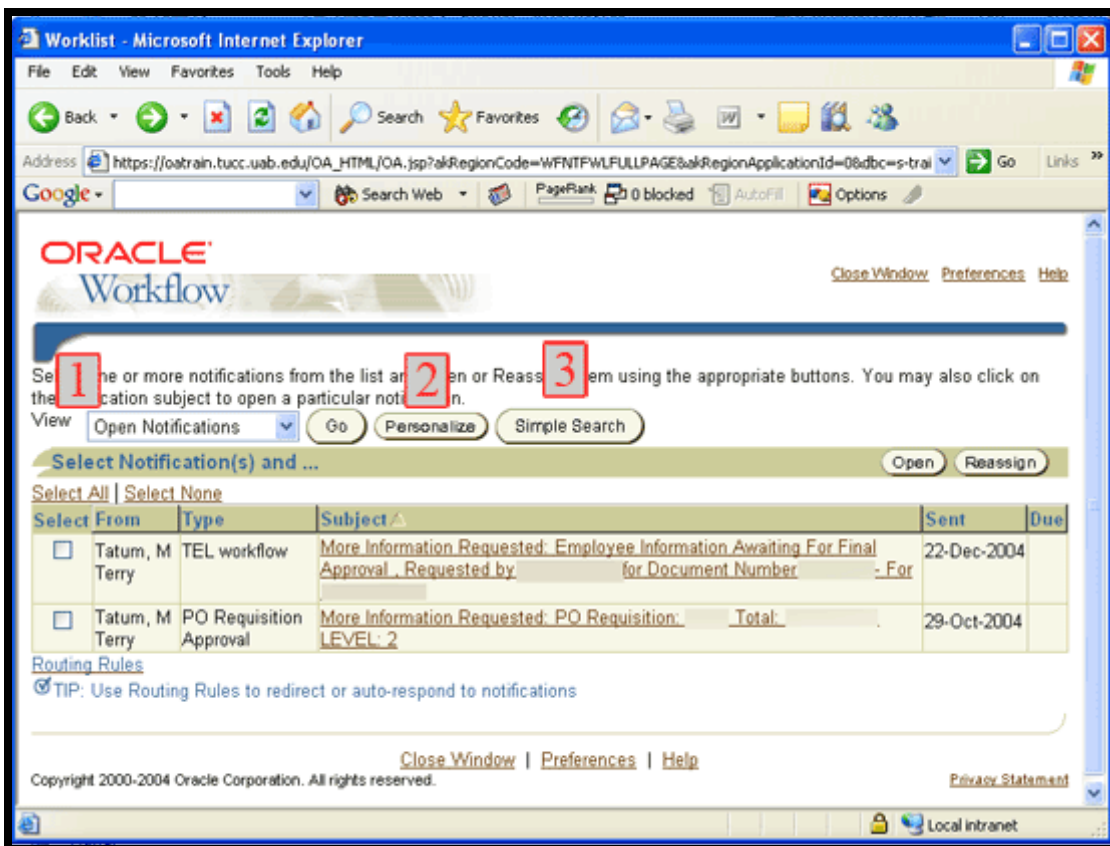


Setting up personalized views for your personal worklist

The first time you open your new personal worklist, it will take a significant amount of time to load. This is a normal, one-time occurrence, so be patient while the personal worklist loads into your system; future uses of the worklist should start more quickly.

TROUBLESHOOTING: There is a possibility that you might have to clear your Jcache the first time you load the new worklist; please call AskIT at 6-5555 for instructions on how to do this, should you find it necessary.

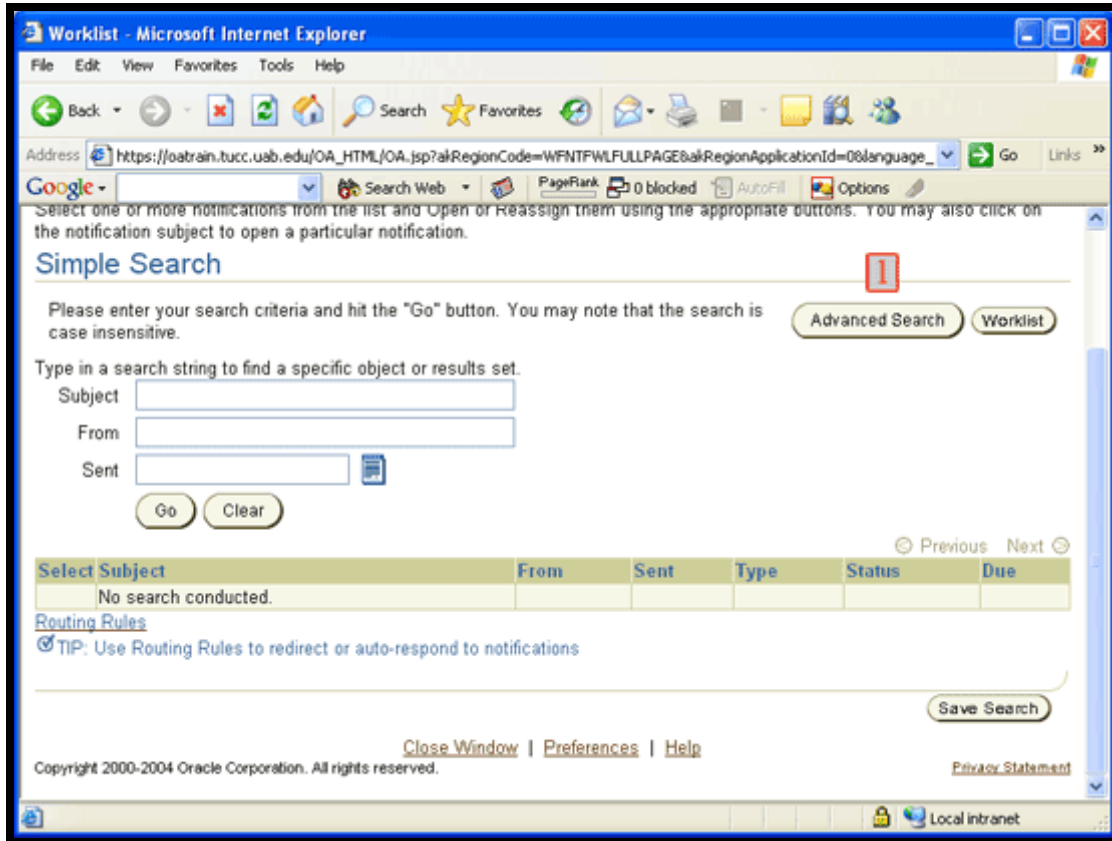
Your new worklist will open showing a list of all open documents. Above the menu, you will see a pull-down menu labelled "View" (#1), a "Personalize" (#2) button and a "Simple Search" (#3) button.



You have the ability to filter your worklist through views, based on parameters you select. The worklist feature include 5 default views: All Notifications, Open Notifications, FYI Notifications, Notifications From Me, and To Do Notifications.

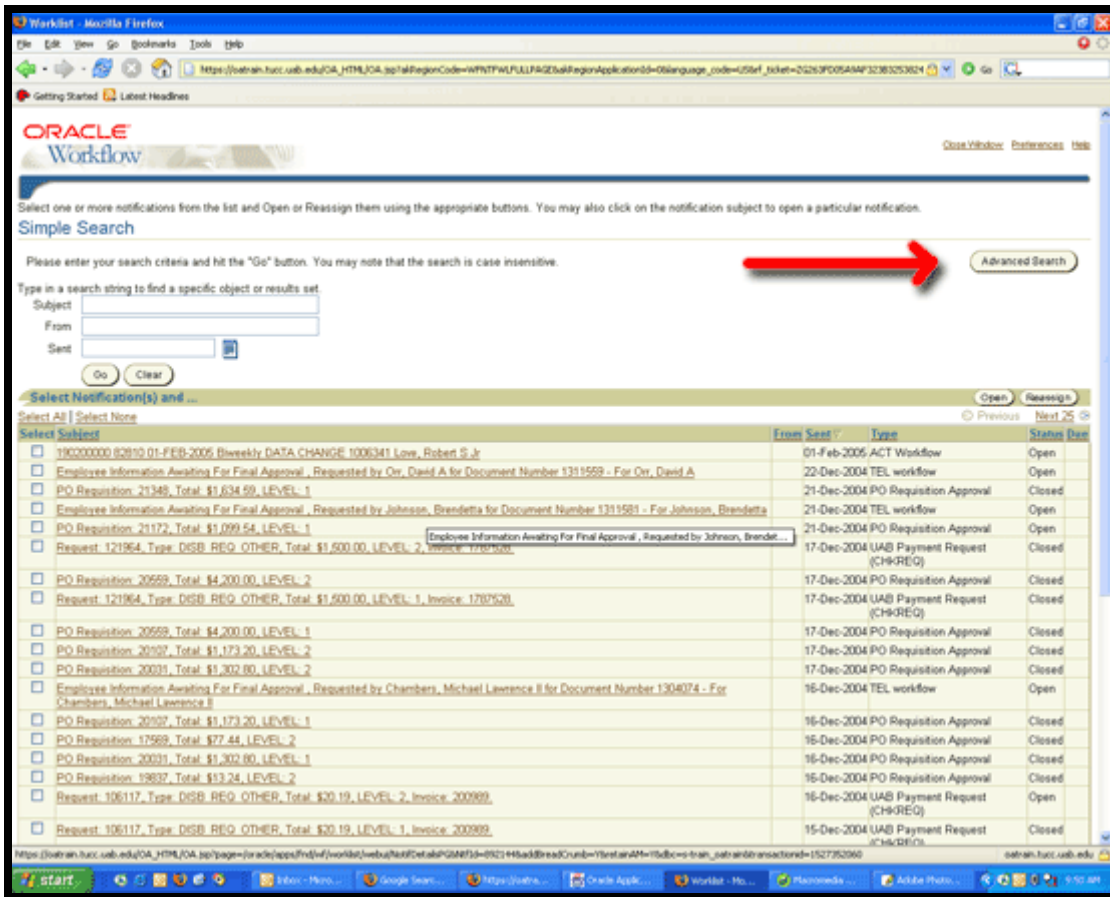
At this time, all default views are functional and operational except for the Notifications From Me view.

There are three search parameter filters available using the Simple Search: Subject, From, and Sent. To get even more search parameters, select the **ADVANCED SEARCH** button on the top-right of the Simple Search or Personalize screens.

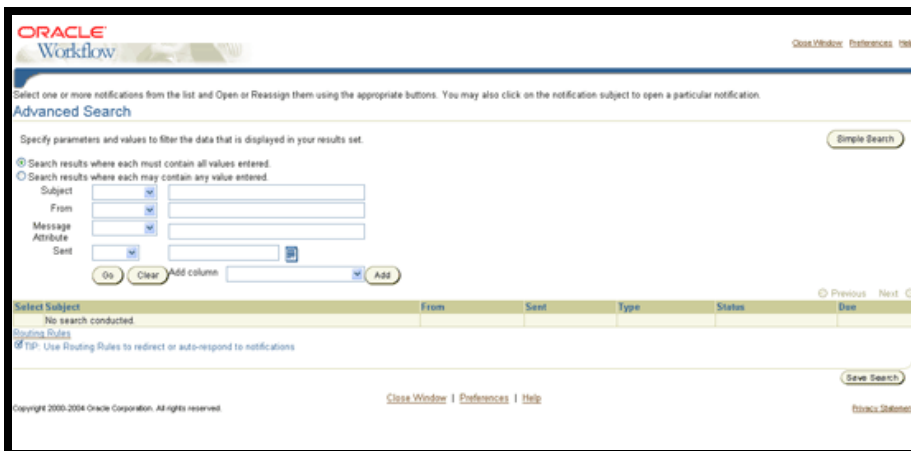


Please note that searches will only return a maximum of 1500 entries; any entry that falls before the maximum return will not show up in your search. If you encounter this problem, you will need to refine your search query, adding more details to narrow the number of results.

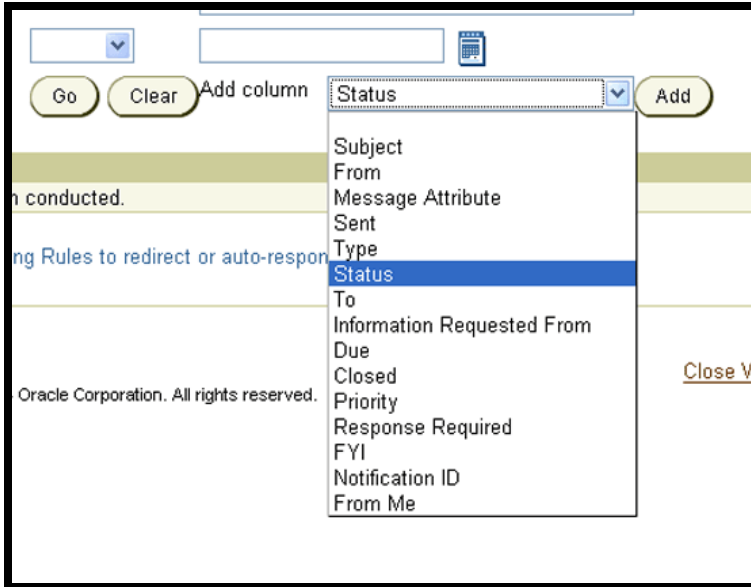
To create a new personalized view, click on the **ADVANCED SEARCH** button on the upper right hand side of the Simple Search or Personalize pages.



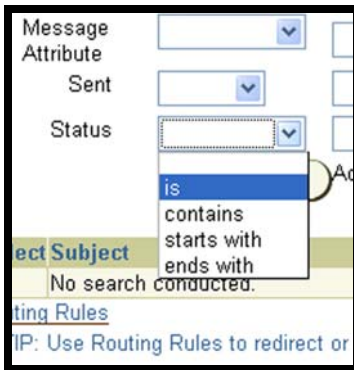
The Advanced Search screen offers the following options: Subject, From, Message Attribute, and Sent. There is also an Add Column, which offers even more filter options.



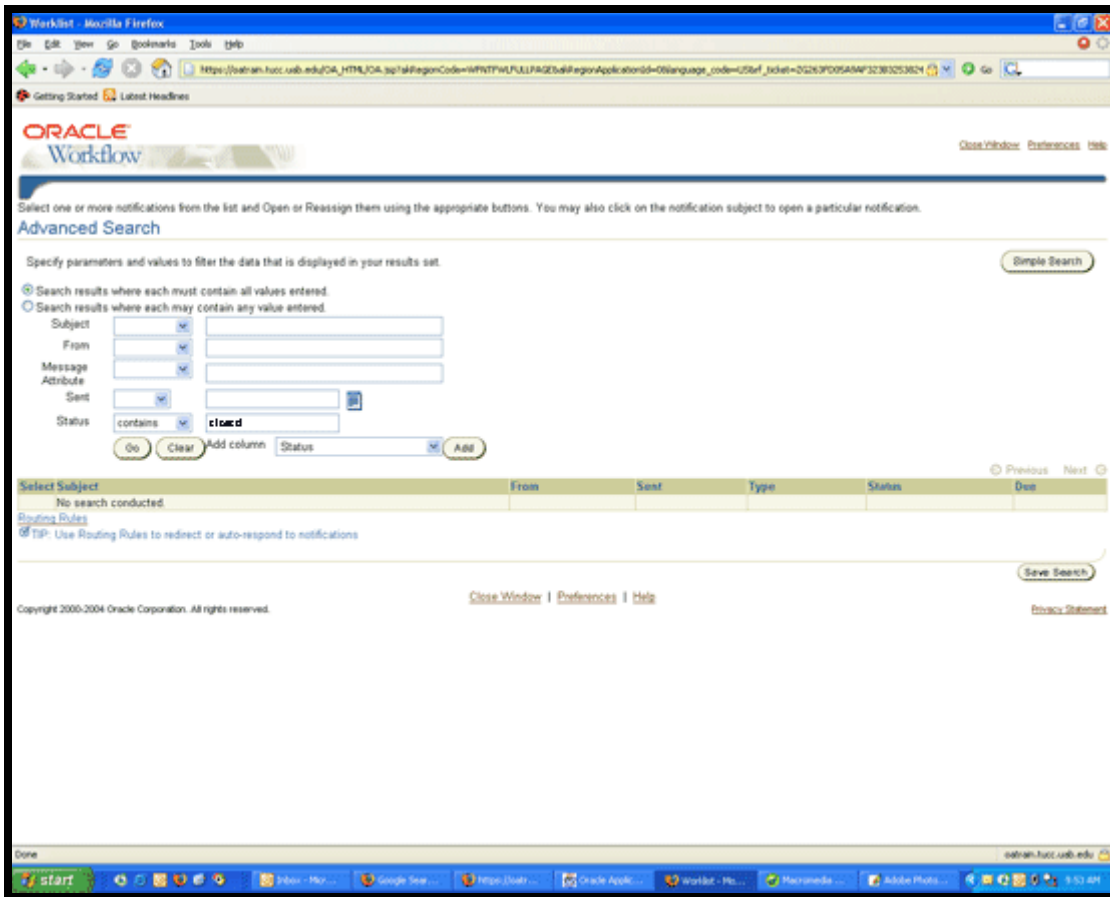
For example, to create an "Closed Items" work view, you will want to search for all notifications with a status of "closed." You'll need to add the status column to your search function. Find "Status" in the add column pull-down menu, and then click add.



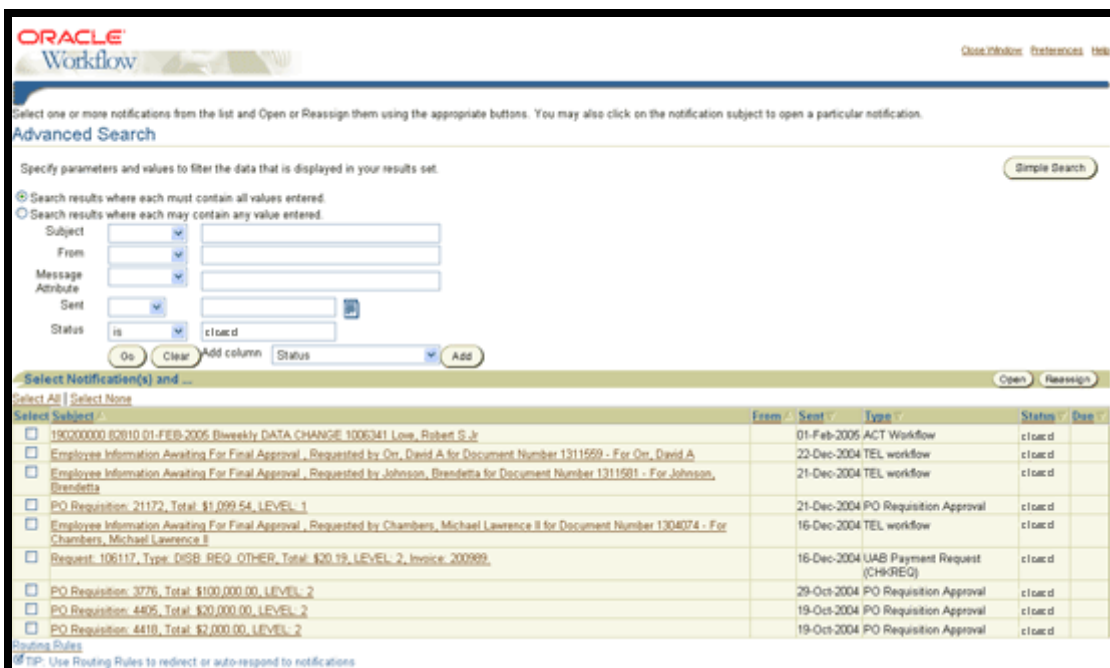
This will add a status field on the search page.



Change the pull-down option next to status to "contains", and type "closed" in the text field.



Click GO to perform the search. The page will refresh, with the search results displaying at the bottom of the page.



Below the results, you will see a SAVE SEARCH button. This will save your search as a view, taking you to the Create View screen.

ORACLE Workflow Close/Refresh Preferences Help

Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.

General Properties

- View Name:
- Number of Rows Displayed: 25 Rows
- Set as Default:
- Description:

Column Properties Advanced Settings

Update the appropriate column attributes as desired.

Columns Shown and Column Order

Available Columns: To, Information Requested From, Closed, Priority, Notification ID, From Me

Columns Displayed (in Order): Subject, From, Sent, Type, Status, Due

Sort Settings

Column Name	Sort Order
First Sort: Sent	descending
Second Sort: Subject	ascending
Third Sort: From	ascending

Search Query to Filter Data in your Worklist

Specify parameters and values to filter the data that is displayed in your table.

Advanced Search Search results where each must contain all values entered.

To start, give your view a name.

ORACLE Workflow Close/Refresh Preferences Help

Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.

General Properties

- View Name: Closed Items
- Number of Rows Displayed: 25 Rows
- Set as Default:
- Description: My current closed item notifications

Use something that describes the search parameters – in this case, "Closed Items" is a good label. The description is similar; make sure that you match the description to the view. It is not necessary to change the number of rows, unless you wish to see more or less on a page at one time; keep in mind that more rows on a page might make the page hard to read or navigate. There is also no need to change anything in the "Columns Shown and Column Order" area of the page, unless you wish to see additional information about the documents in the worklist. It is recommended that you change the "Sort Settings" to Sent, Type, and Subject.

Sort Settings

	Column Name	*Sort Order
First Sort	Sent	* descending
Second Sort	Type	* ascending
Third Sort	Subject	* ascending

Search Query to Filter Data in your Worklist

Specify parameters and values to filter the data that is displayed in your table.

Advanced Search

Search results where each must contain all values entered.
 Search results where each may contain any value entered.

Status

Add column

This is not necessary, but it will keep your newest items at the top of your view, as well as sorting your notifications by type (TEL, purchase order, ACT, etc.), offering further organization.

Once you have completed the items on the page, click APPLY at the bottom of the page. This will take you to a list of available views where your "Closed Items" view is listed. You may select Return to Worklist, or remain on this form to create another view.

Personal Table Views

Below is a list of all pre-configured and/or personalized views applicable to "Worklist" table on the previous screen.

Select View and ...

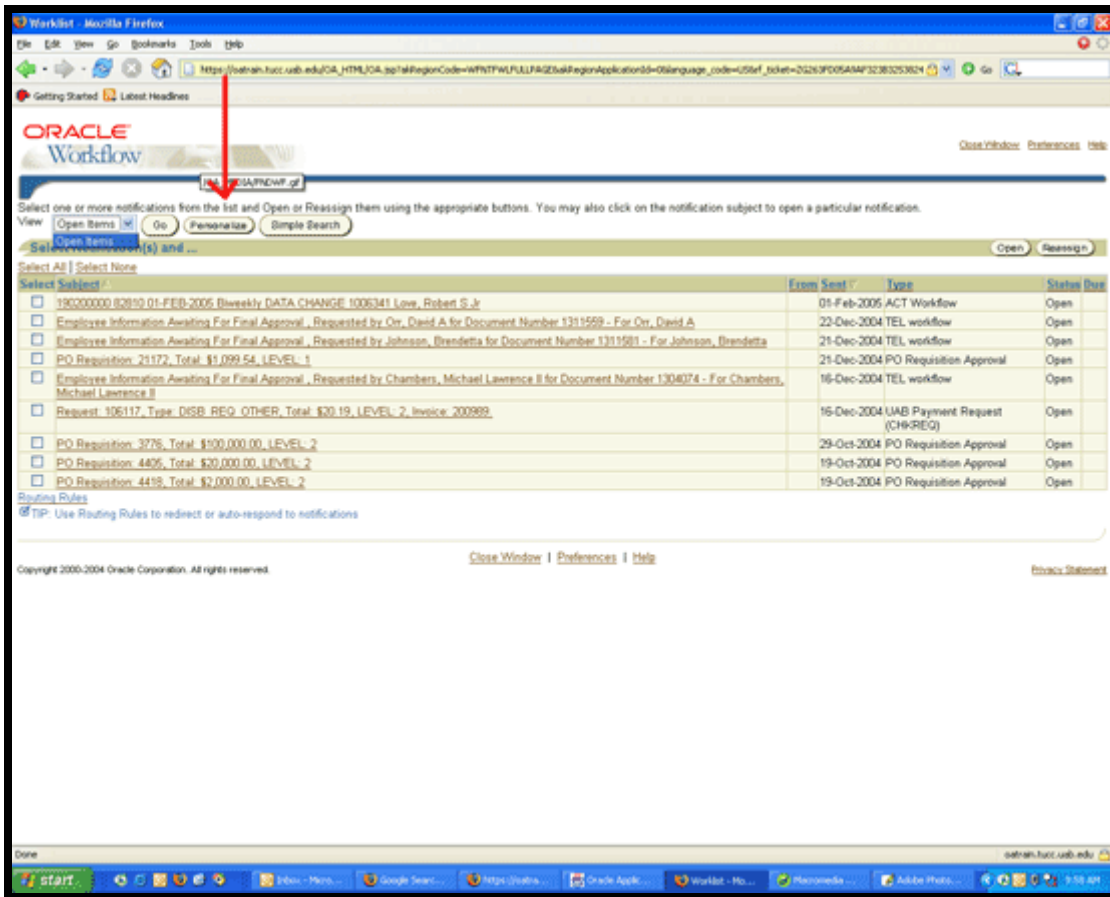
Select View Name	Description
<input type="radio"/> Open Items	My current open item notifications

[Return to Worklist](#)

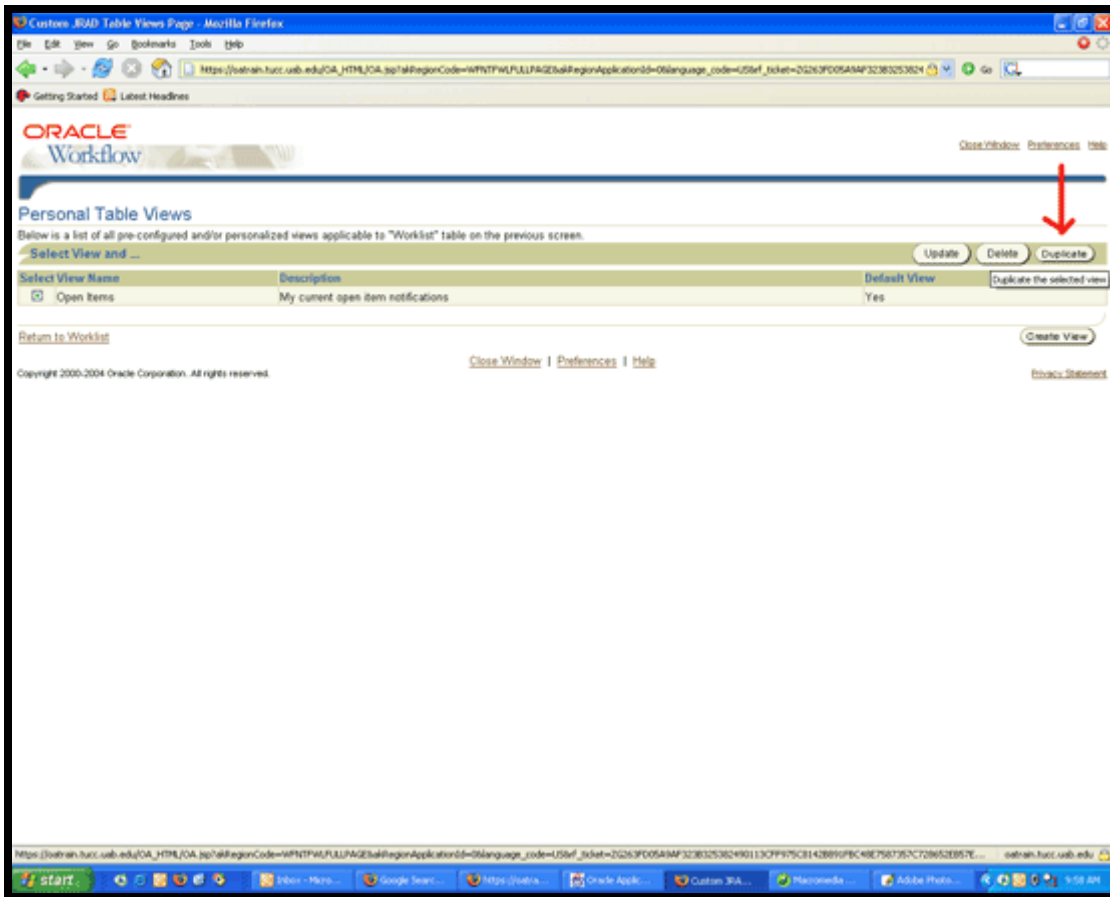
Close Window | Preferences | Help

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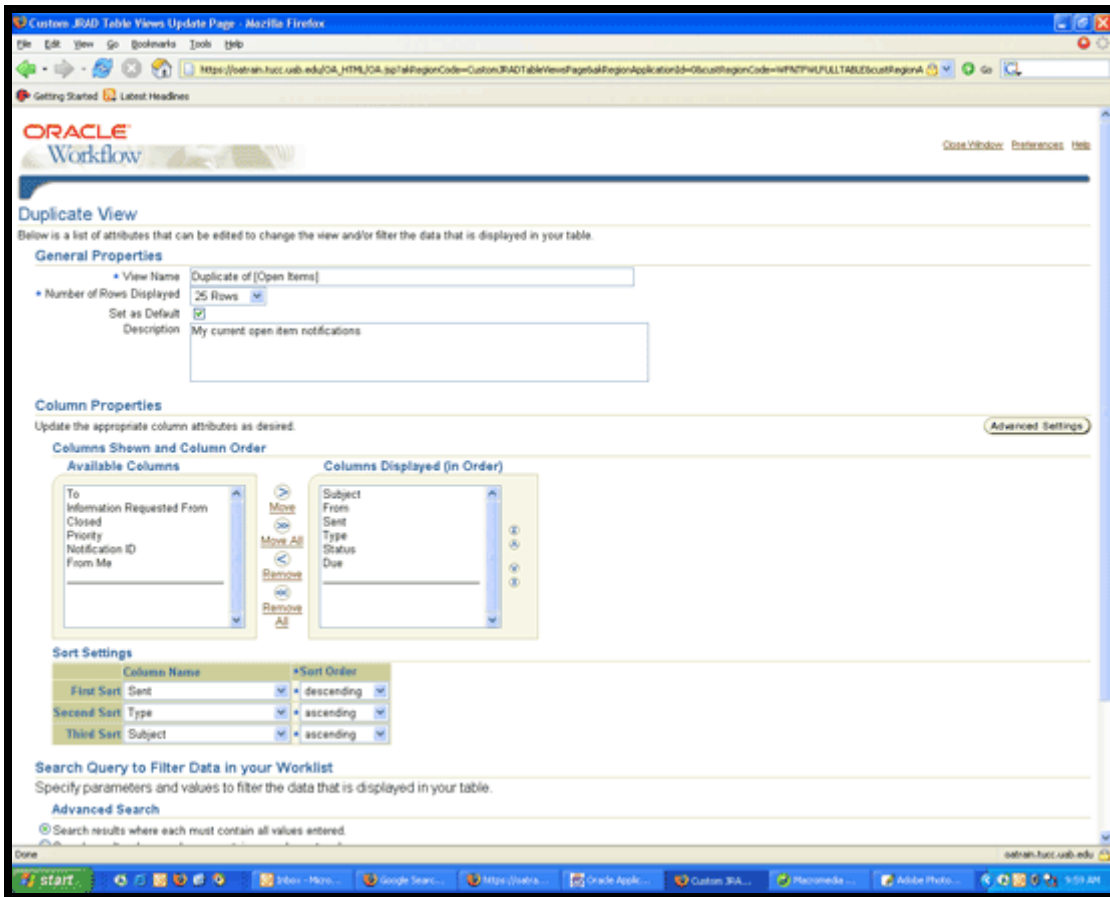
You can access this screen from the main worklist by clicking PERSONALIZE, which is located near the top of the page. At any time, you can delete existing views, edit existing views, or create new ones (as you just did for "Open Items").



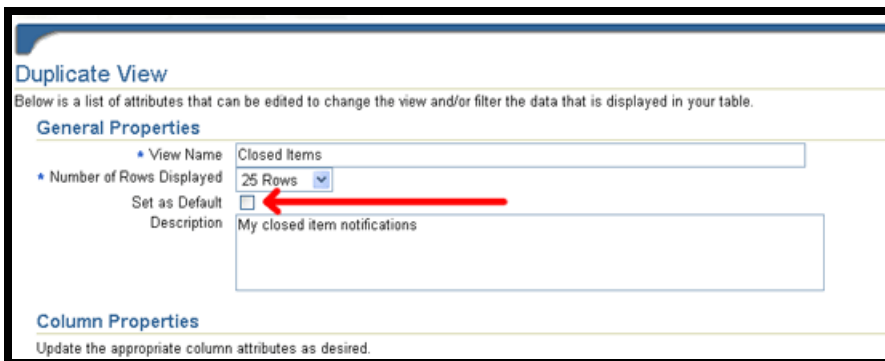
You can also create a new view by duplicating and editing an existing view. To do this, select the radio button next to an existing view and click duplicate – for example, we’ll use the "Open Items" view to create a list of our closed items.



You'll find yourself on the familiar-looking Duplicate View screen.



Change the View Name and Description, and make sure that the box next to "Set as Default" is not checked.



You can leave the middle area of the page (Column Properties) alone; change it if you wish to include different information in your worklist view. At the bottom of the page, under "Advanced Search", change the text field next to status to "closed" (since you wish to see all closed items),

Search Query to Filter Data in your Worklist

Specify parameters and values to filter the data that is displayed in your table.

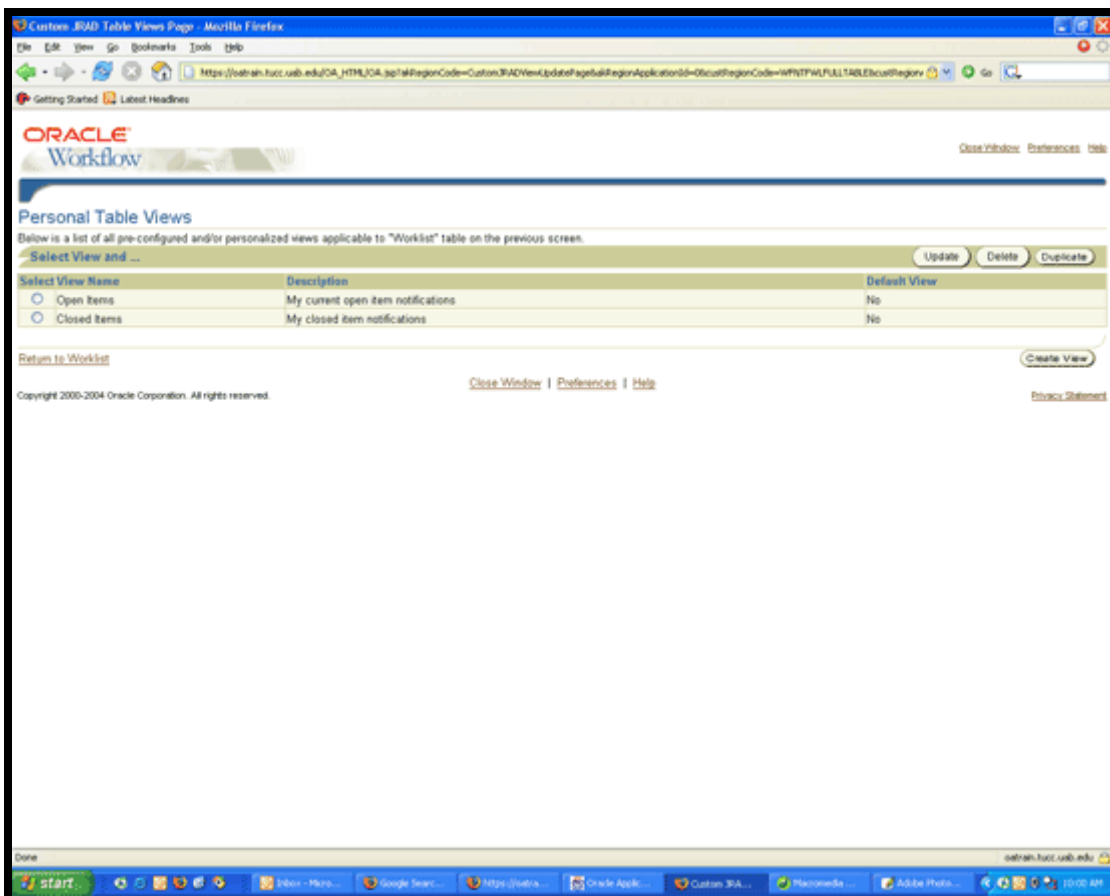
Advanced Search

Search results where each must contain all values entered.
 Search results where each may contain any value entered.

Status

Add column

and then click APPLY at the bottom right hand side. You will be sent to the View list,

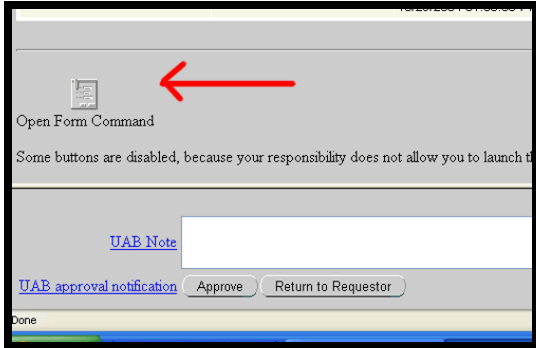


where you will now see two options for your views. Clicking the "Return to Worklist" link at the bottom left will return you to your default view.

Benefits of the new worklist

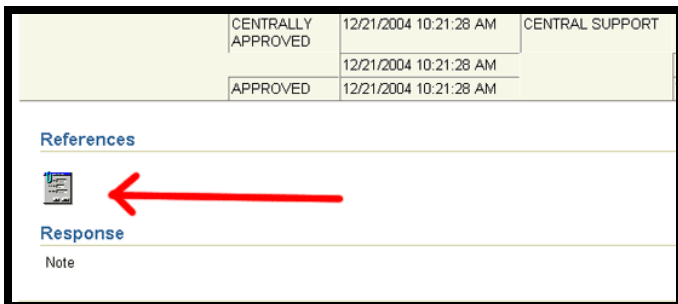
Your personal worklist can be found through your Oracle window under the header "UAB WORKFLOW".

One of the greatest benefits of the new worklist is a smarter workflow. In the old notifications, you would often see the message, “Some buttons are disabled, because your responsibility does not allow you to launch these forms.”



This would occur when you were trying to view a document that required you to be signed in under a different responsibility than you currently were (for instance, if you were completing your payroll responsibilities, but checking on a PO Requisition in your notifications). In order to complete the notification, you would have to return to the main Oracle screen, change responsibilities (under the “top hat” icon), and then return to the worklist.


In the new worklist, however, the icon for the form is no longer grayed out.



When you click on the icon to view the original document, the system will automatically adjust your responsibility to match the document that you are trying to view, saving you time and navigation through the system.

The new worklist contains another new feature that will save many people time and navigation. At the bottom of each notification details page, you will see a checkbox marked “ Display next notification after my response”, located on the left hand side of the page, just below the ‘return to worklist’ link.

References



Response

TEL_Note

[Return to Worklist](#)

Display next notification after my response

[Close W](#)

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Done

Checking this box will take you to the next notification in your queue after clicking the “Approve” or “Return to Requestor” buttons, rather than taking you automatically back to the worklist view. For employees with large numbers of notifications awaiting approval, this will save a lot of time and clicking through the worklist.