Log in to WAM
- Navigate to myUAB
- Locate and click WAM
- Log in using your BlazerID and strong password

WAM opens in the Query View
- Use the Org Filter field to search for an Organization
  - The % wildcard can be used when searching a part of a value
- Choose Document Type(s) by clicking the [+] next to FN (Finance), HR (Human Resources), or System
Select Organization(s) and Document Type(s)

- Click to select the checkbox to the left of the desired Org and Document Type
  - To clear the WAM form and restart your query, click Clear Form
- Click Search to populate results based on the selected parameters

Results will display based on chosen Org(s) and Document Type(s)
- Columns can be sorted
- Note the Organization and Document Type column if searching multiples
- Approver Level (numerical routing order for the document) is displayed in the Lvl column
Dollar thresholds set for an Approver to limit the Finance documents in their personal worklist are noted in the Amount From and Amount To fields.

To query the Central Path approvers:
- Click Central Path
- A new window will open, where you can query the Central Path approvers by the selected document type(s)

By clicking on the Roles tab, WAM Roles Maintenance opens
- Use the search fields to search in the same way as on the Query view
- WAM Roles identifies organizational personnel assigned to the workflow administrative roles which are pertinent to the workflow of the selected Organization and Document Type

Note: Dollar thresholds should be used with caution. Assigning threshold amounts for the Amount From/Amount To values to every approver could result in some dollar ranges being omitted. It will result in documents being rejected if they fall within the missing value range.

Primary Workflow Officer (WFO)

Identifies the individual within the organization that maintains and updates the end user approval paths via the Workflow Approval Maintenance form. Individuals assigned to this role must be:
- Current employee with an assignment category of 01 Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee
• Selected at the School/VP level, or designee
• The Workflow Administrator sets up Workflow Officers in Oracle and associates the Workflow Officer with his or her Organizations

The Primary Workflow Officer can create Secondary Workflow Officer roles.

Notify Person

Identifies the individual within the organization that receives FYI 24-hour hold notifications. Individuals assigned to this role must be:

• Current employees with an Assignment Category of 01 Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee
• Assigned by the Workflow Officer (if not assigned, the WFO is the default)

By clicking on the Reports tab, the available ad hoc reports to run in WAM will appear

• Click on the report name link to open the report in a new window

The chosen report will open in a new window

• Enter all desired report parameters
• Click View Report
Workflow Basics

The following information is pivotal to understanding how the approver details affect workflow:

- Only one organization has the ability to approve a document. Workflow follows the assignment organization (primary org) of the employee for which the document is being worked. All secondary organizations receive an FYI notification that the document has been submitted into Workflow. The document is placed on hold for 24 hours to allow secondary organizations time to reject the document. If after the 24-hour period no one rejects the document, it will continue down the workflow approval path.

- **24-Hour Notifications:** When multiple accounts, affiliated with different organizations, are entered on a document:
  - **Multiple GL accounts:** The organization paying the highest percentage of costs drives the workflow approval path.
  - **Multiple GA accounts:** The organization paying the highest percentage of costs drives the workflow approval path.
  - **Multiple GA/GL accounts:** The workflow is dictated by the GA account string.

- In addition to the Notify Person, all Level 1 Approvers receive FYI 24-hour hold notifications in their personal worklist; they also have the ability to reject the transaction during the 24-hour response period.

- Two unique end user approvals are required for all documents submitted into workflow, except for TEL documents submitted by a Timekeeper and GL journal entries.

- The Requestor counts as the approver except:
  - When the requestor uses UAB Requisitions Input
  - When document is for the requestor; cannot approve their own document

- Generally, only one level of approvers is required. However,
  - If the submitter uses the UAB Requisition Input, there must be at least two approval levels in order to obtain the two required signatures
  - If more than one level of approvers is established, the document will require a signature at each level, barring any dollar thresholds, even if the two required signatures have already been logged.

- Each approval level requires one approval to advance onto the next approval level.

- It is strongly recommended that multiple approvers be placed on each approval level. Failure to do so could result in delayed document processing should a single approver be unavailable to approve a document.

- All documents without two unique end user approvals are returned to the requestor with a document status of “Open”; re-opened documents must be resubmitted by the requestor and flow through the end user approval path before advancing to the Central Administration Workflow.