

Payroll Coordinators


Manage Approvals

Lesson Objective:

Upon the completion of the Managing Approvals lesson, you will be able to:

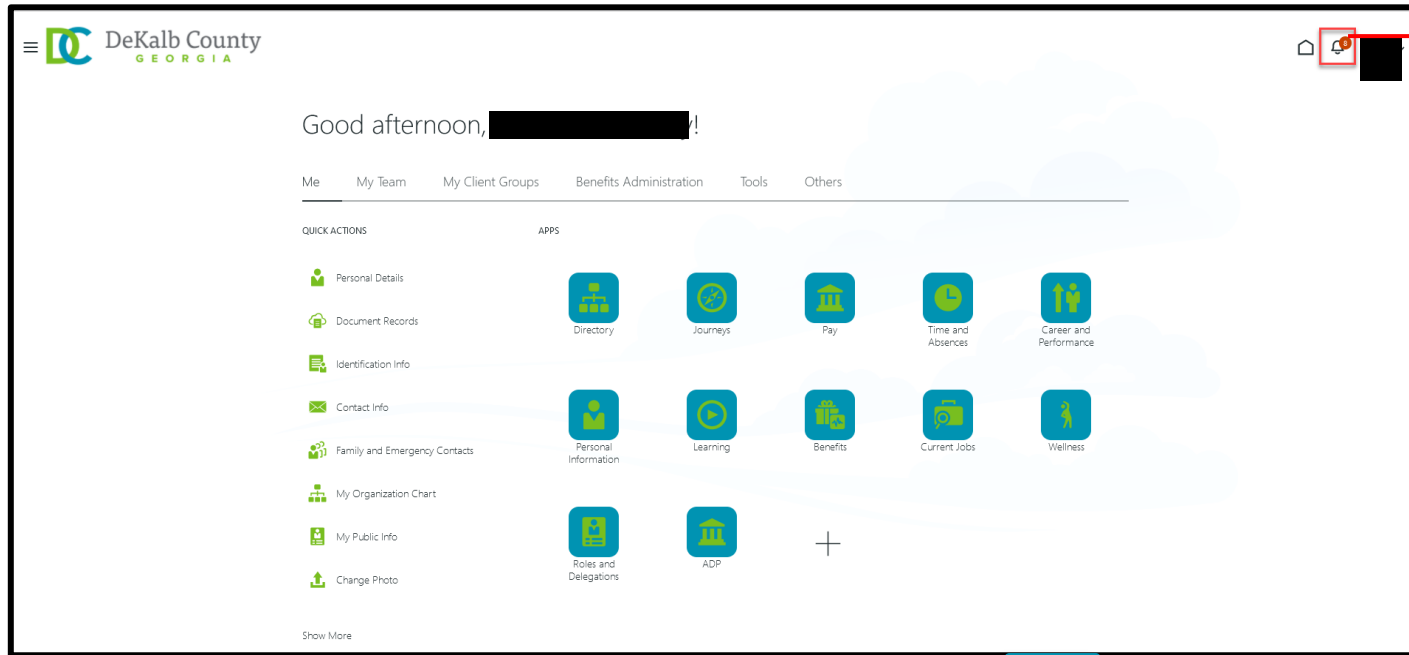
Objective

- Manage Approvals



Payroll Coordinators will be receiving Approval Notifications from Employees for approving transactions such as Address Update, Email Update, Phone Updates and Driver's License. When an Employee submits any of the mentioned request, the Coordinator will receive an Approval Notification

Managing Approvals

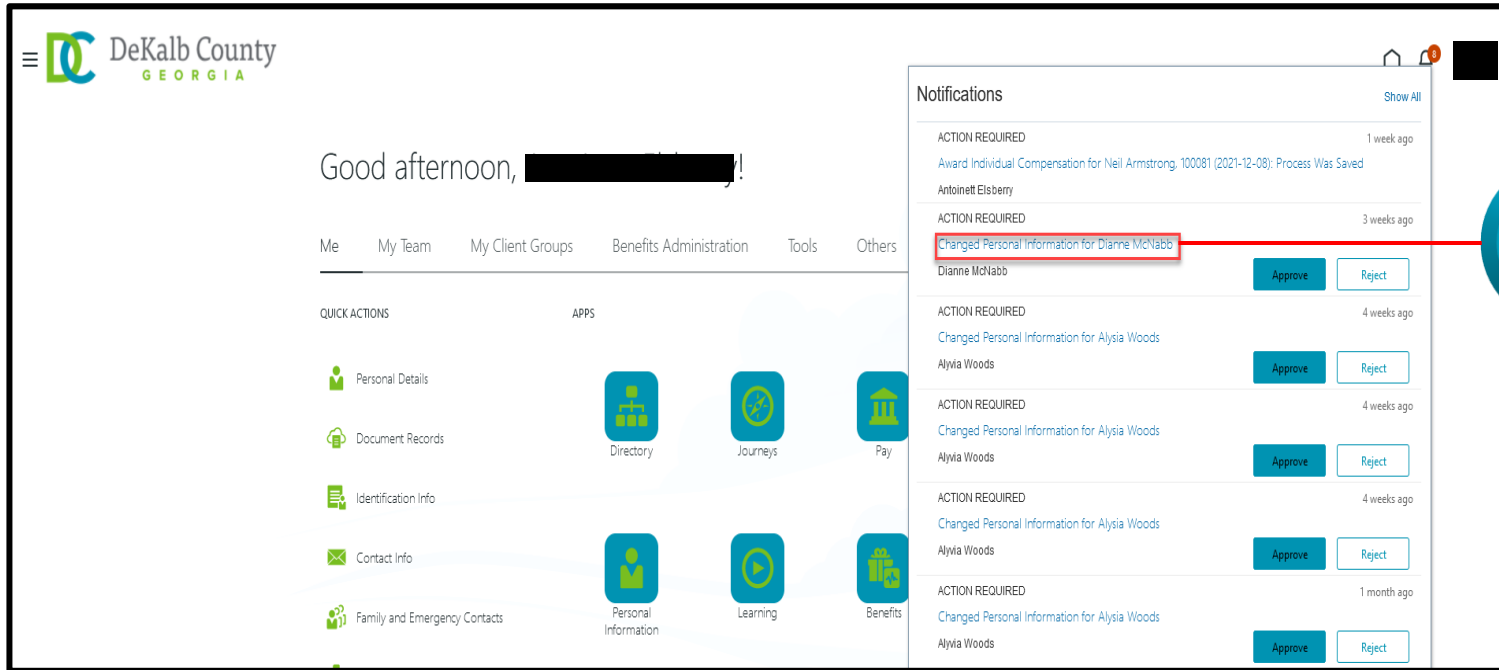


1

Select the **Bell** icon on the top right corner of the CV360 homepage

Selecting the Bell icon will display a list of all the notifications that the Payroll Coordinators have received in CV360. The notification can either be an approval notification or it can be For Your Information (FYI) notification. If the notification is a FYI, there will be a Dismiss button for the user to Dismiss the notification

Managing Approvals



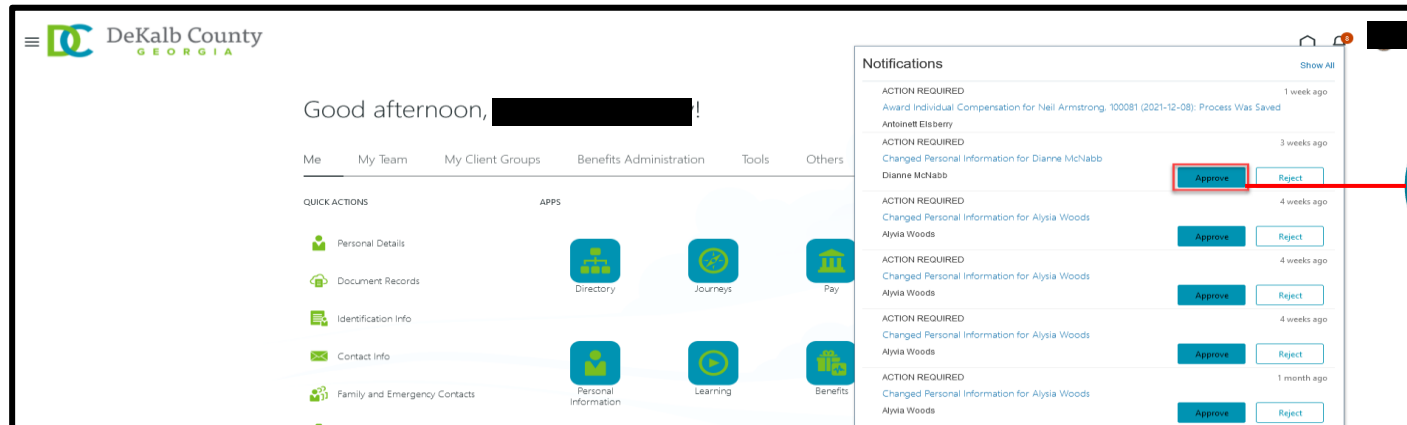
The screenshot shows the DeKalb County Georgia HR system interface. A notification panel on the right lists several 'ACTION REQUIRED' items. The notification for 'Changed Personal Information for Dianne McNabb' is highlighted with a red box. Below the notification title are two buttons: 'Approve' and 'Reject'.

2

Select the relevant **Notification** that you would like to act on (Approve or Reject)



Selecting the Notification will open the Notification with basic details of the transaction in a new tab. You can also click on Approve and approve the transaction



The screenshot shows the same DeKalb County Georgia HR system interface. The 'Approve' button for the notification 'Changed Personal Information for Dianne McNabb' is highlighted with a red box.

3

Select the **Approve** button to approve the transaction



To Reject a request, select the Reject button next to the Approve button

Managing Direct and Indirect Reports

Lesson 7: Manage Approvals

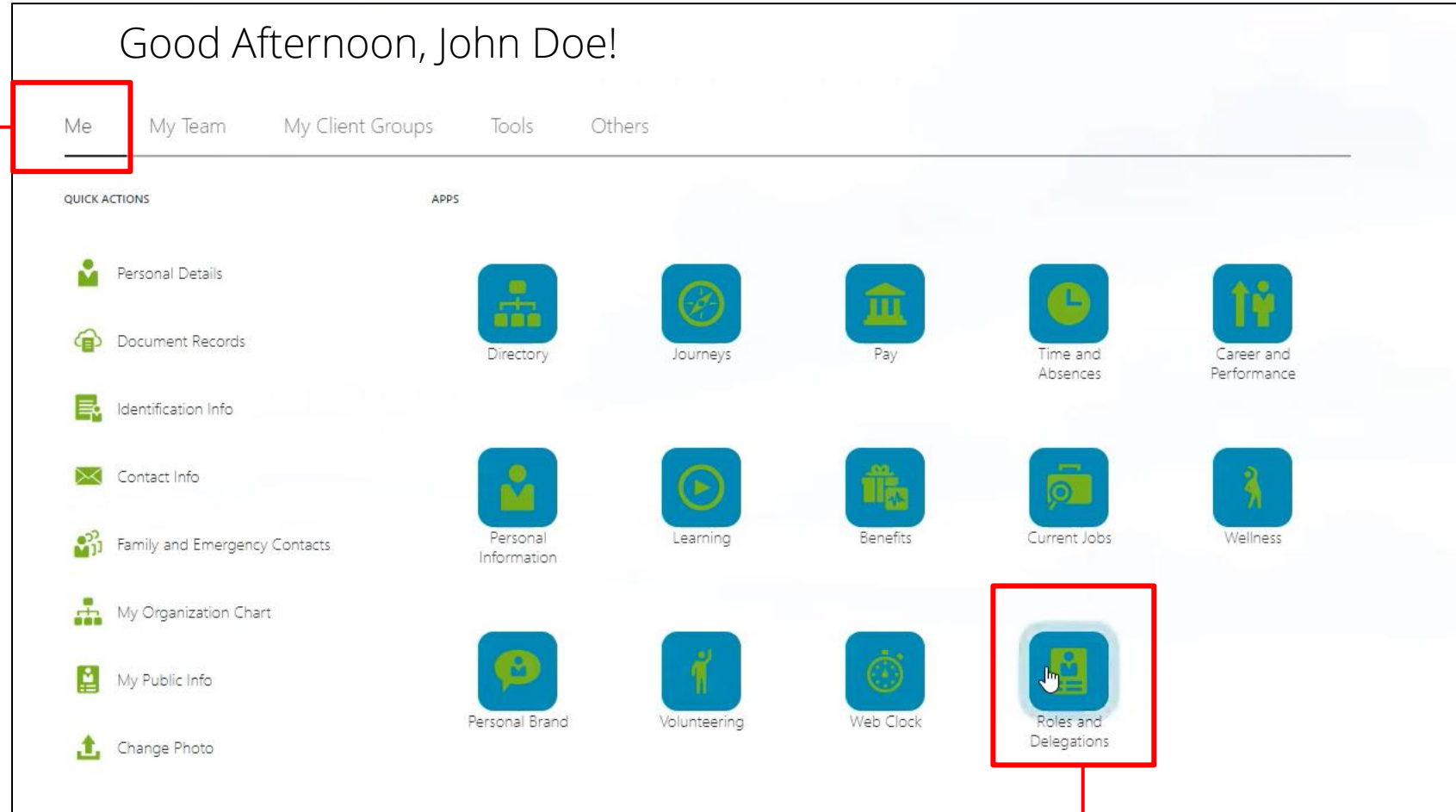
Section 2: Create a Delegation Rule for Approvals (Core HR)



Create a Delegation Rule for Approvals

1

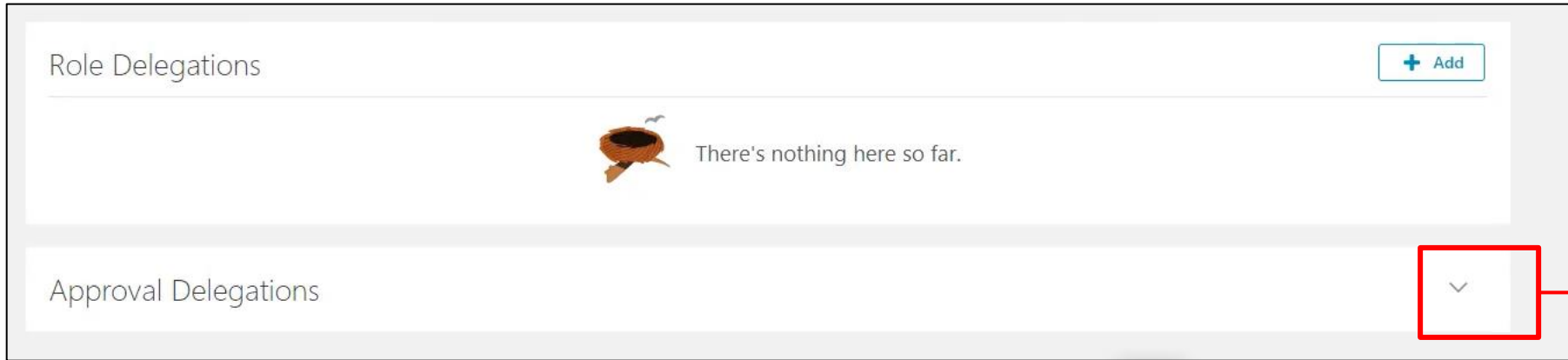
Select the **Me** tab from the CV360 homepage



2

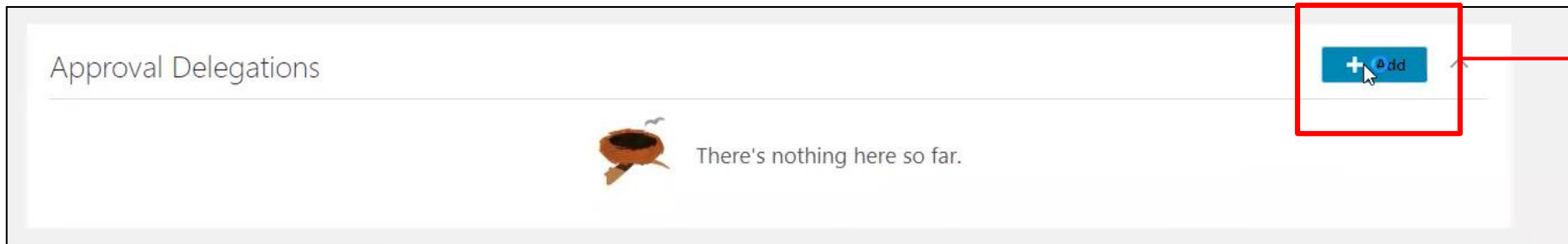
Select the **Roles and Delegations** tile from the Apps section

Create a Delegation Rule for Approvals



3

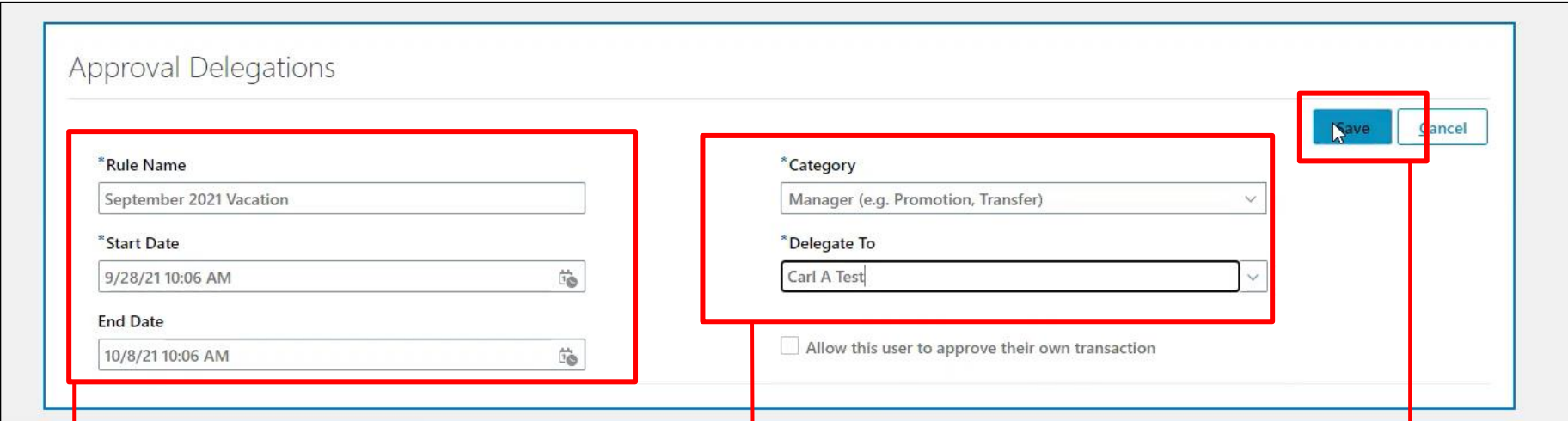
Select the drop-down chevron in the Approval Delegations section



4

Select the +Add button

Create a Delegation Rule for Approvals



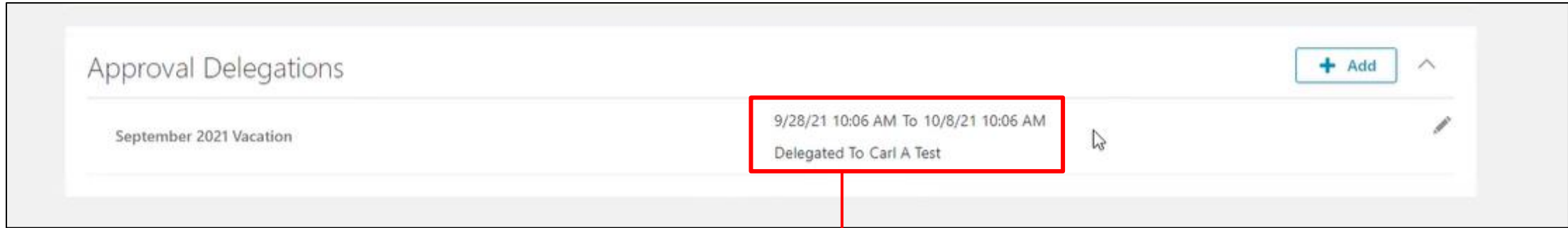
The screenshot shows the 'Approval Delegations' form. A red box highlights the 'Rule Name' field containing 'September 2021 Vacation', the 'Start Date' field containing '9/28/21 10:06 AM', and the 'End Date' field containing '10/8/21 10:06 AM'. Another red box highlights the 'Category' dropdown menu showing 'Manager (e.g. Promotion, Transfer)' and the 'Delegate To' dropdown menu showing 'Carl A Test'. A third red box highlights the 'Save' and 'Cancel' buttons at the top right of the form.

5 Key in the appropriate **Rule Name**, **Start Date**, and **End Date** for the Approval Delegation you wish to create

6 Key in the appropriate information for the **Category** of the Approval Delegation and who you wish to **Delegate To**

7 Select the **Save** button

Create a Delegation Rule for Approvals



Approval Delegations		+ Add
September 2021 Vacation	9/28/21 10:06 AM To 10/8/21 10:06 AM Delegated To Carl A Test	✎



The delegated Employee Name should now appear under the Approval Delegations section

Create a Delegation Rule for Approvals: Knowledge Check

Managers do not have to select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

True or False?

A. True

B. False



Create a Delegation Rule for Approvals: Knowledge Check

Managers do not have to select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

True or False?

A. True

B. False



The correct answer is B. Managers must select a specific Employee to Delegate Approvals to when creating a new Delegation Rule

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Submit a Delegation Rule for Approvals

Managing Approvals: Knowledge Check

There are two types of Notifications: Approval Notification and For Your Information Notification.
True or False?

A. *True*

B. *False*



Managing Approvals: Knowledge Check

There are two types of Notifications: Approval Notification and For Your Information Notification.
True or False?

A. *True*

B. *False*



The correct answer is A. There are two types of Notifications: Approval Notification and For Your Information Notification

Managing Approvals: Knowledge Check

Which of the following icons on the CV360 homepage is selected to display a list of all Notifications?

A. Home

B. Green dot

C. Bell

D. Down arrow



Managing Approvals: Knowledge Check

Which of the following icons on the CV360 homepage is selected to display a list of all Notifications?

A. Home

B. Green dot

C. Bell

D. Down arrow

 The correct answer is C. Bell icon on the CV360 homepage is selected to display a list of all Notifications

Course Exercise:

Identify a Participant in the audience to share their screen and complete the following exercise:

Assignment:

- Approve an Employee's request