# 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 http://work.duke.edu, entering your NetID and Password when prompted.

2. Under the iForms tab, click on the Positions page.

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

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.

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 cannot belong to one of the following Personnel Subareas (PSAs):

| | |
|---|---|
| 0006 Grad Student | 0007 UnderGrad Student |
| 0012 Restricted Use | 0015 DTS Employee |
| 0022 Emeritus | 0023 Unpaid NRR Faculty |
| 0025 Allied Health PRN | 0029 Workers Comp |
| 0030 Non-Comp Awards | 0035 Non-Duke Student |
| 0050 Retiree | |

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   [Reload with Effective Date]   **1**

**Approver Information**

**Approver**

| | | |
|---|---|---|
| Unique ID: 00600016 | Company Code: 0010 | Org. Unit: 50000407  **2** |
| Name: ROLAND WOOD | Org.key: DD25 | BFR: 6032214010 |
| Position: 50604553 | | Org. Name: FSB Building Maintenance |
| Description: TIMECARD SUPERVISOR | | |

**Backup Approvers**

| Backup 1 | Backup 2  **3** |
|---|---|
| Unique ID: 00600015  Name: RUBY LARSON | Unique ID: 00600017  Name: DEXTER ANDERSON |

**Employees**

[Export] [Insert Row]                                                          Set

| | 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.

## Effective Date

Effective Date: 09/09/2010   [Reload with Effective Date]

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



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.



10. To identify a Backup Approver, you may either:
    a. Enter the DUID directly into the Unique ID box; or
    b. 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.



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

12. To add an employee to the Employee list, click on the Insert Row button.



13. In the new row, you may either:
    a. Enter the DUID directly into the Unique ID box; or

      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.