



City of Fairfield



Approvals & Workflow Forwarding





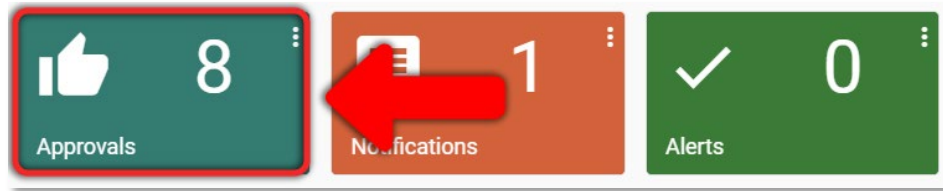
Approvals & Workflow Forwarding

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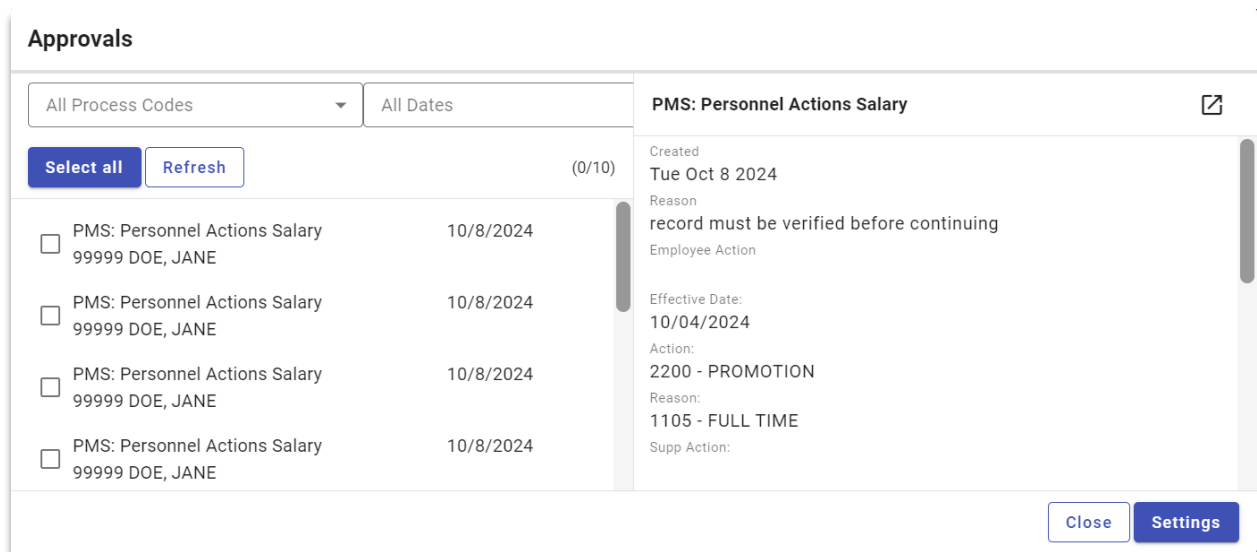
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Approving Actions

On your Tyler Hub home screen, there are three colored squares called **Hub Cards**, shown below. In this guide, we are only concerned about the leftmost card titled **Approvals**.



Clicking the **Approvals** card opens a larger 2-pane window:

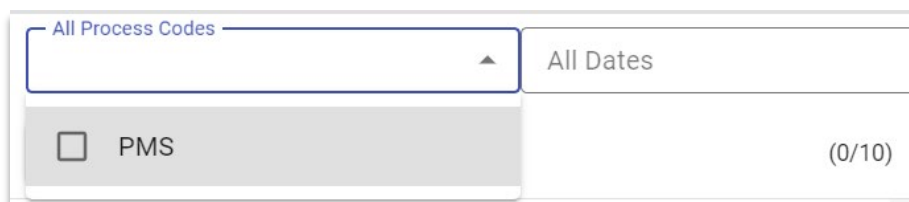


The screenshot shows the 'Approvals' window. On the left, there is a list of actions pending approval, each with a checkbox and a date. On the right, there is a detailed view of a selected action, including its creation date, reason, effective date, and action type.

Process Code	Date
<input type="checkbox"/> PMS: Personnel Actions Salary 99999 DOE, JANE	10/8/2024
<input type="checkbox"/> PMS: Personnel Actions Salary 99999 DOE, JANE	10/8/2024
<input type="checkbox"/> PMS: Personnel Actions Salary 99999 DOE, JANE	10/8/2024
<input type="checkbox"/> PMS: Personnel Actions Salary 99999 DOE, JANE	10/8/2024

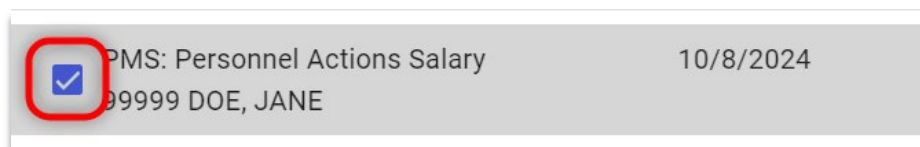
PMS: Personnel Actions Salary
Created: Tue Oct 8 2024
Reason: record must be verified before continuing
Employee Action
Effective Date: 10/04/2024
Action: 2200 - PROMOTION
Reason: 1105 - FULL TIME
Supp Action:

On the left side is a list of actions pending your approval, with options to filter by date or by process code (New Hire, Invoice, Requisition, etc.).



This image shows a close-up of the filter options in the Approvals window. It includes a dropdown menu for 'All Process Codes' and a text input for 'All Dates'. Below these, there is a checkbox for 'PMS' and a count '(0/10)'.

To see more details about an action, click the record:



This image shows a close-up of a selected action record in the Approvals window. The checkbox is checked, and the record is highlighted. The text 'PMS: Personnel Actions Salary' and '99999 DOE, JANE' is visible, along with the date '10/8/2024'.

Selecting an action to view its details will check the selection box, so be careful to uncheck any unintended actions before approving/rejecting.

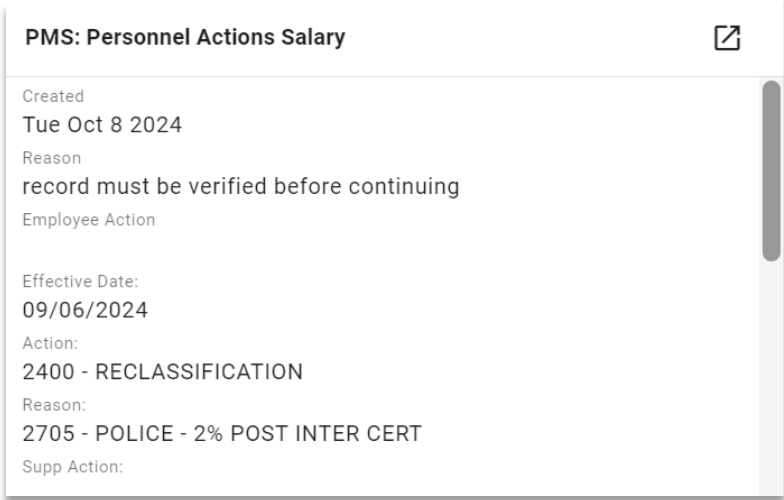


This will update the right pane which shows high-level details about the action, such as:

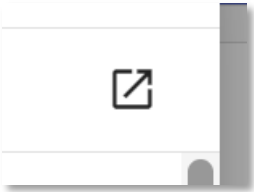
- When it was created
- Why you are seeing it (for your approval)
- The request type (action code)
- The creator of the action and their department
- The employee, their job title, bargaining unit, and location

These fields may differ if it is for an invoice, timesheet, or other approval types.

You will need to scroll to see the rest of the information available.

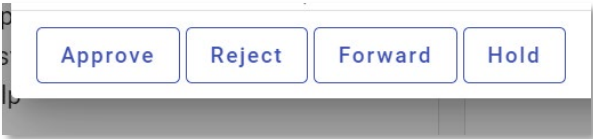


In the top right, there is an **Open in New** button that allows you to see the full action/invoice. This is useful if you are looking to view attachments, see clerk notes, or look at the details of an action:



If you click this button and get a permissions error, please contact tylerhelp@fairfield.ca.gov to update your access.

Once you have reviewed the action, **select an action** and use the buttons on the bottom left to approve, reject, etc. You can also click the checkbox on several actions to approve/reject in batches.



After approving, the item will leave your queue and proceed to the next approval step.



Forwarding Action Approvals

You can reach the approvals forwarding menu by clicking **Settings** in your Approvals hub card:

	PMI: Personnel Actions Injury/Incident	
(0/4)	Created Thu Aug 29 2024	
9/2024	Reason record must be verified before continuing Employee Action	
9/2024	Effective Date: 08/27/2024	
3/2024	Action: 7100 - WORKERS COMP	
3/2024	Reason: 5515 - CHANGE	
	Supp Action:	
	On-Boarding:	
	Category:	
		Close Settings

The two important fields on this menu are **Forwarding** and **Selective Forwarding**. These allow you to forward items in whole or keep specific ones for yourself. **Please note that you CANNOT forward your ESS timesheet and time off approvals from this menu.** Go to the [Forwarding Time Approvals](#) section on how to forward timesheet approvals in ESS.

Approvals Settings

aperez - Perez, Andrew is not currently forwarding any work.

Process Code Restriction [dropdown] Workflow Card Title Approvals

Forwarding

Forward all Workflow to user [Forward To User dropdown] ← Forward all items

Selective Forwarding

PBR	Position/Budget Request	[Forward To User dropdown]
PMB	Personnel Actions Benefit	[Forward To User dropdown]
PMC	Position Ctrl Change Position	[Forward To User dropdown]

Reset forwarding [button] Cancel Save [button]



Scroll down to schedule your approval forwarding for a specific start and end date, after which the forwarding will automatically cease. **Please note that whoever you forward to will not be able to forward any items for themselves until your forwarding rule expires.**

Schedule Forwarding

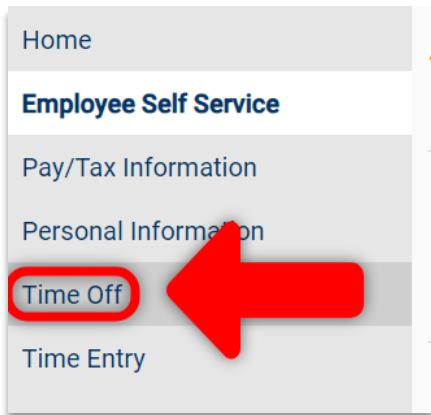
Start Date: [Calendar Icon] Hour: 12 Minute: 00 AM/PM: AM End Date: [Calendar Icon] Hour: 12 Minute: 00 AM/PM: AM

Reset or save your workflow settings by clicking the **Reset Forwarding** or **Save** buttons:

[Reset forwarding](#) [Cancel](#) [Save](#)

Approving Time

In ESS, click “Time Entry” in the sidebar.



Displayed is a list of employees that report to you, the time range they are submitting for, and the number of hours pending approval in their timesheet. **Pending or pre-approved time off requests may decrease or increase an employee’s timesheet from the typical 80-hour amount.**

Pending Timesheets

[Employee Name]	8.00	11/8/2024
[Employee Name]	36.00	12/30/2024 - 1/7/2025
[Employee Name]	45.00	11/12/2024 - 11/19/2024
[Employee Name]	0	

[APPROVE AND SUBMIT ALL PENDING TIME SHOWN ABOVE](#)

You can expand each record and get a breakdown of what pay types are being used for what hours.



45.00	11/12/2024 - 11/19/2024
45.00	APPROVE DETAILS
45.00	APPROVE DETAILS
PERSONAL LEAVE SAL	APPROVE

You can individually approve records or batch approve using the large button at the bottom of the screen. You can also view the employee's timesheet directly by clicking the **Details** button.

Forwarding Time Approvals

Please note that any forwarding rules set in ESS **DO NOT** affect approvals such as invoices, personnel actions, and other approvals. Please refer to the previous section on [Forwarding Action Approvals](#).

On the ESS homepage, set your forwarding settings in the **Workflow Forwarding** area:

Workflow forwarding

Forward time off requests to:

Forward timesheets to:

Start: End:

Check the **check box** for the forwarding setting to be applied:

Workflow forwarding

Forward time off requests to:

Forward timesheets to:

Start: End:

To forward your approvals indefinitely, **do not** check the box for **Start/End**. Otherwise, you can use the Start/End fields to schedule your approvals to automatically start/end on the date and time you choose.

Once you are finished, click **Update Forwarding** on the right-hand side:

UPDATE FORWARDING