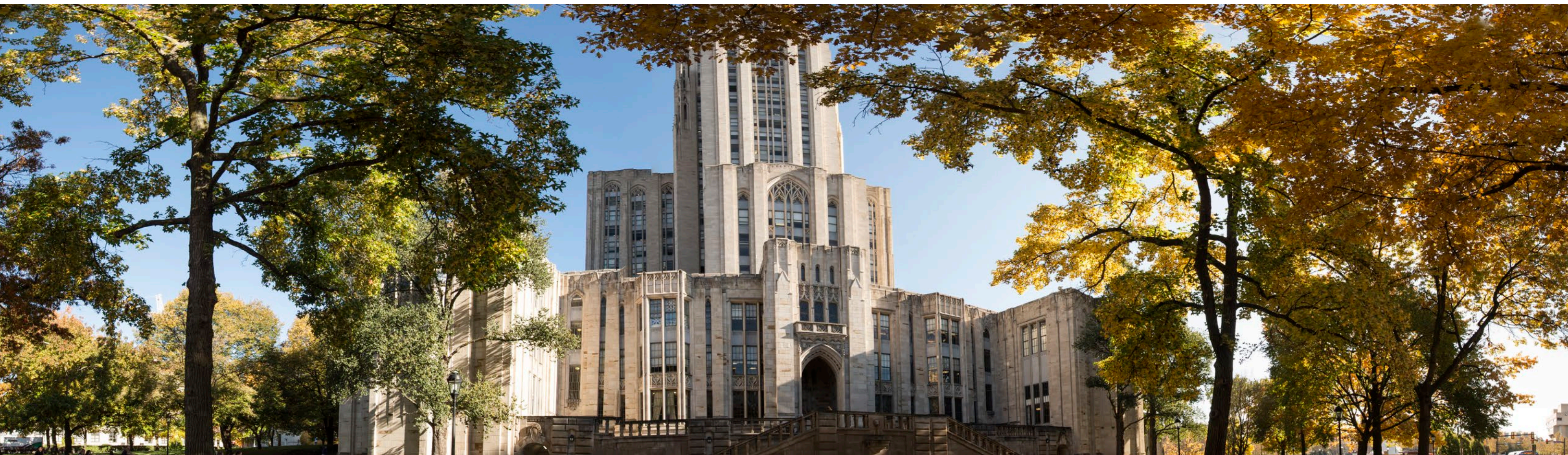
University of Pittsburgh

PRISM TRKS Quick Guide

Supervisor Guide



General Information and Logging In

General Information about Timecards

- All time worked must be submitted via the online PRISM TRKS system
- The University work week runs Sunday to Saturday
- Employees must record hours worked for each day
- Timecards must be both submitted and approved by noon on Mondays, unless otherwise announced

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

1. Navigate to my.pitt.edu
2. Enter your University username and password to login via single sign-on
3. Once logged in, select **PRISM** from the right-side list on the homepage

Managing Timecards

Approving or Rejecting a Timecard from the Worklist

1. Locate the notification for the timecard you want to review in the **Worklist** section of the homepage
2. Select that timecard and review the hours submitted
3. If the hours are accurate, select the **Approve** button
    a. If the hours are incorrect, enter a message to the employee indicating the reason and then select the **Reject** button

Mass Timecard Review

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. Select **Mass Timecard Approvals**
    a. Note: All timecard notifications will populate, which allows approvers to take group actions on timecards; the details of a timecard can be reviewed by selecting the **Details** button
3. Review the details of each timecard
4. Each timecard has three options in the Action field:
    a. **Approve**: forwards for processing in the next payroll cycle
    b. **Skip**: leaves the timecard in "Submitted" status for later action
    c. **Reject**: returns the timecard to the employee
5. Select the appropriate action for each timecard and then select the **Continue** button
6. Review the summary screen for accuracy and then select the **Submit** button

Creating and Submitting a Timecard on Behalf of an Employee

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. Select **Time Entry**
3. Locate the employee for whom you wish to create a timecard and then select the **Action** icon
4. Select 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 select the **Continue** button
7. Select 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 they submitted it on the employee's behalf.

Accessing Missing Timecard and Time Off Balances Reports

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. For missing timecards: Select **Missing Timecard Information**
    a. This includes the current timecard week and goes back 62 days for monthly employees and 25 days for biweekly employees)
3. For time off balances: Select **Time Off Balance**
    a. This includes vacation, sick, personal, and compensatory balances as of the As Of date at the top of the report

Note: Both reports include all employees in a downward reporting hierarchy. To review only direct reports, select the **Direct Reports** radio button at the top of the page. Columns with asterisks can also be sorted.

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

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. Select **Time Entry**
3. Locate the employee for whom you need to dock and then select the **Action** icon
4. Select the **Pencil** icon under the "Revise Timecard" column for the timecard that you need to dock
5. On the next blank row in the "Hours Type" column, select **N-Dock Time**
    a. Note: You may need to reduce the hours submitted in the "Hours Worked" row
6. Select the **Continue** button
7. Review the timecard then select 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.

Designating Approvers

Designating an Alternate or Backup Approver

Prior to designating an alternate or backup approver, **you must approve at least one (1) timecard**.

1. From the PRISM homepage, select **Worklist Access**, and then select the **Grant Worklist Access** on the top left of the page
2. Add the last name of the person who will be an alternative approver in the field to the right of the "All Employees and Users" field
    a. A list will automatically populate under the search bar or you can select the magnifying glass icon to open a list of search results in a new window
3. Select the person's name from the populated search results or select **Quick Select** if you opened a new window with the search results
4. Enter the purpose of the rule, such as **Access to Approve Timecards**, in the "Description" field
5. Adjust the "Start Date," if necessary, and leave the "End Date" blank
6. Select the **Selected Item Types** radio button
7. In the "Available Item Types" block, select **OTL Workflows for Employees**
8. Select the **Move** arrow button to move it to the **Selected Items Type** block, then select **Apply**

Designating an Assigned Approver

Prior to designating an assigned approver, **you must approve at least one (1) timecard**.

1. From the PRISM homepage, select **Vacation Rules**
2. Select the **Create Rule** button on the top left of the page
3. Select the down arrow icon in the **Item Type** list
4. Select **OTL Workflows for Employees** and then select **Next**
5. Select the "Select" radio button
6. Enter a percentage symbol (**%**) in the text field and then select the magnifying glass icon
7. Search results will open in a new window; select **Quick Select** located to the left of the "TIMECARD_APPROVAL_INLINE" row
8. "Inline Timecard Approval" is now listed in the Select field text box
9. Select the **Next** button
10. Adjust the "Start Date" using the calendar icon, if needed, and leave the "End Date" blank
11. The **Reassign** button should be selected
12. Enter the last name of the person who will become the assigned approver into the field to the right of the "All Employees and Users" field
    a. A list will automatically populate under the search bar or you can select the magnifying glass icon to open a list of search results in a new window
13. Select the person's name from the populated search results or select **Quick Select** if you opened a new window with the search results
14. The selected person's name will now be listed in the **Reassign** field; do not change any of the other fields on this screen below the Reassign field
15. Select the **Apply** button

Changing Supervisors

Changing the Supervisor of a Direct Report

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. Select **Change Manager**
3. Locate the employee that you wish to reassign and replace your name with the new supervisor's name in the "Direct Reports Manager" field
4. Verify the **Effective Transfer Date**
5. Select the **Next** button
6. Review the summary of changes and then select the **Submit** button

Reassigning Direct Reports of a Terminating Supervisor

1. Select the **PRISM TRKS Supervisor** drop-down from the Main Menu section of the homepage
2. Select **Manager Actions**
3. Locate the terminating supervisor and select the **Action** icon
4. Select the **Start** button
5. Verify that the **Effective Date** is correct and select **Continue**
6. In the "New Manager" field, enter the name of the new or interim supervisor
7. Select the **Assign to All** button
8. Review the changes for accuracy and then select the **Next** button
9. Select the **Submit** button to process the changes

Additional PRISM Resources

Changing Account Numbers via the NEAD Form

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

Online Resources

PRISM TRKS computer-based training and reference guides are available online:
https://prism.pitt.edu/training/training-manuals/#prism-trks

Contact Information

Office of Human Resources
Customer Support

Email: HRCustomerSupport@pitt.edu
Phone: 412-383-8463

Address: 100 Craig Hall, 200 South Craig Street, Pittsburgh, PA 15260