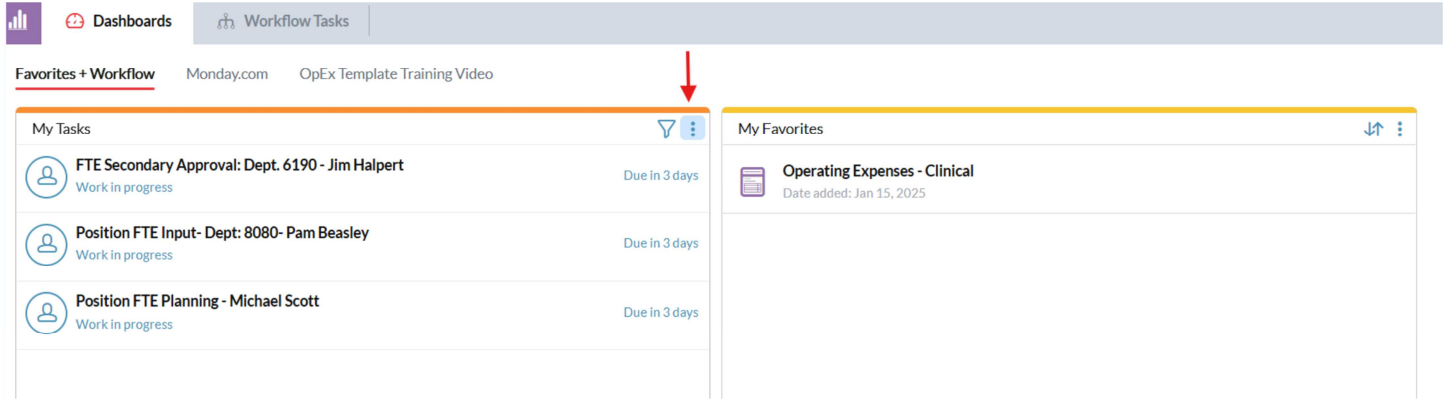


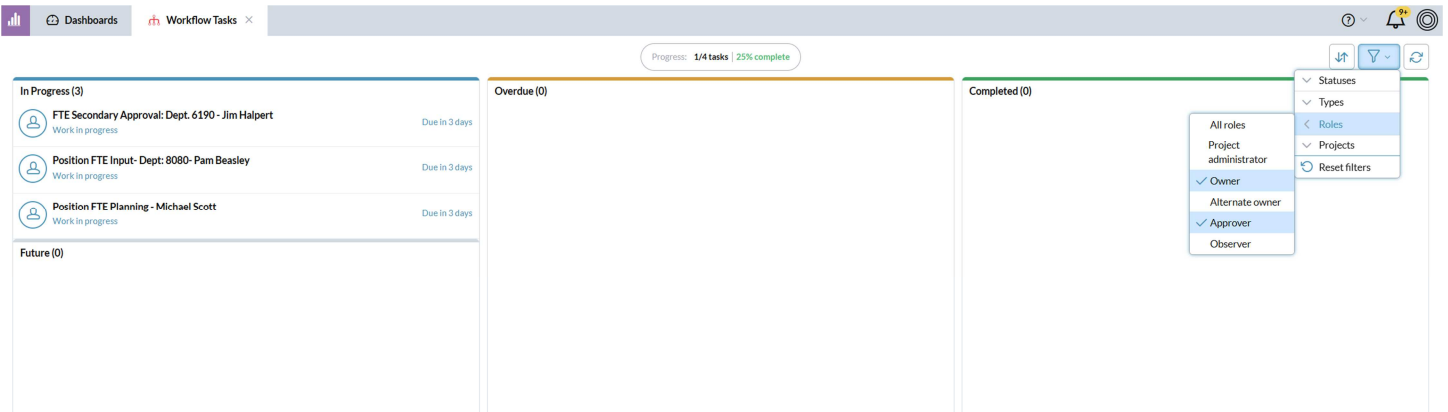
FTE Planning Template – Online Data Entry

Accessing Budget Templates

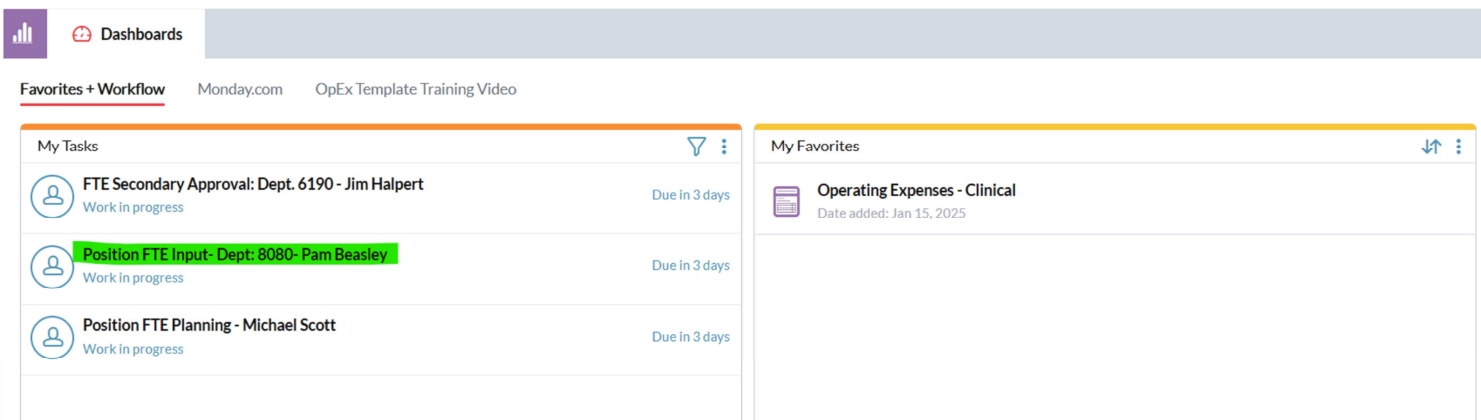
- Below is an example of the Dashboard in Prophix. The My Tasks section contains your budget templates. Clicking on the task will open the associated template.



- Alternatively, you can view your Tasks filtered by your role by selecting the filter icon in My Tasks and then clicking Launch.
- Next, click the filter icon in the right corner to select either the Owner role (data entry) or Approver role (template review and approval)

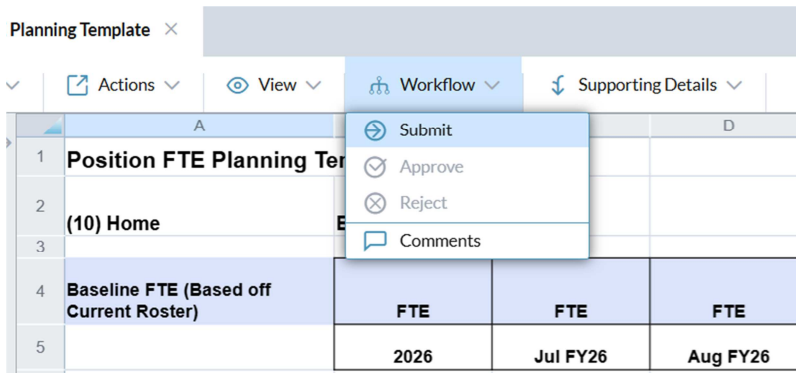


Data Entry as Task Owner



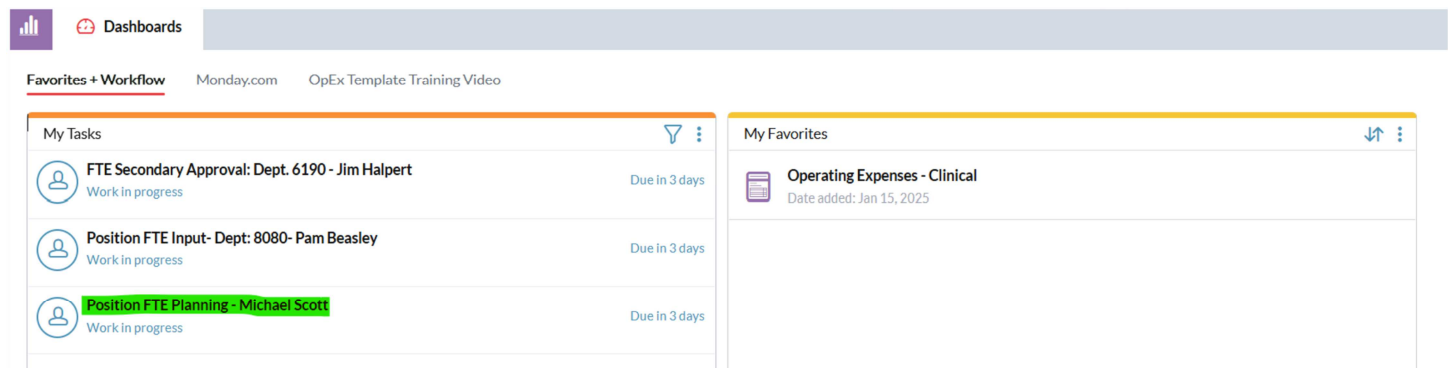
Submitting completed Workflow Tasks

- Once data entry is complete, select Workflow from the Toolbar → Submit
- Submitting will mark this task as “Submitted” in the My Task section of your dashboard and make it inaccessible for further editing. If there is an approver for this task, once submitted the task will be sent to the Approver for rejection or approval. If a task is rejected it will reappear under My Tasks as “Work in Progress” so that the required edits can be made.



Primary Approval Tasks

- Tasks labelled as “**Position FTE Planning – *Manager’s Name***” are tasks that you are the Primary Approver of and are responsible for reviewing and approving or rejecting.
- When you open the task as the primary approver you will only be able to see the Departments that the individual identified in the Task Name is responsible for. In the below example, the primary approver on the task “Position FTE Planning – Michael Scott”, will only see Michael’s departments and will be responsible for reviewing these pages and approving or rejecting them.



- After reviewing all available departments select Workflow in the Toolbar → Approve or Reject
- ***Note:** Approvers can make edits to the template before approving or rejecting.

Secondary Approval Tasks

The screenshot shows a dashboard interface. At the top, there is a navigation bar with a 'Dashboards' button and a search bar. Below the navigation bar, there are two main sections: 'My Tasks' and 'My Favorites'. The 'My Tasks' section contains three task entries, each with a person icon, a task title, a status, and a due date. The first task is 'FTE Secondary Approval: Dept. 6120, 5626 - Jim Halpert' with a status of 'Waiting' and a due date of 'Due in 3 days'. The second task is 'Position FTE Input- Dept: 8080- Pam Beasley' with a status of 'Work in progress' and a due date of 'Due in 3 days'. The third task is 'Position FTE Planning - Michael Scott' with a status of 'Work in progress' and a due date of 'Due in 3 days'. The 'My Favorites' section contains one favorite item, 'Operating Expenses - Clinical', with a date added of 'Jan 15, 2025'.

Task Title	Status	Due Date
FTE Secondary Approval: Dept. 6120, 5626 - Jim Halpert	Waiting	Due in 3 days
Position FTE Input- Dept: 8080- Pam Beasley	Work in progress	Due in 3 days
Position FTE Planning - Michael Scott	Work in progress	Due in 3 days

Favorite Item	Date Added
Operating Expenses - Clinical	Jan 15, 2025

- Tasks labelled as “**FTE Secondary Approval: Dept. #### – Manager’s Name**” are tasks that you are the Secondary Approver of and are responsible for reviewing and approving.
- ***Note**-These tasks will appear as Overdue on your Dashboard. Please ignore the deadlines on secondary approval tasks
- When you open the task you will only be able to see the Departments that the individual identified in the Task Name is responsible for.
- After reviewing all available departments select Workflow in the Toolbar → Approve or Reject