Workflow Approval Maintenance (WAM) Form Documentation

Oracle HR documents have a specific electronic approval path they must route through before reaching “complete” approval status; this routing process is referred to as **Workflow**. 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 **WAM form** is a **view only** form and has no user restrictions on the following HR end user responsibilities:

- HR Officer
- UAB Salary Reclass User
- UAB Timekeeper

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.

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

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

**UAB Timekeeper → UAB Workflow → WAM → Approval Paths**

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**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.
## WAM Query View

![WAM Query View](image)

### Where do I start?

Typical usage begins by first entering an organization value in the ORG FILTER field. This can be any part of an organization name; you can use the wildcard symbol '%' if needed.

Next select a document type from the DOCUMENT TYPES panel.

Finally, click on SEARCH to query the workflow approvers.

### How is the wildcard symbol ‘%’ used?

You can use the ‘%’ as a wildcard when you only know a piece or part of a value.

### What does the Clear button do in the UAB Organizations filter panel?

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.

### How do I select multiple Organizations or Document Types?

There is a selector checkbox that allows you to easily select multiple values. When this checkbox is selected (checked) the items below that area are selected. When this checkbox is de-selected (unchecked) the items below that area are de-selected.

### What does the ‘Search’ button do?

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.
Workflow Approval Maintenance (WAM) From Documentation

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

1.

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

2.
What is the 'Central Path' option used for?

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

This screen will display a query panel to query the Central Path approvers.

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

This data grid identifies the organizational personnel assigned to the end user approval path for the specified HR document type.

Persons listed will receive an approval notification in their Oracle Personal Worklist and are given access to the HR document via the worklist link.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Document Type</th>
<th>Approver Name</th>
<th>BlazerID</th>
<th>Lvl</th>
<th>Grp</th>
<th>Amt From</th>
<th>Amt To</th>
</tr>
</thead>
<tbody>
<tr>
<td>311102000</td>
<td>BUDGET</td>
<td>Bulgarella, S Dawn</td>
<td>DBULGARE</td>
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</tr>
<tr>
<td>311102000</td>
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</tr>
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</tr>
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</tr>
</tbody>
</table>

- **APPROVER NAME**: Identifies the organizational personnel assigned to approve a specific HR document type for each approval level. Individuals designated as approvers must be/have:
  - Current employees with an Assignment Category of 01, 03, 04 Retiree, or 04 Affiliated Zero Pay
  - Access to the appropriate HR responsibilities

- **Lvl**: Identifies the numerical routing order number *(approval level)* established by the Workflow Officer.
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 of the primary org.
- Two unique end user approvals are required for HR documents submitted into workflow, except for TEL documents submitted by a Timekeeper.
- The Requestor submitting the document counts as the first unique approval, except when the requestor submits a document on themselves.
- Generally, only one additional approval level is required.
- Each approval level requires one approval to advance onto the next approval level.
- If more than one approval level has been established on the WAM form for a specific document type, the document will require approval at all levels even if two unique approvals have already been logged.
- 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 (i.e. medical leave).
- HR documents (excluding TEL documents submitted by a Timekeeper) 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.
- 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.
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 **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, 03, 04 Retiree, or 04 Affiliated Zero Pay
  - 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 **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, 03, 04 Retiree, or 04 Affiliated Zero Pay
  - Assigned by the Workflow Officer (if not assigned, the WFO is the default)
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.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>WAM Approval Path Details</td>
<td>Displays approver details for an Organization/Document Type workflow path. Filters include Organization, Document Type and Approver.</td>
</tr>
<tr>
<td>WAM Roles</td>
<td>Displays persons associated with WAM roles; WFO, Notify Person, Secondary WFO. Filters include Organization, Document Type, and Role.</td>
</tr>
<tr>
<td>WAM Central Paths</td>
<td>Displays Central Path approver details. Filters include Document Type.</td>
</tr>
<tr>
<td>WAM History</td>
<td>Displays WAM History for a given Organization/Document Type. Filters include Organization, Document Type and Date Range.</td>
</tr>
</tbody>
</table>

Return to Top