Personal Worklist Documentation

Transactional documents entered into the Oracle Administrative System generate notifications. These notifications alert users of an action that needs to be taken (such as approvals or corrections). Many system notifications are delivered to requestors and approvers via their personal worklist. Users may access their personal worklist from the following system responsibilities:

UAB GL End User→ Personal Worklist
UAB GA End User→ Personal Worklist
UAB HR Officer→ Personal Worklist
UAB FN Document Entry/Approval→ Personal Worklist
UAB AP End User→ Personal Worklist

The Personal Worklist includes notifications for both Finance and HR transactional documents, as well as, report notifications sent by UAB Notification Mailer. Your worklist will open showing a list of all open notifications. (See below illustration)

The Personal Worklist includes five default views: All Notifications, Open Notifications, FYI Notifications, Notifications From Me, and To Do Notifications. The default view can be changed by clicking on the drop down arrow, selecting the view you wish to display, and click Go to update the view.

At this time, all default views are functional and operational except for the Notifications From Me view.
Personal Worklist Navigation Basics:

You can **open** or **reassign** a notification or multiple notifications. Select the notification(s) to be opened or reassigned by clicking in the check box(s) next to the notification.

Click on **Open** to open the selected notification(s).

If multiple notifications were selected, the first notification will open as **Step 1 of**. Proceed with action if applicable or advance to the next selected notification by clicking on **Next**.

Click on **Reassign** to reassign the selected notification(s).

The **Reassign Notification** window will display.

Users have two reassign options, they can:

- Delegate the notification which authorizes another user to respond to the notification in their behalf;
- Transfer the notification which gives another user complete ownership of and responsibility for the notification.
Once the selection is made, locate the user by clicking on the “flashlight”. Enter comments in the Comment section when applicable. Click on Submit to reassign the notification.

Once a notification has been reassigned, the action history will display on the notification.

<table>
<thead>
<tr>
<th>Num</th>
<th>Action Date</th>
<th>Action</th>
<th>From</th>
<th>To</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>04-FEB-2010 14:38:01</td>
<td>Submit</td>
<td>McGone, Carrie</td>
<td>ACT2943255</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>17-FEB-2010 13:40:08</td>
<td>Transfer</td>
<td>Davis, Jo-Alice</td>
<td>McGone, Carrie</td>
<td>For training documentation</td>
</tr>
</tbody>
</table>

To return to your personal worklist from a notification, click on the Return to Worklist link located in the lower left hand side of the notification; you may also choose to display the next notification after selecting the appropriate response by clicking in the ‘Display next notification after my response’ checkbox.
Personal Worklist Notifications

The types of notifications sent to the Personal Worklist are **Approval Notifications** and **FYI notifications**.

**Approval Notifications**

Approval Notifications inform recipients that a transactional document for which they are an approver on the Workflow Approval Maintenance (WAM) form is awaiting their approval. **Approval Notifications require action by the recipient.** Approval Notifications will display in the Personal Worklist similar to the illustration below.

<table>
<thead>
<tr>
<th>Select Notifications: (Open) (Reassign)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All</td>
</tr>
<tr>
<td>Select From</td>
</tr>
<tr>
<td>ACT Workflow</td>
</tr>
<tr>
<td>ACT Workflow</td>
</tr>
</tbody>
</table>

Once opened, **Approval Notifications** will have a combination of the following action buttons:

1. **Approve** - Information is correct and document should continue through approval process
2. **Cancel** – Approver is cancelling document; document status changes to **Canceled**
3. **Return to Requestor** - Information is incorrect; requestor must make appropriate changes and resubmit

*Note: If the approver attempts to cancel the document from the approval notification by clicking on **CANCEL**; or attempts to reopen the document by clicking on **RETURN TO REQUESTOR**, the system will require a “comment” be entered in the **RESPONSE NOTE** section before the action can be performed.

4. **Reassign** - Approver is reassigning document to another party to act on their behalf
5. **Printable Page**

Approval notifications also contain a link to the referenced document in order to review the details of the transaction. Approvers must have the appropriate access responsibility assigned to them in the Oracle Administrative System before they can view the document from the notification link.

**Note:** All approvers should be viewing the document prior to approving to verify HR related data, account strings being charged and salary data when applicable.

**FYI Notifications**

FYI Notifications inform recipients that an action has been taken. They may or may not require an action by the user. The types of FYI notifications are:
1. **Report Notifications**: though reports are no longer delivered to the personal worklist (they are delivered to the Report Viewer), old reports that were delivered prior to the Report Viewer may still be in your worklist. They will appear in the worklist similar to the illustration below:

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Message Type</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>WFIUAB</td>
<td>Report Sent by UAB Notification Maker</td>
<td>24-Jul-2009</td>
<td></td>
</tr>
<tr>
<td>WFIUAB</td>
<td>Report Sent by UAB Notification Maker</td>
<td>17-Aug-2009</td>
<td></td>
</tr>
</tbody>
</table>

Once the report notification is opened, a notification similar to the illustration below will display.

Report notifications include a hyperlink to the report. The **View Report** hyperlink is only active for 24 hours once the notification is sent to the personal worklist.

Access to the report is limited on one time from the **View Report** hyperlink. Saving the report to a file for future reference is recommended. If the **Authentication failed** error displays when attempting to access the report from the notification, the hyperlink to the report is no longer active.

2. **Secondary Organization Notifications**

- Finance documents are routed through the workflow of the organization paying the highest percentage of the cost. Secondary Organization notifications are sent to all other organizations paying a percentage of the cost to inform them that this document is in workflow.

- HR documents are routed through the workflow of the individual’s assignment organization; all other funding organizations receive Secondary Organization Notifications informing them this document is in workflow.

Secondary Organization Notifications will display in the personal worklist similar to the highlighted notification on the right.
Secondary Organization Notifications will have a combination of the following action buttons:

- **Return to Requestor** - if the secondary organization has the ability to stop the action, this button is available (ACT, Payment Request, etc.)
- **OK or Remove from Worklist** - if the secondary organization DOES NOT have the ability to stop the action (TEL, Salary Reclass)
- **Reassign** - Reassign to another party for review.

Secondary Organizations only have 24 hours to review a notification and take action to stop a document. After 24 hours, the document is released and continues through the primary organizations workflow. This illustrates the importance of reviewing your worklist on a daily, consistent basis.

FYI notifications may also include document links.