Financial Documents are approved from Oracle's Worklist. Approvers are assigned to certain approval groups within workflow. All documents for each approval group will be in each approver's Worklist. This allows everyone to see all documents related to a specific approval group and approve for others in the case of emergencies or employee absence.

From any responsibility containing the Personal Worklist choose Personal Worklist.

When financial enter the Worklist for approval there will be three things used for identification. Those three things are Type, Subject, and Sent.

**Type** indicates what type of document it is.

**Subject** indicates the document number, and the total amount, and what level the document currently resides.

**Sent** indicates when the notification was sent.

Data may be sorted by clicking on any of the column headers in the Worklist. In order to group all like document types sent to an approver click on the “Subject” or “Type: column header. Other advanced options are available. Those instructions are available from [http://www.uab.edu/adminsystems/additional-resources/views/worklist_views.html](http://www.uab.edu/adminsystems/additional-resources/views/worklist_views.html)

Once in the Worklist choose a subject line and click. This is a link to a Notification Detail screen for the document to be reviewed. The document may either be approved or returned to the requestor from this screen. In the UAB Notes field a message may be entered that will be
documented on the Notification Detail screen for subsequent approvers or for the requestor if the document is returned to them.

In order to see all the detail about a document click on the “Open Form Command” Icon in the lower left of the Notification Detail. Once the document’s form is open all the detail may be reviewed.
Once the review of the document is complete, close the document form and return to the Notification Detail screen. Be sure not to close out of the Oracle application, only the document being reviewed. The Notification Detail will be minimized in the Tray with all other open programs.
A screen like the figure below will be displayed when the notification is accessed from the tray. Use the back button to return to the notification.
Once the back button is clicked the Notification Detail will again be displayed.

Step By Step Instruction for Approving a Financial Document

1. From the UAB any responsibility containing the Personal Worklist, choose Personal Worklist to access documents ready for approval.

2. Click on a specific Subject Line to open the Notification Detail.

3. Click on the “Open Form Command” to open the document’s form in the Oracle Application.

4. Review the document.

5. Close the document form.

6. Click on the Notification Detail.

7. Add any comments in the UAB Notes field if necessary.

8. Click on the “Approve” button to approve the document or click on the “Return to Requestor” button to return the document to the requestor.
9. If no action is taken on the document at this time, click on the browser's back button to return to the Worklist or click on the return to worklist link within the notification.

10. If the document is approved or returned to the requestor the Worklist will automatically be displayed. The display next notification box may also be checked. This will move to the next open notification in the worklist.

11. To exit the Worklist, close the browser window.