

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. The Personal Worklist is available on most UAB Central responsibilities and the following end user responsibilities:

UAB HR Officer > Personal Worklist

UAB Salary Reclass User > Personal Worklist

UAB Timekeeper > Personal Worklist

UAB FN Document Entry/Approval > Personal Worklist

UAB GA End User > Personal Worklist

UAB GL End User > Personal Worklist

UAB AP End User > Personal Worklist

UAB Requisition Input > 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 screenshot displays the UAB Worklist application interface. At the top, there is a navigation bar with the UAB logo and the text 'UAB Worklist'. Below this, there are several controls: a 'View' dropdown menu set to 'Open Notifications', a 'Go' button, and a 'Personalize' button. There are also buttons for 'Select Notifications', 'Open', 'Reassign', and 'Close'. A 'Simple Search' button is located on the right side. The main content area is a table with the following columns: 'Select From', 'Type', 'Subject', 'Sent', and 'Due'. The table contains six rows of notifications, each with a checkbox in the 'Select From' column. The bottom of the interface features a footer with 'Home Logout Help' and 'Copyright (c) 2006, Oracle. All rights reserved.'

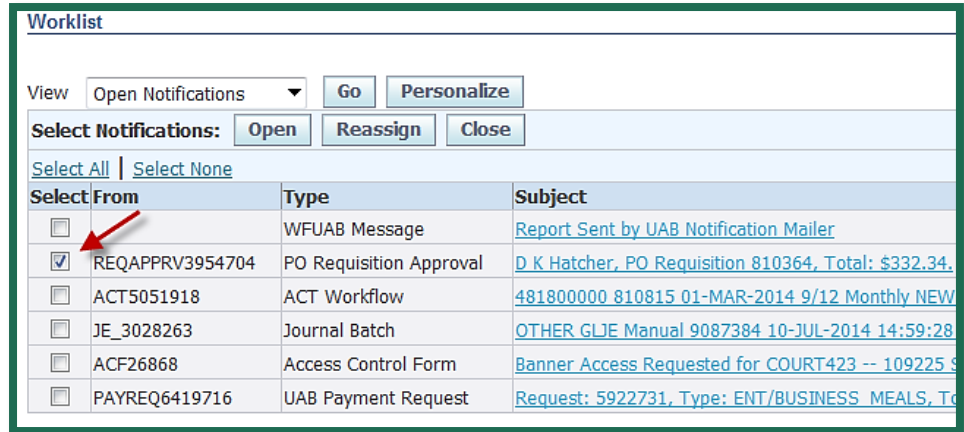
Select From	Type	Subject	Sent	Due
<input type="checkbox"/>	WFUAB Message	Report Sent by UAB Notification Mailer	25-Jul-2014	
<input type="checkbox"/>	REQAPPRV3954704	PO Requisition Approval D K Hatcher, PO Requisition 810364, Total: \$332.34.	17-Jul-2014	
<input type="checkbox"/>	ACT5051918	ACT Workflow 481800000 810815 01-MAR-2014 9/12 Monthly NEW HIRE Test, Document LEVEL 1	17-Jul-2014	
<input type="checkbox"/>	JE_3028263	Journal Batch OTHER GLJE Manual 9087384 10-JUL-2014 14:59:28 (Pierce, Michael Wesley)	11-Jul-2014	
<input type="checkbox"/>	ACF26868	Access Control Form Banner Access Requested for COURT423 -- 109225 Security Officer Approval 310008400 Comprehensive Cancer Center	30-May-2014	
<input type="checkbox"/>	PAYREQ6419716	UAB Payment Request Request: 5922731, Type: ENT/BUSINESS MEALS, Total: \$105.11, Org: 223008000, LEVEL 1, [Example, Employee]	30-May-2014	

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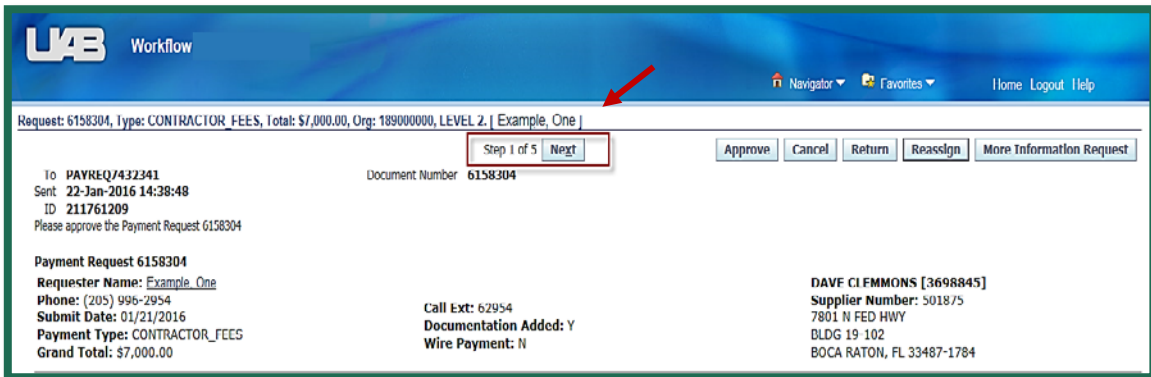
Personal Worklist Navigation Basics

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.

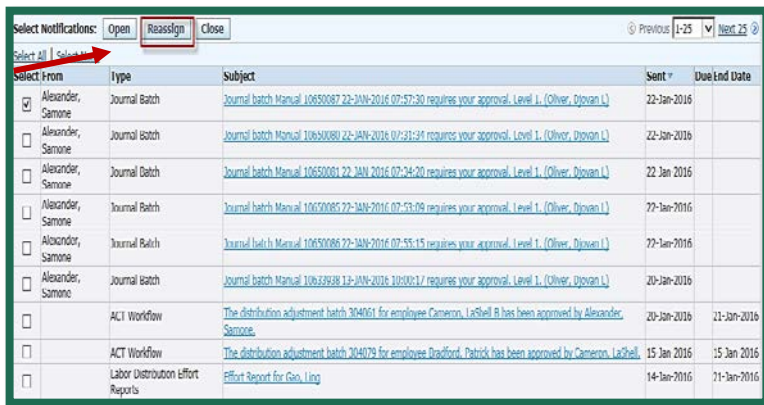
Click on **Open** to open the selected notification(s).



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).

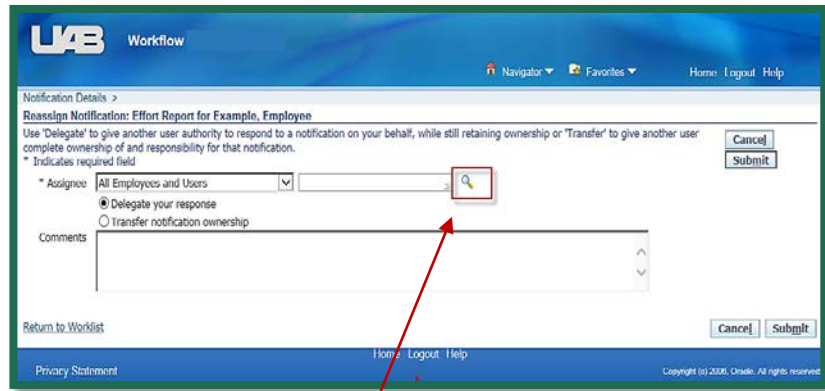


The **Reassign Notification** window will display.

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Users have two reassign options, they can:

1. Delegate the notification which authorizes another user to respond to the notification in their behalf; or
2. Transfer the notification which gives another user complete ownership of and responsibility for the notification.

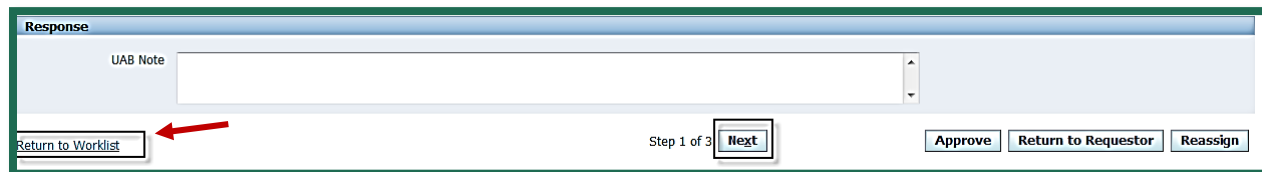


Once the selection is made, locate the user by clicking on the **“flashlight”**. Enter comments in the **Comment** section when applicable. Click on **Submit** to reassign the notification.

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

Journal Batch Approval History (Journal Batch: 10650087)			
Action	Approver UserName	Date/Time	Notes
SUBMITTED	Oliver, Djovan	Jan-22-2016 07:58:56 AM	Document Submitted
	-	Jan-22-2016 07:58:56 AM	Notification sent to User Approvals Level 1
REASSIGNED	-	Jan-22-2016 01:54:02 PM	Work Item Reassigned from to LASHHELLC
REASSIGNED	-	Mar-28-2016 03:29:25 PM	Work Item Reassigned from SAM1 to HALEY

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.

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Select	From	Type	Subject	Sent	Due	End Date
<input type="checkbox"/>	UAB	Payment Request	Request: 6158538, Type: SUPPLIES, Total: \$300.00, Org: 010000000, LEVEL 1. [Thomas, Katrina A.]	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>	UAB	Payment Request	Request: 6158531, Type: DISB_REQ_OTHER, Total: \$1,359.53, Org: 010000000, LEVEL 1. [Colafrancesco, Trina C]	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>	ACT	Workflow	945677 01-FEB-2016 Monthly TRANSFER LATERAL/DIFFERENT DEPT 1013396 Hall, Charlotte A	22-Jan-2016		
<input type="checkbox"/>		Requisition	PO Requisition: 946468, Total: \$6.99, Org: 992008000, LEVEL: 2	22-Jan-2016		
<input type="checkbox"/>		Requisition	PO Requisition: 946521, Total: \$1,842.00, Org: 010002000, LEVEL: 1	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>		Journal Batch	Journal batch Manual 10650108 22-JAN-2016 11:01:17 requires your approval. Level 1. (Bowers, Mary Wyatt)	22-Jan-2016		
<input type="checkbox"/>		TEL workflow	FYI: Request for Approval on Document with Document # 4923167 has been submitted - For McNeil, Nikiya B	22-Jan-2016		
<input type="checkbox"/>	ACT	Workflow	944420 17-JAN-2016 Biweekly TRANSFER LATERAL/SAME DEPT 1049705 Wright, Ke'Aundria M.	22-Jan-2016		
<input type="checkbox"/>	ACT	Workflow	944585 17-JAN-2016 Biweekly TRANSFER LATERAL/SAME DEPT 1077759 Jones, Ashley	22-Jan-2016		
<input type="checkbox"/>	UAB	Payment Request	W B Rodgers, Request: 6154099, Type: DISB_REQ_OTHER, Total: \$1,835,400.00, CENTRAL ACCOUNTING MGR. [Gray, Gary K Sr.]	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>	UAB	Payment Request	Request: 6158268, Type: OUT_OF_ST_EMPL_TRVL, Total: \$1,298.23, Org: 189000000, LEVEL 2. [Godwin, Romika]	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>		Requisition	PO Requisition: 946468, Total: \$6.99, Org: 992008000, LEVEL: 1	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>	ACT	Workflow	945351 10-JAN-2016 Biweekly TRANSFER LATERAL/DIFFERENT DEPT 1077099 Davis, Jimmie IV	22-Jan-2016		
<input type="checkbox"/>		TEL workflow	Employee Information Awaiting For Final Approval, Requested by Wheeler, Angela for Document Number 4918548 - For Smith, Benjamin D, LEVEL 1	22-Jan-2016	22-Jan-2016	22-Jan-2016
<input type="checkbox"/>	UAB	Payment Request	Request: 6158369, Type: DISB_REQ_OTHER, Total: \$612.90, Org: 010000000, LEVEL 1. [Colafrancesco, Trina C]	22-Jan-2016	22-Jan-2016	22-Jan-2016

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

- **Approve** - Information is correct and document should continue through approval process
- **Cancel** – Approver is cancelling document; document status changes to **Canceled**
- **Return or 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 OR RETURN TO REQUESTOR, the system will require a "comment" be entered in the RESPONSE NOTE section before the action can be performed.**

Workflow Administrator

Request: 6158480, Type: VENDOR_SERVICES, Total: \$107.80, Org: 189000000, LEVEL 2. [Godwin, Romika]

To: PAYREQ7432311
Sent: 22-Jan-2016 14:32:29
ID: 211761161
Please approve the Payment Request 6158480

Document Number: 6158480

Action Buttons: Approve, Cancel, Return, Reassign, More Information Request

Payment Request 6158480

Requester Name: BlazerD
Phone: (205) 996-2954
Submit Date: 01/22/2016
Payment Type: VENDOR_SERVICES
Grand Total: \$107.80

Call Ext:
Documentation Added: Y
Wire Payment: N

LITHO PLATE & NEGATIVE INC-01 [25400]
Supplier Number: 4966
2429 3RD AVE S
BIRMINGHAM, AL 35233

Line	Invoice	Invoice Date	Invoice Amount
1	123456	01/13/2016	\$107.80

Doc Locator Link (Opens in New Window)

References

- Documentation Form
- Payment Request Form **← Link to Document**

Response

Approver Comment: [Text Area]

Action Buttons: Approve, Cancel, Return, Reassign, More Information Request

Return to Worklist

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- **Reassign** - Approver is reassigning document to another party to act on their behalf
- **Request Information is non-functional.**

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.**

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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:

- **Report Notifications** - though reports are no longer delivered to the personal worklist (they are delivered to the UAB Report Viewer), old reports that were delivered prior to the UAB Report Viewer may still be in your worklist. They will appear in the worklist similar to the illustration below:

Select	From	Type	Subject	Sent
<input type="checkbox"/>		WFUAB Message	Report Sent by UAB Notification Mailer	24-Feb-2016

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: Vaughan, Carrie
Sent: 24-Feb-2016 14:29:27
ID: 211765028

PAYROLL WIRE JE DOCUMENT

Document Number: 14289
Status: READY
Consolidation Set: BIWEEKLY
Date Paid: 29-JAN-2016
Wire Amount: \$861,617.84

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

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.



- **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.

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Secondary Organization Notifications will have a combination of the following action buttons:

- **Return or 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.

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Funding source(s) changes for Document Number 946862, Document Reason TRANSFER LATERAL/DIFFERENT DEPT for Example, Employee

To: ACT5866270
Sent: 28-Mar-2016 11:17:30
Due: 29-Mar-2016 11:17:30
ID: 211773009

Funding source(s) changes for

Document Number: 946862
Document Reason: TRANSFER LATERAL/DIFFERENT DEPT
Employee Name: Example, Employee

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.

Costing Details

Employee Data

Employee Name	Example, Employee
---------------	-------------------

Action Being Taken

Document Number	946862
Document Reason	TRANSFER LATERAL/DIFFERENT DEPT
Effective Date	01-MAR-2016
Requestor Name	HALEY
Requestor Email	workflow@uab.edu
Requestor Phone	(205) 934-3048

Account	Percent	Annual Amount
2100048.000.123100000.311800000.0000.0000000	100	XX,XXX.XX

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	28-MAR-2016 11:17:30	Submit	Clarkson, Florence	ACT5866270	

References

- UAR Act Form (Sec.orgs)

Response

UAB Notes

Return to Worklist

Return to Requestor Reassign More Information Request

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Setting up Personalized Views

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.

Worklist

View: Open Notifications (dropdown arrow) Go Personalize

Select: All Notifications Reassign Close

Select: FYI Notifications

Select: Notifications From Me

Select: Open Notifications (highlighted) Reassign Close

Select: To Do Notifications

UAB Message

In order to make approving documents more efficient, users may also personalize their Worklist to display only certain types of notifications using the **Simply Search** screen.

Worklist

View: Open Notifications (dropdown arrow) Go Personalize

Select: Notifications From Me Reassign Close

Simple Search

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Simple Search

There are three Simple Search filters options available: **Subject, From, and Sent.**

The screenshot shows the 'Simple Search' section of the UAB Workflow application. It includes a 'Save Search' button at the top right. Below it, there are buttons for 'Advanced Search' and 'Worklist Views'. A red arrow points to the 'Advanced Search' button. The search filters are: Subject, From, and Sent. There are 'Go' and 'Clear' buttons. Below the filters is a table with columns: Select Subject, From, Sent, Type, Status, and Due. The table content shows 'No search conducted.' There is another 'Save Search' button at the bottom right of the table area.

***Note:** Please note that searches will only return a maximum of 1500 entries. Any entry that falls before the maximum return will not show up in your search. If you encounter this problem, you will need to refine your search query, adding more details to narrow the number of results.

To create a new personalized view, click on the **Advanced Search** button on the top-right of the **Simple Search** screen.

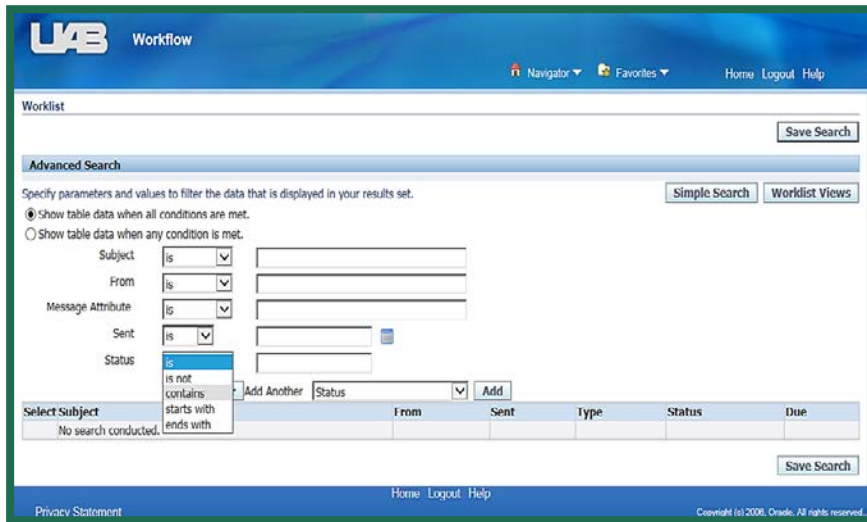
Advance Search

The screenshot shows the 'Advanced Search' section of the UAB Workflow application. It includes a 'Save Search' button at the top right. Below it, there are buttons for 'Simple Search' and 'Worklist Views'. The search filters are: Subject, From, Message Attribute, and Sent. Each filter has a dropdown menu for the operator (e.g., 'is') and a text input field. There are 'Go', 'Clear', 'Add Another', and 'Add' buttons. Below the filters is a table with columns: Select Subject, From, Sent, Type, Status, and Due. The table content shows 'No search conducted.' There is another 'Save Search' button at the bottom right of the table area.

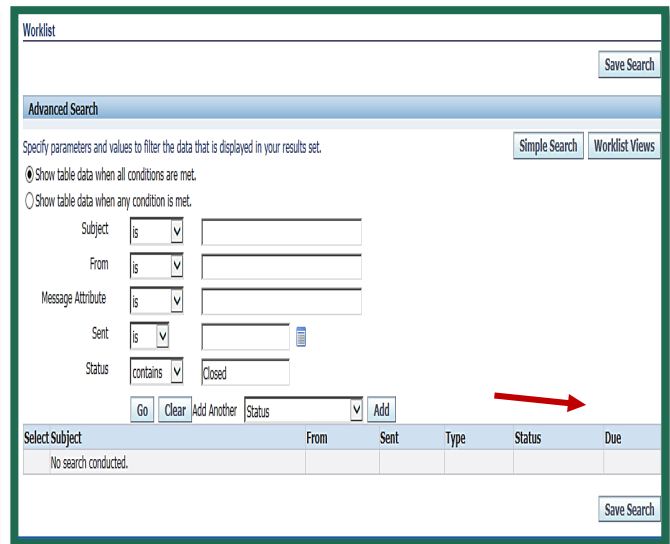
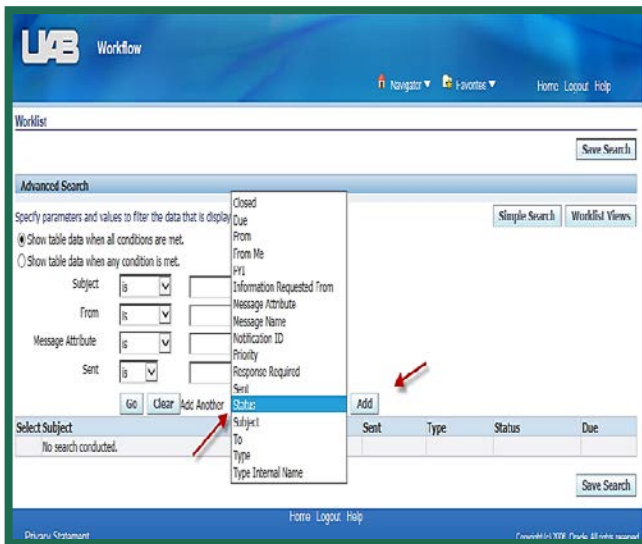
The **Advance Search** screen offers these filter options: **Subject, From, Message Attribute, and Sent.** There is also an **Add Another** column, which offers even more filter options.

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For example, to create a “Closed Items” work view, you will want to search for all notifications with a status of “closed”. You will need to add the status column to your search function. Find “**Status**” in the add column pull-down menu, and then click on the **Add** button.



This will add a status field on the search page. Change the pull-down option next to status to **contains**, and type “**closed**” in the text field.



Click on the **Go** button to perform the search. The page will refresh with the search results displaying at the bottom of the page. Below the results, you will see a **Save Search** button.

The **Save Search** button will allow the user to save the search as a View. The user will be directed to the **Create View** screen. (See below screen shot for recommendations on using the **Create View** screen)

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Create View

UAB Workflow | Home | Logout | Help

Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.
* Indicates required field

General Properties

* View Name: ← The **View Name** field is a required field as denoted by an asterisk. (*) This name should describe the search parameters.

Number of Rows Displayed: ← Changing the number of rows displayed, might make the page hard to read or navigate.

Set as Default

Description: ← If a description is entered, it should be similar to the **View Name**.

Column Properties

Update the appropriate column attributes as desired.

Columns Shown and Column Order

Available Columns: Closed, Date_Attribute1, Date_Attribute2, Date_Attribute3, Date_Attribute4, Date_Attribute5, Form_Attribute1, Form_Attribute2, Form_Attribute3, Form_Attribute4, Form_Attribute5, From Me, Information Requested From, Message Name, Notification ID, Number_Attribute1, Number_Attribute2, Number_Attribute3, Number_Attribute4, Number_Attribute5

Columns Deployed: From, Type, Subject, Sent, Due, Status

← There is no need to change anything in the **Columns Shown and Column Order** area unless additional information needs to display in the Worklist.

TIP: Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

Column Name	Sort Order
First Sort: <input type="text" value="Sent"/>	<input type="text" value="descending"/>
Second Sort: <input type="text" value="Subject"/>	<input type="text" value="ascending"/>
Third Sort: <input type="text" value="From"/>	<input type="text" value="ascending"/>

← It is recommended that **Sort Settings** be changed to **Sent, Type and Subject**. This will keep newest items at the top of the view, as well as, sorting notifications by type (TEL, Requisitions, Payment Request, ACT, etc.)

Search Query to Filter Data in your Table

Specify parameters and values to filter the data that is displayed in your table.

Advanced Search

Show table data when all conditions are met.
 Show table data when any condition is met.

Subject:

From:

Message Attribute:

Sent:

Add Another:

Click **Apply** once completed

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Click on the **Apply** button at the bottom of the page to save the created view.

The **Personalize View** screen will display.

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Personalize Views

At any time users may delete existing views, edit existing views, or create new ones.

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Personalize Views Cancel Apply

Below is a list of all pre-configured and/or personalized views applicable to "Customizable and searchable worklist" table on the previous screen. Pre-configured views are read only. Duplicate a pre-configured view to see its definition or to create a variation of the same.

Select View: Duplicate | Create View

Select View Name	Description	Display View	Default	Update	Delete
<input type="radio"/> Closed Items	Contains only items with a status of closed	Yes			
<input type="radio"/> All Notifications		Yes			
<input type="radio"/> FYI Notifications		Yes			
<input type="radio"/> Notifications From Me		Yes			
<input type="radio"/> Open Notifications		Yes			
<input type="radio"/> To Do Notifications		Yes			

Cancel Apply

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Note: The **Personalize View** screen may also be accessed directly from the main **Worklist**.

Worklist

View Open Notifications Go **Personalize**

The user may also create a new view by duplicating and editing an existing view. To do this, select the radio button next to an existing view and click on the **Duplicate** button.

Personalize Views Cancel Apply

Below is a list of all pre-configured and/or personalized views applicable to "Customizable and searchable worklist" table on the previous screen. Pre-configured views are read only. Duplicate a pre-configured view to see its definition or to create a variation of the same.

Select View: Duplicate | Create View

Select View Name	Description	Display View	Default	Update	Delete
<input type="radio"/> Closed Items	Contains only items with a status of closed	Yes			
<input type="radio"/> All Notifications		Yes			
<input type="radio"/> FYI Notifications		Yes			
<input type="radio"/> Notifications From Me		Yes			
<input checked="" type="radio"/> Open Notifications		Yes			
<input type="radio"/> To Do Notifications		Yes			

Cancel Apply

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The **Duplicate View** screen will display. Follow the steps outlined below.

Duplicate View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.

* Indicates required field

General Properties

* View Name: Duplicate of [Open Notifications] **Change View Name**

Number of Rows Displayed: 25 Rows

Description: **Enter description**

Column Properties

Update the appropriate column attributes as desired. **Rename Columns / Totaling**

Columns Shown and Column Order

Available Columns: Closed, Date_Attribute1, Date_Attribute2, Date_Attribute3, Date_Attribute4, Date_Attribute5, Form_Attribute1, Form_Attribute2, Form_Attribute3, Form_Attribute4, Form_Attribute5, From Me, Information Requested From, Message Name, Notification ID, Number_Attribute1, Number_Attribute2, Number_Attribute3, Number_Attribute4, Number_Attribute5

Columns Displayed: From, Type, Subject, Sent, Due

Sort Settings

Column Name	Sort Order
First Sort: Sent	descending
Second Sort: Subject	ascending
Third Sort: Message Name	descending

Search Query to Filter Data in your Table

Specify parameters and values to filter the data that is displayed in your table.

Advanced Search

Show table data when all conditions are met.
 Show table data when any condition is met.

Status: is OPEN

Add Another: Closed **Add**

Apply

To set a view as a default view, click in the **Set as Default** checkbox; once completed, click on the **Apply** button.

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The newly created view has been added and is set as the Default View by user.

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Personalize Views Cancel Apply

Below is a list of all pre-configured and/or personalized views applicable to "Customizable and searchable worklist" table on the previous screen. Pre-configured views are read only. Duplicate a pre-configured view to see its definition or to create a variation of the same.

Select View: Duplicate | Create View

Select View Name	Description	Display View	Default	Update	Delete
<input type="radio"/> Closed Items	Contains only items with a status of closed	Yes <input type="checkbox"/>			
<input type="radio"/> Carrie's Default View	Default View	Yes <input type="checkbox"/>	Set by User		
<input type="radio"/> All Notifications		Yes			
<input type="radio"/> FYI Notifications		Yes			
<input type="radio"/> Notifications From Me		Yes			
<input type="radio"/> Open Notifications		Yes			
<input type="radio"/> To Do Notifications		Yes			

Cancel Apply

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