

Workflow Approval Maintenance (WAM) Form Documentation

Workflow is the routing of electronic documents within the HR and Finance Administrative (FN) Systems. Some workflow routing is programmatically controlled, such as self-service banking changes, effort reports, and invoices. Other workflow routing is defined by the user organizations using the **WORKFLOW APPROVAL MAINTENANCE (WAM)** form. Workflow from the requestor to Central Administration is referred to as the **end user approval path**.

The **end user approval path** is controlled by the **WORKFLOW APPROVAL MAINTENANCE (WAM)** form. Each organizational unit has a **Workflow Officer (WFO)** who is responsible for setting up and managing the **WAM** form. The Workflow Officer may use the same approval path for all document types, or the approval path may vary by document type, based on the needs of the organization.

The **WAM** form is a **view only** form and has no user restrictions on HR and FN end user responsibilities. The WAM form can be accessed via URL
<https://dcsapps.ad.uab.edu/WAM/Login.aspx?ReturnUrl=%2fwam%2fdefault.aspx>.

The following documentation explains how to view the end user approval paths using the **WAM** form, and provides an explanation of the end user approval path.

UAB HR Officer → UAB Workflow → WAM - - Approval Paths

UAB Salary Reclass → UAB Workflow → WAM - - Approval Paths

UAB Timekeeper → UAB Workflow → WAM - - Approval Paths

UAB FN Document Entry/Approval → WAM - - Approval Paths

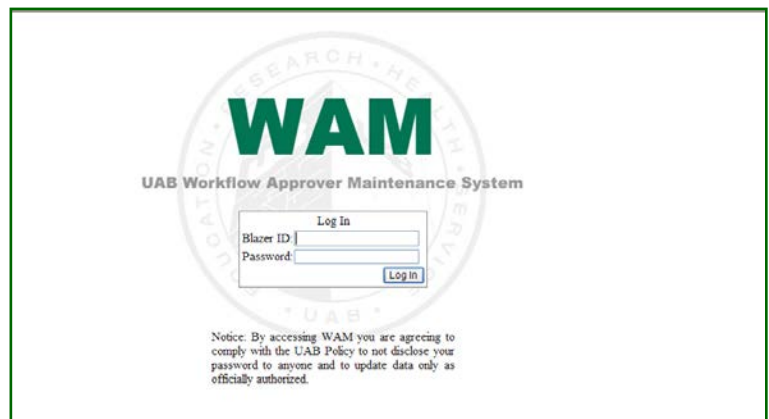
UAB GA End User → UAB Workflow → WAM - - Approval Paths

UAB GL End User → UAB Workflow → WAM - - Approval Paths

Logging In

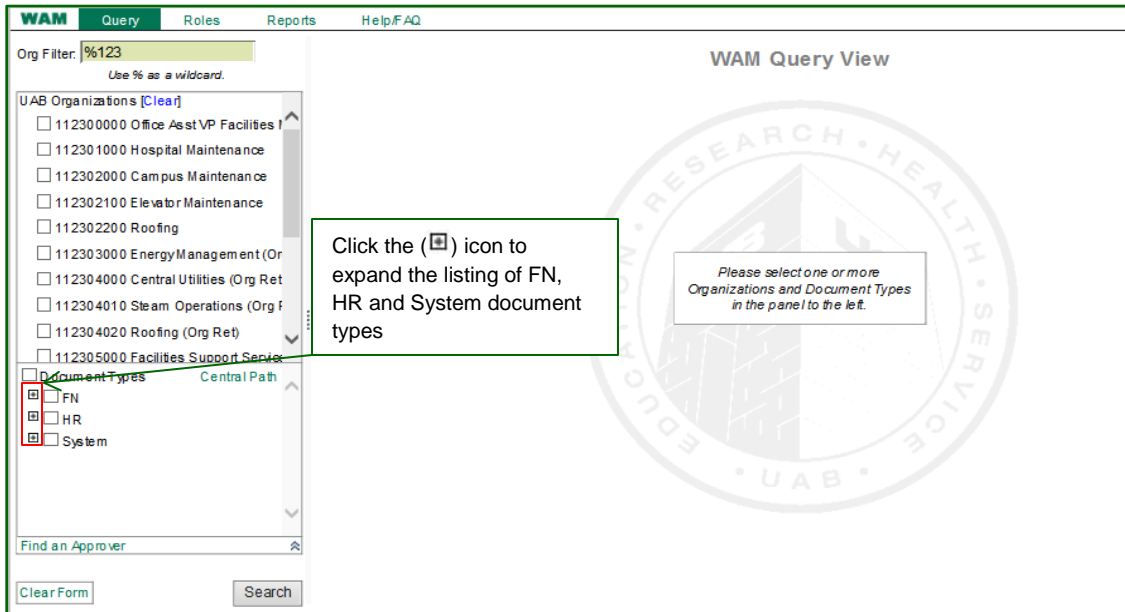
After clicking on the **WAM - - APPROVAL PATHS** menu option a login window will display; enter your **BLAZER ID/PASSWORD** and click on the **LOG IN** button.

The **WAM** form will open.



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WAM Query View



| | |
|--|---|
| <p>Where do I start?</p> | <p>Typical usage begins by first entering an organization value in the ORG FILTER field. This can be any part of an organization name or number; you can use the wildcard symbol '%' if needed.</p> <p>Select at least one organization and document type from the DOCUMENT TYPES panel.</p> <p>Finally, click on SEARCH to query the workflow approvers.</p> |
| <p>How is the wildcard symbol '%' used?</p> | <p>The '%' can be used as a wildcard when you only know a piece or part of a value.</p> |
| <p>What does the Clear button do in the UAB Organizations filter panel?</p> | <p>Clear is used to reset the items selected and displayed in the organization panel. Only use this option if you wish to reset and clear the entire organization list.</p> |
| <p>How do I select multiple Organizations or Document Types?</p> | <p>A selector checkbox is available that allows you to easily select multiple values. When this checkbox is selected (✓) the items below that area are selected. Remove the (✓) from the box to de-select organization or document type.</p> |
| <p>What does the 'Search' button do?</p> | <p>Search launches the primary Query and returns information in the center data grid panel. Selections made for Organization and Document Type are used to execute the query.</p> |

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Picture # 1 displays query results for one organization with multiple document types.

The screenshot shows the WAM Query interface with the following details:

- Org Filter:** %anest%
- Document Types:** HR (checked), BUDGET, CHANGE, COSTING CHANGE, CRF.
- Table Columns:** Organization, Document Type, Approver Name, BlazerID, Lvl, Grp, Amt From, Amt To.
- Table Data (Sample):**

| Organization | Document Type | Approver Name | BlazerID | Lvl | Grp | Amt From | Amt To |
|--------------|----------------|-----------------------|----------|-----|-----|----------|--------|
| 311102000 | BUDGET | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | BUDGET | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | BUDGET | Drew, Daron Michelle | DDRE W1 | 2 | | | |
| 311102000 | BUDGET | Graham, Anne C. | GRAHAMAC | 2 | | | |
| 311102000 | BUDGET | Mack, LaKisha | LCOLEMAN | 2 | | | |
| 311102000 | BUDGET | Maddox, Paulette | HARPO | 2 | | | |
| 311102000 | CHANGE | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | CHANGE | Drew, Daron Michelle | DDRE W1 | 2 | | | |
| 311102000 | CHANGE | Graham, Anne C. | GRAHAMAC | 2 | | | |
| 311102000 | CHANGE | Mack, LaKisha | LCOLEMAN | 2 | | | |
| 311102000 | CHANGE | Maddox, Paulette | HARPO | 2 | | | |
| 311102000 | COSTING CHANGE | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | COSTING CHANGE | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | CRF | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | CRF | Owen, Debbie M | DEBBIE O | 1 | | | |
| 311102000 | CRF | Austin, Stephen Scott | CHI269 | 2 | | | |
| 311102000 | CRF | Drew, Daron Michelle | DDRE W1 | 2 | | | |
| 311102000 | CRF | Graham, Anne C. | GRAHAMAC | 2 | | | |
| 311102000 | CRF | Mack, LaKisha | LCOLEMAN | 2 | | | |
| 311102000 | CRF | Maddox, Paulette | HARPO | 2 | | | |
- Footer:** Showing 1 to 67 of 67 entries. Buttons for Copy and Excel are visible.

The screenshot shows the WAM Query interface with the following details:

- Org Filter:** %anest%
- Document Types:** FI (checked), AEO/AUTH SIGNOR, APOFFSET, BUDGET MODEL, IT SERVICES, JE.
- Table Columns:** Organization, Document Type, Approver Name, BlazerID, Lvl, Grp, Amt From, Amt To.
- Table Data (Sample):**

| Organization | Document Type | Approver Name | BlazerID | Lvl | Grp | Amt From | Amt To |
|--------------|-----------------|-----------------------|----------|-----|-----|----------|--------|
| 311102000 | AEO/AUTH SIGNOR | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | AEO/AUTH SIGNOR | Holman, Frankie D | FRANDEN | 2 | | | |
| 311102000 | AEO/AUTH SIGNOR | Lynch, Thomas P | TLYNCH | 2 | | | |
| 311102000 | AEO/AUTH SIGNOR | Parker, Stephen C | SPARKE2 | 2 | | | |
| 311102000 | AEO/AUTH SIGNOR | Sheedy, Noelle Cooper | NECOOPER | 2 | | | |
| 311102000 | APOFFSET | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | APOFFSET | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | BUDGET MODEL | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | BUDGET MODEL | Parker, Stephen C | SPARKE2 | 1 | | | |
| 311102000 | BUDGET MODEL | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | BUDGET MODEL | Alexander, Samone M | SAM1 | 2 | | | |
| 311102000 | BUDGET MODEL | Austin, Stephen Scott | CHI269 | 2 | | | |
| 311102000 | BUDGET MODEL | Oliver, Djovan L | DLOLIVER | 2 | | | |
| 311102000 | IT SERVICES | Holman, Frankie D | FRANDEN | 1 | | | |
| 311102000 | IT SERVICES | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | IT SERVICES | Parker, Stephen C | SPARKE2 | 1 | | | |
| 311102000 | IT SERVICES | Rouse, Natalie D. | NATDAMS | 1 | | | |
| 311102000 | IT SERVICES | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | IT SERVICES | Alexander, Samone M | SAM1 | 2 | | | |
| 311102000 | IT SERVICES | Cameron, LaShell B | LASHELLC | 2 | | | |
- Footer:** Showing 1 to 49 of 49 entries. Buttons for Copy and Excel are visible.

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Picture #2 displays query results for multiple organizations and one document type.

The screenshot shows the WAM Query interface with the following data table:

| Organization | Document Type | Approver Name | BlazerID | Lvl | Grp | Amt From | Amt To |
|--------------|---------------|--------------------------|-----------|-----|-----|----------|--------|
| 357005000 | CHANGE | Sloan, Angela | ANGELAC | 1 | | | |
| 357005000 | CHANGE | Stewart, Jennifer H | JENNT | 1 | | | |
| 357005000 | CHANGE | Tate, Theron Michael | TMTATE | 1 | | | |
| 357005000 | CHANGE | Dixon, Donna L | DTHROWER | 2 | | | |
| 357005000 | CHANGE | Sloan, Angela | ANGELAC | 2 | | | |
| 357005000 | CHANGE | Stewart, Jennifer H | JENNT | 2 | | | |
| 357005000 | CHANGE | Anderson, Peter G | PGA | 3 | | | |
| 357005000 | CHANGE | Bolus, Norman E | LMBOLUS | 3 | | | |
| 357005000 | CHANGE | Stewart, Jennifer H | JENNT | 4 | | | |
| 357005000 | CHANGE | Tate, Theron Michael | TMTATE | 4 | | | |
| 357005000 | CHANGE | Jones, Harold P | JONESH | 5 | | | |
| 357005000 | CHANGE | Stewart, Jennifer H | JENNT | 5 | | | |
| 357005000 | CHANGE | Talbot, Melanie L | MELANIE M | 5 | | | |
| 701300000 | CHANGE | Berry, Glynda B | GBERRY | 1 | | | |
| 701300000 | CHANGE | Carlisle, Brenda Haddock | BRENDA15 | 1 | | | |
| 701300000 | CHANGE | Clarkson, Florence E | BCLARKSO | 1 | | | |
| 701300000 | CHANGE | Culver, Sandra P | SANDYC | 1 | | | |
| 701300000 | CHANGE | Kuklinski, Susan A | SKU KLINS | 1 | | | |
| 701300000 | CHANGE | Mannino, Elizabeth H | BMANNINO | 1 | | | |
| 701300000 | CHANGE | Von Hagel, Bruce A | VON S205 | 1 | | | |

Left sidebar filters: CHANGE

Bottom status: Showing 1 to 20 of 20 entries

The screenshot shows the WAM Query interface with the following data table:

| Organization | Document Type | Approver Name | BlazerID | Lvl | Grp | Amt From | Amt To |
|--------------|---------------|--------------------------|-----------|-----|-----|----------|--------|
| 357005000 | BUDGET MODEL | Sloan, Angela | ANGELAC | 1 | | | |
| 357005000 | BUDGET MODEL | Stewart, Jennifer H | JENNT | 1 | | | |
| 357005000 | BUDGET MODEL | Stewart, Jennifer H | JENNT | 2 | | | |
| 357005000 | BUDGET MODEL | Talbot, Melanie L | MELANIE M | 2 | | | |
| 701300000 | BUDGET MODEL | Clarkson, Florence E | BCLARKSO | 1 | | | |
| 701300000 | BUDGET MODEL | Kuklinski, Susan A | SKU KLINS | 1 | | | |
| 701300000 | BUDGET MODEL | Carlisle, Brenda Haddock | BRENDA15 | 2 | | | |

Left sidebar filters: BUDGET MODEL

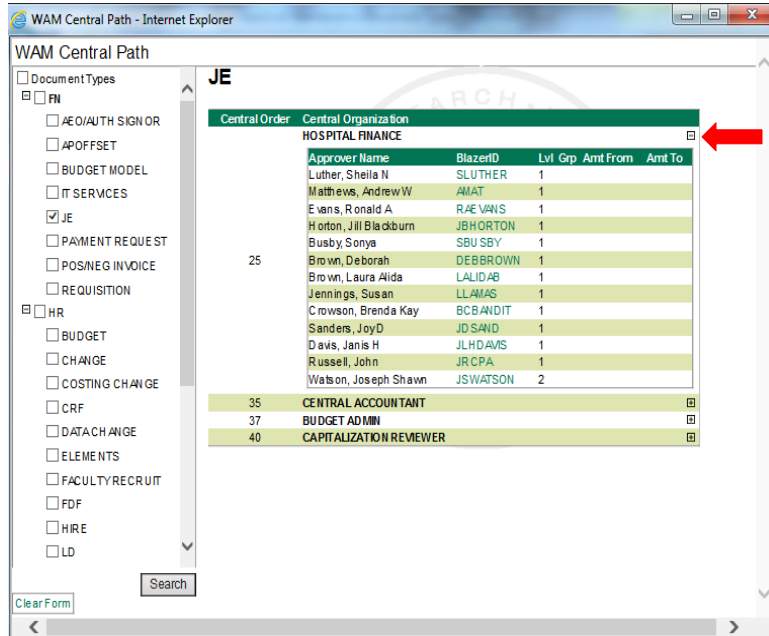
Bottom status: Showing 1 to 7 of 7 entries

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What is the 'Central Path' option used for?

By clicking on the **Central Path** link, navigation will open a separate screen.

The screen will display a query panel to query the Central Path approvers per appropriate document types.



Click the (☐) icon to expand the listing of approvers.

Hover over the name to display the approver contact information.

Can I 'Clear' the form and start over?

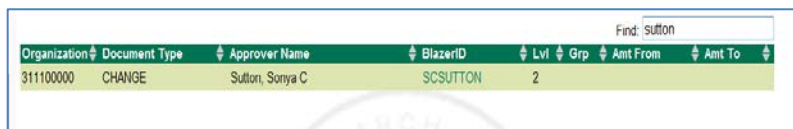
Clear Form is used to reset the entire screen. Only use this option if you wish to reset and clear the entire screen.

How do I use the Copy/Excel/Print options?

There are 3 choices for direct output of the information displayed in the data grid. **Copy:** Copies the contents of the data grid to your desktop clipboard. Information can then be copied using your desktop Paste function. **Excel:** Saves the contents of the data grid to a '.csv' file that can be opened using Microsoft Excel. **Print:** Launches your desktop Print dialogue allowing you to print the contents of the data grid.

What is the 'Find' field used for?

Find allows you to narrow the rows displayed in the data grid. As you type a value in the Find field the data grid is immediately filtered.



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Approver Details

The data grid identifies the organizational personnel assigned to the end user approval path for the specified HR, FN, and System document types.

Persons listed will receive an approval notification in their **Oracle Personal Worklist** and are given access to the document via the worklist link. Dollar thresholds can be set for an approver to limit the finance documents that an approver receives in their personal worklist using the **Amount From** and **Amount To** fields.

| Organization | Document Type | Approver Name | BlazerID | Lvl | Grp | Amt From | Amt To |
|--------------|-----------------|-----------------------|----------|-----|-----|-------------|--------|
| 311102000 | JE | Holman, Frankie D | FRANDEN | 1 | | | |
| 311102000 | JE | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | JE | Parker, Stephen C | SPARKE2 | 1 | | | |
| 311102000 | JE | Rouse, Natalie D. | NATDAMS | 1 | | | |
| 311102000 | JE | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | JE | Alexander, Samone M | SAM1 | 2 | | \$25,000.00 | |
| 311102000 | JE | Austin, Stephen Scott | CHI269 | 2 | | \$25,000.00 | |
| 311102000 | JE | Oliver, Djovan L | DLOLIVER | 2 | | \$25,000.00 | |
| 311102000 | PAYMENT REQUEST | Holman, Frankie D | FRANDEN | 1 | | | |
| 311102000 | PAYMENT REQUEST | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | PAYMENT REQUEST | Parker, Stephen C | SPARKE2 | 1 | | | |
| 311102000 | PAYMENT REQUEST | Rouse, Natalie D. | NATDAMS | 1 | | | |
| 311102000 | PAYMENT REQUEST | Sheedy, Noelle Cooper | NECOOPER | 1 | | | |
| 311102000 | PAYMENT REQUEST | Alexander, Samone M | SAM1 | 2 | | \$25,000.00 | |
| 311102000 | PAYMENT REQUEST | Austin, Stephen Scott | CHI269 | 2 | | \$25,000.00 | |
| 311102000 | PAYMENT REQUEST | Oliver, Djovan L | DLOLIVER | 2 | | \$25,000.00 | |
| 311102000 | REQUISITION | Holman, Frankie D | FRANDEN | 1 | | | |
| 311102000 | REQUISITION | Lynch, Thomas P | TLYNCH | 1 | | | |
| 311102000 | REQUISITION | Parker, Stephen C | SPARKE2 | 1 | | | |
| 311102000 | REQUISITION | Rouse, Natalie D. | NATDAMS | 1 | | | |

- **APPROVER NAME:** Identifies the organizational personnel assigned to approve a specific document type for each approval level. Individuals designated as approvers must meet the following requirements:
 - Current employees with an Assignment Category of 01 Full-time, 03 Part-time, 04 Retiree, or 59 Affiliate Employee
 - Access to the appropriate HR, FN, and System responsibilities
- **LVL:** Identifies the numerical routing order number (**approval level**) established by the Workflow Officer.
- **AMT FROM:** Only documents with a dollar amount equal to or greater than that value will be sent to that approver's personal worklist.
- **AMT TO:** Only documents with a dollar amount equal to or less than that value will be sent to that approver's personal worklist.

Note: Dollar thresholds should be used with caution. Placing threshold amounts for the Amount From and Amount To values for every approver, if not done properly, could result in some dollar ranges being omitted. It will result in documents being rejected, if they fall within the missing value range.

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WAM Roles View

The WAM Roles View identifies organizational personnel assigned to the workflow administrative roles which are pertinent to the workflow of the selected organization and document type.

The screenshot shows the WAM Roles View interface. On the left, there is a sidebar with filters for Organizations and Document Types. The main area displays a table of roles. The table has columns for Organization, Document Type, Name, BlazerID, and Role. The roles listed are:

| Organization | Document Type | Name | BlazerID | Role |
|--------------|----------------|----------------------|----------|----------------------------|
| 113001000 | BUDGET MODEL | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | CHANGE | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | CHANGE | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | COSTING CHANGE | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | COSTING CHANGE | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | CRF | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | CRF | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | DATA CHANGE | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | DATA CHANGE | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | DISCLOSURE | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | DISCLOSURE | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | ELAS | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | ELAS | Duckett, Melissa S | MDUCKETT | Secondary Workflow Officer |
| 113001000 | ELAS | Mullins, Stephanie B | SMULLINS | Notify Person |
| 113001000 | ELEMENTS | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113001000 | ELEMENTS | Mullins, Stephanie B | SMULLINS | Notify Person |

- The **PRIMARY WORKFLOW OFFICER** field 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 Retiree, or 04 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

Note: The Primary Workflow Officer can create Secondary Workflow Officer roles.

- The **NOTIFY PERSON** field 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 Retiree, or 59 Affiliate Employee
 - Assigned by the Workflow Officer (if not assigned, the WFO is the default)

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WAM Reports

The following reports are available for you to run on an as needed basis. Simply click on the report name, login and select suitable parameters.

| Report | Description |
|--|--|
| WAM Approval Path Details ByOrg | Displays approver details for an Organization/Document Type workflow path. Filters include Organization, Document Type and Approver. |
| WAM Approval Path Details byApprover | Displays approver details for any approver across all Organizations. Filters include Approver and Document Type. |
| WAM Roles | Displays persons associated with WAM roles; WFO, NotifyPerson, Secondary WFO. Filters include Organization, Document Type, and Role. |
| WAM Central Paths | Displays Central Path approver details. Filters include Document Type. |
| WAM Roles History | Displays WAM Roles History for a given Organization/Document Type. Filters include Organization, Document Type and Date Range. |
| WAM Approver History | Displays WAM History for a given Organization/Document Type. Filters include Organization, Document Type and Date Range. |

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Workflow Basics

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

- Only one organization has the ability to approve an HR 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 **Order No 1** approvers receive FYI 24-hour hold notifications in their 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 requestor; **cannot** approve 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.

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