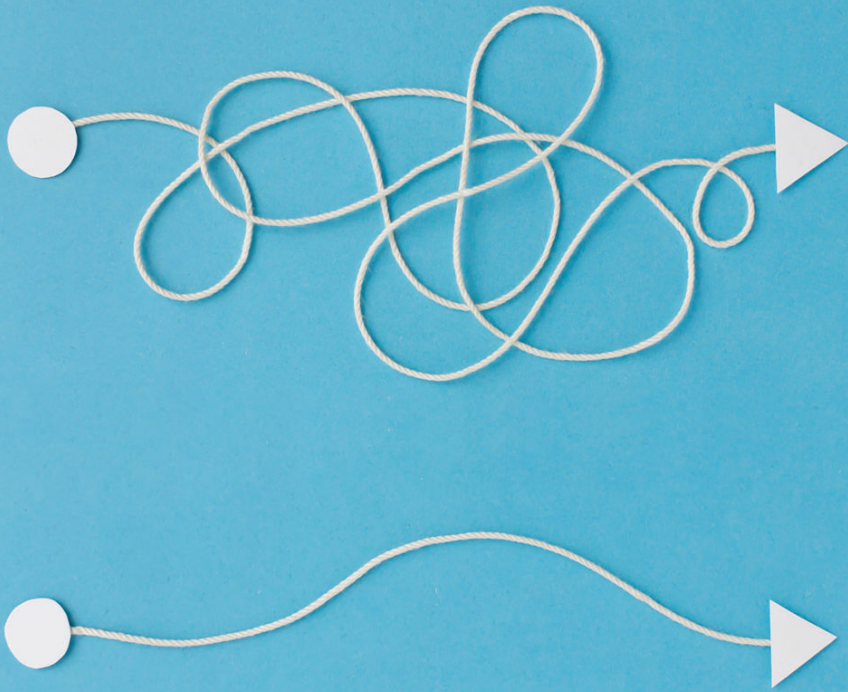
The Workflow Status report is useful for finding where an approval is stalled.



Workflow Structure



Remove Complexity



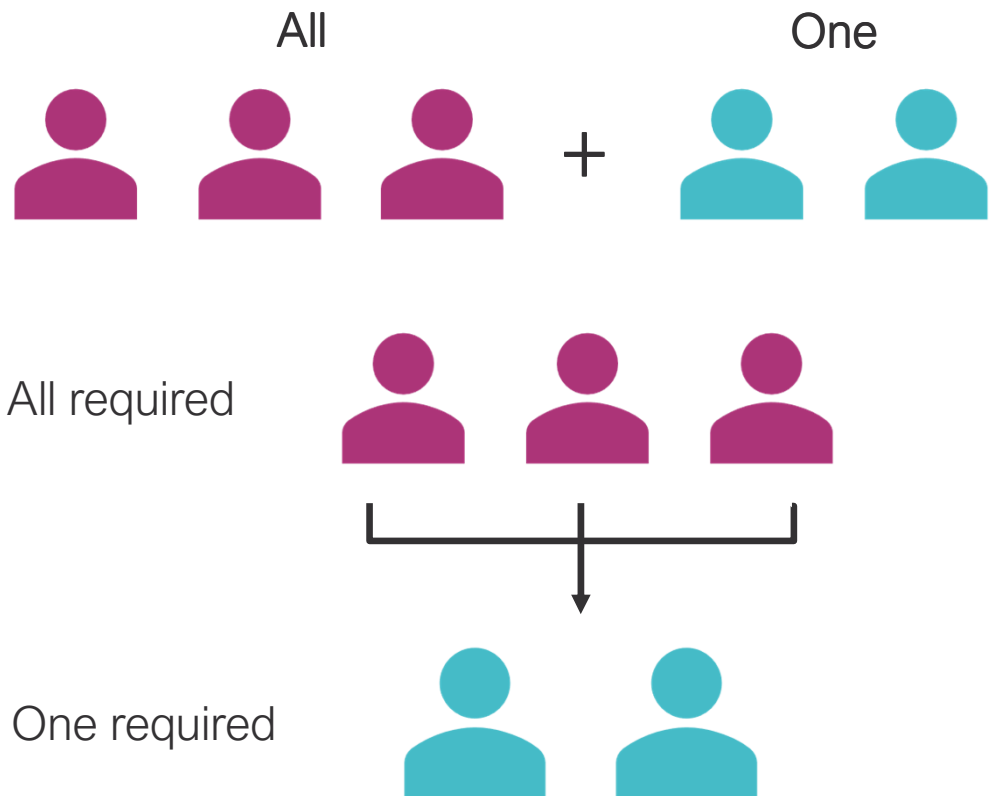
Approvers are assigned to a request based on their approval criteria.

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.

Remove Complexity

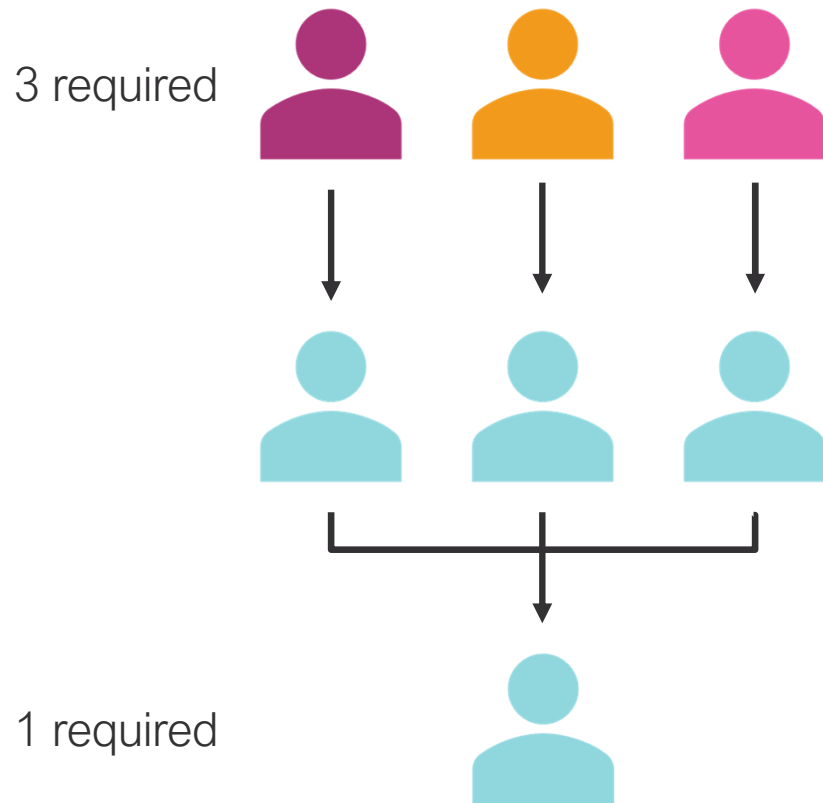


Workflow steps allow two approval conditions:

- **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.

Remove Complexity

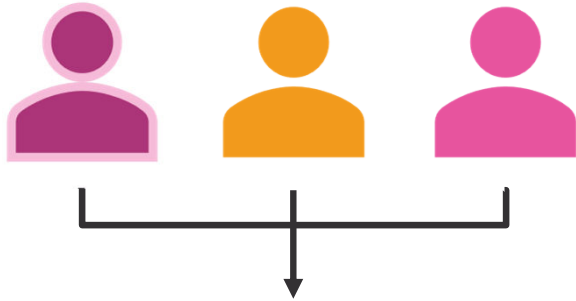


We focus on primary approvers when creating workflows and approval conditions.

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

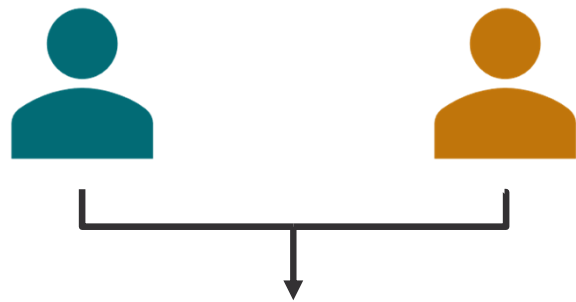
Remove Complexity

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?

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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Questions