EX.010.014 – MY SYSTEM PROFILE – ALTERNATE USER ROUTING

Purpose	• To identify the purpose of specifying an Alternate User. • To identify who can specify an Alternate User through their “My System Profile” page. • To define any special security requirements for the Alternate User. • To identify the impact of assigning an Alternate User if you are a designated approver for both Expenses and e-Procurement. • To specify an Alternate User through the “My System Profile” page.
Description	This topic demonstrates how to review the information in the “My System Profile” link in the Core Application and how to specify an Alternate User in the event an approver will be on temporary leave. By specifying an Alternate User when away from the office on leave, Expense Approvers temporarily route worklist transactions to another employee. Also, the Alternate User must have adequate security rights to perform the tasks assigned to them. If the Alternate User does not have the adequate security rights, they will still receive the transaction but will be unable to act on it. The Expenses Administrator will need to manually reassign those transactions. When using the Alternate User functionality, the system only sends Workflow routings to the immediate Alternate User ID. It does not send routings down multiple levels of alternate User IDs. HCM is the official record for Employee information. The Expenses Module pulls employee information such as User ID, Employee ID, home department, hire date, etc., from HCM so that the information does not have to be duplicated in the Financials Application.
Security Role	**BOR Peoplesoft User / BOR Peoplesoft User-No Tauth**
Dependencies/ Constraints	None

Additional Information	None

Procedure

Below are step-by-step instructions on how to use a system profile to assign an Alternate User.

For this topic, let's imagine that the user will be out of the office from 3/15/08 through 3/20/08. Users need to select "EMPL3" as your Alternate User using the Core Financials Application.

Step	Action
1.	Click the **My System Profile** link.
2.	For this exercise, you wish to have the User ID "**EMPL3**" receive your Workflow transactions from 3/15/25 to 3/20/25.
3.	Enter "**EMPL3**" in the **Alternate User ID** field. You can also search for a User ID by clicking the Look-up button next to this field. Due care should be taken to ensure that the individual you assign to be your alternate can make informed and inpartial decisions on your Worklist transactions.
4.	Enter "**3/15/25**" in the **From Date** field.
5.	Enter "**3/20/25**" in the **To Date** field.
6.	Any transaction (whether it be an Expense transaction or an E-Procurement transaction) will now be routed to the Alternate User ID, EMPL3, for this set period of time. After 3/20/25, subsequent transactions will route back to you.
7.	For informational purposes, the Alternate UserID and From and To Dates do not disappear from this page whenever the time period for your alternate user has ended. Thus, even though transactions will stop routing to the alternate, you will still be able to see who the last alternate was that you used, and for which time period.

Step	Action
8.	**Caution**: The Alternate User that is specified must have adequate security rights to perform the tasks that are assigned to him/her. For example, if “Anne” is going on vacation and you reassign her Worklist items to “Bill”, “Bill” must have the approval security role(s) to process the transactions. If “Bill” does not have the appropriate security, the transaction will still be routed to him, however he cannot act on the transaction; the Workflow administrator will need to manually reassign any transactions that are routed to him.
9.	**Note**: When applying an alternate User ID, make note of the fact that the system only sends workflow routings to the immediate alternate User ID. The system does not send routings down multiple levels of alternate User IDs. For example, assume “Andy” specifies “Barbara” as the alternate user ID while he is out of the office. Also assume that “Barbara” happens to be out of the office at a time during user “Andy’s” absence, and “Barbara” has specified “Charles” as an alternate User ID. In this case, the system does not send workflow routings originally intended for “Andy” to “Charles.”
10.	Do not adjust the **Workflow Attributes**. These checkboxes are not functional at this time.
11.	Expenses Workflow notifies travelers and approvers through email that the status of a transaction has changed or that an action needs to be taken. Thus, to receive these email notifications, all travelers and approvers must have a valid email address. This email address is updated on this page.
12.	An employee can enter/store multiple email addresses on this page, however he/she can select only one Primary Email Account. This primary email account will receive Expenses Workflow notifications.
13.	Click the **Save** button.
14.	Click the **Home** link when you are finished reviewing your My System Profile.