

Reassign Direct Reports of a Terminating Supervisor

1. Click on the “**PRISM TRKS Supervisor**” responsibility.
2. Click on the “**Manager Actions**” link.
3. Locate the terminating supervisor and click on the “**Action**” icon.
4. Click on the “**Start**” button.
5. Verify that the **Effective Date** is correct.
6. Click on the “**Continue**” button.
7. In the **New Manager** field, enter the name of the new or interim supervisor.
8. Click on the “**Assign to All**” button.
9. Review the changes for accuracy and then click on the “**Next**” button in the top right corner of the page.
10. Click on the “**Submit**” button to process the changes.

Docking Pay for Non-Exempt Salaried Employees on a Submitted Timecard

1. Click on the “**PRISM TRKS Supervisor**” responsibility.
2. Click on the “**Time Entry**” link.
3. Locate the employee for whom you need to dock and click on the “**Action**” icon.
4. Click on the pencil under the “**Revise Timecard**” column for the timecard you need to dock.
5. On the next blank row in the **Hours Type** column, select “**N-Dock Time.**”
6. Enter the number of hours that need to be docked on the appropriate day of the **N-Dock Time** row.
*Note: You may need to reduce the hours submitted in the **Hours Worked** row.*
7. Click on the “**Continue**” button.
8. Review the timecard and then click on the “**Submit—I Certify That This Timecard is Accurate and Complete**” button.

Note: Dock time should not be submitted for employees on an approved leave.

Creating and Submitting a Timecard on Behalf of an Employee

1. Click on the “**PRISM TRKS Supervisor**” responsibility.
2. Click on the “**Time Entry**” link.
3. Locate the employee for whom you wish to create a timecard and click on the “**Action**” icon.
4. Click on the “**Create Timecard**” button.
5. Select the appropriate timecard period from the “**Period**” drop-down menu.

6. Enter the employee’s hours for the week and then click on the “**Continue**” button.
7. Click on the “**Submit—I Certify That This Timecard is Accurate and Complete**” button.

Note: The supervisor still needs to approve the employee’s timecard even if he or she submitted it on the employee’s behalf.

Changing Account Numbers via the NEAD Form

1. Click on the “**PRISM TRKS Supervisor**” responsibility.
2. Click on the “**Non-Exempt/Exempt Account Distribution**” link.
3. Click on the employee’s name.
4. To end an account number, locate the **End Date** column at the end of the applicable costing record and enter the date.
5. To add a new account number, click on the “**Add a New Line**” button.
6. Select the appropriate element from the **Element Category** field and then enter the appropriate account number.
*Note: If an incorrect subcode is entered, PRISM TRKS will automatically change it to the correct subcode based on what was selected in the **Element Category** field when you save.*
7. Enter the percentage of hours to be distributed.
*Note: You can add multiple account numbers to each element as long as the **Percentage** column adds up to 100 percent.*
8. Enter the effective date of the new account in the **Start Date** field. This date should be the day after the end date of the old account.
9. Review the **Message from Web page** form to verify charges to accounts are proper, and click on the “**OK**” button.
10. Click on the “**Save**” button.

Additional Information

PRISM TRKS Computer-based Training is available at www.bc.pitt.edu/prism/prismtrks/comptraining.html.

The PRISM TRKS Student Guide, including instructions for submitting standard reports, is available at www.bc.pitt.edu/prism/prismtrks/stuGuides.html.



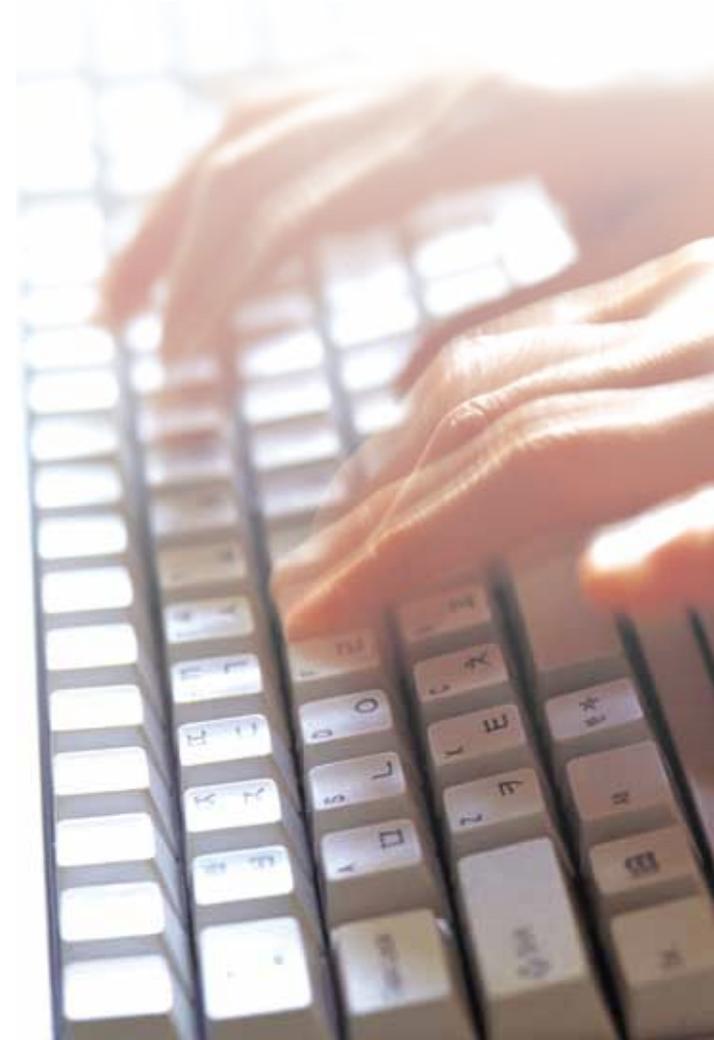
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Supervisor Quick Guide





Logging in at my.pitt.edu and Navigating to PRISM

1. Navigate to the University portal, my.pitt.edu.
2. Enter your University Computing Account username and password.
Note: If you have forgotten your username or password, contact the Technology Help Desk at 412-624-HELP (4357) for assistance.
3. Click on the "Login" button.
4. Click on the "PRISM Login" link.

Approving or Rejecting a Timecard from the Worklist

1. Locate the timecard you wish to review from the **Worklist** section and click on it.
2. Review the hours submitted.
3. If the hours are accurate, click on the "Approve" button. However, if the hours are incorrect, enter a message to the employee in the **Note** box in the **Response** section and then click on the "Reject" button at the bottom of the page.

Mass Timecard Approval

1. Click on the "PRISM TRKS Supervisor" responsibility.
2. Click on the "Mass Timecard Approvals" link.
Note: All timecard notifications will appear, which will allow approvers to take group actions on timecards. The details of a timecard can be viewed by clicking the "Details" button.
3. You will have three options in the **Action** field: Approve, Skip, or Reject.
4. Select the appropriate action for each timecard and then click on the "Continue" button.
5. Review the summary screen for accuracy and then click on the "Submit" button.

Designating an Alternate/Backup Approver

Note: New supervisors will not be able to designate an alternate/backup approver until they have approved at least one timecard.

1. From the **PRISM home page**, click on the "Worklist Access" link.
2. Click on the "Grant Worklist Access" button.
3. Type the last name of the person in the field to the right of the **All Employees and Users** field and click on the "Flashlight" icon.
4. Click on the "Quick Select" icon beside the person's name.
5. Enter the purpose of rule, such as **Access to Approve Timecards**, in the **Description** field
6. Adjust the **Start Date** if needed and leave the **End Date** blank.
7. Click on the "Selected Item Types" radio button.
8. In the **Available Item Types** block, click on the "OTL Workflows for Employees" to select it.
9. Click on the "Move" arrow to move **OTL Workflows for Employees** into the **Selected Item Types** block and click on the "Apply" button.
10. The **Worklist** rule will be displayed.
11. Once the rule is created, the person you granted Worklist access to will see a **Switch User** button at the top of his or her Worklist.

Designating an Assigned Approver

Note: New supervisors will not be able to designate an assigned approver until they have approved at least one timecard.

1. From the **PRISM home page**, click on the "Vacation Rules" link.
2. Click on the "Create Rule" button.
3. Click on the down arrow in the **Item Type** list.
4. Select "OTL Workflows for Employees" and click on the "Next" button.
5. Click on the "Select" radio button.
6. Enter a % symbol in the field to the right of the **Select** radio button and click on the "Flashlight" icon.
7. In the **Results** box, click on the "Quick Select" icon to the left of the **TIMECARD_APPROVAL_INLINE** row.
8. **Inline Timecard Approval** will now appear in the **Select** field.
9. Click on the "Next" button.
10. Adjust the **Start Date** using the **Calendar** icon if needed and leave the **End Date** blank.

11. The **Reassign** radio button should be selected.
12. In the blank field to the right of the **All Employees and Users** field, type the last name of the person and click on the "Flashlight" icon.
13. Click on the "Quick Select" icon beside the person's name.
14. You should see the person's name in the **Reassign** field. Do not change any of the other fields on this screen below the **Reassign** field.
15. Click on the "Apply" button.
16. The **Vacation** rule will be displayed.

Viewing the Missing Timecard or Time Off Balances Report

1. Click on the "PRISM TRKS Supervisor" responsibility.
2. Click on the "Missing Timecard Information" link (includes current timecard week and goes back 62 days for monthly employees and 25 days for biweekly employees) and then click on the "Home" link.
3. Click on the "Time Off Balance" link (includes vacation, sick, personal, and compensatory balances as of the **As Of** date at the top of the report) and then click on the "Home" link.
Note: Both reports include all employees in a downward reporting hierarchy. To view only direct reports, click on the "Direct Reports" radio button at the top of the page. Also, columns with an asterisk can be sorted.

Changing the Supervisor of a Direct Report

1. Click on the "PRISM TRKS Supervisor" responsibility.
2. Click on the "Change Manager" link.
3. Locate the employee you wish to reassign and replace your name with the new supervisor's name within the "Direct Reports Manager" field.
4. Verify that the "Effective Transfer Date" is correct.
5. Click on the "Next" button in the top right corner of the page.
6. Review the summary of the changes and then click on the "Submit" button.
Note: The changes will be submitted to your supervisor for approval.