Pegasys Quick Reference Guides

Workflow Approvals: Availability

Users can use the **Availability tab** under **Settings** to indicate if they are available to perform approvals or if they are out of the office or otherwise unavailable.
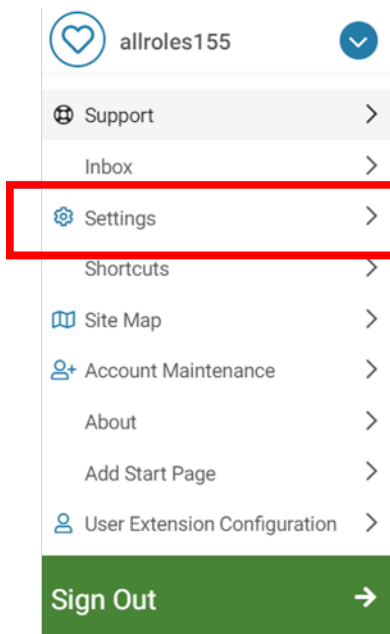
1. Navigate to the User Menu by selecting the drop-down at the top right of the screen next to your User ID.

Figure 1: User Menu

2. Select Settings.
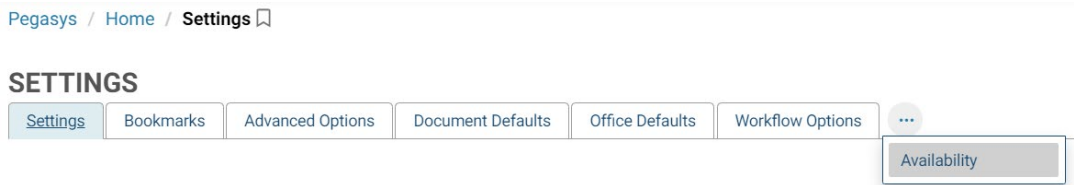
Figure 2: User Menu Settings

3. Select the **Ellipsis button** (3 dots to the right of the Workflow Options tab) then select **Availability**.
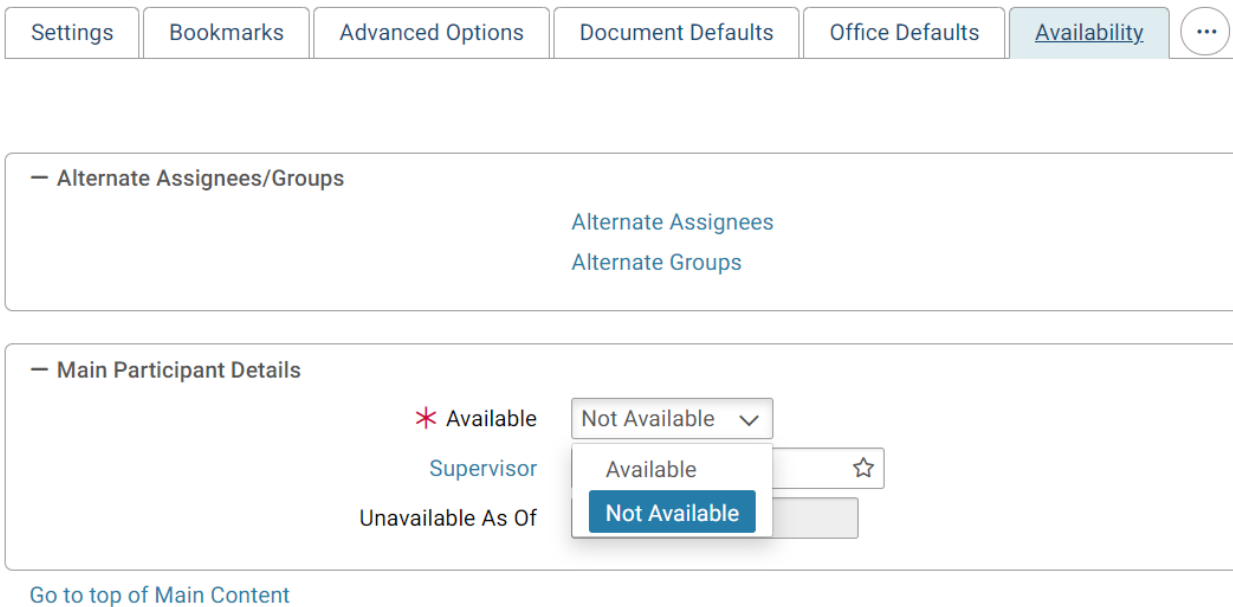
Figure 3: Settings Availability Button

4. On the Availability tab in the Main Participant Details group box, select **Not Available** to indicate that you are not available.

Figure 4: Availability

5. Select **Save**.

   a. The current date will default in the Unavailable As Of field.

   NOTE: An alternate assignee must be assigned in order to save the update.

Alternate Assignees

A designated Alternate Assignee will receive tasks when a user is unavailable.

1. Navigate to the User Menu by selecting the drop-down at the top right of the screen next to your User ID.

2. Select **Settings**.

3. Select the Additional Items icon (…) then Availability.

4. Select the **Alternate Assignees** link.

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Figure 5: Alternate Assignees/Groups

5. Select **Add**.

Figure 6: Alternate Assignees Table

6. Enter a User ID in the **ID Field**.
7. Select **Search**.

Figure 7: Search for User ID

8. Choose the user, and select the **Select** button.

Figure 8: Search for User ID Selected

9. Select **Save**.

10. To add additional alternate assignees, repeat steps 5-9.

11. To delete an alternate assignee, select the assignee, and select **Delete**.

12. Select **Save**.