## Duke@Work: Employee Approver Step-by-Step Guide

When setting up employees with approvers, you must have access to the organizational unit (begins with a 500....) of the employees you are assigning to approvers. The approver does not have to be in the organizational unit to which you have permission. However, if you set up employees in your organizational unit with approvers that are not in your organizational unit, you will not be able to set up back-up approvers for those employees.

- 1. In your web browser, login to <a href="http://work.duke.edu">http://work.duke.edu</a>, entering your NetID and Password when prompted.
- 2. Under the iForms tab, click on the Positions page.

207 Home - SAP NetWeaver Portal								
Duke@WORK								
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Welcome								
Websites Duke Today Budget & Apalysis	<b>i</b> Forms							

3. On the Positions page, choose Approvers Search from the drop-down list. Enter the search criteria (Duke Unique ID, last name, first name).

Go     Approver Search       Go     Go	iForms Views: Search for a Po ▼ Position: Search for a Position Positions Go Approver Search	iForms Views: Approver Search  Personnel No: Last Name: First Name: Go
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4. In the resulting list, find the employee you wish to designate as an Approver and click on the Maintain link on the corresponding row.

Personnel No:								Personalize	Filter On
Last Name: mcinerney	Employee	Pers No	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE	Maintain
First Name:	Michael K McInerney	00211689	50007370	UM	EXEMPT	DDGG	A	N	Maintain
Go									
	Row	1 of 1 💌 🗵	¥						
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## Duke@Work: Employee Approver Step-by-Step Guide Continued

- 5. In order to be an Approver or Backup Approver, an employee must meet two criteria:
  - a. He or she must be an Active employee; AND
  - b. He or she <u>cannot</u> belong to one of the following Personnel Subareas (PSAs):
     0006 Grad Student
     0007 UnderGrad Student

0012	Restricted Use
0022	Emeritus
0025	Allied Health PRN
0030	Non-Comp Awards
0050	Retiree

0007 UnderGrad Student 0015 DTS Employee 0023 Unpaid NRR Faculty 0029 Workers Comp 0035 Non-Duke Student

- 6. The Approvers Maintenance page contains four three sections:
  - a. Section One: the effective date of the approval;
  - b. Section Two: the Approver's Organizational Unit information;
  - c. Section Three: a list of the current Backup Approvers; and
  - d. Section Four: employees assigned to the Approver and Backup Approvers.

Effective Date									
Effective Date: 09/09/2010 C Reload with Effe	ective Date 1								
Approver Information									
Approver									
Unique ID: 00600016 Company Code: 0010 Org. Unit: 50000407 <b>2</b> Name: ROLAND WOOD Org.key: DD25 BFR: 6032214010 Position: 50604553 Description: TIMECARD SUPERVISOR Org. Name: FSB Building Maintenance									
Backup Approvers									
Backup 1		Backup 2		3					
Unique ID: 00600015 DName: RUBY LARSC	N	Unique ID: 00600017	lame: DEXTER A	NDERSON					
Employees									
Export A Insert Row				Se					
Name Unique ID	Position Payroll Area	Org. Unit	BFR	Org. Name					
SARAH JONES 600001	50604538 UB	50000407	6032214010	FSB Building Maintenance					
MICHAEL THOMPSON 600002	50604539 UB	50000407	6032214010	FSB Building Maintenance					
SAM DONALDSON 600003	50604540 UB	50000407	6032214010	FSB Building Maintenance					
RICHARD SONTAG 600006	50604543 UB	50000407	6032214010	FSB Building Maintenance 4					
BRANDON BAILEY 600007	50604544 UB	50000407	6032214010	FSB Building Maintenance					
AMY FREDERICK 600012	50604549 UB	50000407	6032214010	FSB Building Maintenance					

7. Section One lists the effective date of the approval can be set with a retroactive or future date.



## Duke@Work: Employee Approver Step-by-Step Guide Continued

8. Section Two contains read-only, non-editable information about the Approver's Org Unit assignment.

pprover Information							
Approver							
Unique ID: 00600016 Name: ROLAND WO Position: 50604553 Description: TIMECARD S	OD Company Org.key: UPERVISOR	/ Code: 0010 Org. DD25 BFR: Org. I	Unit: 50000407 : 6032214010 Name: FSB Building Maintenance				

9. Section Three is where Backup Approvers are maintained. Users can maintain Backup Approvers only if they assigned to an Org Unit the user can access.

Backup Approvers	
Backup 1	Backup 2
Unique ID: 00600015 DName: RUBY LARSON	Unique ID: 00600017 DName: DEXTER ANDERSON

- 10. To identify a Backup Approver, you may either:
  - a. Enter the DUID directly into the Unique ID box; or
  - Search using the name by clicking on the drop-down icon. Click on the name in the General Value list to place it in the Backup 1 or Backup 2 field.

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Personnel number: General Value List			Lafore H 2002		feeting value Lat	540
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			16111425	U/MPA	ORD UNIT FOR UNASSURED P	151045.00
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			164114875	EM.YIJEA	ORD LINE FOR LINA TO UNA	CSTOAS OF
	OK	Cancel .:	write!	EAC	MERCIE-DECEMONIAL MEDICAL	L ODETES
			1999			In [ Cancel

11. Section Four is where employees are linked to approvers.

	12. To add an employee to the	e Employee list,	, click on the Insert	Row button.
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	Name	Unique ID	Position	Payroll Area	Org. Unit	BFR	Org. Name	
	ERLINDA A ZABALLERO	98712	50008329	UM	50000799	6860201545	Medicine - Oncology	
	SEAN C MEAKIM	196384	50009603	UB	50000043	1620005000	Men's Intercollegiate Athletic	
	YORKE ALLEN IV	226256	50011373	UB	50000043	1620005000	Men's Intercollegiate Athletic	
	DALE R BROWN	104604	50017047	UM	50000243	3254501000	Administrative Application Support Svcs	
	HAROLD M CLEMENTS	106244	50019143	UM	50000243	3254501000	Administrative Application Support Svcs	
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- 13. In the new row, you may either:
  - a. Enter the DUID directly into the Unique ID box; or

## Duke@Work: Employee Approver Step-by-Step Guide Continued

- b. Search using the name by clicking on the drop-down icon. Click on the name in the General Value list.
- 14. Continue entering employees by repeating steps 11 and 12.
- 15. Save your work by clicking on the Save button.
- 16. If you are working with an **over allocated position**, add one of the employees and save your work. Then select the Reload Page button and all the employees holding that position will be displayed.