Telework Online

Administrator Guide

June 2015

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OVERVIEW

Telework Online is a centralized system that simplifies and manages the telework application process. Telework Online can be used "as-is" without customization, or it can be adapted and customized to meet an agency's or department's needs. This guide explains the features and procedures that Telework Administrators should be familiar with to manage their implementation efficiently.

IN THIS SECTION

OVERVIEW

Understanding Application Types and Their Relationships

There are three types of applications in Telework Online – the main Telework application, and any associated Medical or Ad Hoc applications. Medical and Ad Hoc applications are child applications, and they can only exist when there is a parent Telework application.

```
                    ┌─────────────────┐
                    │    Telework     │
                    │   Application   │
                    │    (Parent)     │
                    └────────┬────────┘
              ┌──────────────┴──────────────┐
      ┌───────┴────────┐          ┌──────────┴────────┐
      │ Medical Telework│          │  Ad Hoc Telework  │
      │    (Child)     │          │     (Child)       │
      └────────────────┘          └───────────────────┘
```
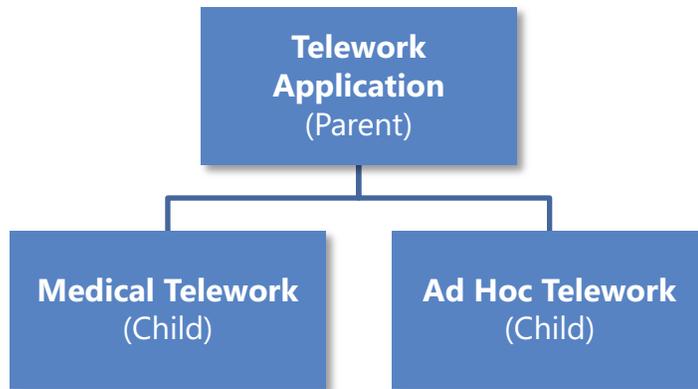
Diagram 1: The relationship of a parent Telework application to child Medical and Ad Hoc applications

In the course of a Telework Application period, an applicant can have multiple Medical and Ad Hoc applications. Each of these applications will have a separate and distinct agreement number, and a period for which they are valid.

Applicants can only create Medical or Ad Hoc Applications if they have selected the corresponding options on their Telework Application (question #3). These options give an applicant the ABILITY TO CREATE the corresponding child application types later, but do NOT give explicit permission to telework at-will in those circumstances.

For instance, in order for an applicant to be able to create an Ad Hoc application at a later date, they must first have an approved Telework application where they selected "Ad Hoc" as an option in question #3. If the applicant did not select "Ad Hoc" in question #3, they would NOT be able create an Ad Hoc application.

The same holds true for a Medical Application. An applicant must have an approved Telework application with the Medical option selected in question #3 in order to create a Medical application at a later date.

In both cases, the Ad Hoc or Medical application (once approved) gives the applicant the right to telework on a specific date or period.

Terms Used in This Guide

Listed below are some of the terms and their definitions that are used throughout this guide.

Table 1: Terms and definitions used in this guide.

Term	Definition
Users and Roles	
Applicant	A general user of Telework Online. An applicant can only create and manage their own application.
Approver	Users who have the authority to approve and reject applications. This includes the applicant's supervisor and the Telework Administrators.
Supervisor	The first approver of an application in a workflow. All supervisors are approvers, but not all approvers in a workflow are supervisors (i.e. approvers who are in a second or third stage of a workflow).
Telework Administrator	Users who are responsible for managing Telework Online at a location. Also known as Telework Coordinators.
Forms	
Application	The forms associated with applying to telework before being approved.
Agreement	A completed and approved Telework application.
Ad Hoc Telework	Telework that occurs on an optional or at-will basis.
Regular Telework	Telework that occurs on a regular or repeating basis.
Medical Telework	Telework that occurs due to a medical situation.
Workflow	An automated series of steps that determines who must approve an application.

OVERVIEW

Notes

- Although not technically correct, Telework Online currently uses the terms **Application** and **Agreement** interchangeably. For the sake of simplicity, this guide will use the term *Application* as much as possible.

- The terms **Supervisor** and **Approver** can also be confusing, and mistakenly used interchangeably. Supervisors are actually a sub-group of approvers. In other words, all supervisors are approvers, but not all approvers are supervisors. Approvers may also be directors, managers, or other department officers.

Approvers

Supervisors

Diagram 2: The relationship of supervisors to approvers.
All supervisors are approvers, but not all approvers are supervisors

LOGIN AND NAVIGATION

The first step in working with Telework Online is to log in as a Telework Administrator, and be familiar with the sections and navigation of the administrator home page.

IN THIS SECTION

LOGIN AND NAVIGATION

Logging in to Telework Online

Telework Online can be accessed via a web browser using the URL for your institute which is typically in the format:

telework.<icname>.nih.gov

Where *<icname>* is the letter abbreviation or acronym for your institute.

Procedure

1. Enter the web address for Telework Online into the web browser.

2. The **NIH iTrust Authorization** page is displayed.

3. Enter your login credentials and click **Log in**.

Selecting a Mode

Once successfully logged in, Telework Online will prompt to select a mode. There are three options available as a Telework Administrator:

- Approver/Admin mode

- Applicant mode for self

- Applicant mode for another employee
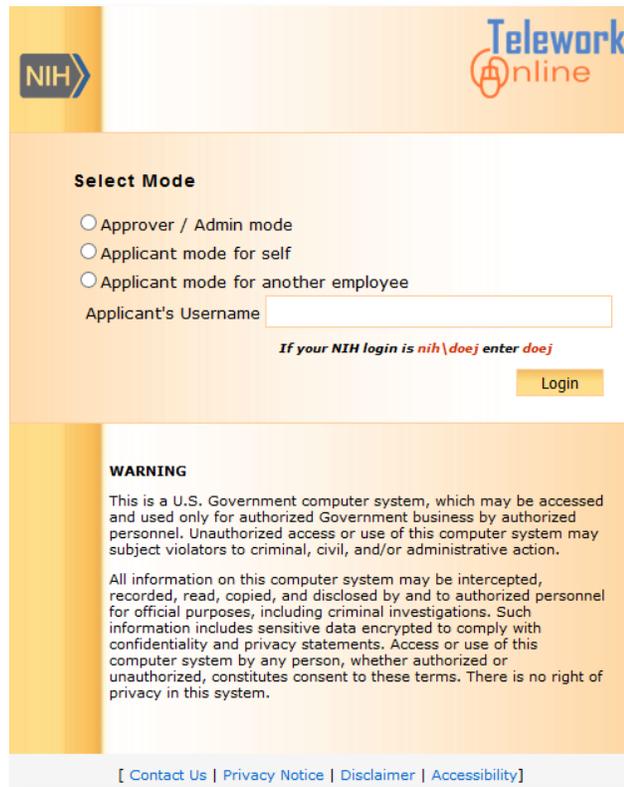
Figure 1: The Telework Online Select Mode page.

Choose **Approver/Admin mode** to access and use the Administrator features.

Choose **Applicant mode for self** to create, update, or view your own application. For more information, see the **Notes** on the next page.

Choose **Applicant mode for another employee** to login on behalf of another employee and create, update, or view their application. For more information, see **Applicant Mode for Another Employee** on page 151.

Notes

- Once logged in to Telework Online, it is not possible to change the working mode. In order to change the working mode, log out, log back in, and select a different mode.

- If you log in as Approver/Admin, **you CANNOT view or modify your own application**. You must log out and change your mode to **Applicant mode for self**.

Understanding the Administrator Home Page

The administrator home page is made up of three main components:

- The **Telework Administrator** menu bar

- The **Announcements** section

- The **Pending Your Approval** section
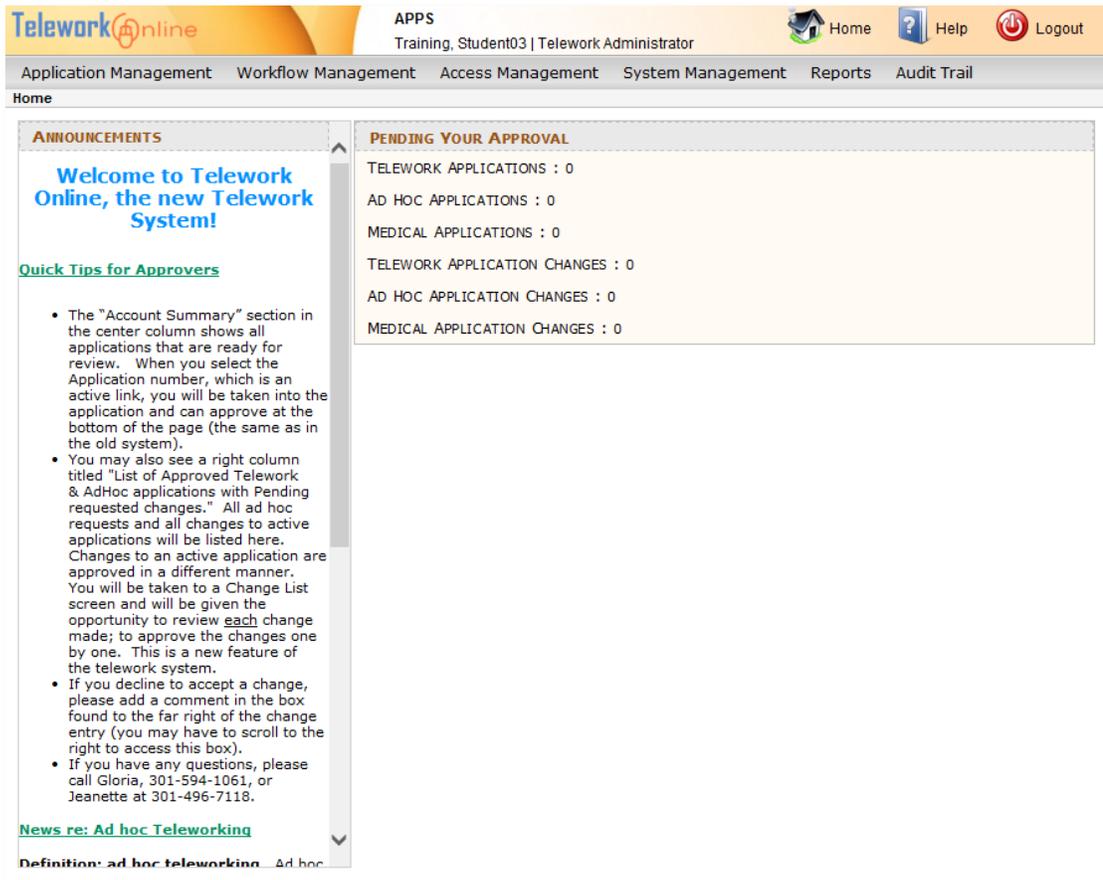
Figure 2: The administrator home page.

The **Telework Administrator** menu bar lists all of the menus and commands that are available when logged in as an administrator.

The **Announcements** section displays the announcements that are visible to both administrators and approvers (not the applicants).

The **Pending Your Approval** section lists applications or application changes that need attention or approval.

LOGIN AND NAVIGATION

Returning to the Administrator Home Page

When navigating other sections and features of Telework Online, there are three ways to return to the administrator home page.
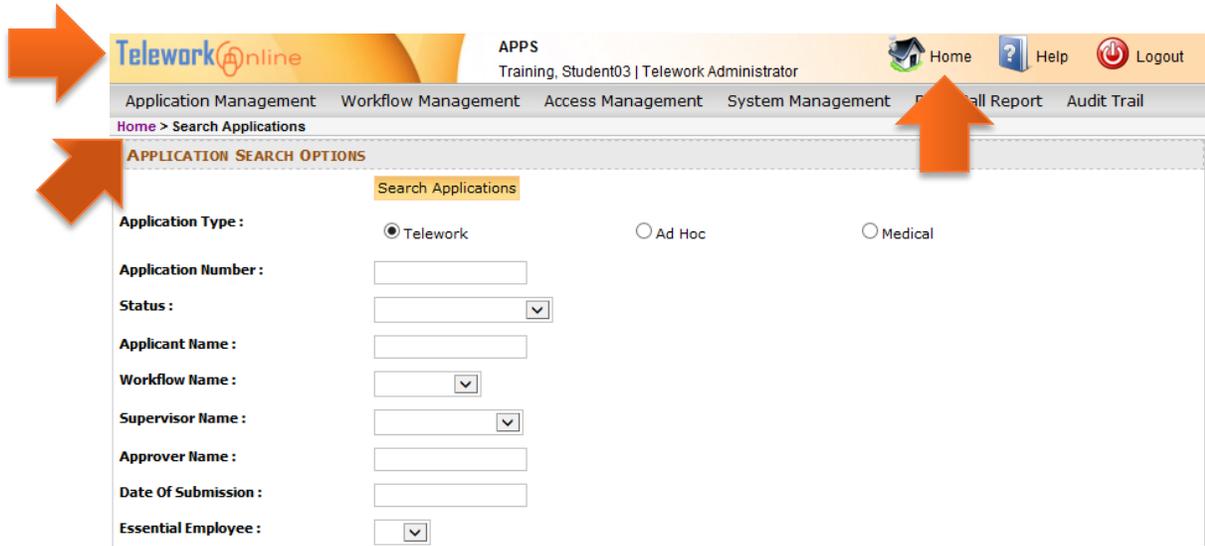
Figure 3: Ways to return to the administrator home page.

Procedure

1. Click the **Telework Online** logo in the upper left hand corner.

   OR

   Click the **Home** icon and text in the upper right hand corner.

   OR

   Click the **Home** link in the bread crumb trail displayed below the menu bar.

2. The administrator home page is displayed.

Tip

- Generally speaking, it is better to use the navigation controls and menus built in to Telework Online for navigating the site than it is to use the Forward and Back buttons of the web browser.

MANAGING APPLICATIONS

The Telework Administrator is responsible for managing the applications in Telework Online. This section explores how to search for and view applications, export lists of applications to Excel, and perform actions on applications such as reassigning a group of applications to another approver, changing the supervisor or workflow for a single application, and terminating an application.

IN THIS SECTION

MANAGING APPLICATIONS

Viewing the Applications List

The **Applications List** page displays all non-archived Telework applications in Telework Online, including Ad Hoc and Medical applications.

Figure 4: The Applications List page with results displayed.

The applications are displayed on two tabs – the **Pending Your Approval** tab and the **Applications List** tab. The number after each tab name indicates the number of applications listed on the tab. Ad Hoc applications have an (A) after the application number, and Medical applications have an (M). All other applications are standard Telework applications.

Applications will be listed with one of 11 possible statuses. These status types are listed and explained in the table on the following page.

Table 2: Application statuses in Telework Online

Status	Description
Active	The application is approved and currently in force.
Approved	The application has completed the workflow process and been approved with future start date.
CompletionProcessExpired	The applicant saved their agreement but did not submit it for approval before the defined expiration period.
Declined	The application was not approved.
ProvisionalApproved	The application has been approved by the first approver but still needs approvals from other approval stages in the workflow.
Saved	The applicant has saved the application, but has not yet submitted it for approval.
Submitted	The applicant has submitted the application for approval, and the application is awaiting approval from the first stage approver.
TerminationByAdmin	The application was terminated by a Telework Administrator.
TerminationByExpiration	This status occurs in two situations: 1. No action was taken by the approvers for a submitted or provisional approved application within the specified approval time period. 2. An active application has reached the end date established for the application.
TerminationByRequest	The applicant requested a termination of their active agreement and the request has been approved.
Withdraw	The applicant withdrew their application before it was approved by the first stage approver.

MANAGING APPLICATIONS

Procedure

1. On the **Application Management** menu, click **Applications List**.
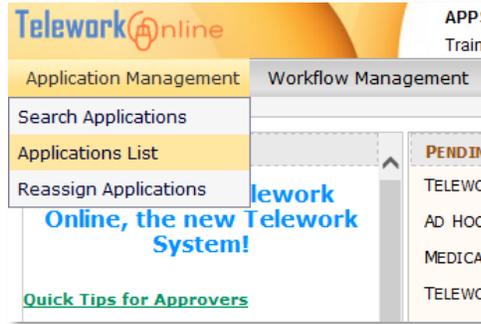
2. The **Applications List** page is displayed. Depending on the size of your monitor, it may be necessary to use the horizontal and/or vertical scroll bars of the list window to see all of the applications and information columns.

3. To view an individual application, click the **Application Number**.

Searching for an Application

The search feature of Telework Online is used to locate and display a single application or a group of applications that fit the defined criteria.

Procedure

1. On the **Application Management** menu, click **Search Applications**.
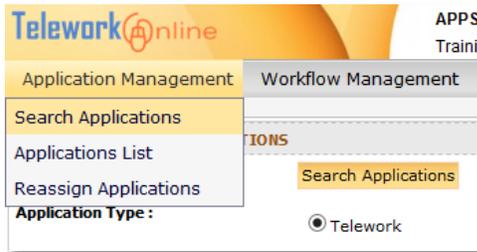
2. The **Application Search Options** page is displayed.

3. Select the **Application Type** (**Telework**, **Ad Hoc**, or **Medical**).

4. Enter other search criteria as desired.

5. Use the **Fields To Be Displayed** section to include fields in the search results list that are not included by default. For more information, see the **Notes** following this procedure. Use the **Right** and **Left** buttons to move fields between boxes, and the **Up** and **Down** buttons to order the fields once they have been added. Fields added to the search results list will be displayed to the right of the default fields.

6. To include applications that have already been archived, select the **Include Archived Applications** check box.

7. To execute the search, click **Search Applications** located at the top or bottom of the page.

8. The search results are displayed on the **Applications List** page.

9. To start a new search, click **Search** above the results list.

Notes

- As mentioned in step 5 of the previous procedure, there are 11 default fields that are included and displayed in the search results list. These fields, in order from left to right, are:

Application Number

Applicant Name

Status

Approval Status

Submission Date

Start Date

End Date

Termination Date

Supervisor

Workflow

Archived

- The left to right order of the default fields cannot be changed. Only the order of fields added to the search can be changed.

- The default fields cannot be removed from the search results list.

Exporting a List to Excel

The Applications List and the results of any application searches can be exported to Excel for further data manipulation and formatting.

Procedure

1. On the **Applications List** page, click **Export To Excel**.
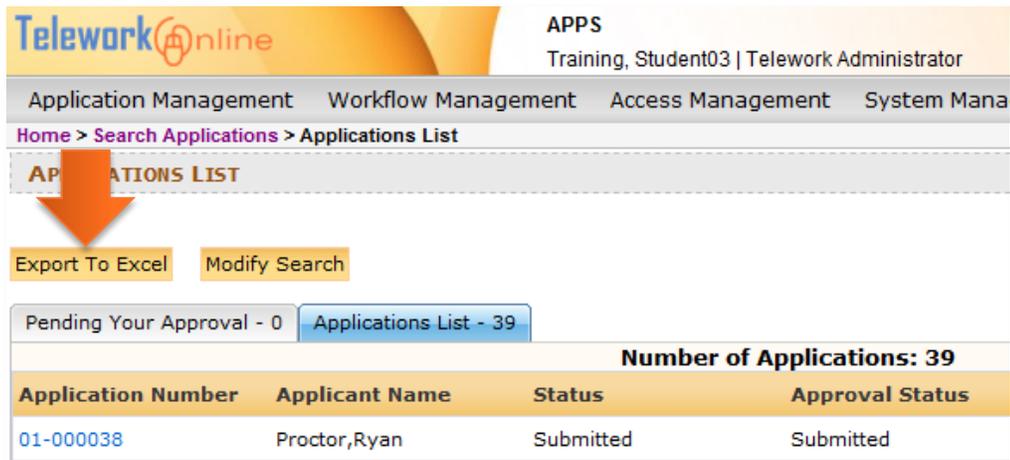
2. Depending on the web browser and version you are currently using, an **Open/Save** dialog box is displayed.

In Internet Explorer, this dialog box displays at the bottom of the browser window (pictured below).

In Google Chrome, the file will automatically be downloaded and saved to the default save location.

For issues with saving and opening Excel files in Firefox, please see the **Warning** section following this procedure.

3. Click **Open**.

4. Excel will start in Protected View with the results displayed. For more information, see the **Tips** following this procedure.

5. There are two sheet tabs in the workbook that correspond with the page tabs of the **Applications List** page. The Pending Your Approval tab may be displayed first and appear to be blank, so it may be necessary to click the Applications List tab to see the list results.
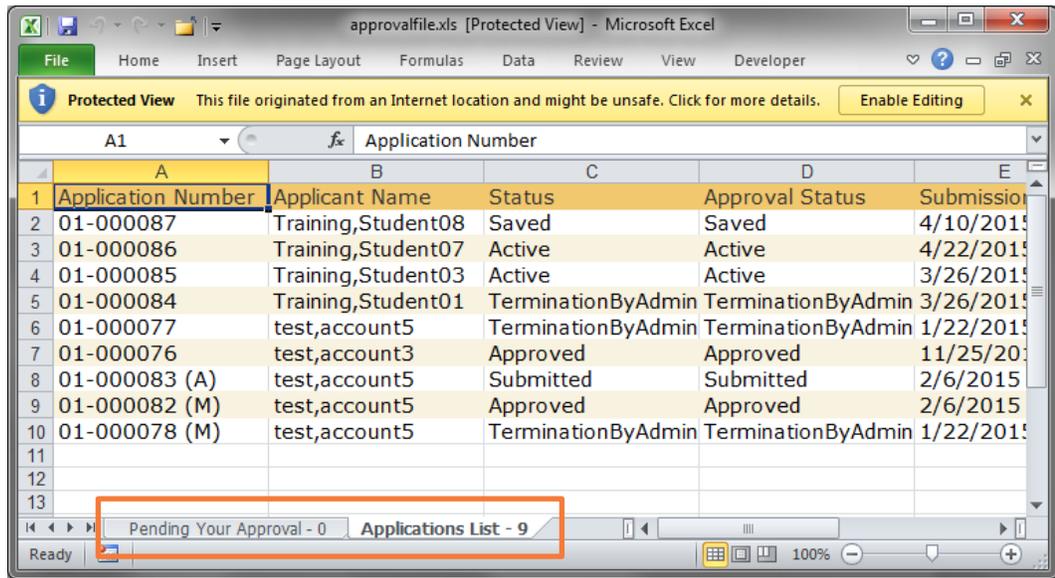
Click the worksheet tabs at the bottom to display the Applications List..

Warning for Firefox Users

- There are several potential issues that can arise when using Firefox to export data to Excel. For more information on these issues and their resolution, see **Issues with Data Exports for Firefox Users** on page 154.

MANAGING APPLICATIONS

Tips

- In Office 2010 and 2013, the Excel file opens in Protected View which does not allow editing. To edit the file, click **Enable Editing** in the banner.
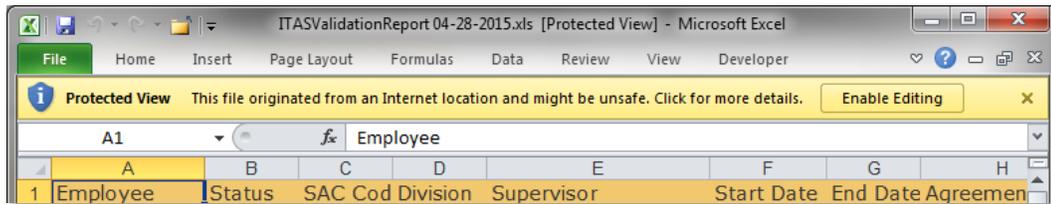
- The exported file is in the older .xls format of Excel 97-2003 instead of the newer .xlsx format of Excel 2007, 2010, and 2013. Because of this, some Excel features may not be available. To convert the file to the newer .xlsx format in Excel, click **File**, make sure the **Info** page is displayed, and then click **Convert**.

Reassigning Applications to Another Supervisor

This procedure allows a Telework Administrator to take either a single Telework or Medical application or more commonly, a group of Telework or Medical applications from one supervisor and reassign them to another supervisor. This procedure is a permanent change to the supervisor listed on an application.

If the new supervisor is a member of a different workflow than the current supervisor, then the current application, any future changes to the application, and any future application renewals will use the new supervisor and the workflow associated with the new supervisor.

This procedure can change the supervisor on both applications that are currently in the approval process, as well as applications that have already been approved.

This procedure applies only to Telework and Medical applications; it does not apply to Ad Hoc applications.

Procedure

1. On the **Application Management** menu, click **Reassign Applications**.

2. Using the lists, select an **Application Type** and a **Current Supervisor**. The page updates to display a list of matching applications.

MANAGING APPLICATIONS

3. (Optional) If the **Current Supervisor** is a member of more than one workflow, use the **Current Workflow** list to select a workflow and filter the results.

4. Select the application(s) to be reassigned by selecting the check box(es) next to the application number(s). To select all listed applications, select the check box at the top.

5. Using the list, select a **New Supervisor**.

6. Select a **New Workflow**. This needs to be selected even if the new supervisor is only a member of one workflow.

7. In the text box below the applications list, enter a **Reason for reassigning the applications**.

8. Click **Reassign Applications**.

9. An action confirmation dialog box is displayed. Click **OK** to continue.

Tip

- This feature can also be used to assign a workflow to a Medical application.

Changing the Supervisor for an Application

This procedure allows an administrator to take a single Telework application from one supervisor and reassign it to another supervisor. This procedure is a permanent change to the supervisor listed on an application.

If the new supervisor is a member of a different workflow than the current supervisor, then the current application, any future changes to the application, and any future application renewals will use the new supervisor and the workflow associated with the new supervisor.
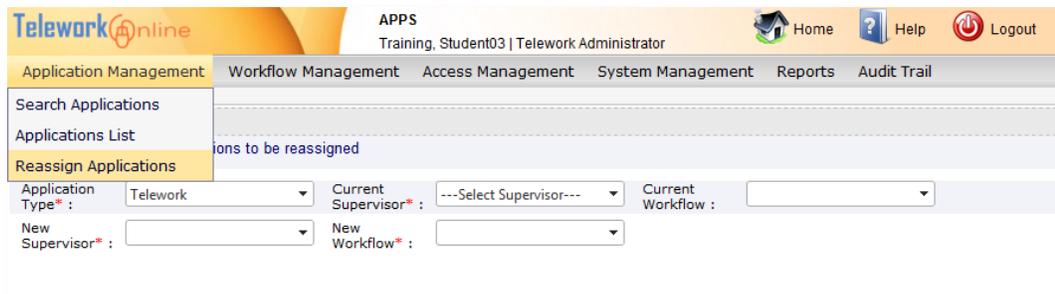
This procedure can change the supervisor on applications that are currently in the approval process, as well as applications that have already been approved.

This procedure applies only to Telework and Medical applications; it does not apply to Ad Hoc applications.

Procedure

1. Search for and display an application.

2. On the **Application Management** tab, in the **What Can I Do** section, click **Change Supervisor**.

3. The **Change Supervisor** page is displayed.
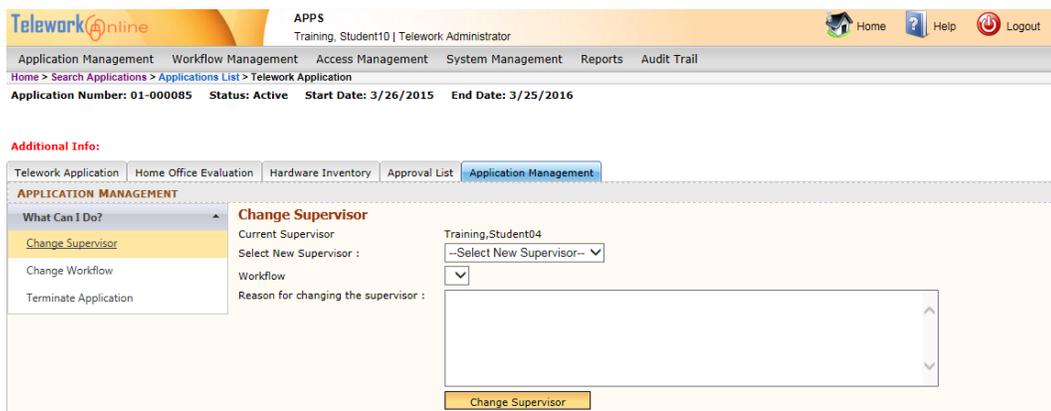
4. Using the **Select New Supervisor** list, select a supervisor.

5. Using the **Workflow** list, select a workflow. If only one workflow is available for a supervisor, that workflow will automatically be selected.

6. In the text box, enter a **Reason for changing the supervisor**.

7. Click **Change Supervisor**.

8. An action confirmation dialog box is displayed. Click **OK** to continue.

Manually Assigning a Workflow to an Application

When Telework Online is unable to determine which workflow an application should follow, it will send a notification email to the Telework Administrator. This situation occurs when an approver is a member of the first approval stage of more than one workflow.

Simple Workflow 1

Director Approval Workflow
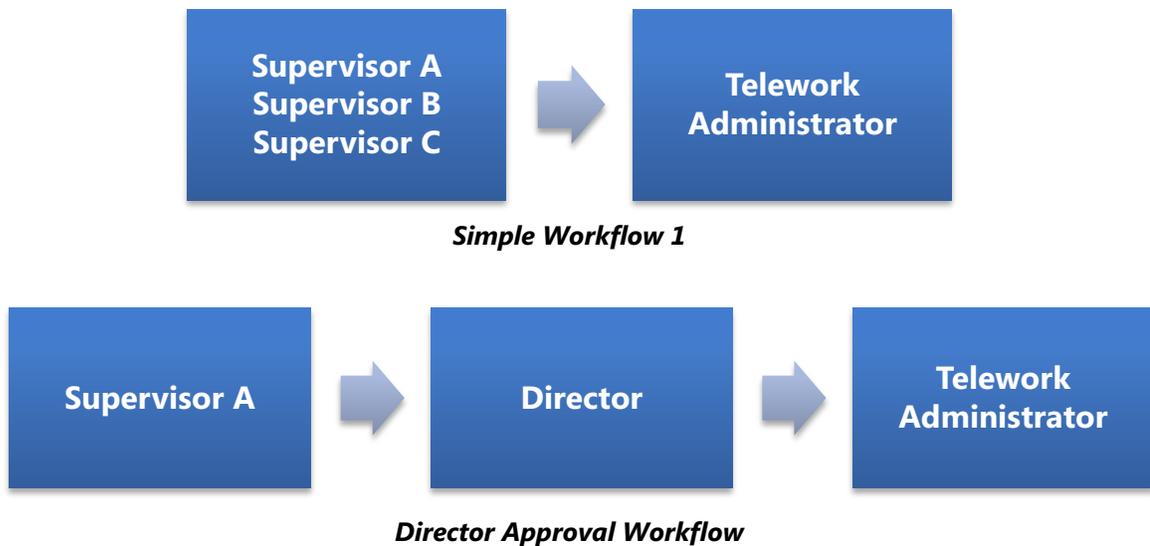
Diagram 3: Supervisor A is in the first stage of two workflows.

In this example, Supervisor A is in the first stage of two different workflows. Because of this, when an applicant selects Supervisor A as their supervisor and submits their application, Telework Online will be unable to determine which workflow to use for the application.

To resolve this situation, the administrator will need to access the application and manually assign a workflow to the application.

See also

- For more information, see **How Workflows Route Applications and Send Email Notifications** on page 37.

Procedure

1. Search for and display an application.

2. On the **Application Management** tab, in the **What Can I Do** section, click **Change Workflow**.

3. The **Change Workflow** page is displayed.

4. In the **Select Workflow to be assigned** list, select a workflow. This list will display only the "possible" workflows for the application based on the supervisor listed.

5. Enter a **Reason for assigning the workflow**.

6. Click **Change Workflow**.

7. An action confirmation dialog box is displayed. Click **OK** to continue.

MANAGING APPLICATIONS

Changing the Effective Dates for a Medical Application

This procedure can only be used on Medical applications that have been fully processed through a workflow and approved.

This procedure cannot be used to lengthen the period of the application – it can only be used to change the Start Date to a later date, or change the End Date to an earlier date.

Procedure

1. Search for and display a Medical application.

2. On the **Application Management** tab, in the **What Can I Do** section, click **Change Application Dates**.

3. The **Change Application Dates** page is displayed.
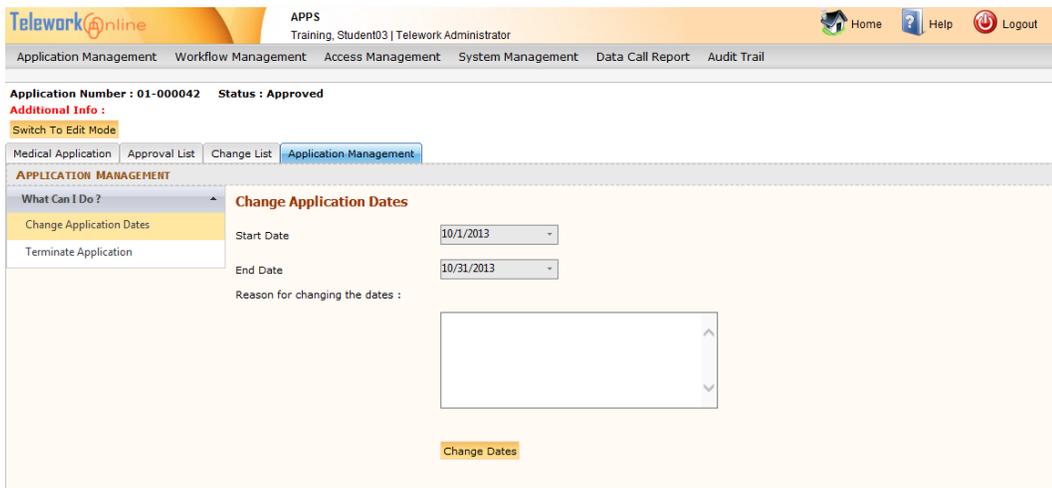
4. Using the lists, enter a new **Start Date** and/or **End Date**.
    - The new Start Date cannot be earlier than the original Start Date.
    - The new End Date cannot be later than the original End Date.

5. Enter a **Reason for changing the dates**.

6. Click **Change Dates**.

7. An action confirmation dialog box is displayed. Click **OK** to continue.

Terminating an Application

Telework Administrators can terminate any type of active and approved application on behalf of an applicant. Applications that are currently in the approval process (i.e. being processed by a workflow) cannot be terminated by an administrator. They can either be withdrawn by the applicant, or the application can finish the approval workflow and then be terminated.

Applications that are terminated by this process will have their status changed to **TerminationByAdmin**. Terminated applications can be archived later.

Procedure – Telework and Medical Applications

1. Search for and display an application.

2. On the **Application Management** tab, in the **What Can I Do** section, click **Terminate Application**.

3. The **Terminate Application** page is displayed.

4. Enter to type or use the calendar popup to select a **Termination Date**.

MANAGING APPLICATIONS

5. In the text box, enter a **Reason for termination**.

6. Click **Terminate Application**.

7. An action confirmation dialog box is displayed. Click **OK** to continue.

Procedure – Ad Hoc Applications

1. Search for and display an Ad Hoc application.

2. Click the **Application Management** tab.

3. The **Terminate Application** page is displayed.
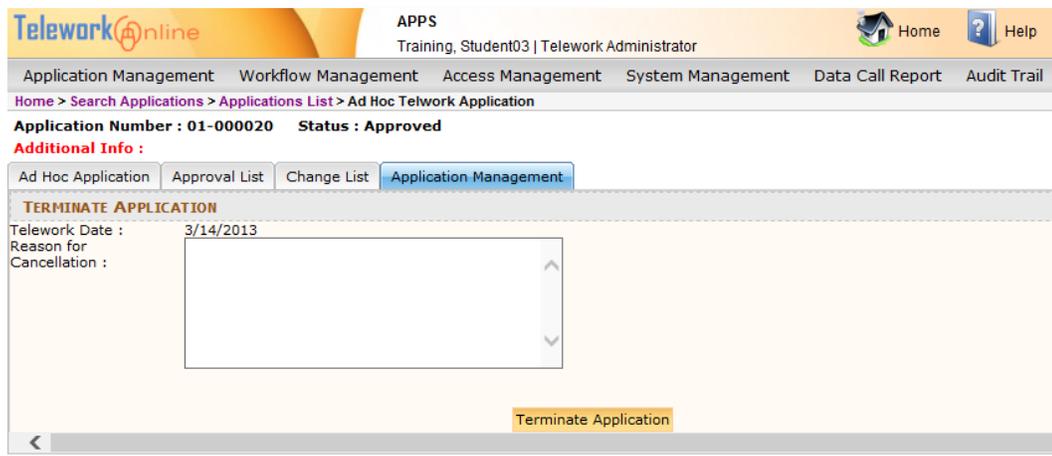
4. Enter a **Reason for Cancellation**.

5. Click **Terminate Application**.

6. An action confirmation dialog box is displayed. Click **OK** to continue.

Notes

- Only Telework Administrators can terminate applications on behalf of applicants. Approvers cannot terminate applications. If an approver needs an application to be terminated, they should request the assistance of an administrator.

- Applicants can terminate their own applications. Telework Online treats a termination request as a major change to the original application, and will process the termination request according to the workflow.

MANAGING WORKFLOWS

A **workflow** is a series of steps that determines how an application moves through Telework Online. This section explores how to create and edit workflows, create and edit approval stages, change the status of a workflow, and delete a workflow when it is no longer needed or used.

IN THIS SECTION

MANAGING WORKFLOWS

The Basic Process of Creating a Workflow

Creating a new workflow involves a series of inter-related steps and actions:

1 Add users to Telework Online.

• See **Adding Users** in the **Managing Users** section.

2 Create approval stages for use in all workflows.

• See **Creating an Approval Stage** in this section.

3 Create a workflow name and type.

• See **Adding a New Workflow** in this section.

4 Add approval stages to a workflow and define their properties within that workflow.

• See **Adding Approval Stages to a Workflow** in this section.

5 Activate the workflow.

• See **Changing the Workflow Active Status** in this section.

6 Save the workflow.

• Click **Save Workflow** on the **Workflow Properties** page.

Diagram 4: Steps to create a workflow

Note

• Steps 1, 2, and 3 can be done in any order, however, it is not possible to move on to step 4 until steps 1, 2, and 3 have been completed.

Understanding Workflows – Basic Properties

Workflows are created by Telework Administrators to govern how applications move through Telework Online. Workflows are made up of basic building blocks called **approval stages**. Approval stages have properties assigned to them when part of a workflow.

The diagram below illustrates the parts and properties of a workflow, and how they relate to each other.
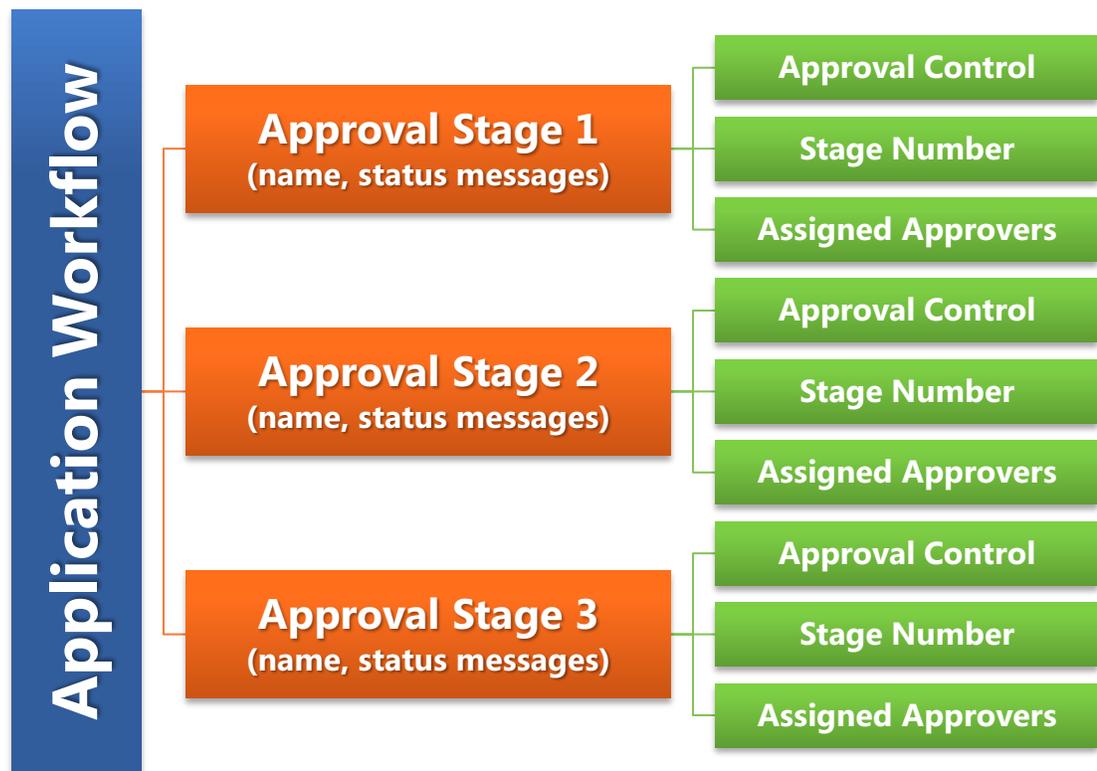
Diagram 5: The parts and properties of a workflow.

Approval stages are basic containers that initially only define the stage name and the status messages that are displayed when an application is approved or declined.

See also

- For more information, see **Creating an Approval Stage** on page 47.

When an approval stage is added to a workflow, three additional properties must be defined (the green blocks in Diagram 5):

- Which of the four basic **approval controls** should be used for the stage.

- A **stage number** indicating the where the stage should appear in the order of the workflow.

- One or more **assigned approvers** who are members of the stage.

In this manner, different workflows can have similarly named approval stages, but the specific properties of those approval stages in each workflow can be different.

At a minimum, there should be at least one workflow for Telework applications, and one workflow for Medical applications.

Depending on the system settings, Ad Hoc applications will either follow the workflow of the parent Telework application, or will only need to be approved by a supervisor.

See also

- For more information, see **System Settings and Options** on page 115.

How Workflows Route Applications and Send Email Notifications

Telework Online uses workflows to route applications to the appropriate approvers and to send email notifications when those approvers have applications to manage, including such tasks as approving applications, and reviewing and approving changes to applications.

Telework Online selects the appropriate workflow for an application by examining the supervisor listed on the application, and then looks for any workflow where that supervisor is listed as an approver in the **first stage** of a workflow.

If a supervisor is in the **first stage** of multiple workflows, Telework Online will send a notification to the Telework Administrator, who will then have to manually assign a workflow to the application. For more information, see **Manually Assigning a Workflow to an Application** on page 28.

Once Telework Online determines the appropriate workflow for an application, the initial approver (always the supervisor listed on the application) receives an email notification.

After the supervisor approves an application, the application moves on to the next stage. In all stages after the first stage, all approvers listed in the stage receive email notifications.

Supervisor A Supervisor B Supervisor C Supervisor D	⇒	Director A Director B	⇒	Telework Administrator

Diagram 6: A basic three-stage workflow.

For example, in the first stage of this workflow, only a single supervisor (A, B, C, or D) receives an email notification, and ONLY that supervisor can approve the application.

However in stage two, BOTH Director A and B will receive email notifications and EITHER Director can approve the application.

In the final stage, only the Telework Administrator receives an email notification, and only that person can approve the application.

MANAGING WORKFLOWS

Understanding Workflows with Two Approval Stages

Consider this simple two-stage workflow for approving a Telework application:

| Supervisor(s) | ➡ | Telework Administrator |

Diagram 7: A simple two-stage workflow.

In this workflow, when an applicant submits a Telework application, it is first routed to their supervisor for approval, then to the Telework Administrator for final approval.

If all applicants have their applications processed in this manner, only one workflow is needed, regardless of who the supervisors are or what department they are from.

An example of needing an additional two-step workflow would be when there are different final approvers for applications. For example:
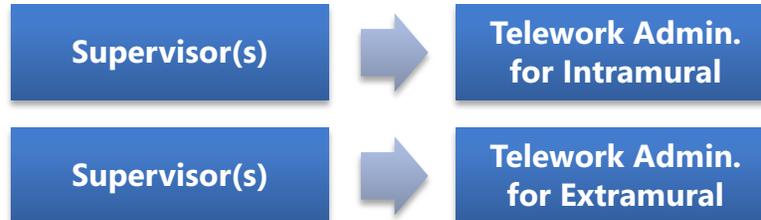
| Supervisor(s) | ➡ | Telework Admin. for Intramural |

| Supervisor(s) | ➡ | Telework Admin. for Extramural |

Diagram 8: Two separate, two-stage workflows.

In this case, two workflows are needed because some applications need to be approved by one Telework Administrator (in this example, the administrator for intramural employees) and some applications need to be approved by the other administrator (in this example, the administrator for extramural employees).

If however, any/either Telework Administrator can approve any application from any supervisor, then only one workflow is needed – simply list both administrators as approvers in the final stage.

| Supervisors | ➡ | Telework Admin./Extramural Telework Admin./Intramural |

Diagram 9: A workflow where both Administrators can approve any applications.

Understanding Workflows with Three or More Approval Stages

The number of workflows needed becomes more complicated when there are three or more approval stages. Consider the following basic process:

Supervisor	➤	Division Director	➤	Telework Administrator

Diagram 10: A basic three-stage approval process.

In this process, applications need to be approved by three people – the supervisor, a division director, and then the Telework Administrator for final approval.

The difference between a two-stage workflow and a workflow with more than two stages is that anyone who is listed as an approver in a stage beyond the first stage of the workflow can approve any application at their respective level, and all of those approvers receive email notifications. This behavior affects how many workflows may be needed to properly route applications and to send notifications only to approvers who need to see them.

In the following workflow example, when Supervisor A, B, C, or D approves an application, **both** Director A and B are notified that an application needs approval, and **either** Director A or B can approve the application. Once either Director approves the application, it will move on to the Telework Administrator for final approval.

Supervisor A Supervisor B Supervisor C Supervisor D	➤	Director A Director B	➤	Telework Administrator

Diagram 11: A three-stage workflow where both Director A and B can approve applications.

This example is a **single** workflow, where Supervisors A, B, C, and D are listed as approvers in the first stage, Directors A and B are BOTH listed as approvers in the second stage, and the Telework Administrator is the final approver.

In this next example, the desired result is that applications from Supervisors A and B should **only** be approved in the second stage by Director A (and only Director A should receive notifications), and applications from Supervisors C and D should **only** be approved in the second stage by Director B (and only Director B should receive notifications). All applications are approved by the Telework Administrator in the third stage.
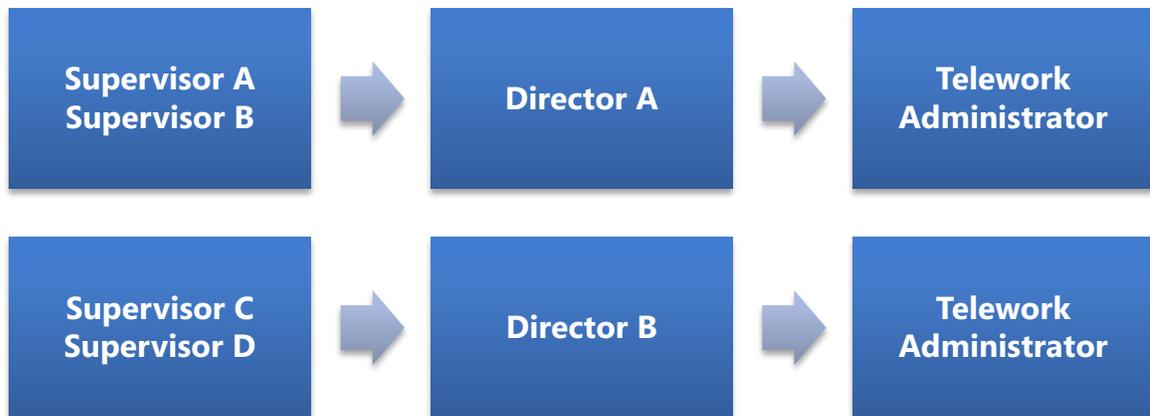

Diagram 12: Two separate three-stage workflows.
These Directors can ONLY approve applications from their respective Supervisors.

In this example, **two separate**, three-stage workflows would be needed. Director A is responsible for approving applications **only** from Supervisors A and B, and Director B is responsible for approving applications **only** from Supervisors C and D.

- In the top workflow of Diagram 12, Supervisors A and B would be listed as approvers in the first stage, Director A would be an approver in the second stage, and the Telework Administrator would be an approver in the third (or final) stage.

- In the bottom workflow of Diagram 12, Supervisors C and D would be listed as approvers in the first stage, Director B would be an approver in the second stage, and the Telework Administrator would be an approver in the third (or final) stage.

Understanding Approval Controls

When approval stages are added to workflows, one of the properties that must be defined is the **approval control** (see the blue blocks in Diagram 5). The approval control determines what options an approver is presented when approving or declining an application.

There are four approval controls built in to Telework Online. These approval controls cannot be modified or edited. These controls are:

- Approval with Dates

- Approval Security

- Approval Policy

- Approval Generic

All four approval controls have the following basic parts:

- Text describing what the approver is agreeing to by granting their approval.

- A drop-down menu to approve or decline the application (required).

- A text box for comments (optional).

- A check box the approver must select to affirm they have reviewed the application (required).

The **Approval with Dates** approval control has two additional fields – a **Start Date** and an **End Date**. These fields determine the period that an application is in effect. The **Approval with Dates** approval control should only be used ONCE in any given workflow. The other approval controls can be used as often as necessary in a single workflow.

The four approval controls are pictured in the following table, along with a short description of when and who they should be assigned to.

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Table 3: Approval control pictures and descriptions.

Approval Control	Picture and Description
Approval with Dates	 This control generally should be used by the supervisor or first approver in a workflow. Technically, it can be used at any point in a workflow, **but it should only be used once** in any single workflow.
Approval Security	 This approval control is generally designated for use by an ISSO or information security officer within the institute. It can be used multiple times within a single workflow.
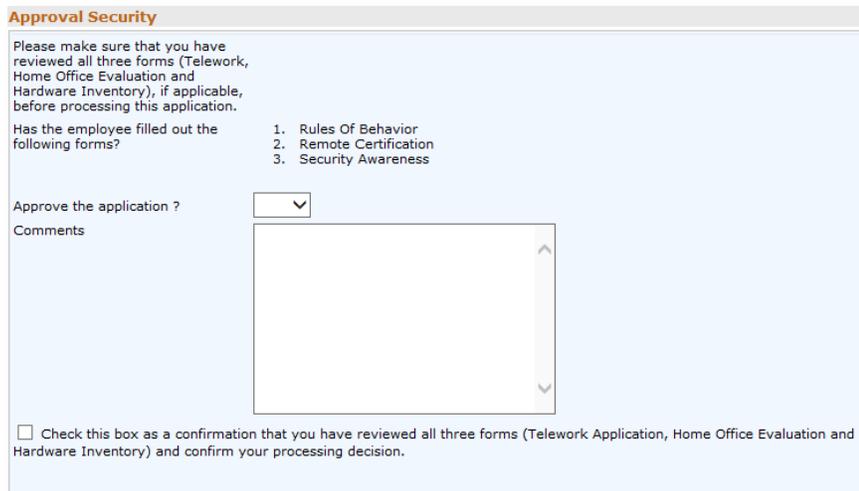
Approval Control	Picture and Description
Approval Policy	**Approval Policy** Please make sure that you have reviewed all three forms (Telework, Home Office Evaluation and Hardware Inventory), if applicable, before processing this application. Is this application in compliance with NIH and the Insititute's work policy ? [dropdown] Comments [text area] ☐ Check this box as a confirmation that you have reviewed all three forms (Telework Application, Home Office Evaluation and Hardware Inventory) and confirm your processing decision. This approval control is designed for use by a policy coordinator or can be used by the Telework Administrator. It can be used multiple times within a single workflow.
Approval Generic	**Approval Generic** Please make sure that you have reviewed all three forms (Telework, Home Office Evaluation and Hardware Inventory), if applicable, before processing this application. Approve this application ? [dropdown] Comments [text area] ☐ Check this box as a confirmation that you have reviewed all three forms (Telework Application, Home Office Evaluation and Hardware Inventory) and confirm your processing decision. This is a generic approval control that can be used by anyone. It can be used multiple times within a single workflow.

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Using Different Approval Controls in Approval Stages

As mentioned earlier, an approval stage can have different approval controls in different workflows. For example:

Approval Stage: Supervisor **Approval Control:** Approval w/Dates	→	**Approval Stage:** Director **Approval Control:** Approval Generic	→	**Approval Stage:** Final Approver **Approval Control:** Approval Generic

Diagram 13: Workflow One

Approval Stage: Supervisor **Approval Control:** Approval Generic	→	**Approval Stage:** Director **Approval Control:** Approval w/Dates	→	**Approval Stage:** Final Approver **Approval Control:** Approval Generic

Diagram 14: Workflow Two

Notice in the first and second stages of these workflows that different approval controls are used for approval stages that have the same name.

In Workflow One (Diagram 13), the **Supervisor** approval stage uses the **Approval with Dates** approval control, however, in Workflow Two (Diagram 14), the **Supervisor** approval stage uses the **Approval Generic** approval control.

In Workflow One (Diagram 13), the **Director** approval stage uses the **Approval Generic** approval control, however, in Workflow Two (Diagram 14), the **Director** approval stage uses the **Approval with Dates** approval control.

In both workflows, the **Final Approver** approval stage uses the **Approval Generic** approval control. This approval control can be used multiple times in a single workflow.

Viewing the Current Workflows

Telework Administrators can view a list of the current workflows in Telework Online. This page is also an entry point for adding, editing, and deleting workflows for Telework and Medical applications.

Depending on the system settings, Ad Hoc applications will either follow the complete workflow of the parent Telework application, or will only need to be approved by a supervisor.

See also

- For more information, see **System Settings and Options** on page 115.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.

2. The **Workflows** page is displayed.

MANAGING WORKFLOWS
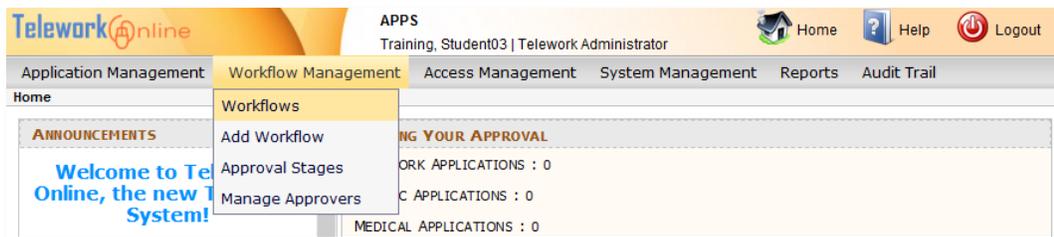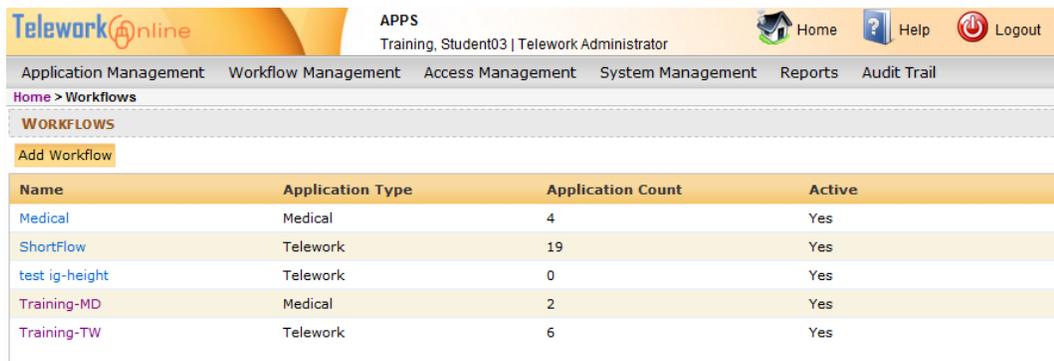
Creating a New Workflow

The first two steps in creating a new workflow are giving the workflow a name, and then assigning an application type to the workflow.

Procedure

1. On the **Workflow Management** menu, click **Add Workflow**.

   OR

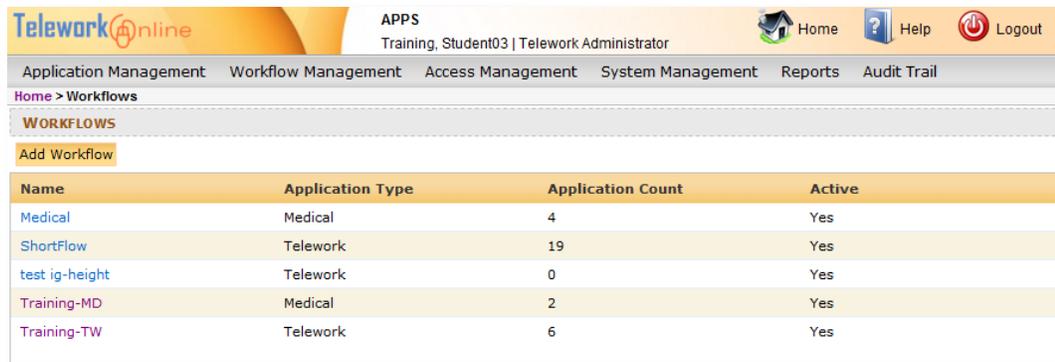   On the **Workflows** page, click **Add Workflow**.
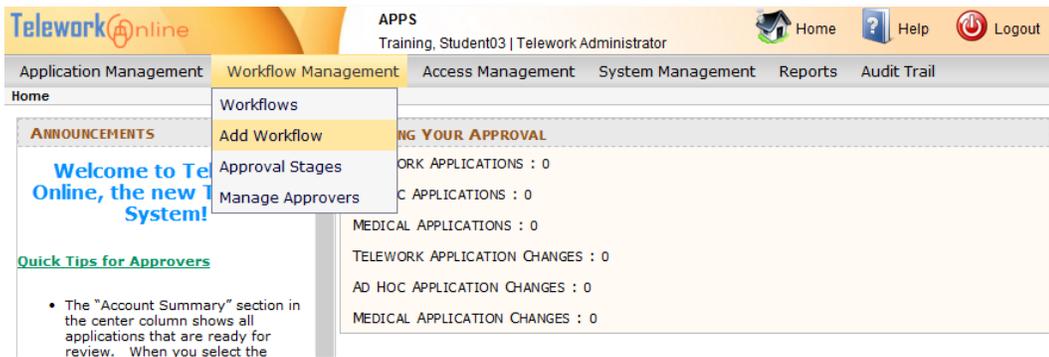
2. The **Workflow Properties** page is displayed.
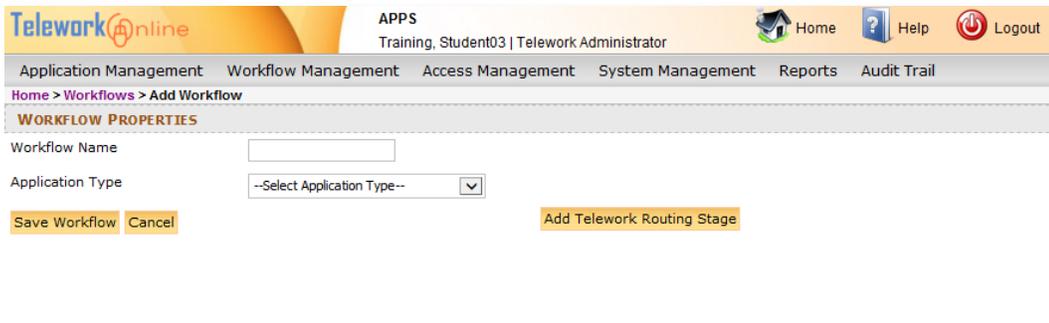
3. Enter a **Workflow Name**.

4. Using the **Application Type** list, select either **Telework** or **Medical**. (NOTE: Once the workflow is saved, the **Application Type** cannot be changed.)

5. Click **Save Workflow**.

Creating an Approval Stage

Approval stages are the basic building blocks of a workflow (see Diagram 5 in the **Understanding Workflows – Basic Properties** topic of this section). Approval stages can be part of one or more workflows.

The creation process here only defines the name of the approval stage, and the status messages that are displayed when an application is approved or declined. Additional properties of an approval stage are defined when the approval stage is added to a specific workflow.

See also

- For more information, see **Adding Approval Stages to a New Workflow** on page 52.

### Procedure

1. On the **Workflow Management** menu, click **Approval Stages**.
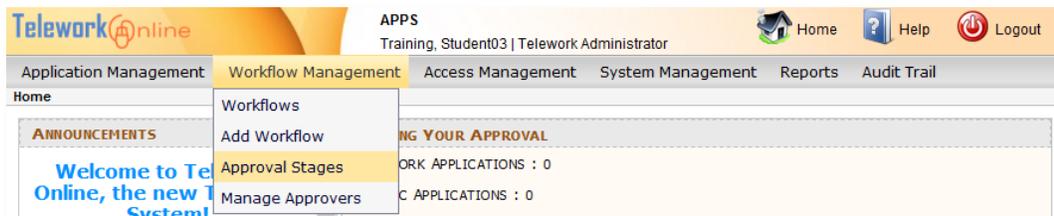
2. The **Approval Stages** page is displayed.

3. Click **Add New Stage**.
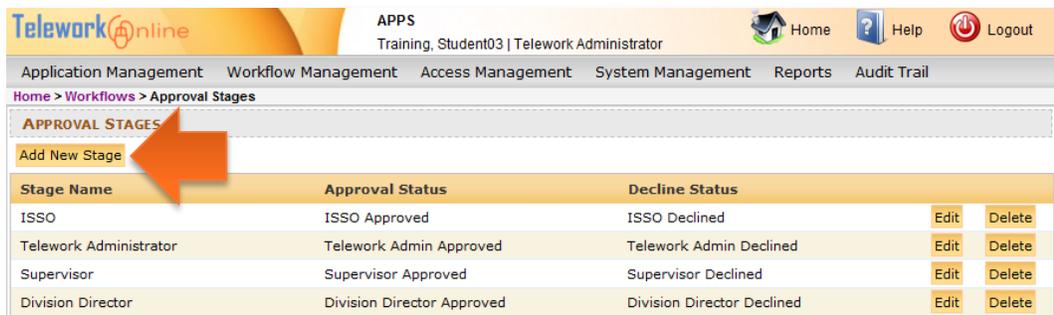
4. The **Approval Stage** dialog box is displayed.
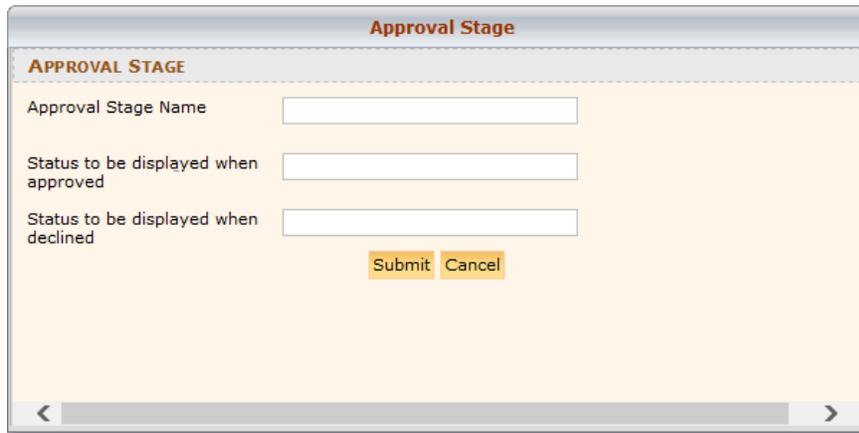
5. Enter the requested information. It is suggested that the approved and declined status messages incorporate the stage name. For example, if the approval stage is named **Supervisor**, the suggested approved status is **Supervisor Approved** and the suggested declined status is **Supervisor Declined**.

6. Click **Submit**.

7. An action confirmation dialog box is displayed. Click **OK** to continue.

Note

- All workflows in Telework Online require that the last approval stage of a workflow be named **Final Approval**. For this reason, a Final Approval approval stage is already built in, and cannot be edited or displayed on the **Approval Stages** page.

Editing an Approval Stage

Any property of an approval stage can be changed. Changes will be reflected in any workflow where the approval stage is currently being used.

Procedure

1. On the **Workflow Management** menu, click **Approval Stages**.

2. The **Approval Stages** page is displayed.

3. Click **Edit** next to the approval stage to be edited.

4. The **Approval Stage** dialog box is displayed.

5. Change the desired information and click **Submit**.

6. An action confirmation dialog box is displayed. Click **OK** to continue.

Deleting an Approval Stage

If an approval stage is no longer used or needed by any workflow, it can be deleted. However, if an approval stage is still part of any workflow (whether the workflow is active or inactive), the approval stage cannot be deleted. The workflow will first need to be deleted.

See also

- For more information, see **Deleting a Workflow** on page 71.

Procedure

1. On the **Workflow Management** menu, click **Approval Stages**.
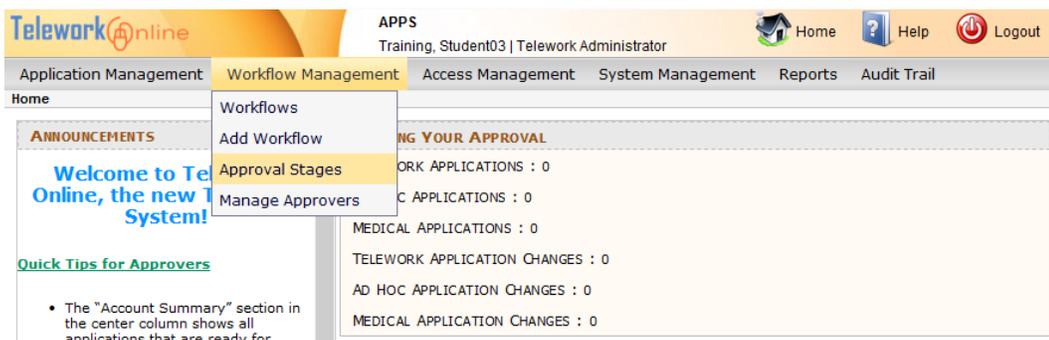
2. The **Approval Stages** page is displayed.

3. Click **Delete** next to the approval stage to be deleted.
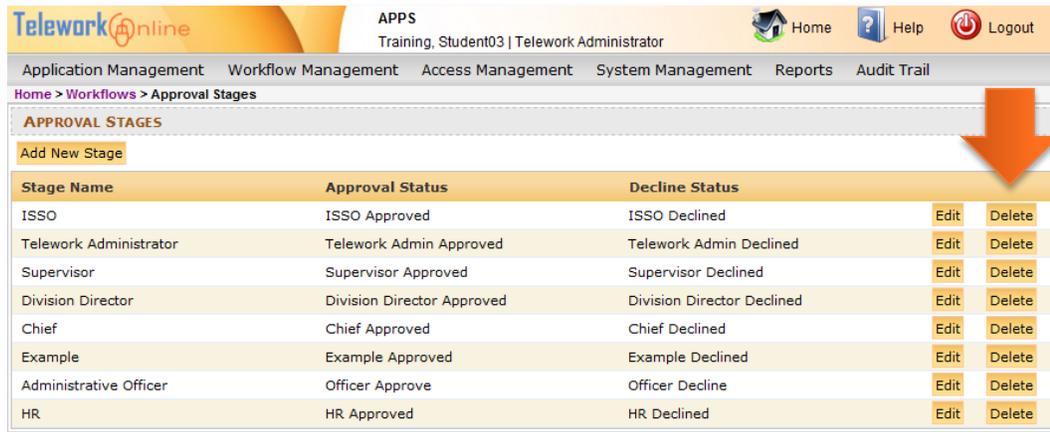
4. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.
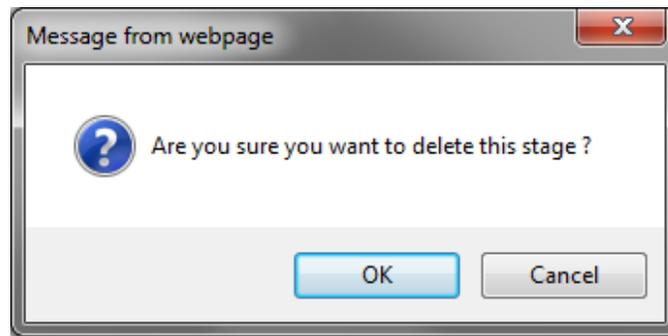
5. An action confirmation dialog box is displayed. Click **OK** to continue.

Warning

- This action cannot be undone. Once an approval stage is deleted, it cannot be recovered.

Adding Approval Stages to a New Workflow

Once approval stages have been created, they can be added to workflows. Each time an approval stage is added to a workflow, it can have different properties. There are some basic guidelines to keep in mind when adding approval stages to a workflow.

- Approval stages can be used multiple times in different workflows and have different properties, approvers, and approval controls in each workflow.

- The approvers listed in first stage of a workflow determine which workflow an application will follow.

- Supervisors must be approvers in the first stage of a workflow.

- The last stage of a workflow must be called Final Approval – this approval stage is already built into the system and can be added using the procedures below.

See also

- Refer to the **Key Points to Remember** on page 73 for important points to consider and remember when creating workflows.

- There are some additional considerations when adding approval stages to an **existing** workflow. For more information, see **Adding an Approval Stage to an Existing Workflow** on page 60.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.
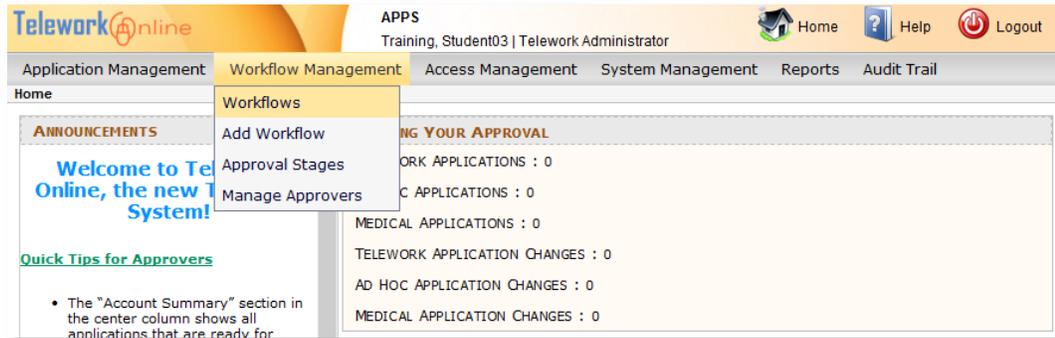
2. The **Workflows** page is displayed.

3. Click the name of the workflow to be built. If a new worklow has not yet been created, see **Creating a New Workflow** on page 46 before continuing. The **Workflow Properties** page is displayed.
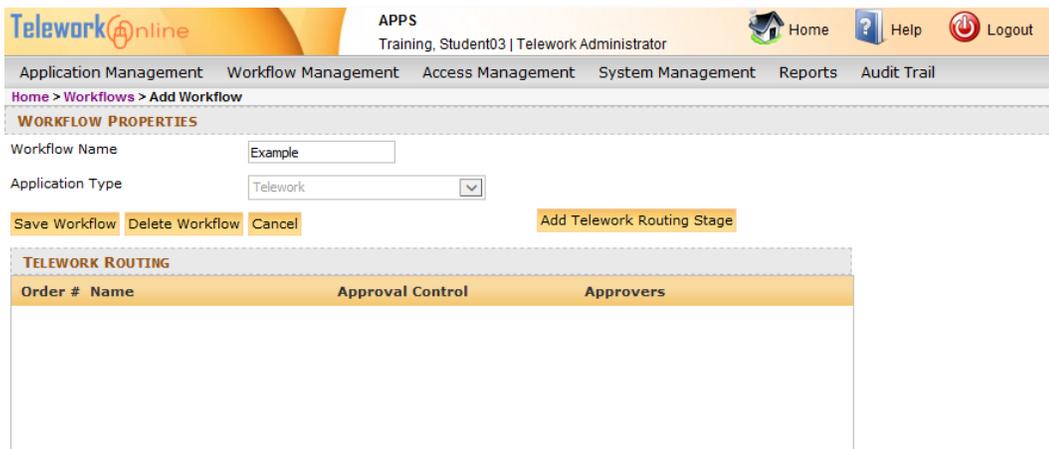
MANAGING WORKFLOWS

4. Click **Add Telework Routing Stage**. The **Workflow Stage** dialog box is displayed.
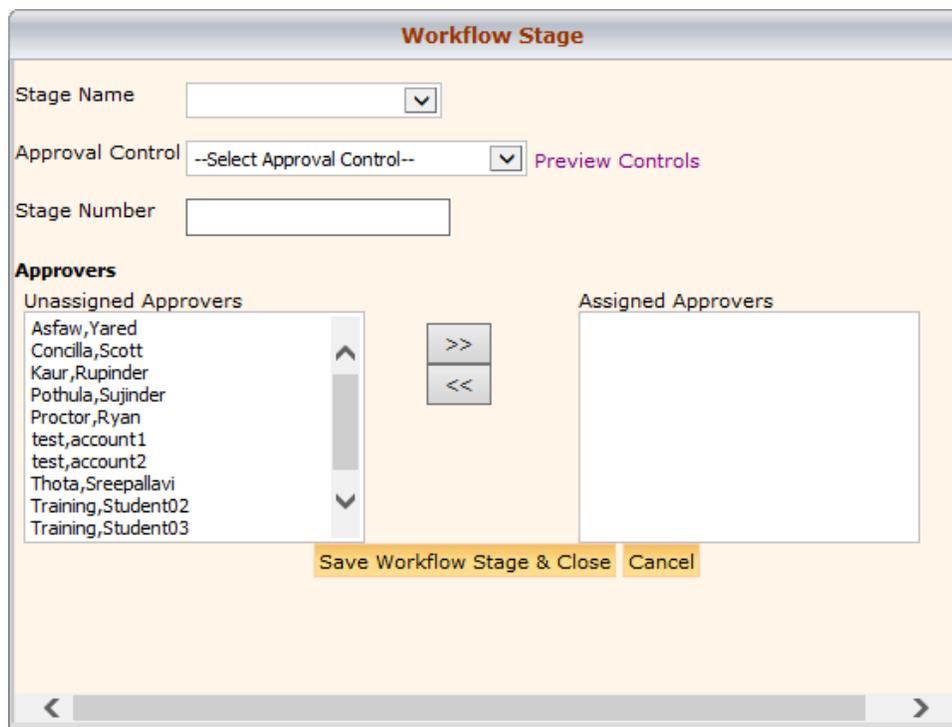
5. Using the **Stage Name** list, select an approval stage. For more information on how to create new approval stages, see **Creating an Approval Stage** on page 47.

6. Select an **Approval Control**. For more information, see **Understanding Approval Controls** on page 41.

7. Enter a **Stage Number**.

8. Select a name or names from the **Unassigned Approvers** list and use the **>>** button to move them to the **Assigned Approvers** list. Use the **<<** button to move a name back from Assigned to Unassigned. If an approver name is not listed on the Unassigned Approvers list, they will first need to be added to the Users list. For more information, see **Adding Users** on page 78.

9. When all fields are completed, click **Save Workflow Stage & Close**.

10. An action confirmation message is displayed. Click **OK** to continue.

11. The **Workflow Properties** page is displayed with the updated workflow.

12. Repeat steps 4 through 10 to continue building the workflow. Remember that the final stage of a workflow must be named **Final Approval** in order for the workflow to be activated.

13. When finished building the workflow, click **Save Workflow**. (Note the page does not change or navigate away from the **Workflow Properties** page).

14. To activate and begin using the workflow, select the **Active** check box and click **Save Workflow**.
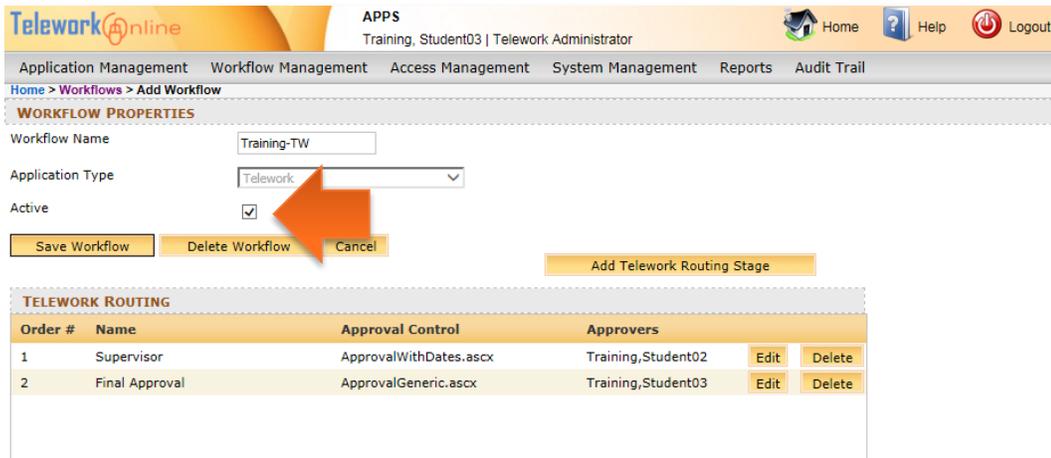
15. If there are any problems or issues, an error message will be displayed. Otherwise, an action confirmation message is displayed. Click **OK** to continue.

Editing an Approval Stage in an Existing Workflow

Approval stages in a workflow can have their properties modified. This does not affect the overall definition of the approval stage as defined on the **Approval Stages** page. Approval stages in a workflow can be edited at any time, and will immediately affect any applications that are currently in the approval process.

See also

- If you only need to add or remove approvers that are in an approval stage, you may wish to use the Manage Approvers feature instead. For more information, see **Managing Approvers** on page 64.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.
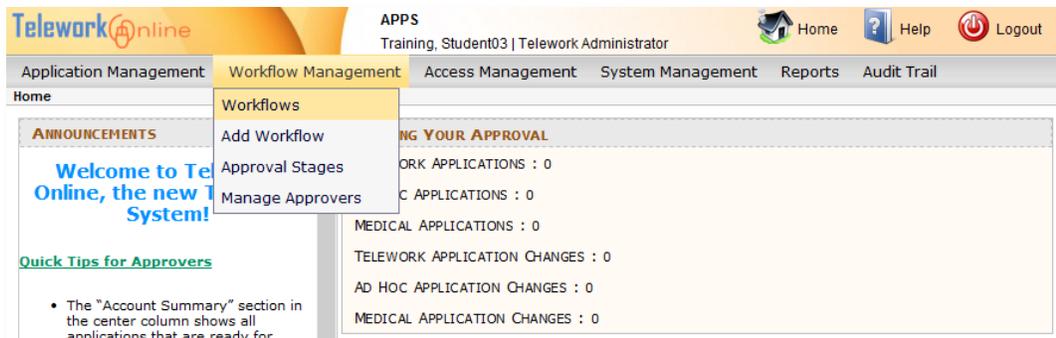
2. The **Workflows** page is displayed.
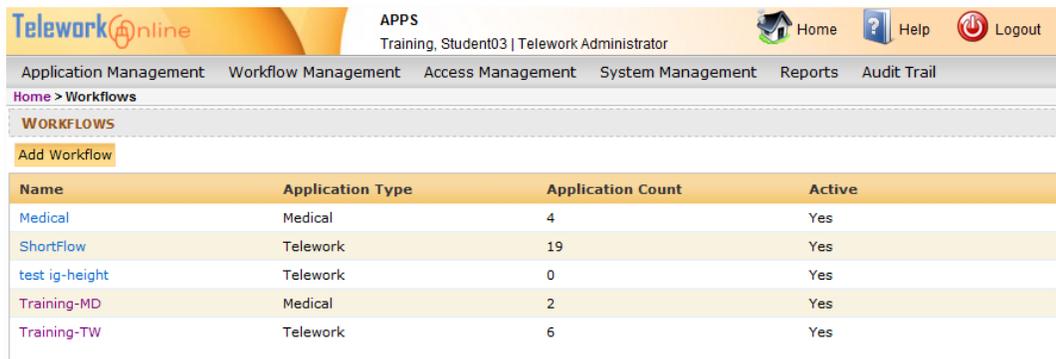
3. Click the name of the workflow to be modified. The **Workflow Properties** page is displayed.
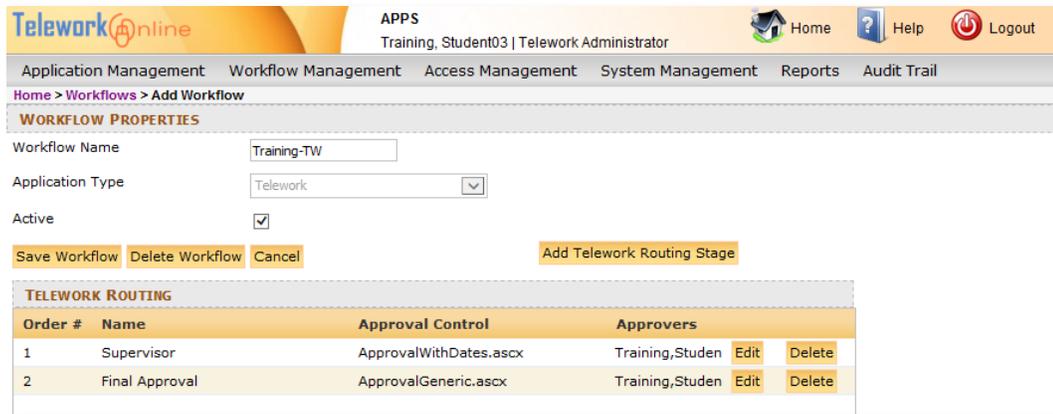
4. Click the **Edit** button of the approval stage to be modified. The **Workflow Stage** dialog box is displayed.
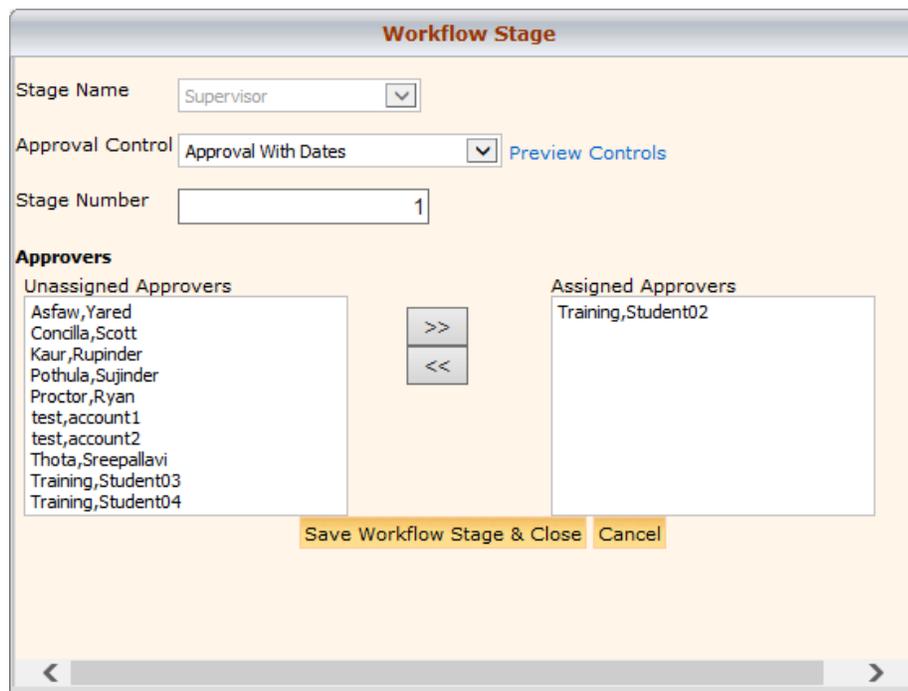
5. Make the desired changes to the workflow stage. For additional information about changing the Stage Number, see the **Notes** after this procedure.

6. When finished, click **Save Workflow Stage & Close**.

7. An action confirmation message is displayed. Click **OK** to continue.

Warning

- The Stage Name of an approval stage in a workflow cannot be changed. If it is necessary to change the Stage Name (which will affect all workflows), see **Editing an Approval Stage** on page 49 for help.

Notes

- Once a workflow has been saved and activated, the first and last stages of the workflow cannot be replaced with another stage. For example, if you have a three-stage workflow, neither stage 2 or stage 3 can be changed to stage 1. Conversely, stage 1 cannot be changed to stage 2 or 3.

- For workflows that have four or more stages, the internal stage numbers can be changed. The following diagrams illustrate the results. (The original workflow appears above the result.)

(1) A	(2) B	(3) C	(4) D	(5) E
(1) A	(2) D	(3) B	(4) C	(5) E

Diagram 15: Result of Stage D being changed from the 4th stage to the 2nd stage.

(1) A	(2) B	(3) C	(4) D	(5) E
(1) A	(2) C	(3) D	(4) B	(5) E
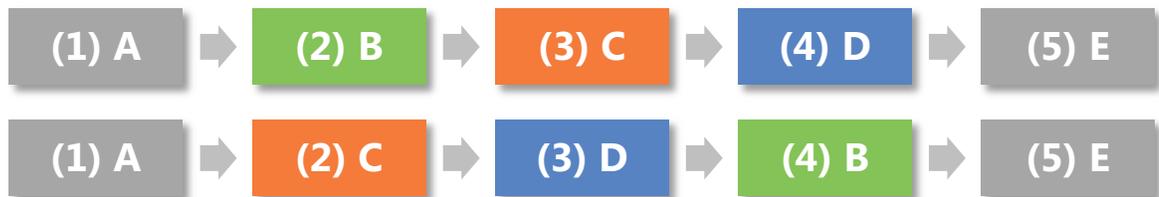
Diagram 16: Result of Stage B being changed from the 2nd stage to the 4th stage.

(1) A	(2) B	(3) C	(4) D	(5) E
(1) A	(2) B	(3) D	(4) C	(5) E
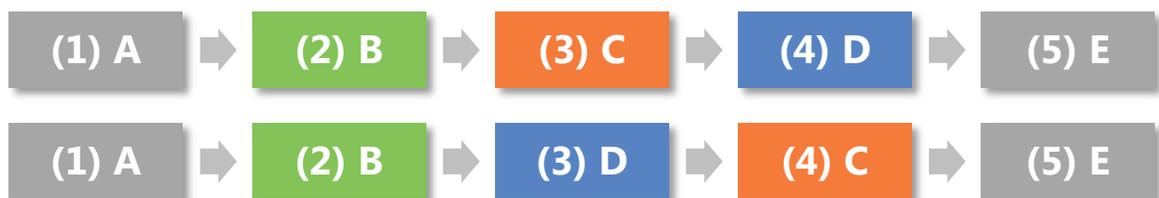
Diagram 17: Result of Stage C being changed from the 3rd stage to the 4th stage.

Adding an Approval Stage to an Existing Workflow

Approval stages can be added to existing workflows, but with one basic condition – the first and last stages cannot be replaced with any new stage.

For example, you **can** do this:

Original workflow

(1) A ➡ **(2) B**

Revised workflow – **YES**

(1) A ➡ **(2) C** ➡ **(3) B**

Diagram 18: Stage C has been inserted as the new second stage.

But you **cannot** do this:

Revised workflow – **NO**

(1) C ➡ **(2) A** ➡ **(3) B**

Diagram 19: Stage C CANNOT be inserted as the new first stage.

And you **cannot** do this:

Revised workflow – **NO**

(1) A ➡ **(2) B** ➡ **(3) C**

Diagram 20: Stage C CANNOT be added as the new last stage.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.

2. The **Workflows** page is displayed.

3. Click the name of the workflow to edited. The **Workflow Properties** page is displayed.

4. Click **Add Telework Routing Stage**. The **Workflow Stage** dialog box is displayed.

5. Using the **Stage Name** list, select an approval stage. For more information on how to create new approval stages, see **Creating an Approval Stage** on page 47.

6. Select an **Approval Control**. For more information, see **Understanding Approval Controls** on page 41.

7. Enter a **Stage Number**. Remember, since this is an existing workflow, the stage number cannot be 1 or the number of the existing last stage.

8. Select a name or names from the **Unassigned Approvers** list and use the **>>** button to move them to the **Assigned Approvers** list. Use the **<<** button to move a name back from Assigned to Unassigned. If an approver name is not listed on the Unassigned Approvers list, they will first need to be added to the Users list. For more information, see **Adding Users** on page 78.

9. When all fields are completed, click **Save Workflow Stage & Close**.

10. An action confirmation message is displayed. Click **OK** to continue.

11. The **Workflow Properties** page is displayed with the updated workflow.

12. If additional approval stages need to be added, repeat steps 4 through 10.

13. When finished editing the workflow, click **Save Workflow**. (Note the page does not change or navigate away from the **Workflow Properties** page).

14. If there are any problems or issues, an error message will be displayed. Otherwise, an action confirmation message is displayed. Click **OK** to continue.

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Managing Approvers

If you only need to add or remove approvers that are in an approval stage, you may wish to use the **Manage Approvers** feature instead of editing the workflow properties.

Procedure

1. On the **Workflow Management** menu, select **Manage Approvers**.
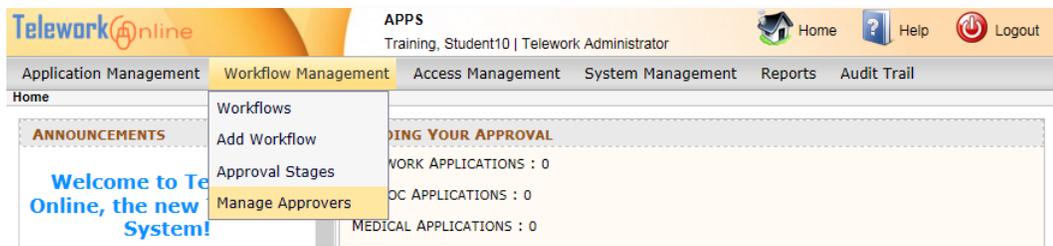
2. The **Manage Approvers** page is displayed.
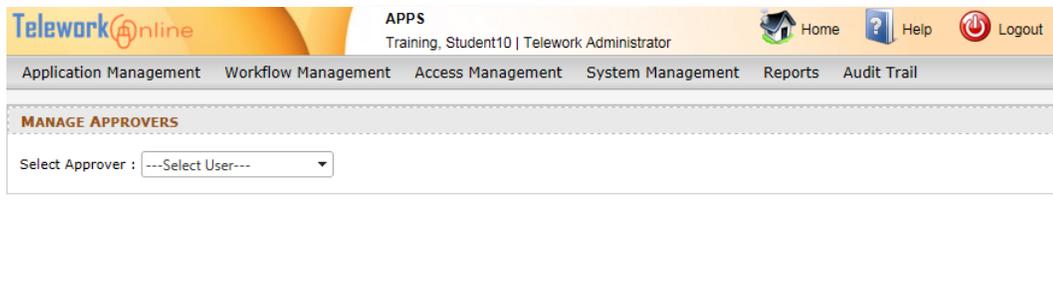
3. Using the **Select Approver** list, select the approver to be added to or removed from a workflow.

4. The page updates to display a list of workflows and approval stages that the selected approver is currently a member of.

5. Use the procedures listed below to add or delete the approver.

Procedure – To Add the Approver to a Workflow

1. Using the **Workflow** list, select a workflow.

2. Using the **Workflow Stage** list, select an approval stage of the workflow.

3. Click **Assign Workflow**.

4. An action confirmation message is displayed. Click **OK** to continue.

5. The **Manage Approvers** page is updated.

6. Repeat these steps as necessary.

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Procedure – To Remove the Approver from a Workflow

1. In the workflow list, click the red **X** next to the workflow from which the approver should be deleted.
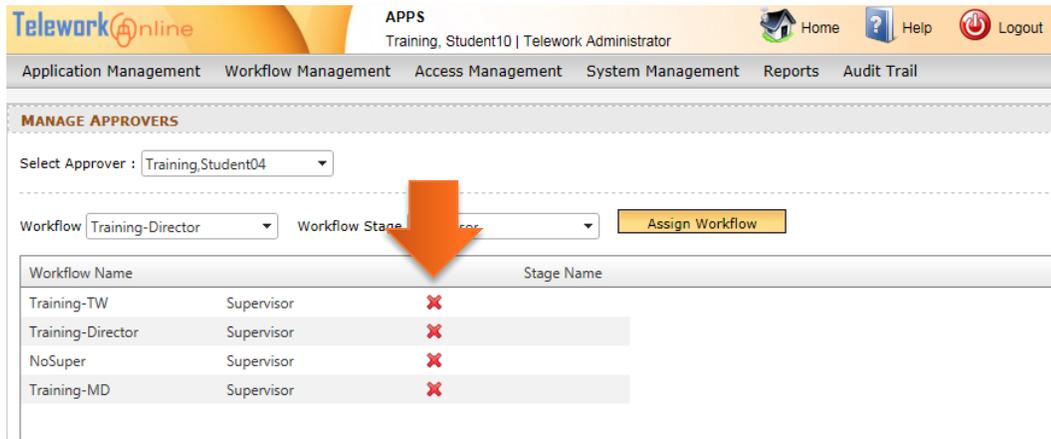
2. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.

3. An action confirmation message is displayed. Click **OK** to continue.

4. The **Manage Approvers** page is updated.
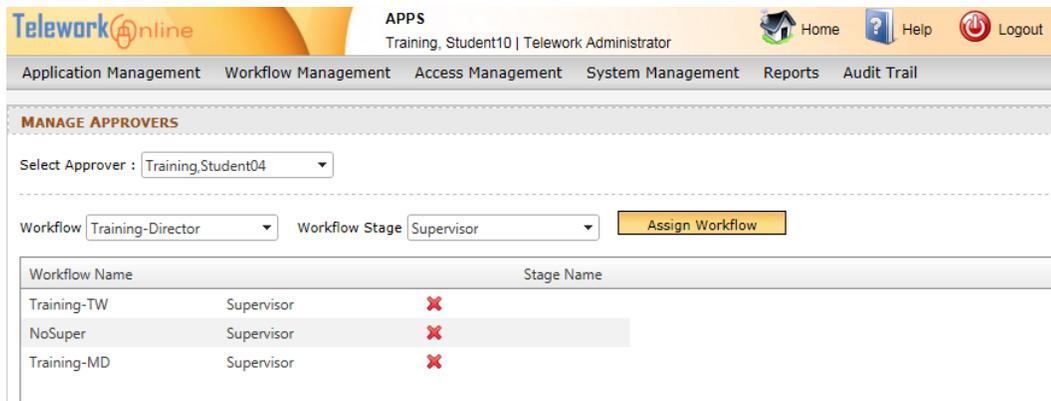
5. Repeat these steps as necessary.

Deleting an Approval Stage in a Workflow

If an approval stage is no longer needed in a workflow, it can be deleted. This procedure only removes the approval stage from the workflow, it does not delete the approval stage from the **Approval Stages** page.

Approval stages **cannot** be deleted from a workflow if:

1) There are applications that are currently in the approval process, or

2) The approval stage is the first or last stage in the workflow.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.

2. The **Workflows** page is displayed.

3. Click the name of the workflow to be modified. The **Workflow Properties** page is displayed.

4. Click the **Delete** button of the approval stage to be deleted.

5. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.
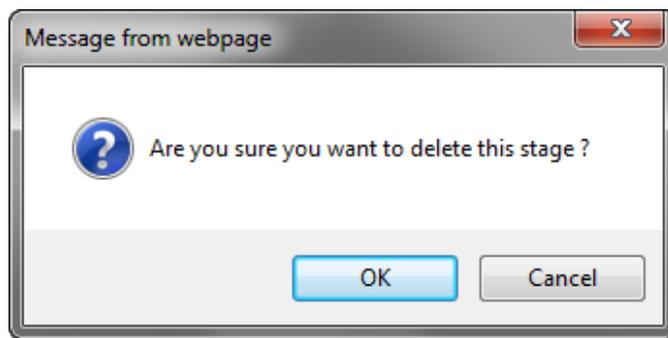
6. An action confirmation message is displayed. Click **OK** to continue.

 Warning

- This action cannot be undone. Once an approval stage is deleted, it cannot be recovered. However, you **are** able to add the approval stage again. For more information, see **Adding an Approval Stage to an Existing Workflow** on page 60.

Changing the Workflow Active Status

In order for workflows to be used for processing applications, they must first be activated. This allows Telework Administrators to create new workflows without affecting current workflows (i.e. for training or testing purposes), and conversely it allows administrators to "retire" workflows without deleting them.

It needs to be noted that in order to deactivate or retire a workflow, there cannot be any applications associated with the workflow (i.e. the Application Count must equal zero). Use the **Applications List** page or the **Search Applications** page to find applications associated with the workflow, and then use the **Reassigning Applications to Another Supervisor** procedure in the **Managing Applications** section of this guide to reassign the applications to another workflow.

The **Workflows** page displays the active status of all Telework and Medical workflows in Telework Online.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.

2. The **Workflows** page is displayed.

MANAGING WORKFLOWS
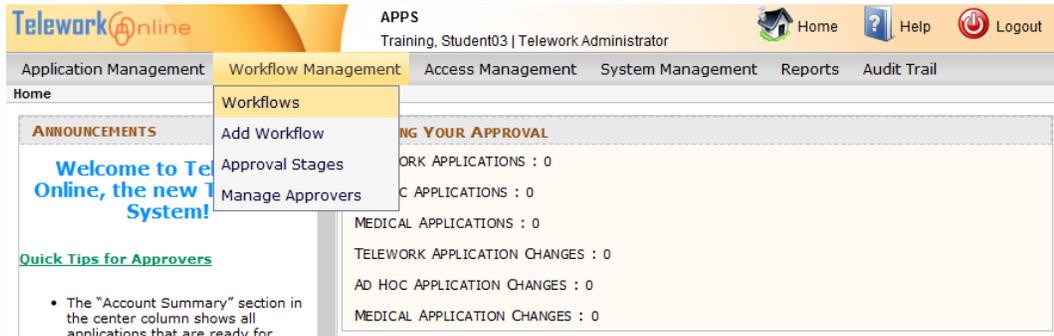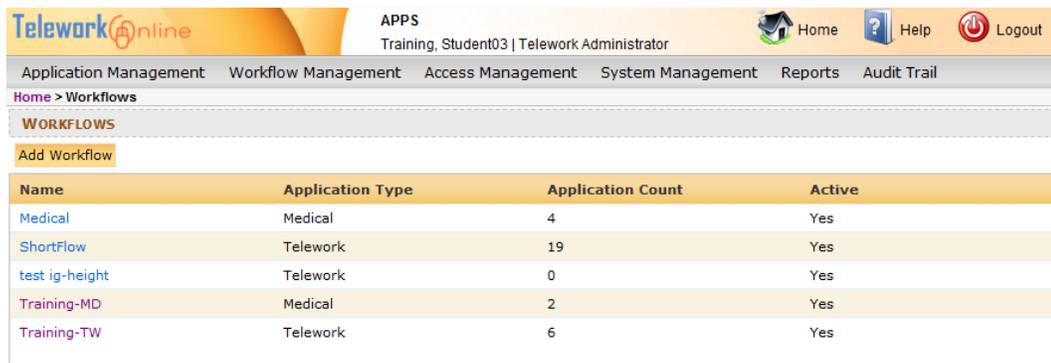
3. Click the name of the workflow to be activated or deactivated. The **Workflow Properties** page is displayed.
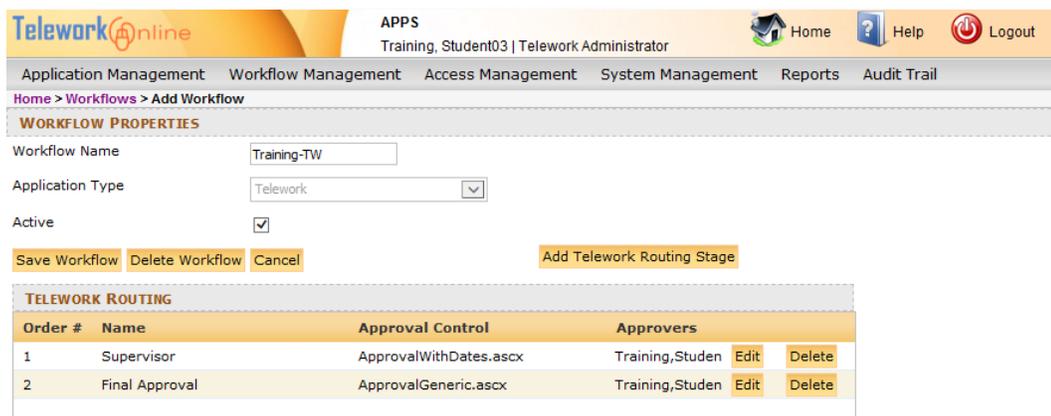
4. On the **Workflow Properties** page, select the **Active** check box to activate the workflow or clear the check box to deactivate the workflow.

5. Click **Save Workflow**. If there are active applications associated with the workflow, an error message will appear. Follow the instructions in this procedure's description for assistance.
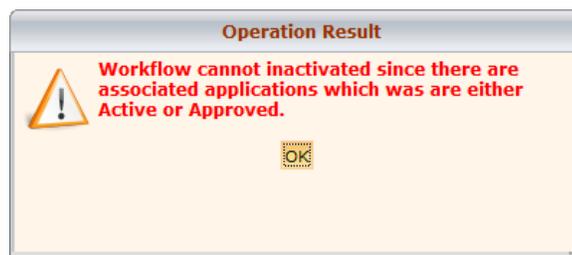
6. If there are no active applications associated with the workflow, an action confirmation message is displayed. Click **OK** to continue.

Deleting a Workflow

If a workflow is no longer needed or no longer in use, it can be deleted. Workflows can only be deleted when there are no applications in progress or in approved status that use the workflow.

Procedure

1. On the **Workflow Management** menu, click **Workflows**.

2. On the **Workflows** page, find the workflow to be deleted, and check that the **Application Count** column reads **0** (zero). If the Application Count DOES NOT read 0, you must first reassign all applications to another workflow. Use the **Applications List** page or the **Search Applications** page to find applications associated with the workflow, and then use the **Reassigning Applications to Another Supervisor** procedure in the **Managing Applications** section of this guide to reassign the applications to another workflow.
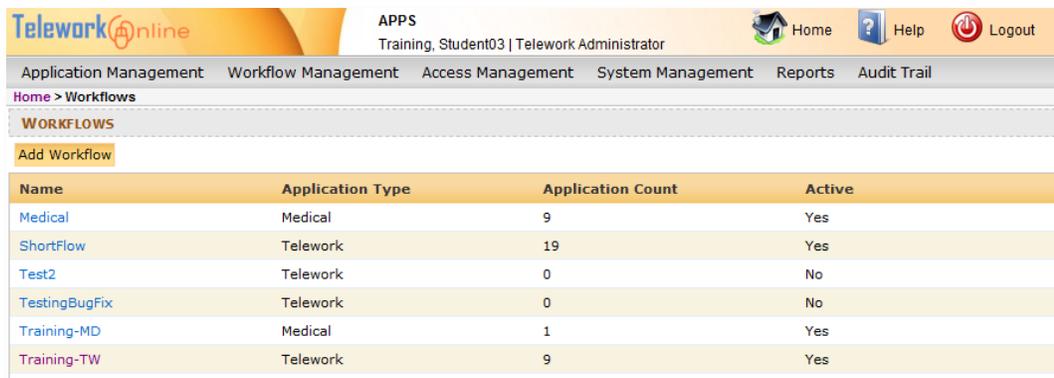
3. Click the name of the workflow to be deleted.

4. On the **Workflow Properties** page, click **Delete Workflow**.
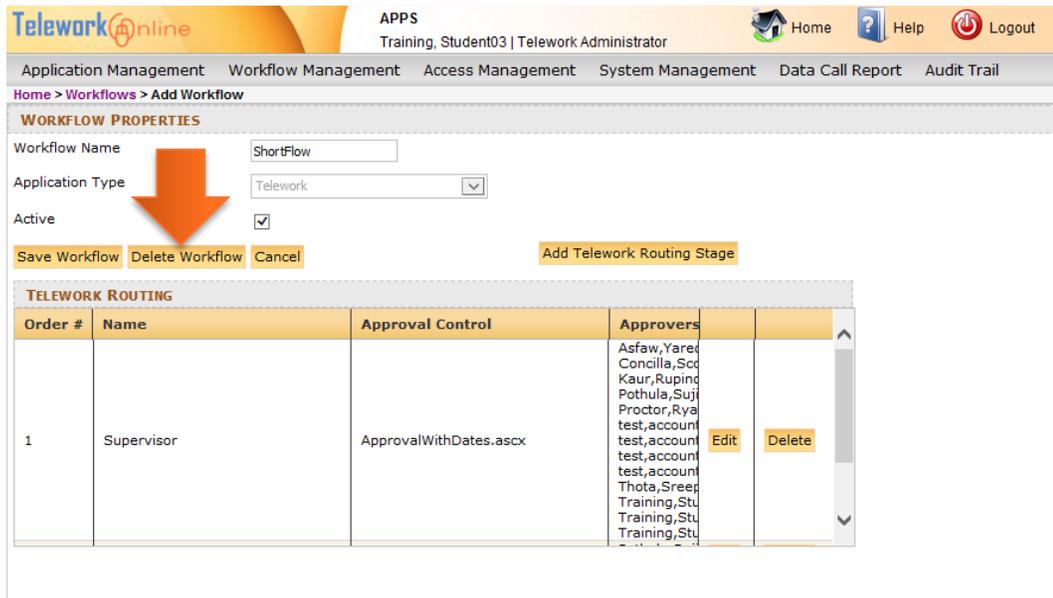
MANAGING WORKFLOWS

5. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.
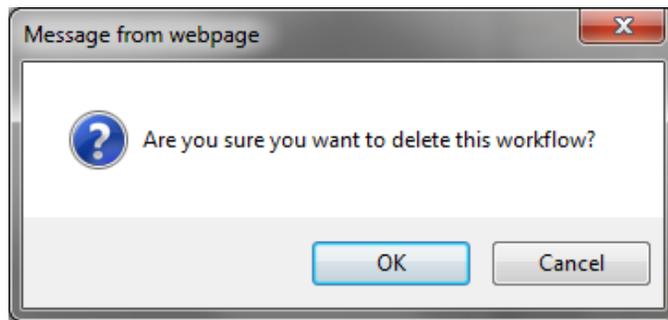
6. An action confirmation dialog box is displayed. Click **OK** to continue.

Warning

- This action cannot be undone. Once a workflow is deleted, it cannot be recovered.

Key Points to Remember

- Workflows are built out of basic building blocks called approval stages that can be used in multiple workflows.

- An approval stage can have different properties and different approval controls in different workflows.

- A minimum of two workflows are needed – one for Telework applications, and one for Medical applications.

- The number of workflows needed is dependent upon the general approval process for applications, NOT the number of departments or divisions.

- Telework Online determines the correct workflow for an application by examining the supervisor on an application, and then it looks for a workflow where that supervisor is an approver in the first stage of the workflow.

- The approvers listed in the first stage of any workflow must be the names of supervisors that are associated with applications.

- In the first stage of a workflow, email is only sent to a single approver, regardless of how many approvers are listed in the first stage of the workflow.

- In all subsequent workflow stages, all approvers listed as members of a stage receive email notifications.

- In the first stage of a workflow, only the supervisor can approve the application, therefore, supervisors MUST ALWAYS be the approvers in the first stage of a workflow.

- In all subsequent workflow stages, all approvers listed as members of a stage can approve applications.

- All supervisors are approvers, but not all approvers are supervisors.

- The last approval stage of a workflow MUST be named Final Approval.

- The Approval with Dates approval control should only be used once in any given workflow.

MANAGING USERS

In order for a user to be able to log in as an approver or as an administrator, they must be given access by an existing Telework Administrator. This section explores how to add a user, assign a role to a user, deactivate users, and delete users.

IN THIS SECTION

Note

- Applicants **do not** need to be added to Telework Online using these procedures. These procedures are **only** for granting users additional privileges such as being an approver or administrator.

Understanding the Roles in Telework Online

There are two roles that can be assigned to users in Telework Online. These roles determine the level of access a user has in the system.

Table 4: The roles in Telework Online.

Role	Description
Approver	Approvers have the ability to approve or decline new or renewed applications, and to approve or decline changes to applications for which they are responsible. Approvers **cannot** make changes to system settings, change workflows, or run reports.
Telework Administrator	At a minimum, there needs to be at least one Telework Administrator for an IC. This role allows a user to change and manage all system settings, manage and approve applications, create and change workflows, run reports, and manage and grant Approver access to other users.

Note

- There is a third role called System Administrator. This cannot be assigned or used by a Telework Administrator. It is used exclusively by the Telework Online Help team. For more information about this role and what it can do, see **System Administrator Tasks** on page 157.

Viewing Telework Users

The **Users** page displays those users that are able to access Telework Online as approvers or administrators. Additionally, users can be edited and deleted on this page.

Procedure

1. On the **Access Management** menu, click **Users**.

2. The **Users** page is displayed.

MANAGING USERS

Adding Users

All users who access Telework Online are automatically granted access as an applicant so that they can create and manage their applications. However, users who will be approvers or administrators must be granted additional privileges so that they can log in to Telework Online in their heightened role.

Procedure

1. On the **Access Management** menu, click **Users**.

2. On the **Users** page, click **Add User**.
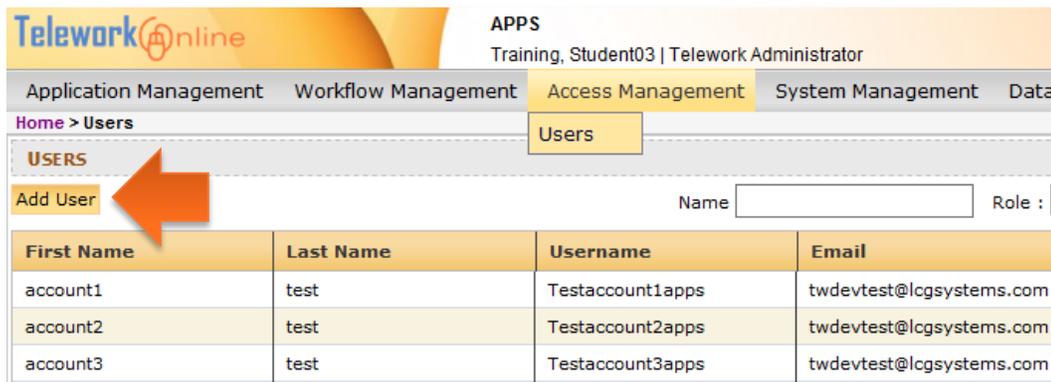
3. The **Check User Name** dialog box is displayed.
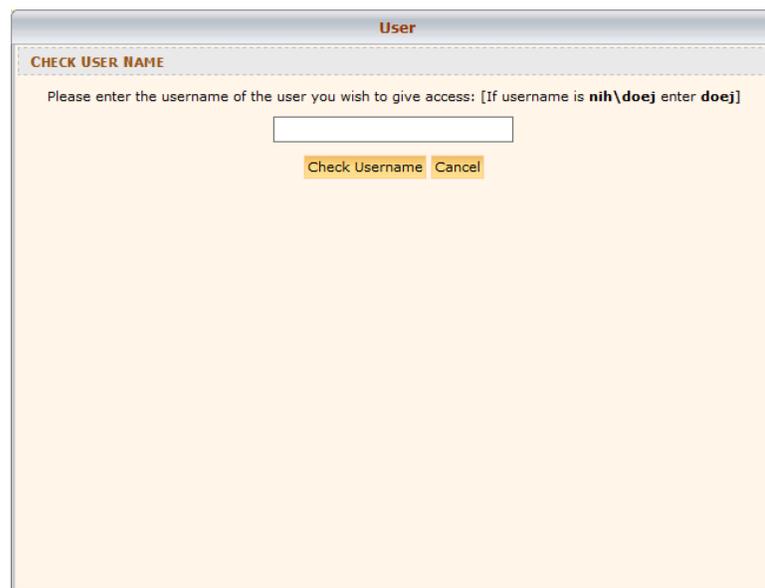
4. Enter a username and click **Check Username**. If the username is valid, the **User** dialog box is displayed. If you do not know the person's username, you will need to ask them for it – Telework Online is not able to look up usernames.

5. Using the **Role** list, select a user role. For more information on roles, see **Understanding the Roles in Telework Online** on page 76.

6. Click **Save User**.

7. An action confirmation message is displayed. Click **OK** to continue.

MANAGING USERS

Changing a User's Role

Once a user has been added to Telework Online as an approver or administrator, a Telework Administrator can change their access level at any time.

Procedure

1. On the **Access Management** menu, click **Users**.
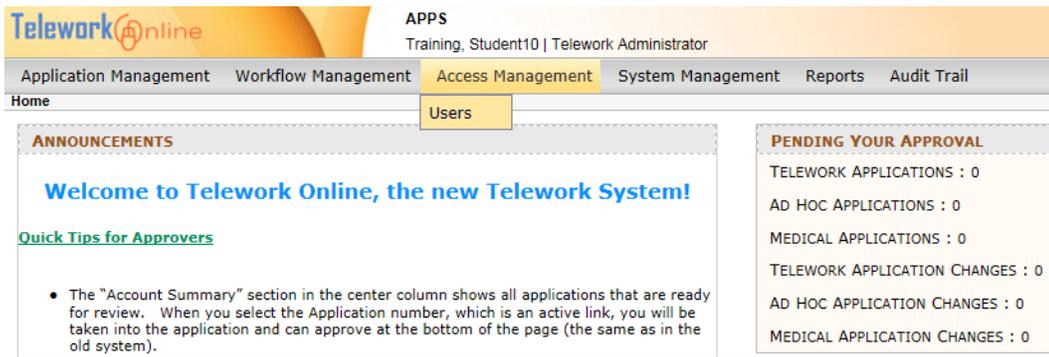
2. On the **Users** page, click the **Edit** button of the user to be modified.

3. The **User** dialog box is displayed.

4. Using the **Role** list, select a user role. For more information about these roles and their abilities, see **Understanding the Roles in Telework Online** on page 76.

5. Click **Save User**.

6. An action confirmation message is displayed. Click **OK** to continue.

Warning

- While it is possible to also change the values in the **First Name**, **Last Name**, and **Email** fields, such action is NOT recommended. If there is incorrect information, please consult with your network administrator about making changes to the information listed in Active Directory.

Deactivating a User

Deactivating a user temporarily removes their approver or administrator level access to Telework Online without completely deleting them. Conversely, this process can be used to re-activate the user.

Procedure

1. On the **Access Management** menu, click **Users**.

2. On the **Users** page, click the **Edit** button of the user to be deactivated.

3. The **User** dialog box is displayed.

4. Remove the checkmark next to the **Active** check box.
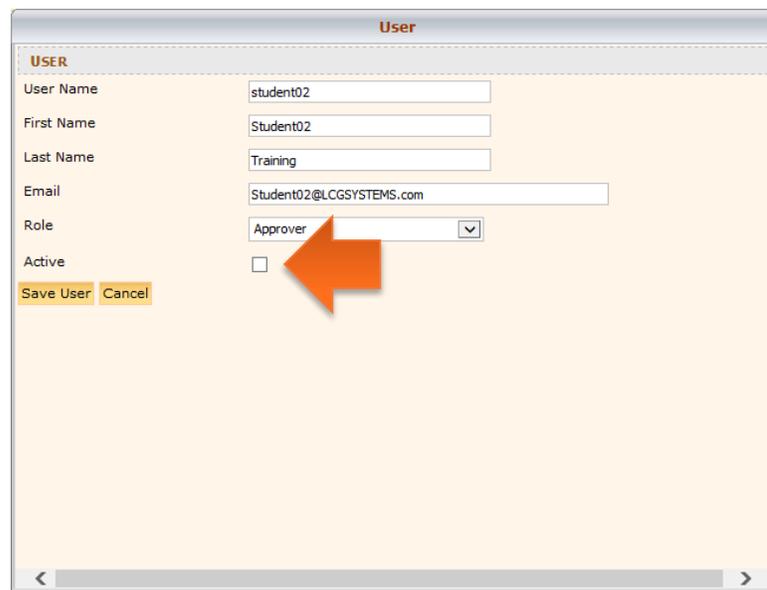
5. Click **Save User**.

Note

- Deactivating a user does not remove their ability to access Telework Online as an applicant.

Deleting a User

When an approver or administrator should no longer have elevated access to Telework Online, their access can be removed.

Procedure

1. On the **Access Management** menu, click **Users**.

2. On the **Users** page, click the **Delete** button of the user to be deleted.

3. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

 Warning

- This action cannot be undone. Once a user is deleted, they cannot be recovered. If a user needs to be restored, see **Adding Users** on page 78

 Note

- Deleting a user does not remove their ability to access Telework Online as an applicant.

MANAGING SYSTEM SETTINGS

Telework Online has many settings and options that can be customized by the Telework Administrator. These settings allow an administrator to change and adjust the behaviors of Telework Online to suit the needs and policies of their respective institute or group. This section explores the email settings and options, various form and system settings, how to edit the announcements, and how to archive applications in Telework Online.

IN THIS SECTION

MANAGING SYSTEM SETTINGS

The System Management Menu

Unlike other menu bar options in Telework Online, clicking the **System Management** option on the menu bar opens up a navigation page.
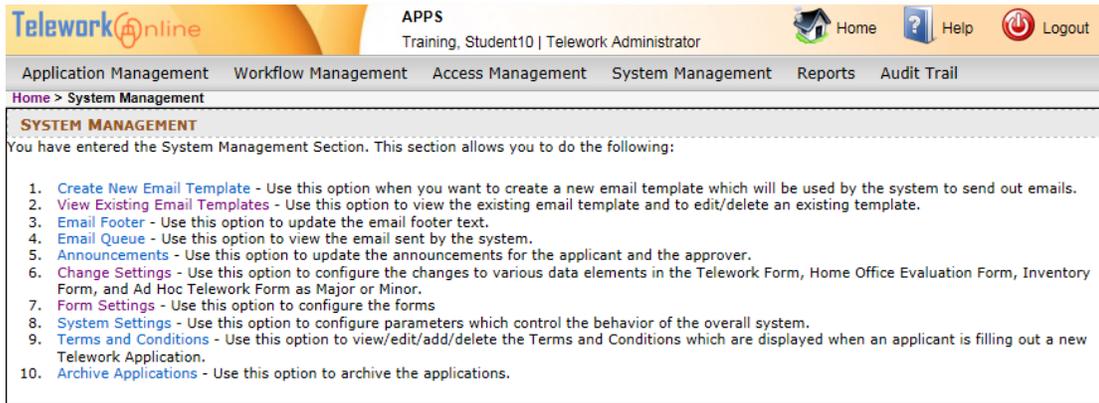
Figure 5: The System Management page with navigation choices.

These 10 choices can be used to navigate to the various subsections of the system management settings discussed in this section.

These same options can be accessed by hovering or pointing to the **System Management** option on the menu bar and waiting for the menu to appear.
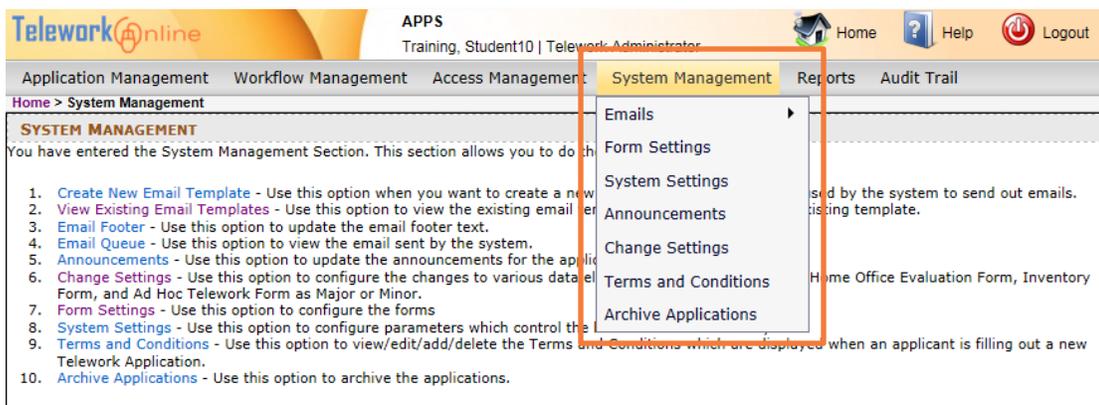
Figure 6: The System Management menu is open and highlighted.

Email Settings and Options

These settings control how and when emails are sent by Telework Online, as well the ability to edit the content those messages contain. To access the various email setting pages, point to **System Management** on the menu bar, then point to **Emails** to display the submenu.
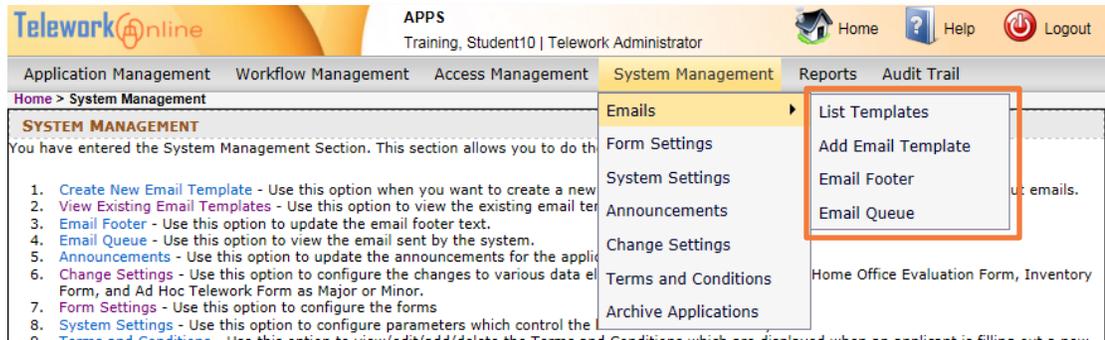
Figure 7: The Emails submenu.

There are four options listed on the submenu:

- List Templates

- Add Email Template

- Email Footer

- Email Queue

These options can also be accessed via the hyperlinks of the first four options on the **System Management** page.
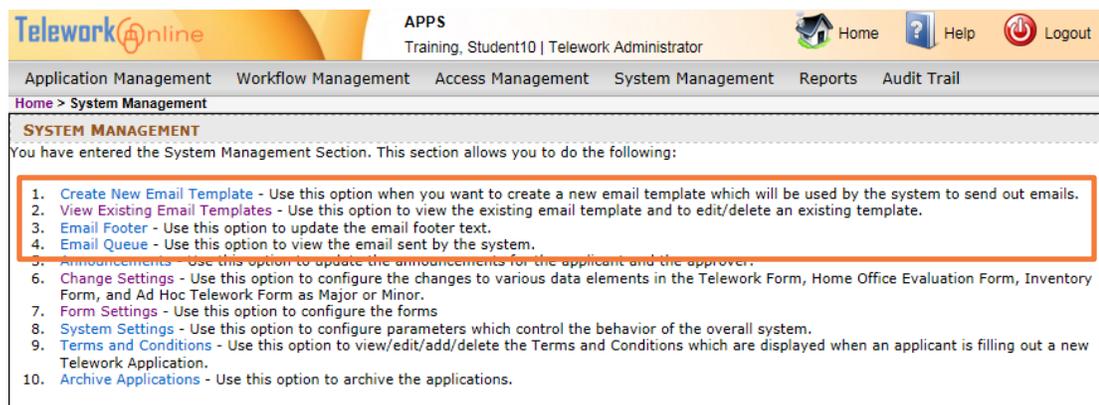
Figure 8: The email hyperlinks on the System Management page.

MANAGING SYSTEM SETTINGS

Listing the Email Templates

Telework Online sends a variety of emails to applicants, approvers, and administrators to notify them of various events and actions that need to be taken.

The **Email Templates** page (shown below) displays a variety of information, including the event in Telework Online that triggers the email (**Event Code**), the **Subject** that is displayed in the email message, the **Recipient** of the email, whether the template is currently **Active**, and an option to **Edit** the template.

Figure 9: The Email Templates page.

Using the controls above the list, the results can be filtered by **Event** and by **Recipient**.

The following table lists the Event Codes used by Telework Online and when each of these emails are triggered. These event codes are listed in the **Event** drop-down menu on the **Email Templates** page, as well as the **Event Code** column of the page data.

Table 5: The email event codes and descriptions.

Event Code	Description
ApplicationApproved	Email is sent when the application is approved in the final stage and becomes active.
ApplicationAssignedForProcessing	Email is sent after an applicant submits an application.
ApplicationAssignedNoProcessing	Email is sent after re-assigning an active application to a new supervisor.
ApplicationChangesByAdmin	Email is sent after a Telework Administrator makes changes to an applicant's application.
ApplicationDeclined	Email is sent when an application is declined.
ApplicationProvisionallyApproved	Email is sent after each stage in the workflow except the final stage when approving an application.
ApplicationSubmitted	Email is sent when applicant successfully submits their application.
ChangeEscalation	Not currently in use.
ChangesApproved	Email is sent when changes have been approved on an active application.
ChangesDeclined	Email is sent when changes have been declined on an active application.
ChangesProvisionallyApproved	Email is sent after each stage in the workflow except the final stage when approving changes.
ChangesSubmitted	Email is sent when an applicant submits changes to an active application.

Event Code	Description
Escalation	This email is sent as a reminder to take an action when an application is pending for approval of submitted changes on an active application or waiting to be approved at one of the workflow stages. *The frequency of this email is set by option #3 of the Email Settings on the System Settings page. For more information, see* **The Email** Settings *on page 121.*
EscalationToApprover	Reminder email to the next approver in the workflow to take action when an application is pending for approval for approval of submitted changes on an active application or waiting to be approved at one of the workflow stages. *The frequency of this email is set by option #2 of the Email Settings on the System Settings page. For more information, see* **The Email** Settings *on page 121.*
HardwareInventorySubmitted	Email is sent after successful submission of the hardware inventory form.
HomeOfficeEvaluationNotSubmitted	Email is sent when an applicant selects **Home** for their telework location but does not submit the home office evaluation form. *The frequency of this email is set by option #5 of the Email Settings on the System Settings page. For more information, see* **The Email** Settings *on page 121.*
RenewalNotice	Email is sent to remind applicant to renew their active application before it expires. *The frequency of this email is set by option #1 of the Email Settings on the System Settings page. For more information, see* **The Email** Settings *on page 121.*

Event Code	Description
TeleworkApplicationSavedNotSubmitted	Email is sent as a remainder to complete and submit a saved application before it expires.
	The frequency of this email is set by option #4 of the Email Settings on the System Settings page. For more information, see **The Email** Settings *on page 121*.
TerminationByAdmin	Email is sent when a Telework Administrator terminates an active application.
TerminationByExpiration	Email is sent when Telework Online terminates an active application (i.e. after the application expires).
TerminationRequestApproved	Email is sent after an application termination that was requested by the applicant has been approved.
TerminationRequestDeclined	Email is sent after an application termination that was requested by the applicant has been declined.
TerminationRequestProvisionallyApproved	Email is sent after each stage in the workflow except the final stage during a termination request initiated by the applicant.
TerminationRequestSubmitted	Email is sent when an applicant submits a termination request for an active application.
WorkflowNotAssigned	Email is sent when Telework Online is unable to determine the correct workflow for an application.

MANAGING SYSTEM SETTINGS

Any of the email templates can be sent to one of five recipients in Telework Online. These roles are listed in the **Recipient** drop-down menu on the **Email Templates** page, as well as the **Recipient** column of the page data.
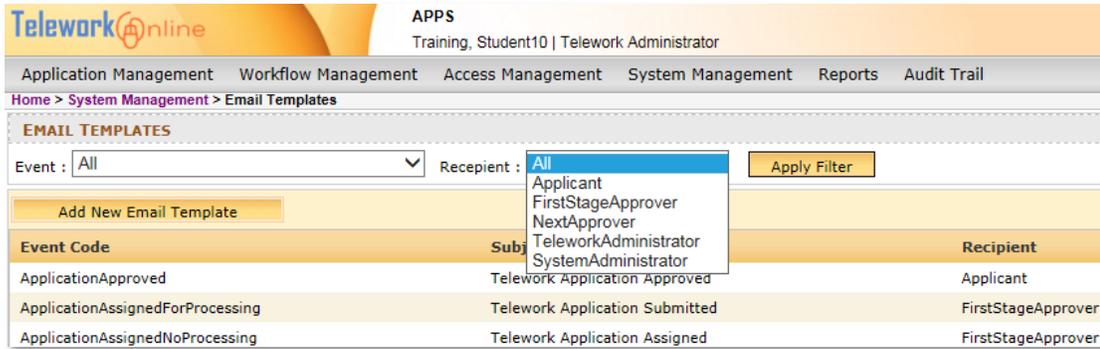
Figure 10: The Recipient drop-down list on the Email Templates page.

Table 6: Email recipients in Telework Online

Recipient	Description
Applicant	The person who completes and submits an application.
FirstStageApprover	An approver listed in the first stage of the workflow. Typically the applicant's supervisor.
NextApprover	Any approver in any stage beyond the first stage.
TeleworkAdministrator	A user designated to manage Telework Online. Typically the last approver in a workflow.
SystemAdministrator	System Administrators are members of the Telework Online help team. This recipient should only be used when advised to do so by a member of the help team as part of a troubleshooting procedure.

Procedure

1. Point to the **System Management** menu, then point to the **Emails** option.

2. On the **Emails** submenu, select **List Templates**.
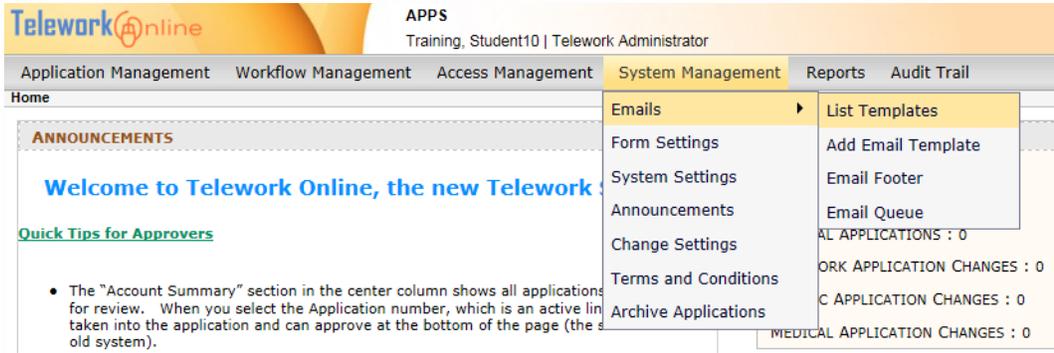
3. The **Email Templates** page is displayed.

4. If necessary, select an option from either the **Event** or **Recipient** filter lists and click **Apply Filter**.
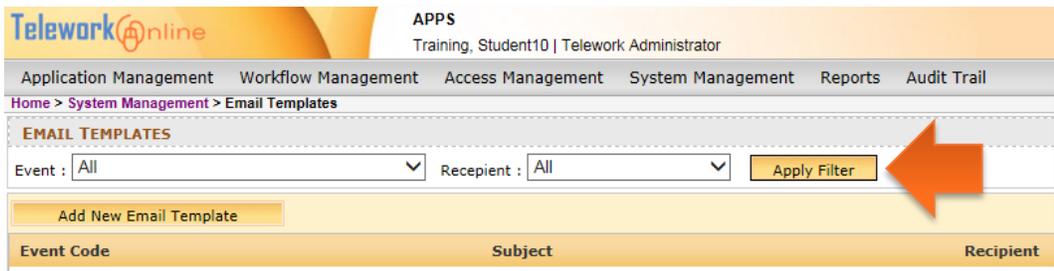
Creating a New Email Template

A Telework Online email template consists of four main parts:

- The **Event** that triggers the creation and sending of the email (see Table 5 on page 89 for a list of event codes).

- An email **Subject** the receiver will see in their email list.

- The designated **Recipient** of the email (see Table 6 on page 92 for a list of recipients).

- The **Text** of the email, which may include keywords to personalize and customize the email message.

An email template can only be sent to a single recipient. This means that if there is an event where multiple users should receive an email, there will need to be an email template for each combination of event and recipient. Conversely, this also means that each combination of event code and recipient can only be used once.

For example, you want both the applicant and the supervisor to receive an email when changes are approved for an application. Two email templates would be required – one email template with the **ChangesApproved** event code and a recipient of **Applicant**, and a second email template with the **ChangesApproved** event code and a recipient of **FirstStageApprover**.

A standard installation of Telework Online will include about 25 built-in email templates. For most administrators, the built-in email templates and their definitions will be adequate for their needs.

If the administrator wishes to customize or change an existing template, they can do so. For more information, see Table 7 on the following page, as well as **Editing an Existing Email Template** on page 98.

If however, the combination of event code and recipient does not currently exist, the administrator can create a new email template.

The table on the following page lists the keywords that can be incorporated into the text of an email template. These keywords can be used to customize or personalize the information contained in the notification email.

Table 7: Keywords that can be added to email templates.

| Keyword	Drop-down Option	Additional Information
#ApplicationNumber#	Application number	
#ApplicationStatus#	Application current status	
#StartDate#	Application start date	
#EndDate#	Application end date	
#ApplicationLink#	Application link	Displays a hyperlink to the application.
#ApplicantName#	Applicant name	
#FirstStageApproverName#	Supervisor name	
#ProcessedStageApproverName#	Name of the user who last processed the application	
#ProcessedStageStatus#	Application status at the last processed stage	
#ProcessedStageDate#	Date when the application was last processed	
#ChangeList#	Change list	Displays a list of changes made to the application.
#Comments#	Comments	Displays comments made by approvers.
#WorkflowName#	Workflow name	Name of the workflow the application is using.
#ApplicationDateOfSubmission#	Date the application was submitted	
#LoginLink#	System login link	Displays a hyperlink to the login page.

MANAGING SYSTEM SETTINGS

Procedure

1. On the **Email Templates** page, click **Add New Email Template**.
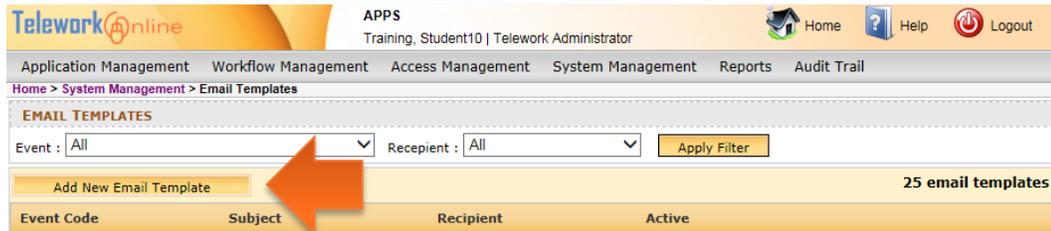
2. The **Add/Edit Email Template** page is displayed.
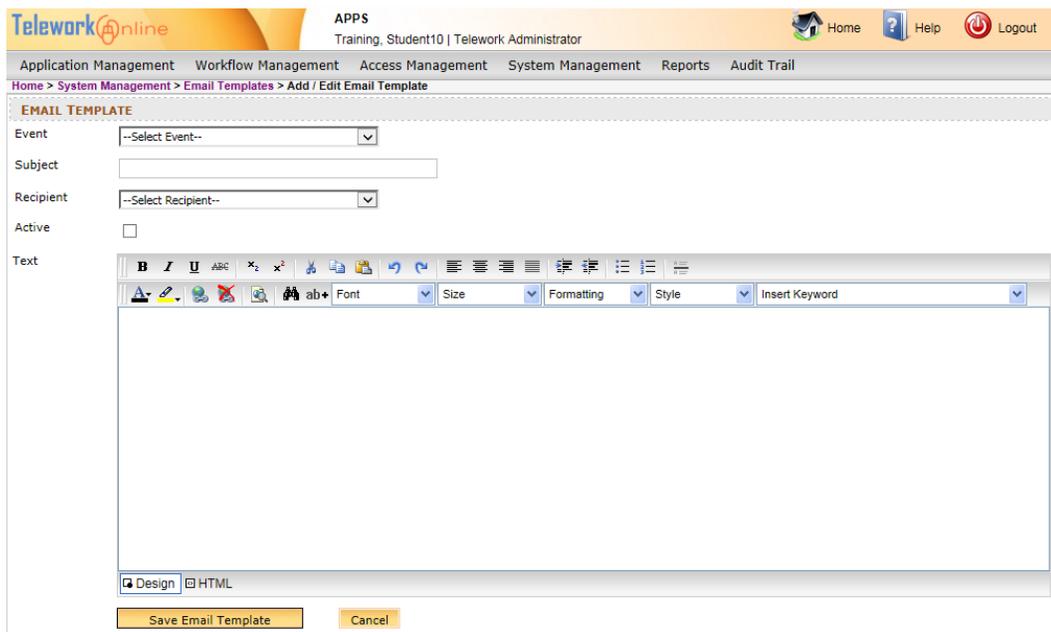
3. Using the **Event** list, select an event that triggers the email. See Table 5 on page 89 for a list of Event Codes and descriptions.

4. Enter a **Subject** for the email.

5. Using the **Recipient** list, select who will receive the email. See Table 6 on page 92 for a list of Recipients and their descriptions.

6. If desired, select the **Active** check box. For more information about this option, see **Activating and Deactivating an Email Template** on page 100.

7. In the message editing area, write the text of the message. Use the formatting toolbars to format the text, and use the **Insert Keyword** drop-down list to add customized or personalized information. See Table 7 on page 95 for a list of keywords and descriptions. Note that Telework Online will also include an email footer as part of every email, so do not duplicate or repeat information that may already be in the email footer. For more information, see **Editing the Email Footer** on page 104.

8. When finished, click **Save Email Template**.

9. An action confirmation dialog box is displayed. Click **OK** to continue.

Tip

*   While it **IS** possible to copy and paste text from other sources into the message editing area, it is **NOT** recommended to paste text that has formatting on it, or comes from Microsoft Word. Pasting directly from a word processing program such as Word can cause strange text behaviors due to how a web browser converts formatting. If you wish to paste text from Word, it is recommended that you **first** paste the text into an unformatted text program such as Notepad, copy the text from Notepad, paste it into the message editing area, and then apply formatting using the formatting toolbars above the message editing area.

MANAGING SYSTEM SETTINGS

Editing an Existing Email Template

Any current email template can be edited, changed, or updated as needed.

Procedure

1. On the **Email Templates** page, click **Edit** next to the template to be edited.

2. The **Add/Edit Email Template** page is displayed.

3. Make changes to the template as desired.

4. Click **Save Email Template** when finished.

5. An action confirmation dialog box is displayed. Click **OK** to continue.

See also

- For more information on editing the content of an email template, see **Creating a New Email Template** on page 94.

MANAGING SYSTEM SETTINGS

Activating and Deactivating an Email Template

All email templates can be activated or deactivated. This allows the Telework Administrator to experiment with creating new templates without emails actually being sent, as well as the administrator can temporarily disable email templates without having to delete them.

As displayed on the **Email Templates** page, email templates with an **Active** status of **Yes** are templates that are currently in use, and email templates with an **Active** status of **No** are currently suspended.

The status of an email template can be changed at any time.

Procedure

1. On the **Email Templates** page, click **Edit** next to the template to be activated or deactivated.

2. The **Add/Edit Email Template** page is displayed.

3. Select (or deselect) the **Active** checkbox.

4. Click **Save Email Template**.

5. An action confirmation dialog box is displayed. Click **OK** to continue.

6. The **Email Templates** page displays. Notice that the status of the **Active** column has changed.

Deleting an Email Template

When an email template is no longer needed or used, it can be deleted. This action takes effect immediately.

Procedure

1. On the **Email Templates** page, click **Edit** next to the template to be deleted.

2. The **Edit Email Template** page is displayed.

3. At the bottom of the page, click **Delete Email Template**.
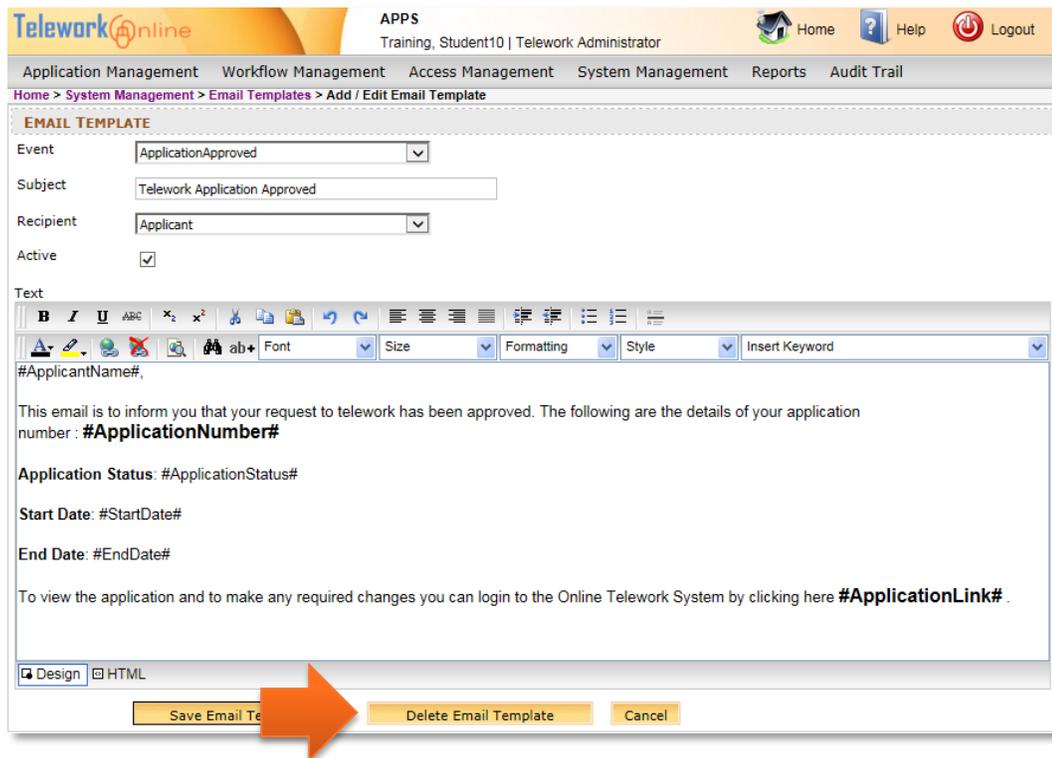
4. A warning message is displayed. Click **OK** to continue, or **Cancel** to abort the deletion.
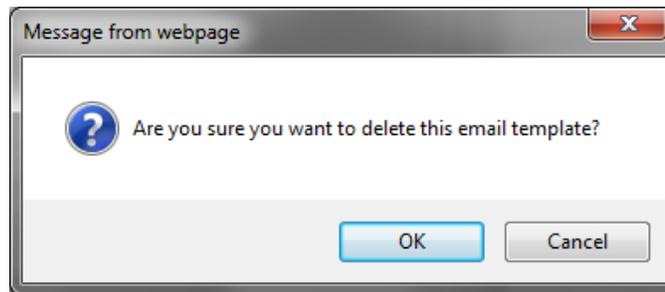
5. An action confirmation dialog box is displayed. Click **OK** to continue.

Warning

- This action cannot be undone. Once an email template is deleted, it cannot be recovered.

MANAGING SYSTEM SETTINGS

Editing the Email Footer

The email footer is a block of text that is added at the bottom of every email sent by Telework Online. The email footer is a good location for contact information (i.e. who to contact if the user needs help), legal warnings, help links, or any other text that should appear on every email.

Procedure

1. Point to the **System Management** menu, then point to the **Emails** option.

2. On the **Emails** submenu, select **Email Footer**.
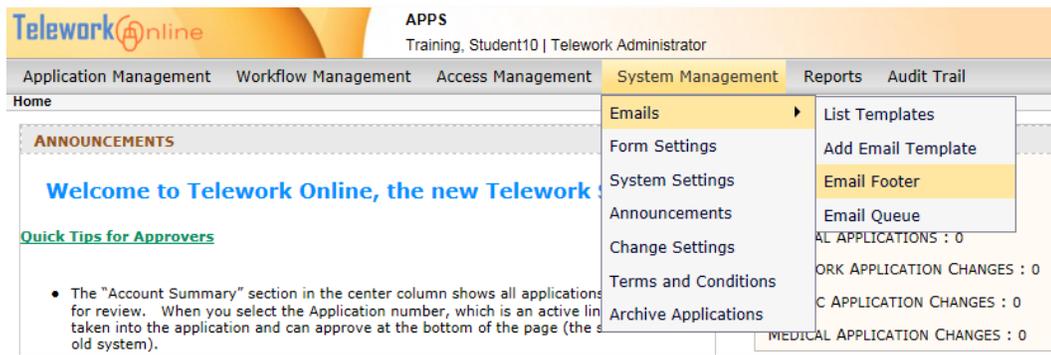
3. The **Email Footer** page is displayed.
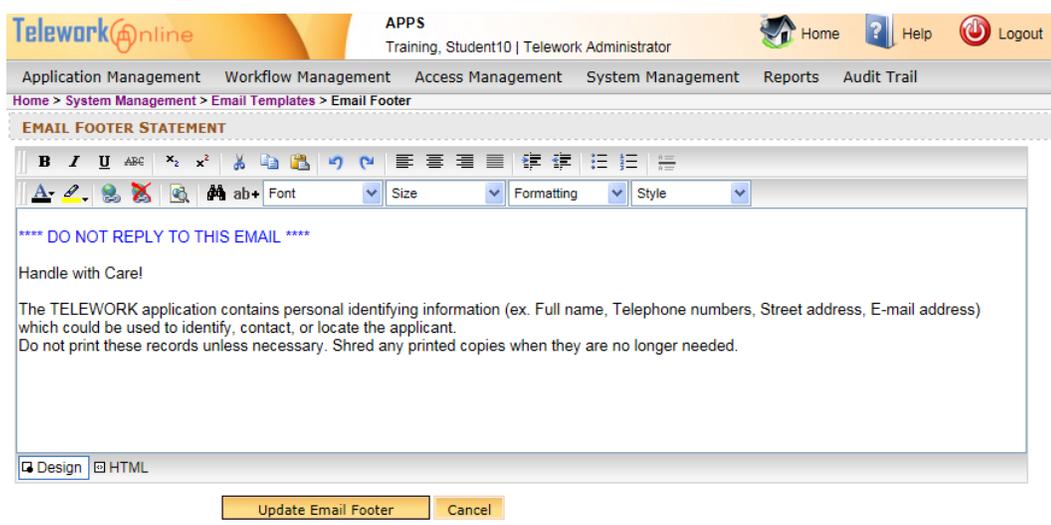
4. Make changes to the email footer text as desired.

5. Click **Update Email Footer** when finished.

6. An action confirmation dialog box is displayed. Click **OK** to continue.

See also

- For more information on the use of the editing area, see **Announcements** on page 123.

Tips

- While it **IS** possible to copy and paste text from other sources into the footer editing area, it is **NOT** recommended to paste text that has formatting on it, or comes from Microsoft Word. Pasting directly from a word processing program such as Word can cause strange text behaviors due to how a web browser converts formatting. If you wish to paste text from Word, it is recommended that you **first** paste the text into an unformatted text program such as Notepad, copy the text from Notepad, paste it into the footer editing area, and then apply formatting using the formatting toolbars above the message editing area.

- Unlike email templates, the email footer does not allow the use of system variables in the text.

Note

- Changes made to the email footer take effect immediately for all future emails.

Viewing the Email Queue

The email queue is a comprehensive list of all emails that have been sent by Telework Online. It is useful for troubleshooting email problems, as well as searching for all emails related to a single application.

This page displays a variety of information, including the **Application Number** associated with the email, the **Date Sent**, the **Event Code** that triggered the email, the **Subject** of the email, and the **To** and **CC** address of the email.

The administrator can also view the actual notification emails sent by Telework Online.

Procedure

1. Point to the **System Management** menu, then point to the **Emails** option.

2. On the **Emails** submenu, select **Email Queue**.
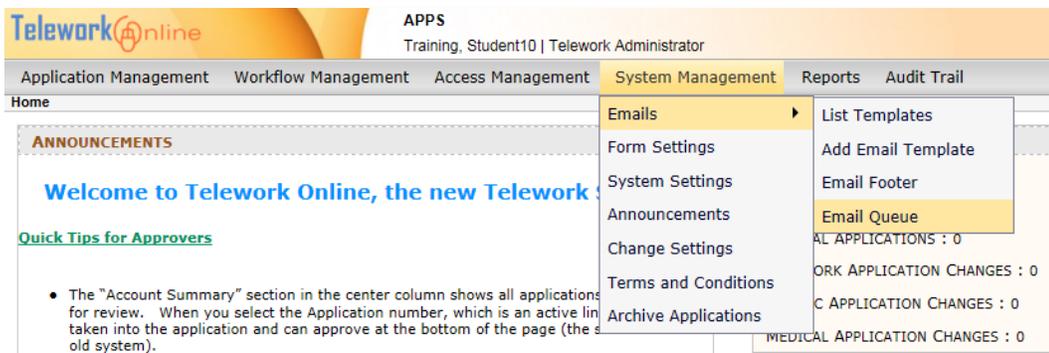
3. The **Email Queue** page is displayed.

4.   Use the **Email Sent** or **Application Number** fields to filter the results list, or use the **Page** drop-down to navigate to a page of results.

5.   To view the text of an email, click **Edit** next to the email.

6.   When finished viewing the email, click **Cancel and Return to Listing**.
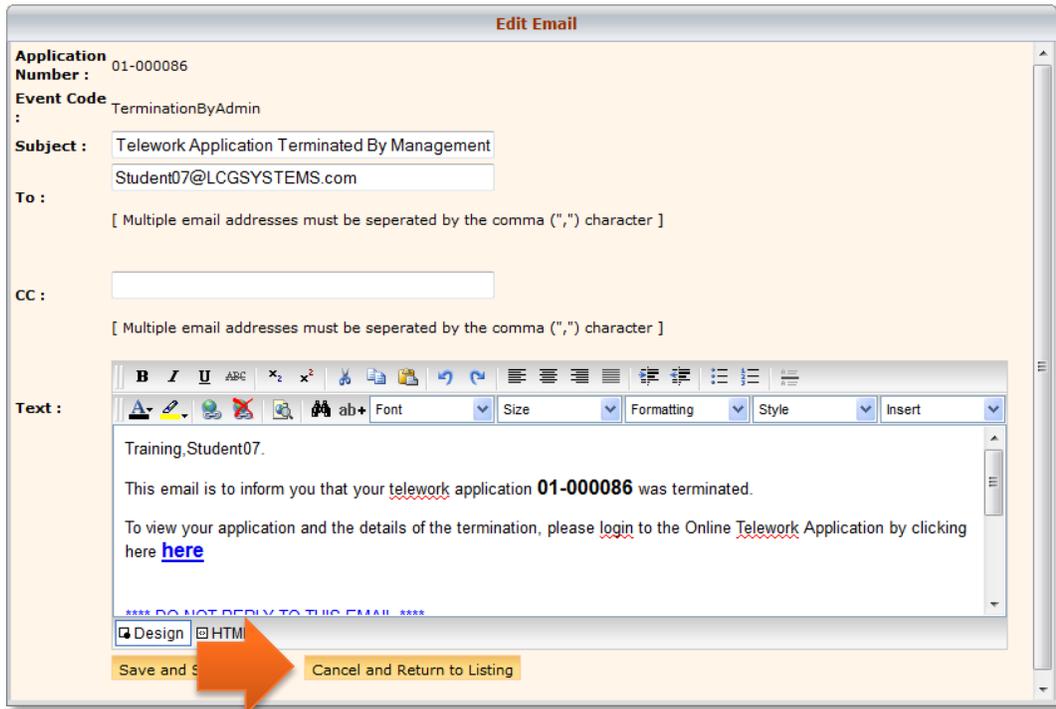
Resending a Previous Email

To aid in troubleshooting problems with email, Telework Online can resend any email that has already been sent. This can help pinpoint whether there is an issue with emails on the server side of Telework Online, or if it is an issue with a user receiving emails in Outlook (e.g. Telework emails are being diverted to the Outlook Junk Email folder instead of the Inbox). Additionally, this feature allows an administrator to send copies of an email to other users.

Procedure

1. On the **Email Queue** page, click **Edit** next to the email to be resent.

2. The **Edit Email** dialog box is displayed.

3. Make any changes, updates, or corrections to the email as needed.

4. Click **Save and Send Email**.

5. An action confirmation dialog box is displayed. Click **OK** to continue.

Form Settings and Options

These settings control options that appear on the first page of the Telework application form. To access this page, point to the **System Management** menu and select **Form Settings**.
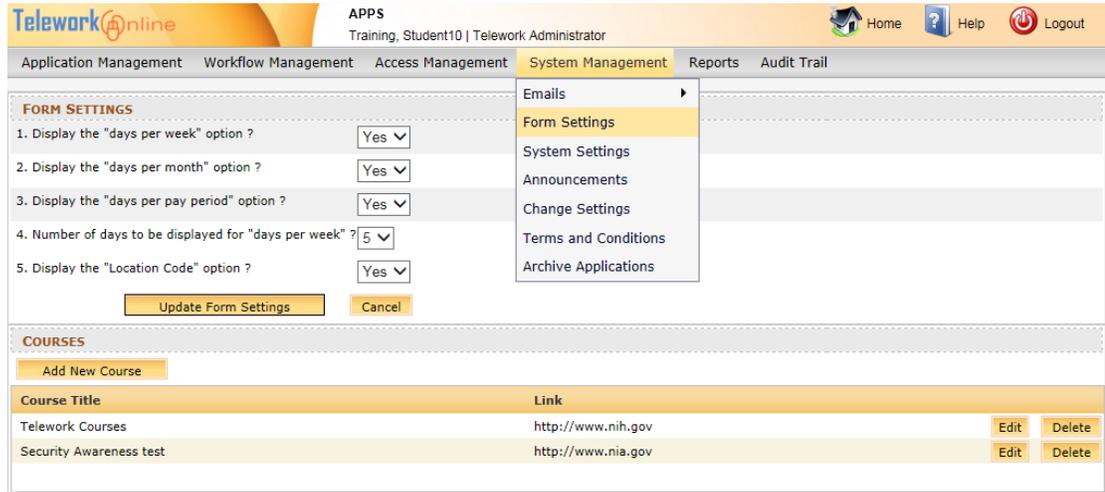
Figure 11: The Form Settings page.

This page is divided into two sections – **Form Settings** and **Courses**.

The Form Settings Section

These settings control what is displayed in two parts of the main Telework application.

Figure 12: The Form Settings section of the Form Settings page.

The first four options control the radio button options that are displayed in question #3a when an applicant chooses the *Regular* option in question #3.

Figure 13: Question #3a on a Telework application

The last option (#5) adds a field in the user information portion of the main Telework application.

The following table lists and describes the Form settings.

Table 8: The form settings, options, and descriptions.

Setting	Options	Description
Display the "days per week" option.	Yes/No	Displays the option in question 3a.
Display the "days per month" option.	Yes/No	Displays the option in question 3a.
Display the "days per pay period" option.	Yes/No	Displays the option in question 3a.
Number of days to be displayed for "days per week".	1, 2, 3, 4, 5	Controls the maximum number of days an applicant can select for any of the above options.
Display the "Location Code" option.	Yes/No	Displays the text box in the user information section of the application.

Procedure

1. Display the **Form Settings** page.

2. Make changes in the **Form Settings** section as desired.

3. Click **Update Form Settings**.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

The Courses Section

This section controls the options that are displayed in question #14 on the Telework application. The applicant must select all of the check boxes in this section to confirm that they have completed the required training courses.
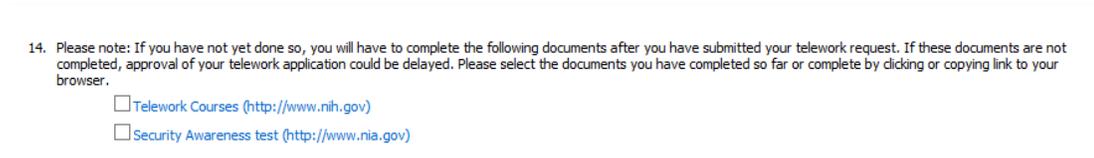
Figure 14: Question #14 on a Telework Application.

Figure 15: The corresponding Courses section on the Form Settings page.

Warning

- Telework Online does not have the ability to verify with external systems whether these training courses have been completed.

- It is up to the Telework Administrator or approvers to put procedures in place to verify that applicants have physically completed the courses.

Note

- Changes made to the Courses will be reflected immediately in all new and current Telework applications. New courses will be displayed in all approved agreements, but the check box will be unselected. Unless requested or necessary for business reasons in your IC, it is not necessary for applicants to go back and update their current agreement with the new course. However, applicants **will** need to select the new check box when renewing their agreement.

Procedure – Adding a new course

1. In the **Courses** section, click **Add New Course**.

2. The **Enter Course** dialog box is displayed.

3. Enter a **Course Title**. This is the user-friendly text that is displayed on the application.

4. Enter a **Link**. This is the hyperlink that is displayed in parentheses next to the course title that an applicant can click to launch the course.

5. Click **Save Course** when completed.

6. An action confirmation dialog box is displayed. Click **OK** to continue.

Procedure – Editing a course

1. In the **Courses** section, click **Edit** next to the course to be edited.

2. The **Enter Course** dialog box is displayed with the current course information.
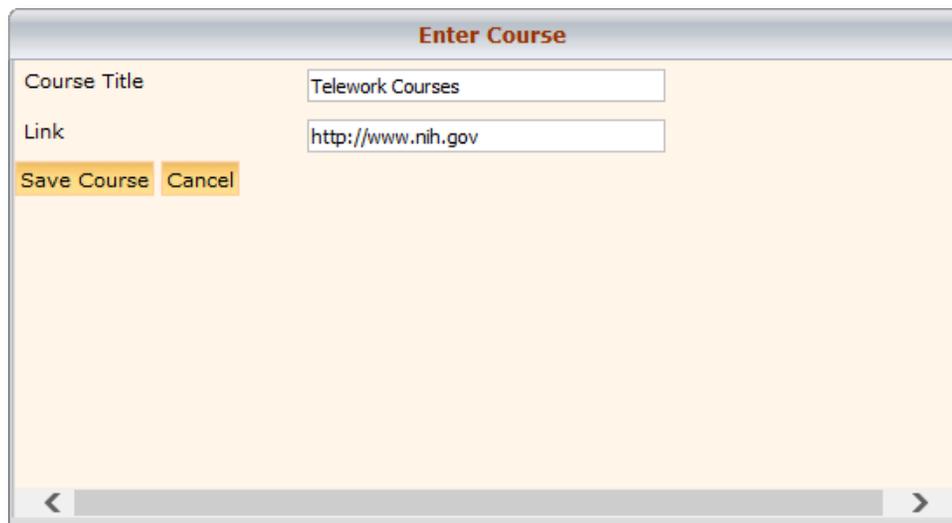
3. Change the information as desired and click **Save Course**.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

Procedure – Deleting a course

1. In the **Courses** section, click **Delete** next to the course to be deleted.

2. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.
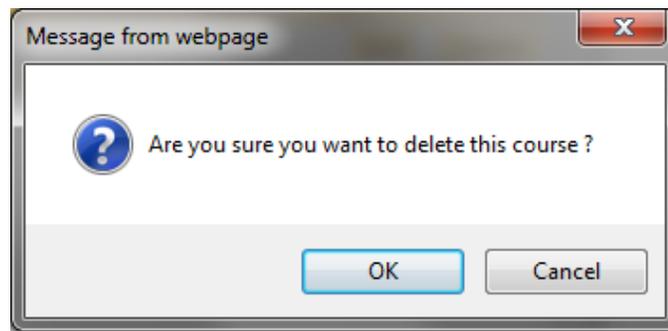
3. An action confirmation dialog box is displayed. Click **OK** to continue.

Warning

- This action cannot be undone. Once a course is deleted, it cannot be recovered.

MANAGING SYSTEM SETTINGS

System Settings and Options

These settings control the actions Telework Online performs when processing applications and when to send emails. To access this page, point to the **System Management** menu and select **System Settings**.
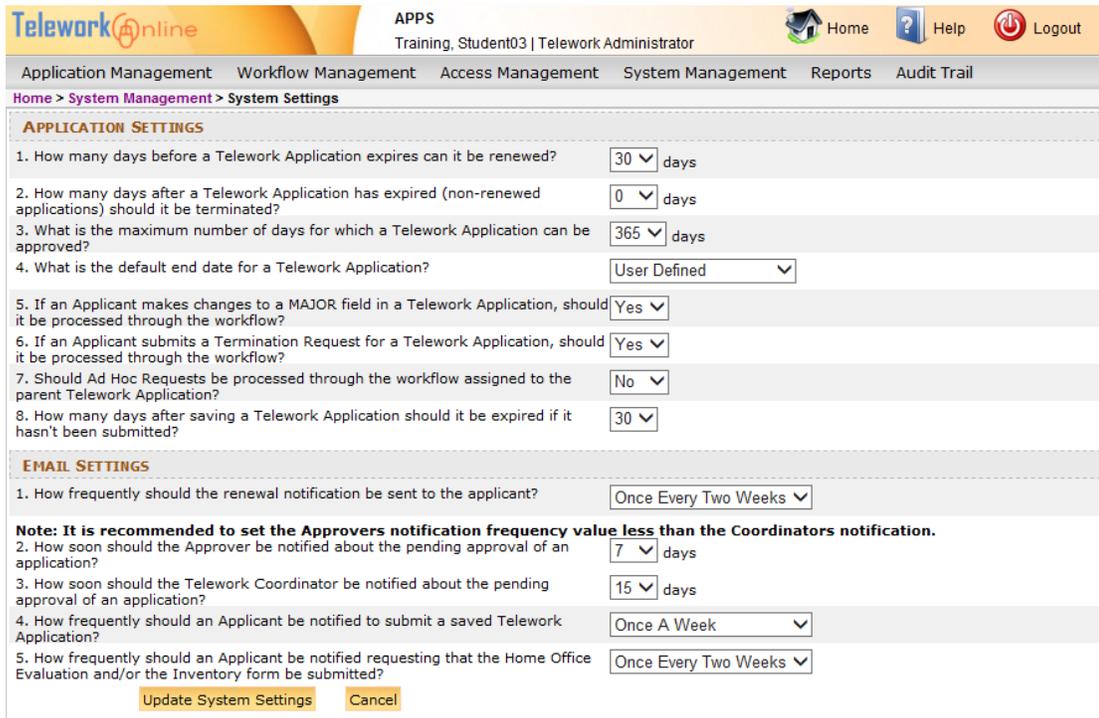
Figure 16: The System Settings page.

This page is divided into two sections – **Application Settings** and **Email Settings**. Settings in both of these sections are updated by the same method.

Procedure

1. Display the **System Settings** page.

2. Make changes in either section as desired.

3. Click **Update System Settings**.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

MANAGING SYSTEM SETTINGS

The Application Settings Section

These settings control the general behaviors of Telework Online in the processing of applications. Most of these settings relate to the number of days before certain actions or processing takes place.

Figure 17: The Application Settings section of the System Settings page.

Table 9: The application settings, options, and descriptions.
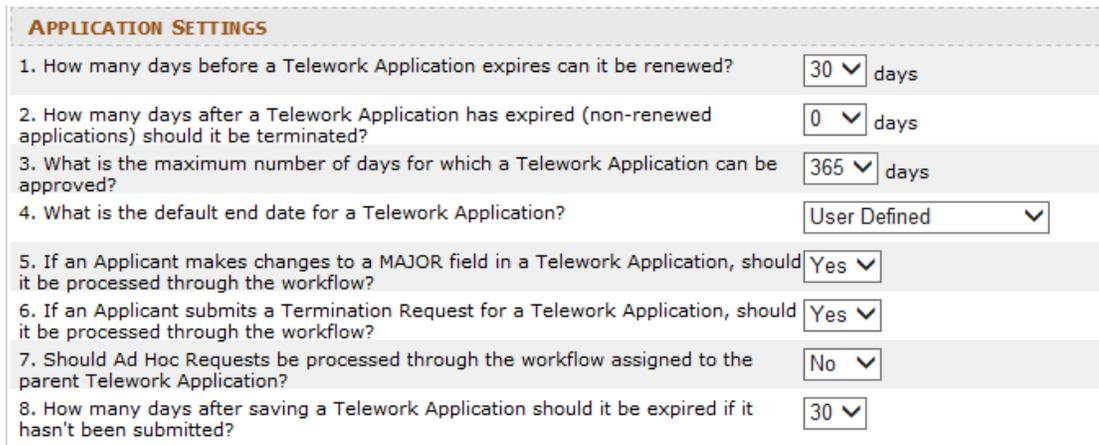
Setting	Options	Description
How many days before a Telework Application expires can it be renewed?	• 15 days • 30 days • 45 days • 60 days	Controls the length of the renewal period for applications. Applicants can only renew their applications during this time period.
How many days after a Telework Application has expired (non-renewed applications) should it be terminated?	• 0 days • 15 days • 30 days • 45 days • 60 days	Controls how many days past an expiration date that Telework Online will automatically set the status of an application to *terminated*. Setting this option to *0 days* prevents the system from changing the status of an expired application to terminated.

Setting	Options	Description
What is the maximum number of days for which a Telework Application can be approved?	• 30 days • 90 days • 180 days • 365 days	Controls the maximum number of days that any application can be valid for. Depending on the values of other options, approvers may be able to set applications to be values less than this maximum. The *365 days* option is the current maximum allowed by the government.
What is the default end date for a Telework Application?	• User Defined • End of Calendar Year • End of Fiscal Year	*User defined* allows approvers and administrators to set the expiration date of an agreement, up to the maximum number of days set in the previous option. *End of calendar* year is December 31st of the year, regardless of the current date. *End of fiscal* year is September 30th regardless of the current date.
If an Applicant makes changes to a MAJOR field in a Telework Application, should it be processed through the workflow?	Yes/No	If *yes*, when an applicant makes a change to a major field (as determined by the **Change Settings**), the change request is processed through the entire workflow. When set to *no*, only the supervisor (1st level approver) needs to approve the change.

MANAGING SYSTEM SETTINGS

Setting	Options	Description
If an Applicant submits a Termination Request for a Telework Application, should it be processed through the workflow?	Yes/No	If *yes*, when an applicant makes a termination request the request is processed through the entire workflow. When set to *no*, only the supervisor (1st level approver) needs to approve the termination request.
Should Ad Hoc Requests be processed through the workflow assigned to the parent Telework Application?	Yes/No	If *yes*, when an applicant creates an Ad Hoc application the application is processed through the entire workflow. When set to *no*, only the supervisor (1st level approver) needs to approve the Ad Hoc application.
How many days after saving a Telework Application should it be expired if it hasn't been submitted?	• 15 days • 30 days • 45 days • 60 days	Applicants can choose to save and complete their applications later. This setting controls how long an application can remain in the saved state before it is automatically expired by Telework Online. Once expired, the applicant will have to start over creating a Telework application.

The Email Settings Section

Telework Online sends a variety of emails to applicants, approvers, and administrators. These settings control how often certain emails are sent, and how soon certain notification or reminder emails are sent.

Figure 18: The Email Settings section of the System Settings page.

Table 10: The email settings, options, and descriptions.

Setting	Options	Description
How frequently should the renewal notification be sent to the applicant?	• Daily • Once a Week • Once Every Two Weeks	Controls how often Telework Online sends renewal reminder emails to applicants. As a general rule, the shorter the renewal period (as determined by the **Application Settings**) the more frequently the applicant should receive reminder notifications.
How soon should the Approver be notified about the pending approval of an application?	• 3 days • 7 days • 10 days • 15 days	Approvers receive a notification immediately after an application is submitted for approval. This setting determines how quickly an approver should be notified again if no action has been taken by the approver since the initial notification.

Setting	Options	Description
How soon should the Telework Coordinator be notified about the pending approval of an application?	• 3 days • 7 days • 10 days • 15 days	If an approver does not take action on a pending application, this setting determines how quickly the Telework Administrator should be notified. **This setting's value should be higher than the value for approver's reminder notification frequency.**
How frequently should an Applicant be notified to submit a saved Telework Application?	• Daily • Once a Week • Once Every Two Weeks	Applicants are able to save Telework applications to complete them later. This value determines how often the applicant should be reminded to complete the application and submit it.
How frequently should an Applicant be notified requesting that the Home Office Evaluation and/or the Inventory form be submitted?	• Daily • Once a Week • Once Every Two Weeks	Applicants are able to save the Home Office Evaluation form and/or the Inventory form of a Telework application to complete later. This value determines how often the applicant should be reminded to complete either form and submit the application.

Announcements

When users log in to Telework Online, the home page displays an Announcements section. There are separate announcements sections for applicants, and for approvers and other administrators. To access this page, point to the **System Management** menu and select **Announcements**.
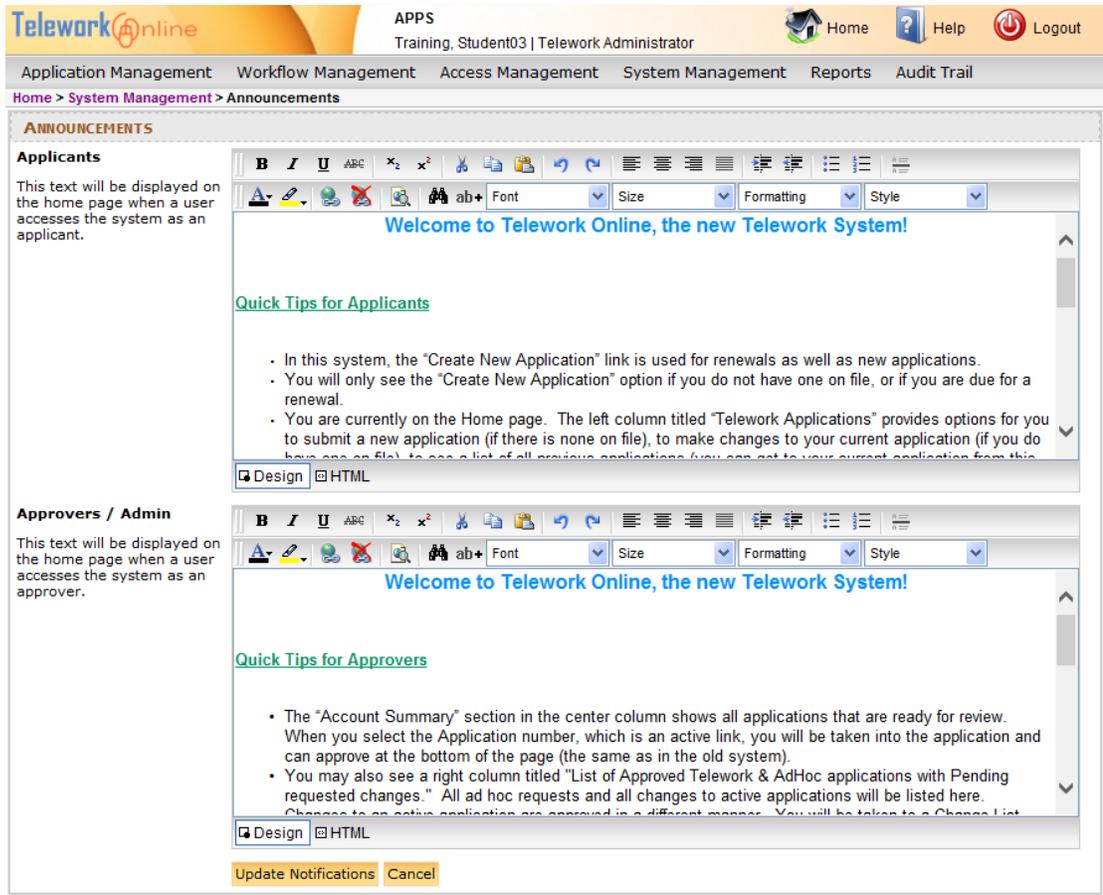
Figure 19: The Announcements editing page.

Both announcements sections can be edited on the **Announcements** page. The top section displays the announcements for applicants, and the bottom section displays the announcements for approvers and administrators.

The editing area for each announcement is the same, and the parts are identified on the following page.
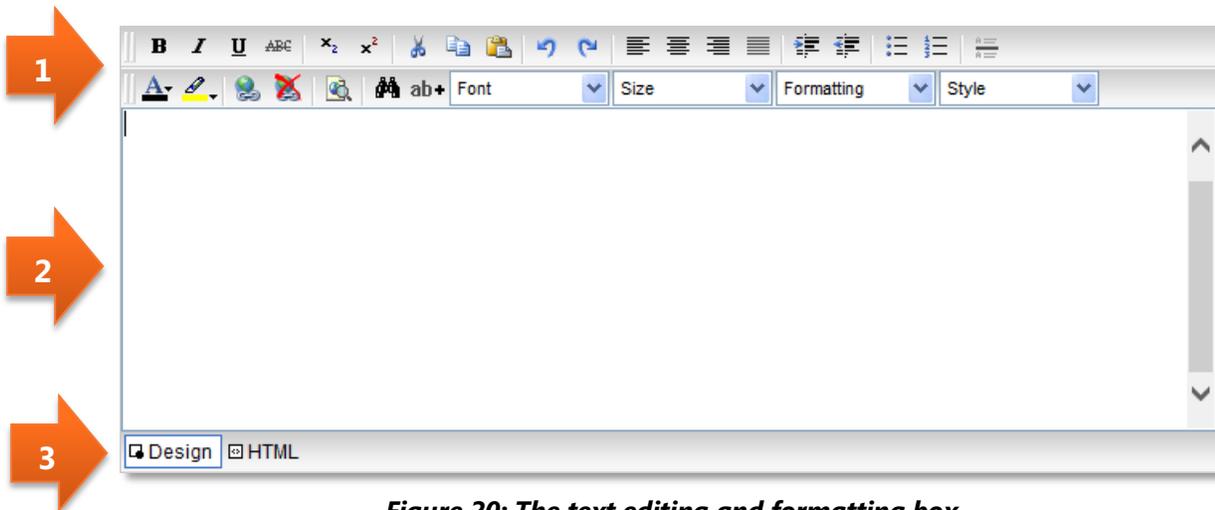
Figure 20: The text editing and formatting box.

1 – Formatting Toolbars Use these toolbars to format the text of the announcement, such as bold, italic, underline, and other alignment options. These buttons also allow the addition of hyperlinks, bulleted lists, numbered lists, and separating lines to the text. For users more familiar with HTML formatting, use the drop-down menus of the bottom toolbar. Hover your mouse over an icon to see a description of its action.

2 – Message Editing Area Use this area to write and format the announcement. Text can be typed directly in this area, or it can be pasted from another source (use the keyboard shortcut [Ctrl]+V to paste). See the **Tip** following the procedure for important information about copy and paste.

3 – View Switch Buttons By default, the announcement is displayed in **Design** mode, which displays the announcement exactly as it will appear on a web page. Clicking the **HTML** button displays the actual HTML code that the web browser creates and uses to display the formatted text. HTML view is for experienced users only, and can be used to apply advanced-level formatting.

Procedure

1. Display the **Announcements** page.

2. Make changes to the **Applicants** and/or **Approvers/Admins** announcements as desired.

3. Click **Update Notifications** when finished.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

Tip

- While it **IS** possible to copy and paste text from other sources into the message editing area, it is **NOT** recommended to paste text that has formatting on it, or comes from Microsoft Word. Pasting directly from a word processing program such as Word can cause strange text behaviors due to how a web browser converts formatting. If you wish to paste text from Word, it is recommended that you **first** paste the text into an unformatted text program such as Notepad, copy the text from Notepad, paste it into the message editing area, and then apply formatting using the formatting toolbars above the message editing area.

MANAGING SYSTEM SETTINGS

Notes

- Changes made to announcements are displayed immediately to all users logging in to Telework Online.

- The announcements displayed are based on the role the user logs in with, not their overall role in Telework Online. If an approver or administrator logs in to work with their own application (i.e. **Applicant mode for self**), they will see the **applicant** announcements, not the approver/admin announcements.

Change Settings

The **Change Settings** page is where Telework Administrators can rank every question on all forms and pages as either *major* or *minor*. This ranking affects how Telework Online processes changes made to applications by applicants after the Telework application has been approved. To access this page, point to the **System Management** menu and select **Change Settings**.

Figure 21: The Change Settings page.

MANAGING SYSTEM SETTINGS
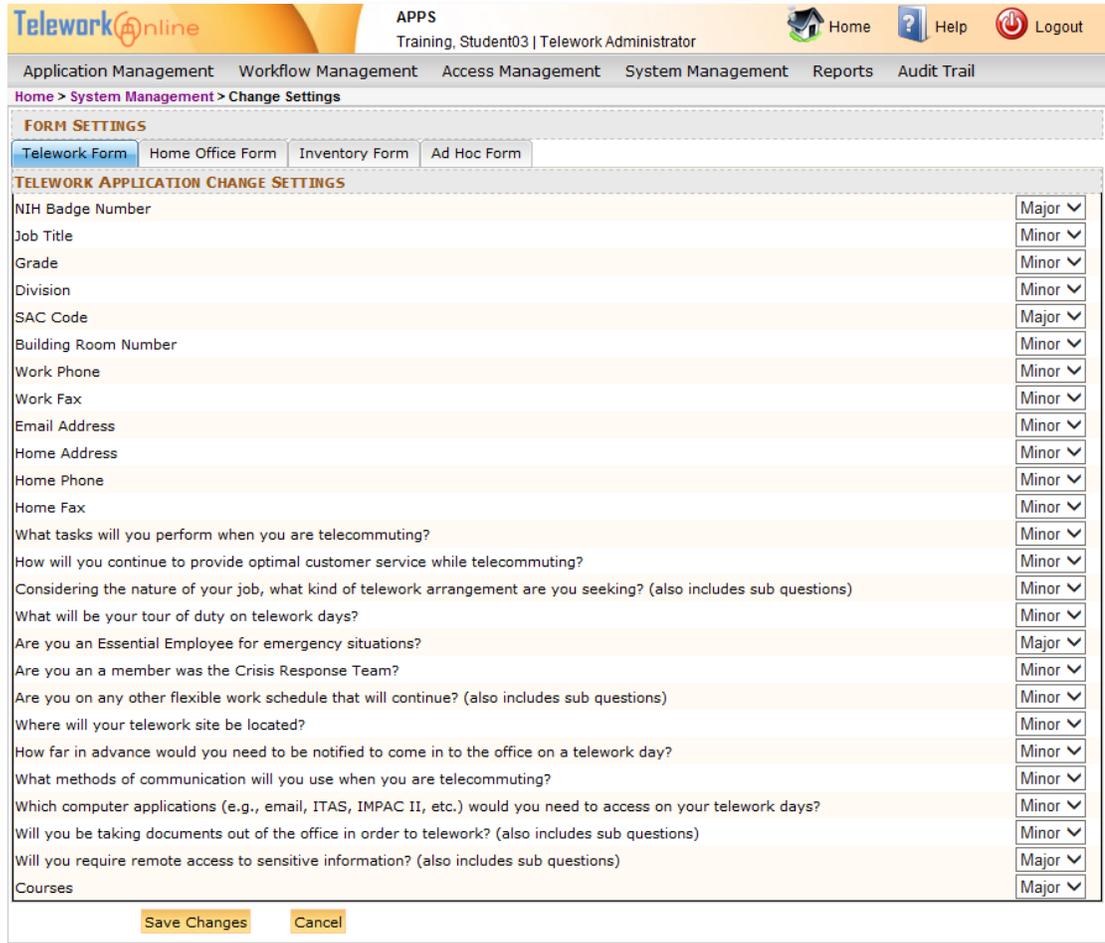
The page displays four tabs across the top corresponding to the four main Telework forms – the **Telework Form**, **Home Office Form**, **Inventory Form**, and the **Ad Hoc Form**.
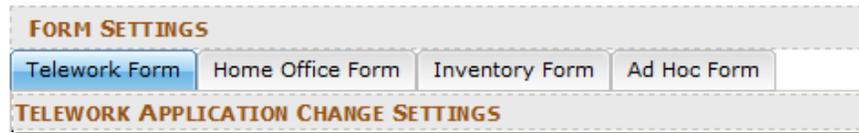
Figure 22: The page tabs that correspond with Telework forms.

By default, changes made to questions and options ranked as *minor* will only have to be approved by the supervisor, and changes made to questions and options ranked as *major* will have to go through the entire workflow.

This default behavior can be changed by the administrator in the **The Application** Settings section of the **System Settings** page.

Note

- Currently there are no user-configurable settings for the Medical application.

Procedure

1. In the **Form Settings** section, select one of the four form tabs.

2. Using the drop-down menus, select either **Minor** or **Major** for each question or option on the respective form.

3. Click **Save Changes** when completed.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

Tip

- You must click **Save Changes** before making changes on another form page tab otherwise your changes will be lost.

Terms and Conditions

Telework Administrators can customize the terms and conditions that are displayed on the Telework application by adding new terms and conditions, editing the existing terms and conditions, or deleting terms and conditions. To access this page, point to the **System Management** menu and select **Terms and Conditions**.

Figure 23: The Terms and Conditions listed at end of a Telework Application.

Figure 24: The corresponding Terms and Conditions page.

Procedure – Adding a new term/condition

1. On the **Terms and Conditions** page, click **Add New Term/Condition**.
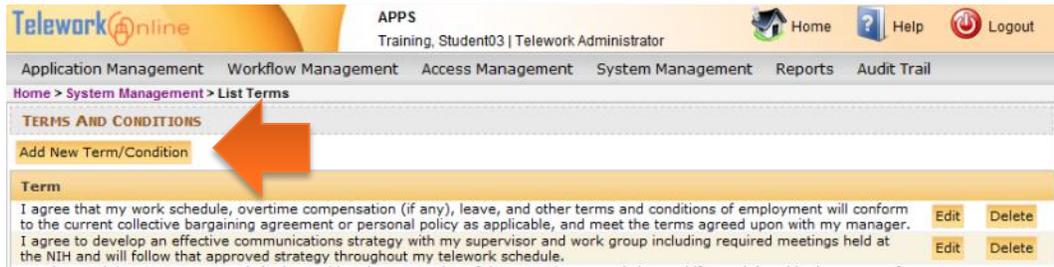
2. The **Enter Term** dialog box is displayed.
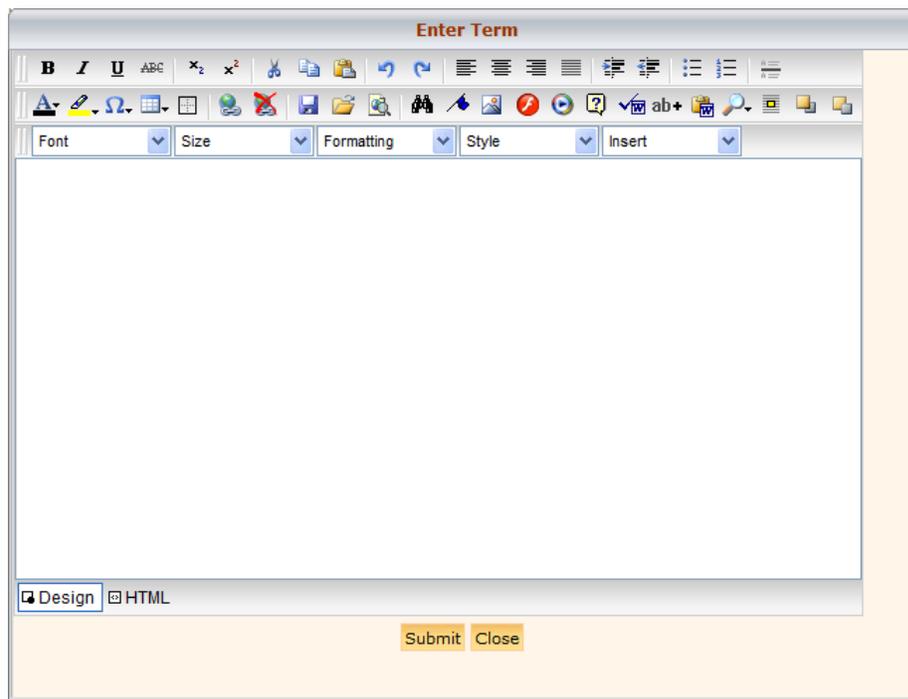
3. In the editing area, enter the term or condition text as desired. See the **Tips** following this procedure for more information. For additional information on the message editing area and formatting toolbars, see **Announcements** on page 123.

4. Click **Submit** when finished.

5. An action confirmation dialog box is displayed. Click **OK** to continue.

Tips

- There is currently no way to "reorder" the terms (i.e. move the third term to be the fifth term). In order to change the order of the terms, edit the existing terms and use copy and paste with a program like Notepad to essentially "swap" text between terms.

- While it **IS** possible to copy and paste text from other sources into the message editing area, it is **NOT** recommended to paste text that has formatting on it, or comes from Microsoft Word. Pasting directly from a word processing program such as Word can cause strange text behaviors due to how a web browser converts formatting. If you wish to paste text from Word, it is recommended that you **first** paste the text into an unformatted text program such as Notepad, copy the text from Notepad, paste it into the message editing area, and then apply formatting using the formatting toolbars above the message editing area.

Procedure – Editing a term/condition

1. On the **Terms and Conditions** page, click **Edit** next to the term to be changed.
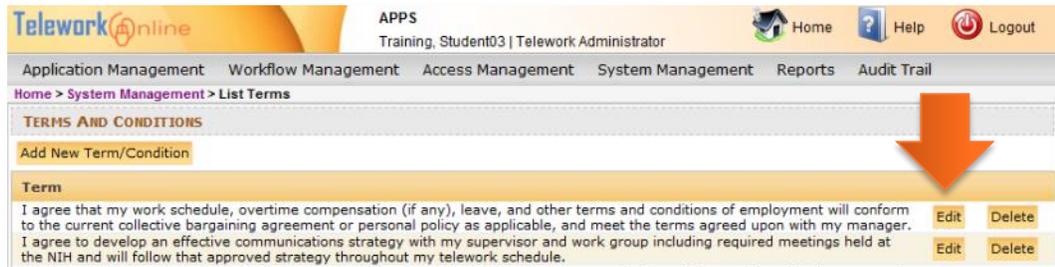
2. The **Enter Term** dialog box is displayed.
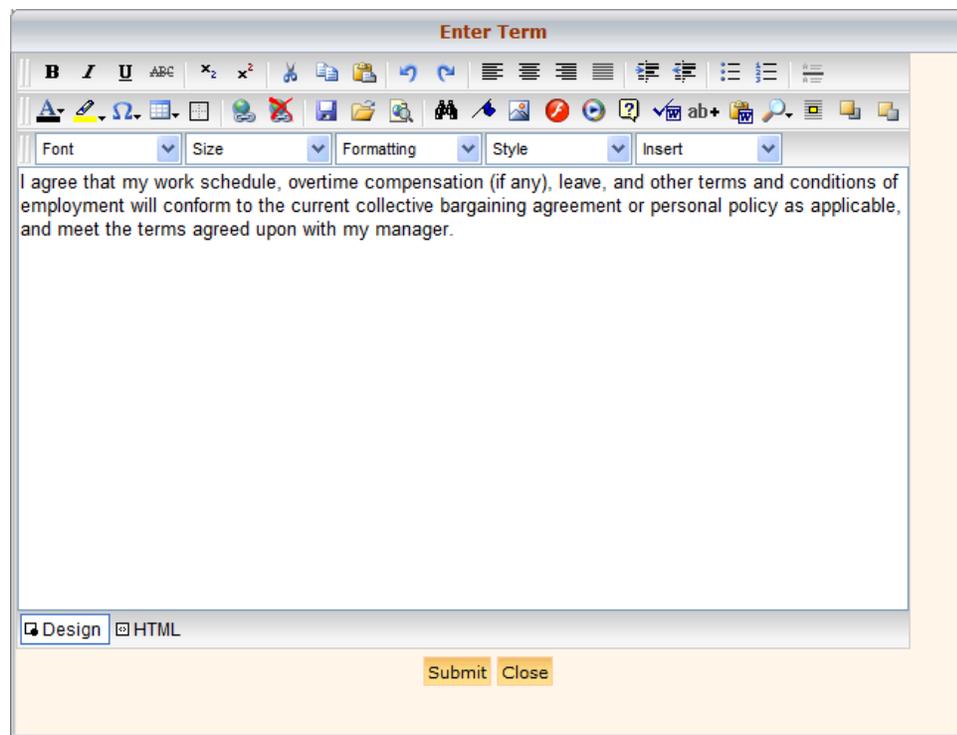
3. Make changes as desired and click **Submit**.

4. An action confirmation dialog box is displayed. Click **OK** to continue.

MANAGING SYSTEM SETTINGS

Procedure – Deleting a term/condition

1. On the **Terms and Conditions** page, click **Delete** next to the term to be removed.
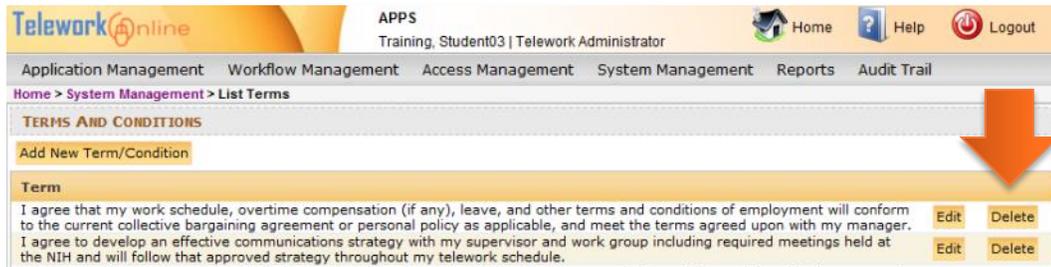
2. A warning message is displayed. Click **OK** to continue, or **Cancel** to exit without deleting.
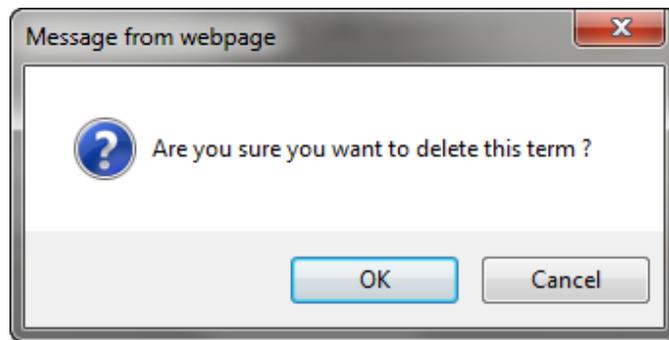
3. An action confirmation dialog box is displayed. Click **OK** to continue.

Warning

- This action cannot be undone. Once a term is deleted, it cannot be recovered.

Archive Applications

As the number of applications in Telework Online continues to grow, you may wish to have older applications or applications of certain statuses not appear in searches. This process is called archiving. To access this page, point to the **System Management** menu and select **Archive Applications**.

On the **Archive Applications** page, Telework Online will display a list of applications that can be archived.

Figure 25: The Archive Applications page listing applications that can be archived.

Only applications with the following statuses can be archived:

- CompletionProcessExpired

- Declined

- TerminationByAdmin

- TerminationByExpiration

- TerminationByRequest

- Withdraw

Applications that have been archived will no longer show up in searches performed by approvers or administrators, and the data from those applications are not factored into reports. However, applicants will still be able to see archived applications listed when viewing their **Applications List** page.

When applications are archived, they **are not deleted**. Rather they are flagged in the database to not appear in lists and searches. Once applications are archived, there is no method for Telework Administrators to "unarchive" them.

To unarchive applications, or to have applications completely deleted from Telework Online, please contact the Telework Online Help team.

Procedure

1. On the **System Management** menu, select **Archive Applications**.
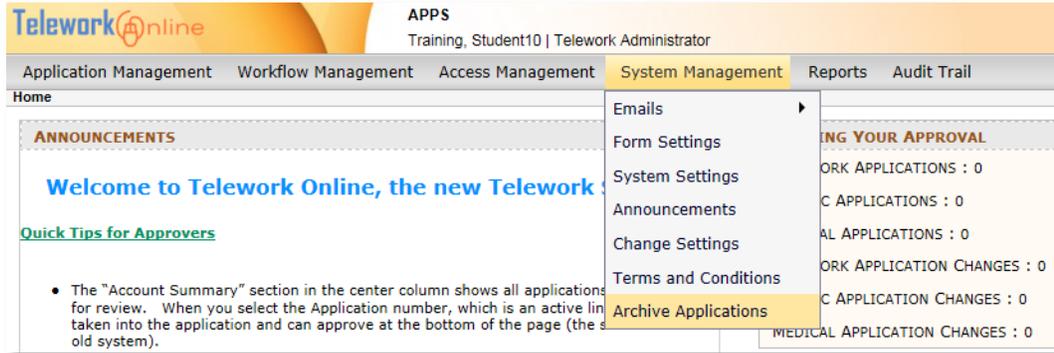
2. The **Archive Applications** page is displayed.
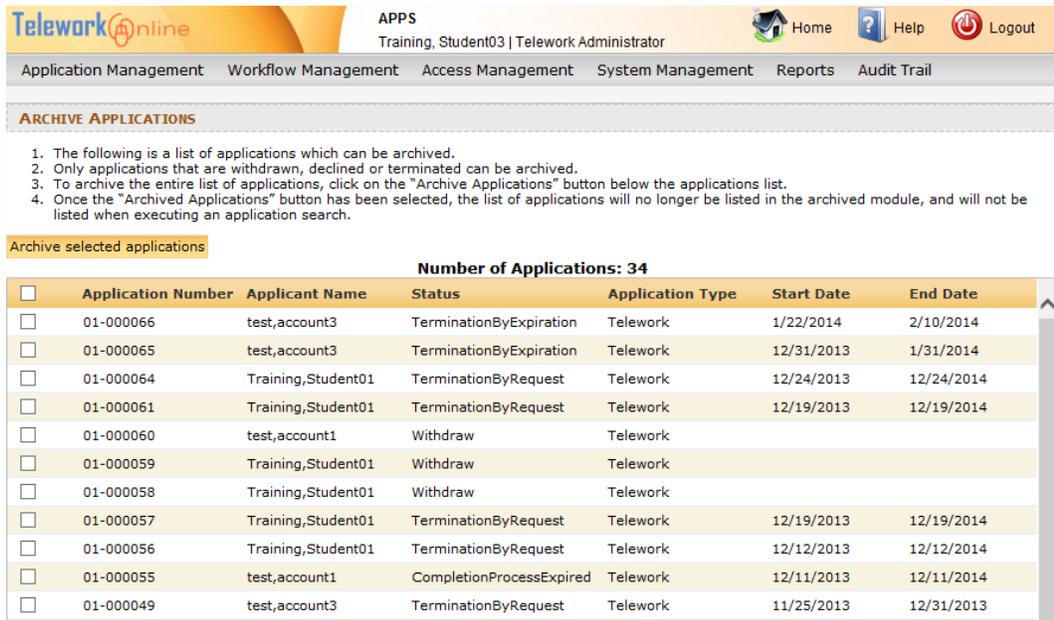
3. To archive all listed applications, select the check box on the left in the list header. To select individual applications, select the check box(es) next to the application number(s).

4. Click **Archive selected applications**.

5. An action confirmation message is displayed. Click **OK** to continue.

WORKING WITH REPORTS

Telework Online has two reports that display data that are useful to a Telework Administrator. Additionally, the administrator can export these reports (as well as other data lists) to Excel for additional data manipulation and formatting.

IN THIS SECTION

WORKING WITH REPORTS

Viewing the Data Snapshot Report

The Data Snapshot report summarizes information from several fields in a Telework application. The counts in this report include **Active**, **Approved**, **Provisionally Approved**, and **Submitted** applications.

Procedure

1. On the **Reports** menu, click **Data Snapshot Report**.
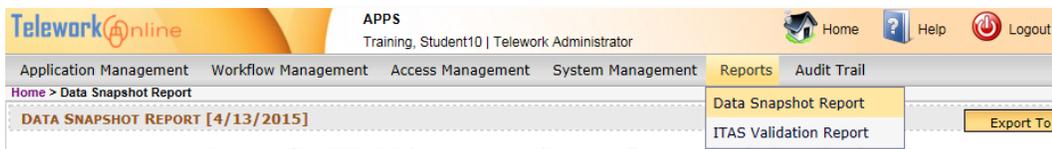
2. The **Data Snapshot Report** page is displayed.
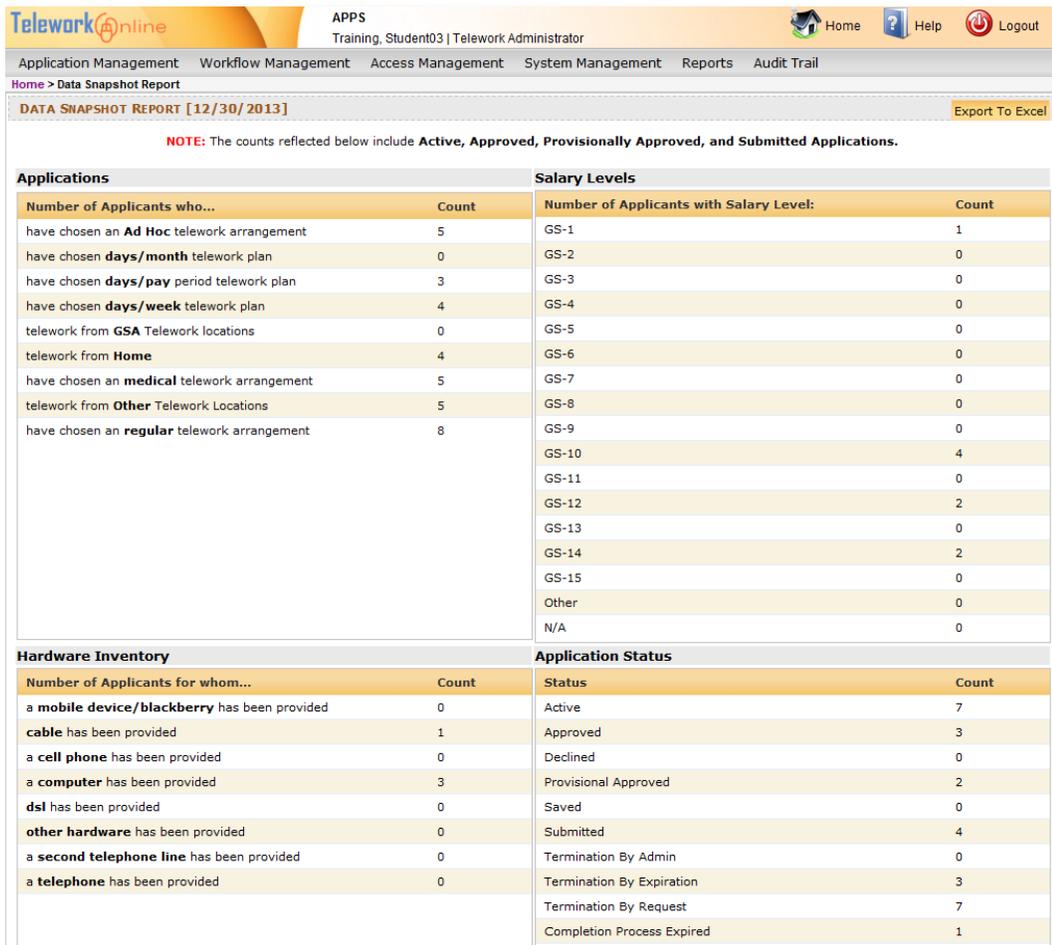
Viewing the ITAS Validation Report

The ITAS Validation report generates data and information a Telework Administrator can export and share with their IC Admin Timekeeper. The report allows the timekeeper to cross-reference and verify employees' telework status in ITAS with the actual Telework applications in Telework Online.

Procedure

1. On the **Reports** menu, click **ITAS Validation Report**.
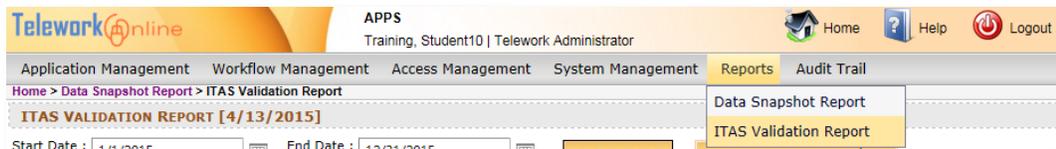
2. The **ITAS Validation Report** page displays information for the current calendar year (from January 1 to December 31).
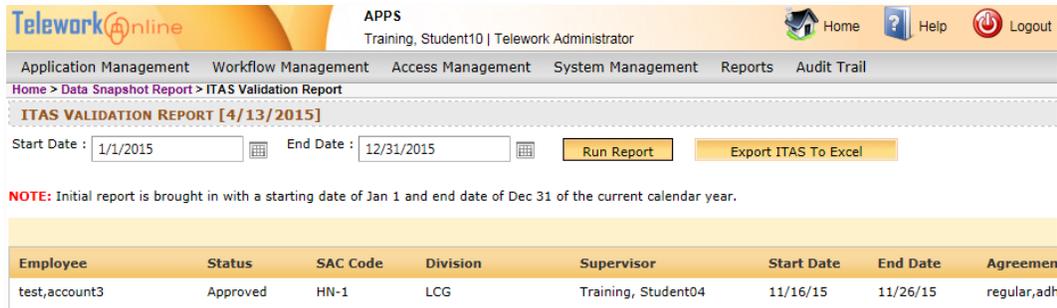
3. To select a different report period, select dates using the **Start Date** and **End Date** list boxes.

4. Click **Run Report**.
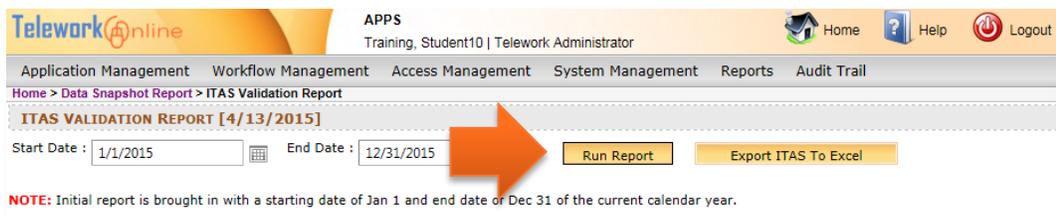
5. The updated report is displayed.

6. To export this data to Excel, see the following topic and procedure.

Exporting a Report to Excel

Both the Data Snapshot report and the ITAS Validation report can be exported to Excel for further data manipulation and formatting.

Procedure

1. Display either the Data Snapshot Report or the ITAS Validation Report.

2. On the **Data Snapshot Report** page, click **Export to Excel**; on the **ITAS Validation Report** page, click **Export ITAS to Excel**.

Data Snapshot Report page

ITAS Validation Report page

3. Depending on the web browser and version you are currently using, an **Open/Save** dialog box is displayed.

> In Internet Explorer, this dialog box displays at the bottom of the browser window (pictured below).
>
> In Google Chrome, the file will automatically be downloaded and saved to the default save location.
>
> For issues with saving and opening Excel files in Firefox, please see the **Warning** section following this procedure.

4. Click **Open**.

5. Excel starts with the results displayed. Note that there are four sheet tabs present in the workbook that correspond with the report sections of the Data Snapshot Report. The ITAS Validation Report only has one sheet.
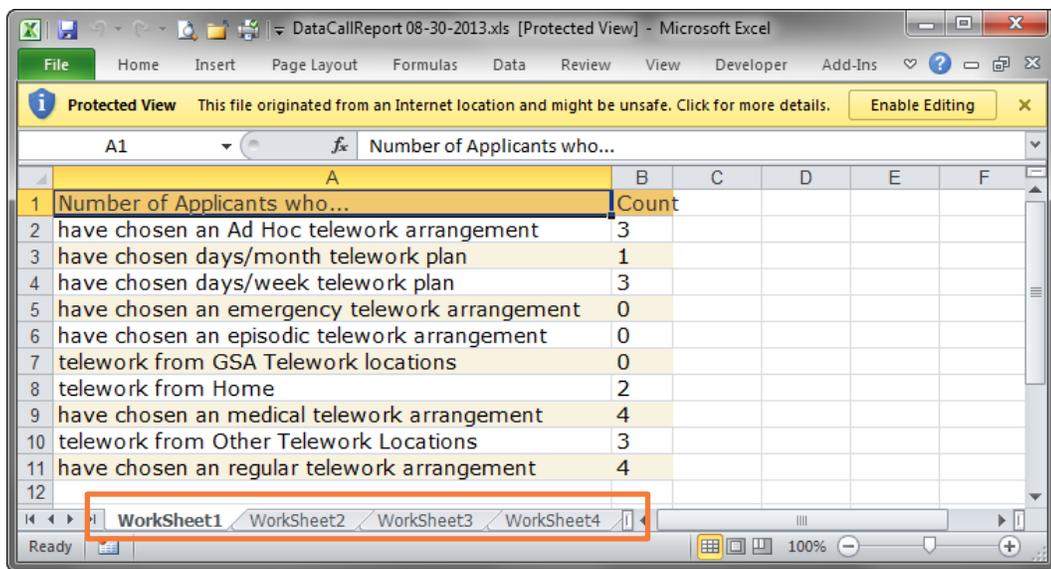
The Data Snapshot Report exported to Excel.
Notice the four sheet tabs at the bottom of the workbook.
These tabs correspond with the four sections of the report.

The ITAS Validation Report exported to Excel.
Notice there is only one worksheet in this workbook.

Warning for Firefox Users

- There are several potential issues that can arise when using Firefox to export data to Excel. For more information on these issues and their resolution, see the **Issues with Data Exports for Firefox Users** on page 154.

Tips

- In Office 2010 and 2013, the Excel file opens in Protected View which does not allow editing. To edit the file, click **Enable Editing** in the banner.
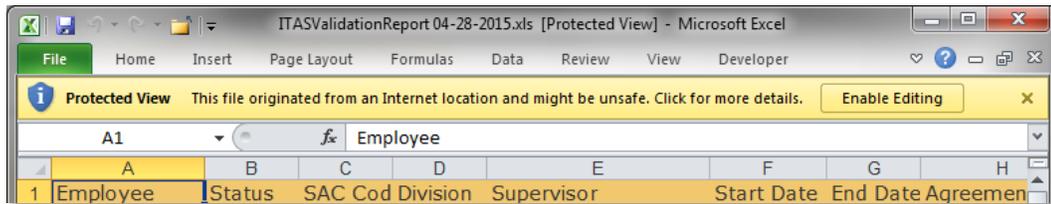
- The exported file is in the older .xls format of Excel 97-2003 instead of the newer .xlsx format of Excel 2007, 2010, and 2013. Because of this, some Excel features may not be available. To convert the file to the newer .xlsx format in Excel, click **File**, make sure the **Info** page is displayed, and then click **Convert**.
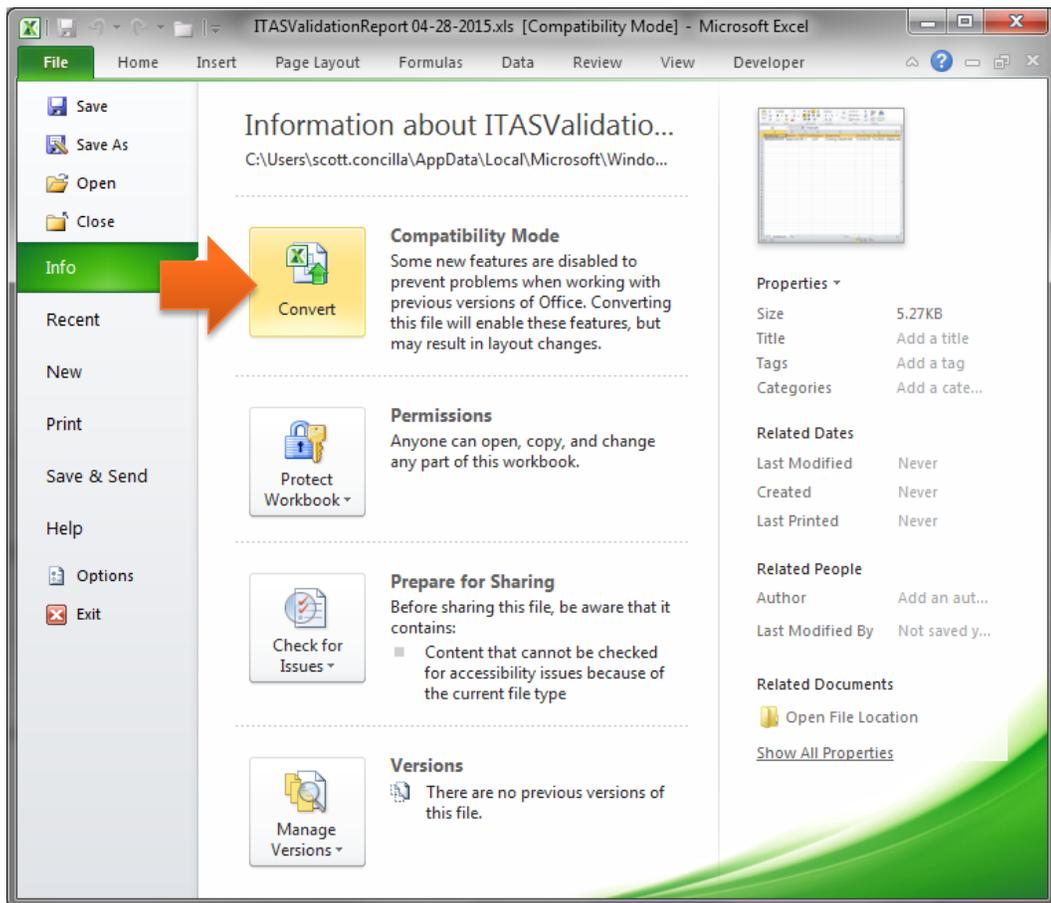
OTHER FUNCTIONS AND FEATURES

This section covers other important functions and features that are found in Telework Online for administrators.

IN THIS SECTION

Audit Trail

The Audit Trail provides a detailed log of all actions performed in Telework Online. It is useful for many situations, including troubleshooting issues with Telework Online, determining when changes were made to system settings, and when users logged in to the system.

Figure 26: The Audit Trail page displaying the Audit Log for a date range.

Procedure

1. On the menu bar, click **Audit Trail**.

2. The **Audit Log** page displays. This page will initially display any data for the current date.

3. To set a date range, set the **Start Date** and **End Date** controls.

4. Use the **Name**, **Activity Type**, and **Module** controls to filter the results.

5. Click **Get Audit Trail** to display the results.

6. After the results are displayed, the values of the filters and controls can be changed to refine the results, however, **Get Audit Trail** must be clicked again to refresh the results list.

7. The results list can be exported to Excel for further analysis. Click **Export to Excel** to begin the export operation and follow the prompts.

OTHER FUNCTIONS AND FEATURES

Help

Even if you are logged in as a Telework Administrator, the **Help** icon located in the upper right corner of the Telework Online site will open a PDF of the **Quick Reference Guide for Approvers**, not the Administrator Guide.

Figure 27: The Help icon located on all pages.

Procedure

1. Click the **Help** icon in the upper right corner of any page.

2. The **Quick Reference Guide for Approvers** opens as a PDF in a separate window.

3. To download or print the quick reference guide, click the appropriate icon.

Tip

- To open and view the electronic copy of this Administrator Guide, navigate to the Telework Online SharePoint site at:

  http://niaportal.nia.nih.gov/OAM/itb/ISS/Telework_Stdv/STO/

  This site will always have the most recent and up-to-date version of this guide.

Applicant Mode for Another Employee

Telework Online gives Telework Administrators the ability to log in as other applicants. This allows the administrator to create, edit, and manage an applicant's Telework application on their behalf. This mode can be used when the applicant needs assistance with filling out their application, for troubleshooting issues with the applicant's application, or if the applicant is incapacitated or out of the office for an extended period of time.

Procedure

1. Enter the web address for Telework Online into the web browser.

2. The **NIH iTrust Authorization** page is displayed.

3. Enter your login credentials and click **Log in**.

4. The **Select Mode** page is displayed.

5. Select **Applicant mode for another employee**.

6. In the **Applicant's Username** box, type the username of the applicant you wish to manage.

7. Click **Login**.

8. You are now logged in to Telework Online as the applicant.

9. When finished, click **Logout**.

APPENDIX

IN THIS SECTION

APPENDIX

Issues with Data Exports for Firefox Users

When using the export data feature of Telework Online in Mozilla Firefox, there are two potential issues that could arise.

Issue #1

- Firefox incorrectly identifies the export file as an HTML document, and tries to open the file with Internet Explorer.
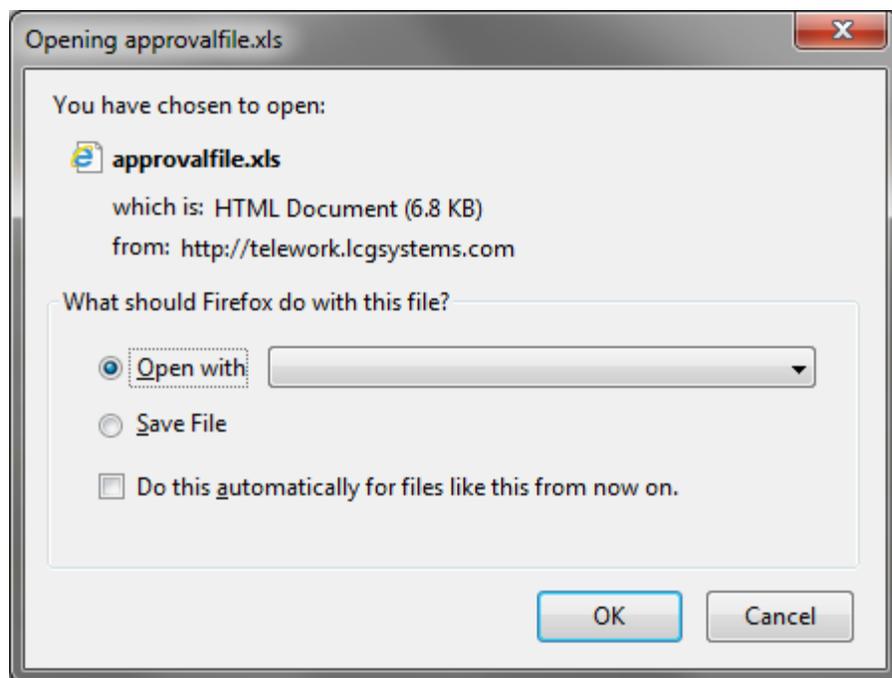
Resolution

1. Select **Save File** and click **OK**.

2. Open the folder where Firefox downloaded the file. This is usually the **Downloads** folder in your Windows user profile.

3. Double-click the file to open it in Excel.

Issue #2

- Firefox seems to identify the file as an Excel file, but does not give you an **Open with** option of Excel. Additionally, if you choose **Save File**, the file is saved without an extension.
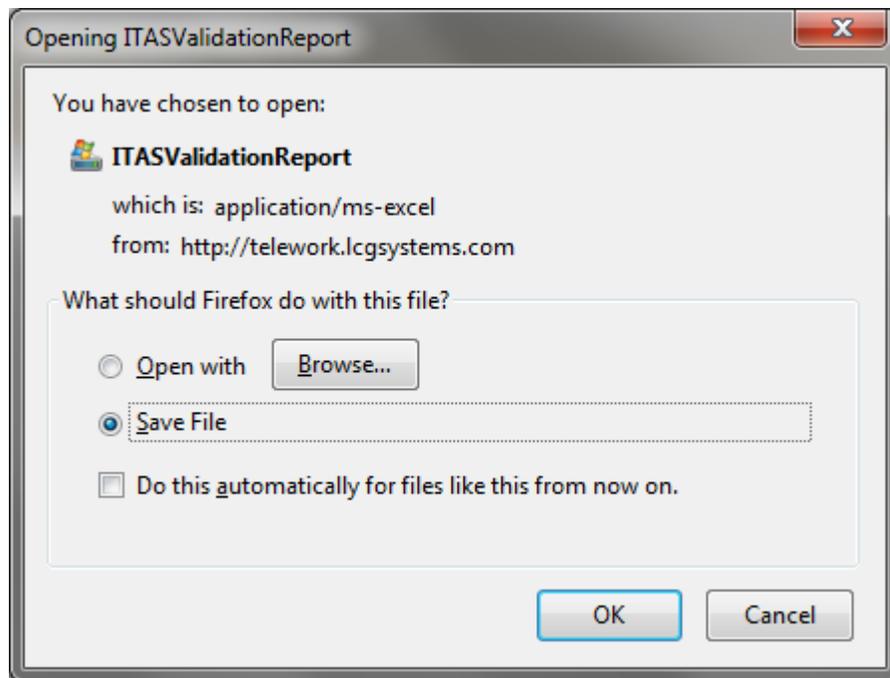
Resolution

1. Select **Save File** and click **OK**.

2. Open the folder where Firefox downloaded the file. This is usually the **Downloads** folder in your Windows user profile.

3. Rename the file and add .xls to the end of the file name.

4. Double-click the file to open it in Excel.

APPENDIX

Basic Troubleshooting

This section lists several common problems in Telework Online and how to resolve them. For all other issues, please contact the Telework Online help team.

| Issue	Resolution
Administrator is unable to access their own application.	Log out of Telework Online and log back in using **Applicant mode for self**.
Certain elements of the interface can't be reached or accessed.	Try using a different web browser.
Buttons or commands are not responding to mouse click.	Try using a different web browser.
Applicants or approvers are not receiving emails.	Check the recipient's Junk folder. If not there, use the Email Queue to troubleshoot.
Approver is unable to log in to approver mode.	Make sure the approver has been added as a User to Telework Online.
The text of announcements, emails, terms, courses, etc. contains weird formatting, extraneous characters, or is not aligned properly.	Make sure the text was not copied and pasted directly from Microsoft Word. Use Notepad instead.
Administrator is unable to terminate an application.	If the application is currently in a workflow, it cannot be terminated.
A search returns zero results.	Check your search criteria. Also, make sure you are not viewing the Pending Your Approval tab.
Administrator is unable to delete a workflow.	Make sure no applications are assigned to the workflow. Reassign all applications to a different supervisor or workflow.

System Administrator Tasks

Telework Administrators are able to control and modify various aspects of their Telework Online implementation and perform many management tasks, however, there are several tasks that can only be performed by a System Administrator. These tasks are:

- Adding, deleting, or updating the SAC codes on the drop-down menu of the Telework application and on active applications.

- Reactivating an archived application.

- Changing an agreement from Terminated to Active status.

- Changing the name on an active application – i.e. when an applicant gets married.

Please submit a service request to the Telework Online Help team for assistance with these tasks.