

## 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**

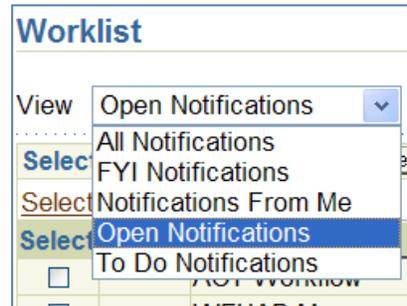
**UAB AP End User → Personal Worklist**

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)

Select From	Type	Subject	Sent	Due
<input type="checkbox"/>	ACT Workflow	114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY 1015246 LEVEL 1	04-Feb-2010	
<input type="checkbox"/>	ACT Workflow	310008400 462392 01-FEB-2010 Monthly FUNDING SOURCE CHANGE 1008986 LEVEL 1	23-Jan-2010	
<input type="checkbox"/>	ACT Workflow	311401400 459240 23-DEC-2009 END A VOLUNTEER 1052115 LEVEL 3	14-Jan-2010	
<input type="checkbox"/>	ACT Workflow	311402400 462371 15-JAN-2010 12/12 Monthly Faculty NONRECURRING ELEMENT 1002155 LEVEL 2	22-Jan-2010	
<input type="checkbox"/>	ACT Workflow	311500000 448712 27-SEP-2009 12/12 Monthly Faculty SALARY SCHEDULE ADJUSTMENT 1002179	29-Dec-2009	
<input type="checkbox"/>	ACT Workflow	411000000 462245 22-JAN-2010 Monthly NONRECURRING ELEMENT 1031701 LEVEL 2	22-Jan-2010	
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	702550000 461637 19-JAN-2010 Monthly DATA CHANGE 1053830 LEVEL 1	19-Jan-2010	
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	703550000 460493 19-FEB-2010 Monthly TERMINATE EMPLOYEE 1046323 LEVEL 2	21-Jan-2010	
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	708350000 462309 17-JAN-2010 Biweekly TRANSFER LATERAL/DIFFERENT DEPT 1022022 LEVEL 1	22-Jan-2010	
<input type="checkbox"/>	ACT Workflow	Funding source(s) changes for Document Number 462417 , Document Reason FUNDING SOURCE CHANGE for	17-Feb-2010	18-Feb-2010
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	24-Jul-2009	
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	17-Aug-2009	
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	17-Aug-2009	

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.

ORACLE Workflow

Worklist

View: Open Notifications [Go] [Personalize]

Select Notifications: [Open] [Reassign]

Select All | Select None

Select From	Type	Subject
<input checked="" type="checkbox"/>	ACT Workflow	114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY
<input checked="" type="checkbox"/>	ACT Workflow	310008400 462392 01-FEB-2010 Monthly FUNDING SOURCE
<input checked="" type="checkbox"/>	ACT Workflow	311401400 459240 23-DEC-2009 END A VOLUNTEER 10521

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

If multiple notifications were selected, the first notification will open as **Step 1 of 3**. Proceed with action if applicable or advance to the next selected notification by clicking on **Next**.

114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY

From: [Redacted]  
 To: McGlone, Carrie  
 Sent: 04-Feb-2010 14:38:01  
 ID: 10120568

The document below has been submitted for approval. Please

**Document Number:** 462410  
**Effective Date:** 05-JAN-2010  
**Payroll:** Biweekly  
**Document Reason:** FMLA WITH PAY  
**Employee Name:** Nalls, Veronica N  
**Requested by:** HALEY

Click on the link below to review the document.

[Document Locator Link](#) (Opens in New Window)

**Action History**

Num	Action Date	Action	From
1	04-FEB-2010 14:38:01	Submit	McGlone, Carrie
2	17-FEB-2010 13:40:08	Transfer	Davis, Jo-Alice

**References**

[UAB Act Form](#)

**Response**

Note: [Text Area]

[Return to Worklist](#) Step 1 of 3 [Next](#)

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

ORACLE Workflow

Worklist

View: Open Notifications [Go] [Personalize]

Select Notifications: [Open] [Reassign]

Select All | Select None

Select From	Type	Subject
<input checked="" type="checkbox"/>	ACT Workflow	114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY
<input checked="" type="checkbox"/>	ACT Workflow	310008400 462392 01-FEB-2010 Monthly FUNDING SOURCE
<input checked="" type="checkbox"/>	ACT Workflow	311401400 459240 23-DEC-2009 END A VOLUNTEER 10521

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; or

Transfer the notification which gives another user complete ownership of and responsibility for the notification.

ORACLE Workflow

Home Logout Help

Reassign Notification: 114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY 1015246 Nalls, Veronica N LEVEL 1

Use 'Delegate' to give another user authority to respond to a notification on your behalf, while still retaining ownership or 'Transfer' to give another user complete ownership of and responsibility for that notification. [Cancel] [Submit]

\* Indicates required field

\* Assignee: All Employees and Users [Change]

Delegate your response  
 Transfer notification ownership

Comments: [Text Area]

[Return to Worklist](#) [Cancel] [Submit]

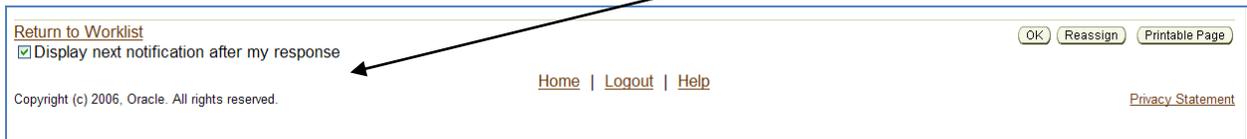
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Once the selection is made, locate the user by clicking on the **“flashlight”**. Enter comments in the **Comment** section when applicable. Click on **Submit** to reassign the notification.

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

Action History					
Num	Action Date	Action	From	To	Details
1	04-FEB-2010 14:38:01	Submit	McGlone, Carrie	ACT2943255	
2	17-FEB-2010 13:40:08	Transfer	Davis, Jo-Alice	McGlone, Carrie	For training documentation

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..



Return to Worklist

Display next notification after my response

OK Reassign Printable Page

Home | Logout | Help

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An arrow points from the 'Return to Worklist' link to the 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.

Select From	Type	Subject	Sent	Due
<input type="checkbox"/>	ACT Workflow	114503000 462410 05-JAN-2010 Biweekly FMLA WITH PAY 1015246 LEVEL 1	04-Feb-2010	
<input type="checkbox"/>	ACT Workflow	310008400 462392 01-FEB-2010 Monthly FUNDING SOURCE CHANGE 1008986 LEVEL 1	23-Jan-2010	

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.**

**ORACLE** Help Close Window

392200000 406532 01-MAR-2009 Trainee SALARY SCHEDULE ADJUSTMENT 1038990 Dean, Alison Mary LEVEL 1

Approve Cancel Return to Requestor Reassign Printable Page

To: ACT2581720  
Sent: 30-Apr-2009 16:24:10  
ID: 8788048  
The document below has been submitted for approval. Please take the required action.

**Document Number:** 406532  
**Effective Date:** 01-MAR-2009  
**Payroll:** Trainee  
**Document Reason:** SALARY SCHEDULE ADJUSTMENT  
**Employee Name:** Dean, Alison Mary  
**Requested by:** JOALICE

Click on the link below to review the document.

[Document Locator Link](#) (Opens in New Window)

**Action History**

Num	Action Date	Action	From	To	Details
1	30-APR-2009 16:24:11	Submit	Davis, Jo	ACT2581720	

**References**

[WAB Act Form](#) ← **Link to Document**

**Response**

Note

← **Enter Comments**

[Return to Worklist](#)

Display next notification after my response

Approve Cancel Return to Requestor Reassign Printable Page

Help | Close Window

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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:

<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	24-Jul-2009
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	17-Aug-2009
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	17-Aug-2009

Select Notifications:

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

**Information**  
This notification does not require a response.

**Report Sent by UAB Notification Mailer**

To: **McGlone, Carrie**  
Sent: **24-Jul-2009 15:36:47**  
Closed: **25-Jul-2009 15:36:47**  
ID: **9376569**

Request #: 7319910; PIE Payroll Information Extract Submission Parameters: DETAIL - Labor Distribution; Organization: 702500000 Cardiovascular Services; Org Type: All; Element Set: UAB PIE All LD; From Date Earned: 01-JAN-09; To Date Earned: 30-JUN-09; Include All Assignment Sets: N

The report file can be accessed by clicking on the link below.

[View Report](#)

**NOTE 1:** For Security reasons this report will be viewable only once. i.e. once you have viewed the report, you will no longer be able to click on the URL. To retain the report click on File>Save and save to a local directory. Otherwise, to view it again, you will have to regenerate the request.

[Return to Worklist](#)  Display next notification after my response

[Home](#) | [Logout](#) | [Help](#)

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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.

Select From	Type	Subject	Sent	Due
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	702550000 461637 19-JAN-2010 Monthly DATA CHANGE 1053830 LEVEL 1	19-Jan-2010	
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	703550000 460493 19-FEB-2010 Monthly TERMINATE EMPLOYEE 1046323 LEVEL 2	21-Jan-2010	
<input type="checkbox"/> Davis, Jo-Alice	ACT Workflow	708350000 462309 17-JAN-2010 Biweekly TRANSFER LATERAL/DIFFERENT DEPT 1022022 LEVEL 1	22-Jan-2010	
<input type="checkbox"/>	ACT Workflow	Funding source(s) changes for Document Number 462417... Document Reason FUNDING SOURCE CHANGE for...	17-Feb-2010	18-Feb-2010
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	24-Jul-2009	

**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.

ORACLE Help Close Window

Funding source(s) changes for Document Number 462417 , Document Reason FUNDING SOURCE CHANGE for

[Return to Requestor](#) [Reassign](#) [Printable Page](#)

To ACT2943262  
Sent 17-Feb-2010 16:31:02  
Due 18-Feb-2010 16:31:02  
ID 10121582

Funding source(s) changes for

**Document Number:** 462417  
**Document Reason:** FUNDING SOURCE CHANGE  
**Employee Name:**

**Note:** FYI only, no action is required.  
Below is a snapshot of the LD Costing

You are receiving this notification because you are the notify person or first level approver for a secondary organization on this document. This document will be approved with no action from you at the end of the 24-hour period. Pressing the "Return to Requestor" button within the 24-hour period will stop the workflow process and return the document back to the requestor. Reasons for returning this document back to the requestor should be entered in the comments box below.

**Requestor Email** workflow@uab.edu  
**Requestor Phone** (205) 996-5595

Account	Percent	Annual Amount
7150310.000.130000000.708450000.0000.8104010	50	
2100381.000.123900000.392300000.0000.0000000	50	

**Element Level Costing Information**

Element Name	Effective Start Date	Effective End Date
Null	Null	Null

[Document Locator Link](#)

**Action History**

Num	Action Date	Action	From	To	Details
1	17-FEB-2010 16:31:02	Submit	McGlone, Carrie	ACT2943262	

**References**

[UAB Act Form \(Sec. orgs\)](#)

**Response**

UAB Notes