

CO-1092 Training for Approving Managers

Introduction

The following document is intended for CO-1092 Approving Managers for approving and denying CO-1092 Security Requests. The CO-1092 Manager Approval page will only display requests for which the manager is designated as the Approving Manager of a transaction. The search page can be used to review saved, submitted or completed requests. The approving manager will receive an email notification similar to the screenshot. The email may or may not contain a URL and the verbiage of the email may change.

From: [REDACTED]
Sent: Friday, June 14, 2013 4:33 PM
To: [REDACTED]
Subject: The HRMS CO-1092 Security Request for HurlockP (Hurlock,Paul A) has been approved.

The CO-1092 Security Request form has been approved for the following:
Transaction: 51
Date: 2013-06-12
User ID: [REDACTED]
Employee ID: [REDACTED]
Name: [REDACTED]
Manager ID: [REDACTED]
Manager Name: Green,Jennifer E
Security Liaison: DDS(S)-Nelson Sharon A

Agency Approving Managers can navigate to: Core-CT HRMS > PeopleTools > Security > CO1092 Manager Approvals

Core-CT Approvers can navigate to: Core-CT HRMS > PeopleTools > Security > CO1092 Security Approvals OR click on the link below:

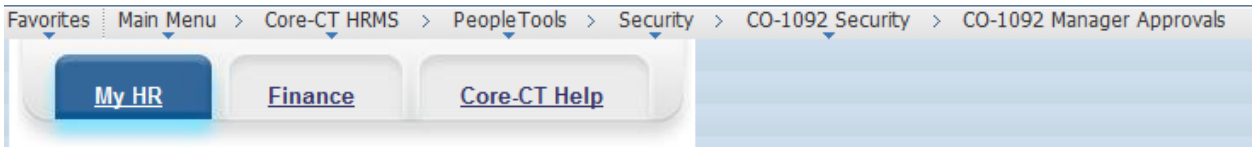
https://corect.ct.gov:10000/psp/PEPRD/EMPLOYEE/HRMS/c/CT_CO1092.CT_CO1092_APPROVE.GBL?Action=U&TRANSACTION_NBR=51&TRANSACTION_DT=2013-06-12&OPRID=HurlockP

Note: Please do not reply to this email. This mailbox does not allow incoming messages.

CO-1092 Manager Approvals – Approving Submitted Requests

1. The CO-1092 Approving Manager will login to PeopleSoft Portal and navigate to Main Menu > Core-CT HRMS > PeopleTools > Security > CO-1092 Security > CO-1092 Manager Approvals, or Main Menu > Core-CT Financials > PeopleTools > Security > CO-1092 Security > CO-1092 Manager Approvals.

2. The Approving Manager will use the search page to look for requests awaiting approval or to review the progress of a transaction. This search page can also be used to retrieve completed transactions.
3. The Search page contains the following search fields:
 - a. Transaction Number – The auto-generated number for the transaction.
 - b. Transaction Date – The date the request was entered.
 - c. User ID – The User Profile for the request.
 - d. Employee ID – The Employee ID for the request.
 - e. Workflow Status – The Status of the request: Saved Data, Submitted, Approved, In Approval Process, Denied.



CO-1092 Manager Approval

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Transaction Number: =

Transaction Date: =

User ID: begins with

Empl ID: begins with

Name: begins with

Workflow Status: =

Include History Correct History Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)

Search Results

View All First 1 of 1 Last

Transaction Number	Transaction Date	User ID	Empl ID	Name	Workflow Status
337	07/18/2013	COREPerkinsS	449397	Perkins, Stephen E.	Submitted

4. Enter in any of the fields to help search the correct transaction. This can be seen from the email message that is received or contact the Security Liaison.

Favorites | Main Menu > Core-CT HRMS > PeopleTools > Security > CO-1092 Security > CO-1092 Manager Approvals

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CO-1092 Security Approval Comments

Transaction No. 337 Transaction Date 07/18/2013 Workflow Status Submitted

Request Details

*User ID	<input type="text" value="COREPerkinsS"/>	*Manager User ID	<input type="text" value="COREPerkinsS"/>
Empl ID	449397	Manager ID	449397
Name	Perkins,Stephen E.	*Manager Name	<input type="text" value="Perkins,Stephen E."/>
Email ID	Stephen.perkins@po.state.ct.us	Manager E-mail	Stephen.perkins@po.state.ct.us
Telephone	8606222582 Core	Row Security	<input type="text"/>
Department ID	OSC15000	Edit Departments View Existing Roles Edit TL Groups	

Security Roles (Add/Delete) Personalize | Find | View All | First 1-3 of 3 Last

*Role Name	*Role Actions	Description		
1 CT AGY HR POSITIONS SPECIALIST	Add	This is a Valid Role.	+	-
2 CT AGY PAYROLL SPECIALIST	Add	This is a Valid Role.	+	-
3 CT AGY PY VIEWER	Add	This is a Valid Role.	+	-

Approve
Deny

Route to Approving Manager

TRANSACTION_NBR=337, TRANSACTION_DT=2013-07-18, OPRID=COREPerkinsS:Pending

Manager Approval

Pending

CORE-Perkins Stephen E
CO-1092 Approving Manager

Route to HR Role Approvers

TRANSACTION_NBR=337, TRANSACTION_DT=2013-07-18, OPRID=COREPerkinsS:Awaiting Further Approvals

HR Role Approvers

5. When a transaction is opened the following can apply:
 - a. If the status of the request is **Submitted**; you will be able to Approve or Deny the transaction.
 - b. If the status of the request is **Saved Data**; you will not be able to Approve or Deny the transaction.
 - c. If the status of the request is **In Approval Process**; you will not be able to Approve or Deny the transaction.
 - d. If the status of the request is **Approved**; you will not be able to Approved or Deny the transaction.
 - e. Note: If the transaction is denied, the request can no longer be used. A new request will need to be created by the Security Liaison.
6. Comments are recommended for each approval but not mandatory. The comments tab will record who entered comments and what time the comments are entered. The comments section may also contain attachments.

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CO-1092 Security Approval Comments

Transaction Number	337	Transaction Date	07/18/2013	User ID	COREPerkinsS
Scroll Area					
Find View All First 1 of 1 Last					
Effective Date	07/18/2013				
Comments/ Business Justification	This request is approved by Manager 4.				
Attached File	<input type="button" value="Add"/>				
				COREPerkinsS	07/18/13 1:34:41PM

- When the request is ready to be Approved, click on the Approve button. Notice that the Route to Approving Manager step will change from **Pending** to **Approved**, and the next step in the Approval Process will change from **Awaiting Further Approvals** to **Pending**. Then Approve and Deny buttons will also disappear because the transaction can no longer be worked on by the Approving Manager.

Route to Approving Manager

<p>TRANSACTION_NBR=2, TRANSACTION_DT=2013-04-22, OPRID=503444:Approved</p> <p>Manager Approval</p> <p>Approved</p> <p> Approving Manager 4 CO-1092 Approving Manager 04/22/13 - 1:47 PM</p>
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Route to Level 1 Approvers

<p>TRANSACTION_NBR=2, TRANSACTION_DT=2013-04-22, OPRID=503444:Pending</p> <p>Group 1 Approvers</p> <p>Pending</p> <p> Multiple Approvers CO-1092 Approval 1</p>
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- An Email notification will automatically go to the next approvers in the approval process. Depending on the transaction, it could contain approvers for Group 1, Group 2, Group 3, Group 4, or Group 5. Each group of approvers will need to approve in order for the entire CO-1092 Security Request to be completely approved and processed by the Core-CT Security Team.