

Introduction**Process and Trigger**

Use this procedure to see and perform actions for approval items in HCM, SRM and FI.

Here are some examples of circumstances when the Worklist functionality may be used:

- HCM - leave requests, hiring, and personnel actions, as an area of Manager Self-Service.
- FI - journal entry, shopping carts, PO invoices, Purchase Orders, as Finance submitter or approver.

In some cases, approval of an item will be a shared task with one of your colleagues. This topic will be discussed further on within this guide.

Prerequisites

Items are waiting for approval in the Worklist.

Menu Path

BUworks Central portal → Worklist tab

Tips and Tricks

N/A

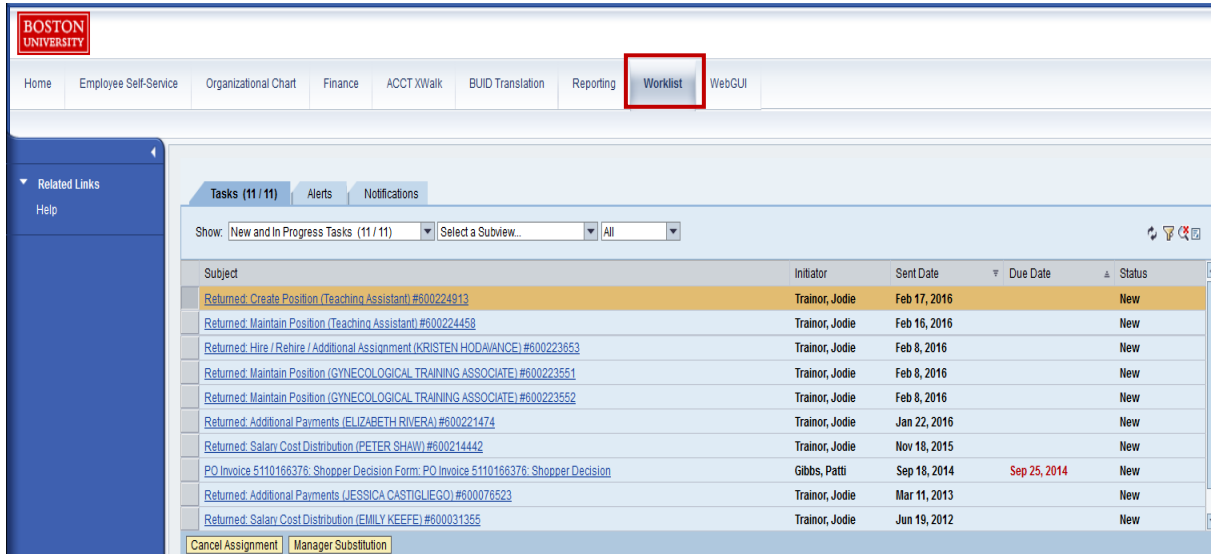
Procedure

Click on the link below to navigate to the desired topic in the Work Instruction.

Topic #	Step Name	Description
1	Changing the Display of the Worklist and Personalization	Options for manipulating the display and personalization of information on the Worklist screen. <ul style="list-style-type: none"> • Refresh screen • Add/Remove columns to personalize • Sort columns • Show Filter to select time period
2	Shared Approval Items	Working with “shared” approval tasks. <ul style="list-style-type: none"> • How to Return a Task to “Shared” Status • How to Forward an Approval Task to Another User • How to Edit and Resubmit a Form “Returned” by a Workflow Approver
3	Substitutions	Ability to setup other users as substitutes that will be able to permanently, or temporarily, approve items and tasks on your behalf. <ul style="list-style-type: none"> • How to Assign a Substitute • “Receive My Tasks” - What the Assigned Substitute Sees • “Fill in For Me” - What the Assigned Substitute Sees • How to Turn Off a Substitute You’ve Assigned

Topic 1: Changing the Display of the Worklist and Personalization

1. Login to BUworks Central Portal and click on Worklist tab.

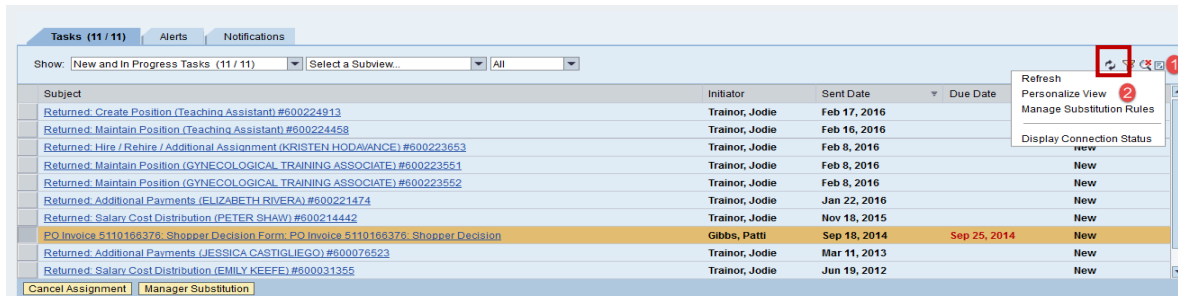


2. From the drop-down menu, select Refresh to get the most up-to-date list of tasks waiting to be approved.

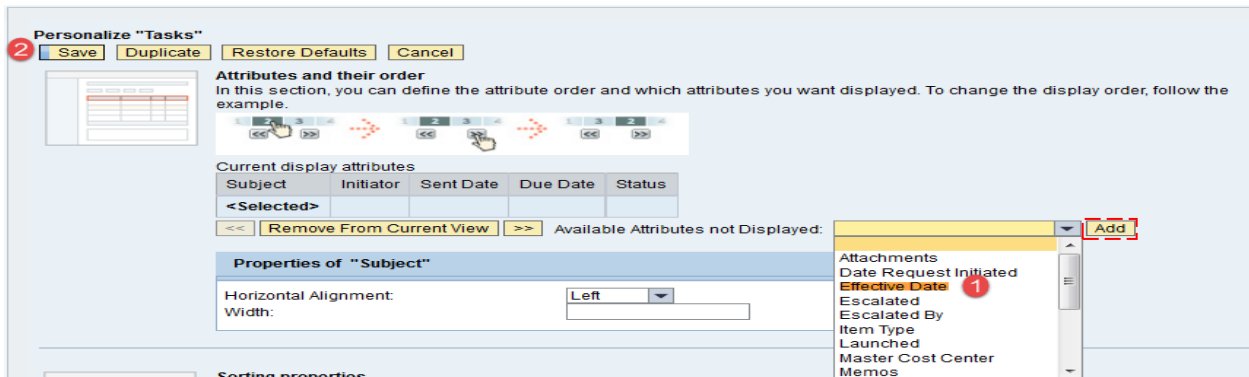
Alternatively, to refresh the worklist, on the right corner, you can click on



3. To personalize your view by adding new columns or deleting existing columns, select the “Personalize View” option from the drop-down menu.



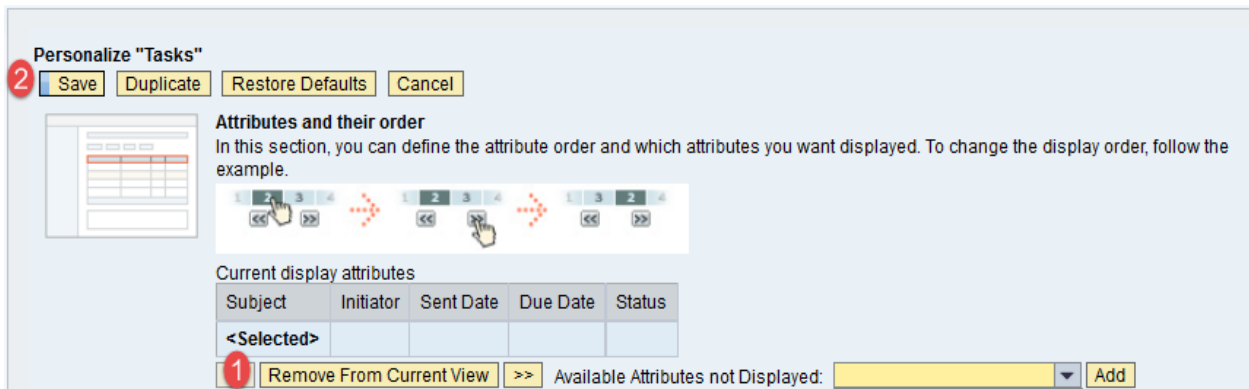
4. You can remove existing columns from the current view or add new columns. You can also adjust the horizontal alignment and the column width of any column. To add the Effective Date column to the worklist display, select the option from the drop-down menu next to the field “Available attributes not displayed”. Click on “Add” and then on “Save”.

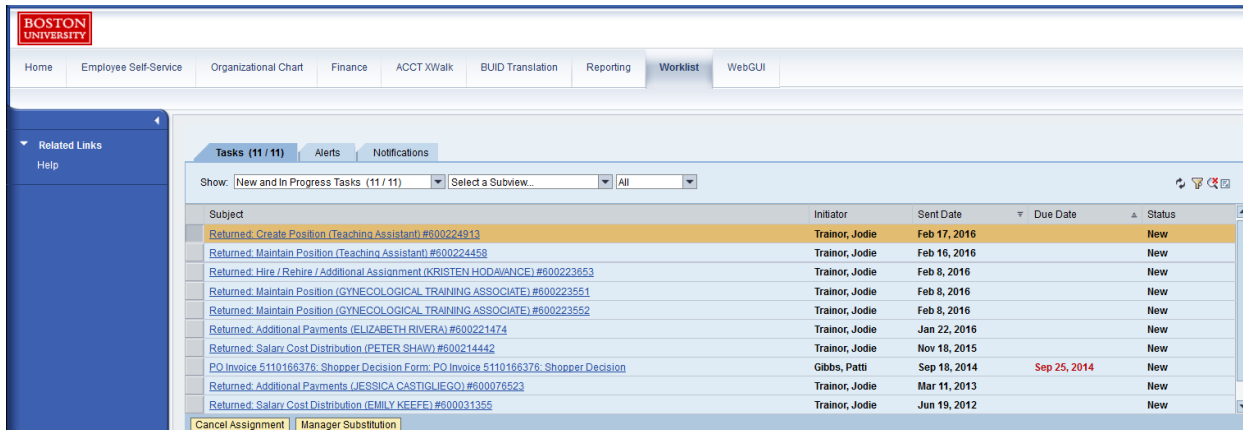


5. You can now see the Effective Date column appear as the first column in the worklist.

Effective Date	Subject	Initiator	Sent Date	Due Date	Status
	Returned: Create Position (Teaching Assistant) #600224913	Trainer, Jodie	Feb 17, 2016		New
	Returned: Maintain Position (Teaching Assistant) #600224458	Trainer, Jodie	Feb 16, 2016		New
	Returned: Hire / Rehire / Additional Assignment (KRISTEN HODAVANCE) #600223653	Trainer, Jodie	Feb 8, 2016		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223551	Trainer, Jodie	Feb 8, 2016		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223552	Trainer, Jodie	Feb 8, 2016		New
	Returned: Additional Payments (ELIZABETH RIVERA) #600221474	Trainer, Jodie	Jan 22, 2016		New

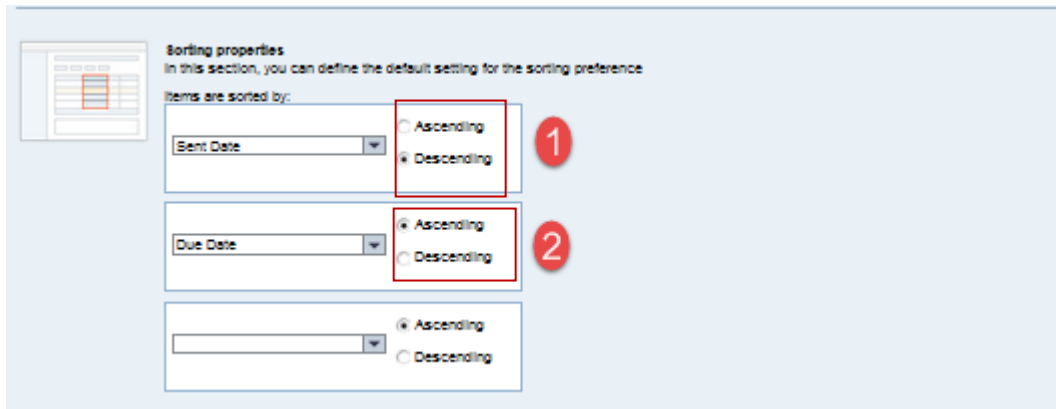
6. To remove a column from the worklist, click on "1" Remove from Current View and choose a column you do not want to see in the display, such as Effective Date. Click on "2" "Save". The column disappears from the worklist display.



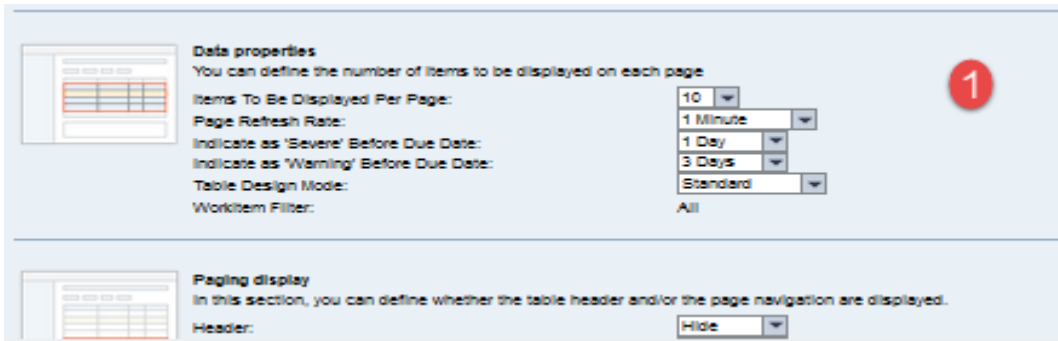


Available Columns for Adding or Removing	Description
Effective Start Date	The effective start date for the transaction.
BUID or Position ID	Employee's BU Identification number or Position Identification.
Primary Org Unit	"Umbrella" Division, School, or Department where the position or employee is located at.
Org Unit title column	Organization Unit for employee (in PA forms) or position (OM forms).
Master Cost Center	The Cost Center for the position/employee.
Date Request Initiated	Date on which the request was initiated.

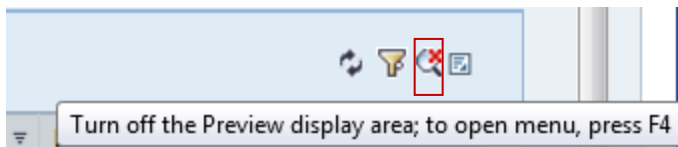
- You can also change the sort properties on each column. Click on the radio button "Ascending" or "Descending" next to each column to specify the sort order.



- 8. You can customize other features, such as specifying how many rows (10 in the example below) you want to see displayed in your worklist in Data properties section of Personalize View.



- 9. To turn off the Preview display area or to include it in the display, the looking glass icon on the right corner works as a toggle.




Effective Date	Subject	Initiator	Sent Date	Due Date	Status
	Returned: Create Position (Teaching Assistant) #600224913	Trainor, Jodie	Feb 17, 2016		New
	Returned: Maintain Position (Teaching Assistant) #600224458	Trainor, Jodie	Feb 16, 2016		New
	Returned: Hire / Rehire / Additional Assignment (KRISTEN HODAVANCE) #600223653	Trainor, Jodie	Feb 8, 2016		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223551	Trainor, Jodie	Feb 8, 2016		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223552	Trainor, Jodie	Feb 8, 2016		New
	Returned: Additional Payments (ELIZABETH RIVERA) #600221474	Trainor, Jodie	Jan 22, 2016		New
	Returned: Salary Cost Distribution (PETER SHAW) #600214442	Trainor, Jodie	Nov 18, 2015		New
	PO Invoice 5110166376: Shopper Decision Form: PO Invoice 5110166376: Shopper Decision	Gibbs, Patti	Sep 18, 2014	Sep 25, 2014	New
	Returned: Additional Payments (JESSICA CASTIGLIEGO) #600076523	Trainor, Jodie	Mar 11, 2013		New
	Returned: Salary Cost Distribution (EMILY KEEFFE) #600031355	Trainor, Jodie	Jun 19, 2012		New
	Returned: Termination (MARISA MAGLATY) #600001474	Trainor, Jodie	Jul 21, 2011		New

10. Click on Show Filter and select any column. A row appears below the columns. In the example below, from the drop-down of Sent Date column, the option “Last 7 days” is chosen to look at requests sent in the last 7 days. You can also choose from an option (New/In Progress/Completed) in the Status column.

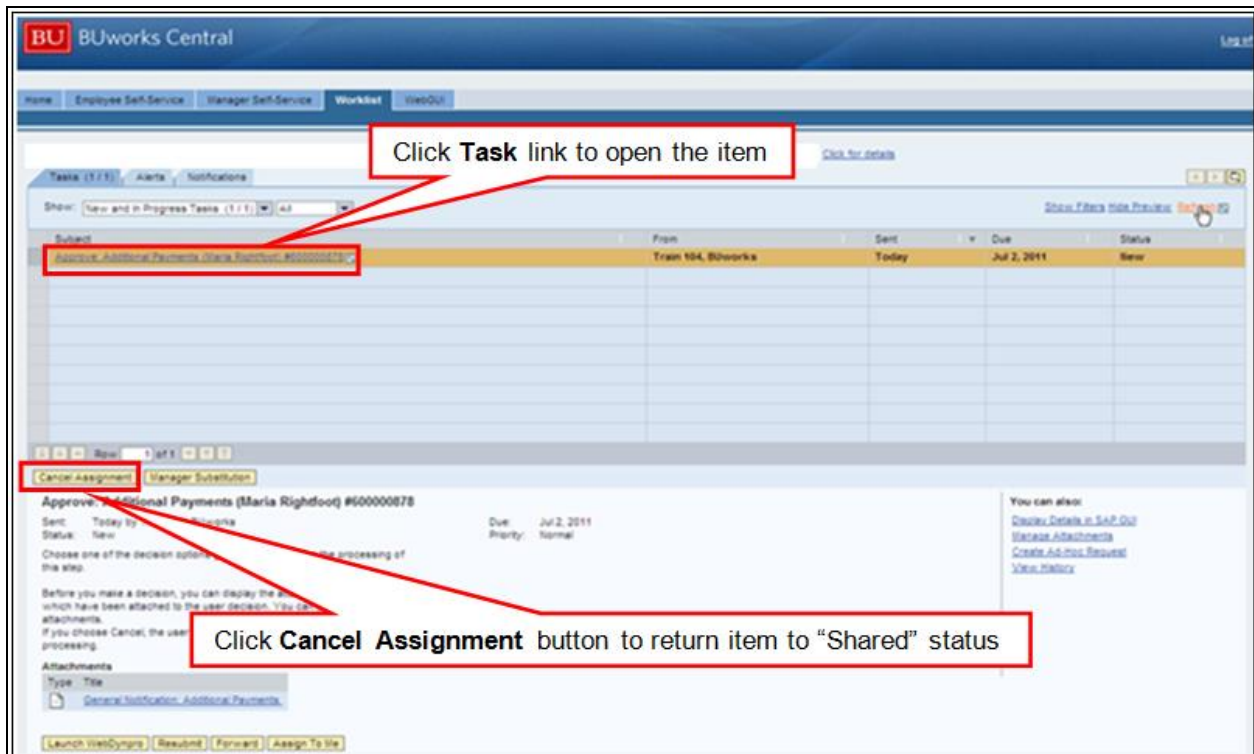
Effective Date	Subject	Initiator	Sent Date	Due Date	Status
	Returned: Create Position (Teaching Assistant) #600224913	Trainor, Jodie	Today		New
	Returned: Maintain Position (Teaching Assistant) #600224458	Trainor, Jodie	Yesterday		New
	Returned: Hire / Rehire / Additional Assignment (KRISTEN HODAVANCE) #600223653	Trainor, Jodie	Last 7 Days		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223551	Trainor, Jodie	Last 30 Days		New
	Returned: Maintain Position (GYNECOLOGICAL TRAINING ASSOCIATE) #600223552	Trainor, Jodie	Last 90 Days		New
	Returned: Additional Payments (ELIZABETH RIVERA) #600221474	Trainor, Jodie	Feb 8, 2016		New
	Returned: Additional Payments (ELIZABETH RIVERA) #600221474	Trainor, Jodie	Jan 22, 2016		New
	Returned: Salary Cost Distribution (PETER SHAW) #600214442	Trainor, Jodie	Nov 18, 2015		New
	PO Invoice 5110166376: Shopper Decision Form: PO Invoice 5110166376: Shopper Decision	Gibbs, Patti	Sep 18, 2014	Sep 25, 2014	New
	Returned: Additional Payments (JESSICA CASTIGLIEGO) #600076523	Trainor, Jodie	Mar 11, 2013		New
	Returned: Salary Cost Distribution (EMILY KEEFFE) #600031355	Trainor, Jodie	Jun 19, 2012		New
	Returned: Termination (MARISA MAGLATY) #600001474	Trainor, Jodie	Jul 21, 2011		New

You have successfully changed the display of the worklist to suit your working style.


Topic 2: Shared Approval Items

Action	Description
How to Return a Task to “Shared” Status	<p>Once you click on a task and open it, that task disappears from the Worklist of the other users. If you would like to return this item to reappear back on the Worklists of your colleagues, you need to cancel the assignment of the task:</p> <ul style="list-style-type: none"> • Select item by clicking on the Task link • Click on the Cancel Assignment button
How to Forward an Approval Task to Another User	<p>Should you wish to forward an approval task to any other user in the SAP:</p> <ul style="list-style-type: none"> • Click on the small, white Icon  appearing to the right of the task link • From the dropdown menu that appears, select Forward <p>You can also click on the Forward button in the bottom of the screen within the Preview section.</p>
How to Edit and Resubmit a Form “Returned” by a Workflow Approver	<p>When a form has been returned to you from an approver in the workflow, the Status of the form’s approval appear as “Returned” on your Request Tracker. When you see this, you should not forward it to anyone. It means it was returned to you to make corrections and resubmit it, or cancel it.</p>

How to Return a Task to “Shared” Status



How to Forward an Approval Task to Another User

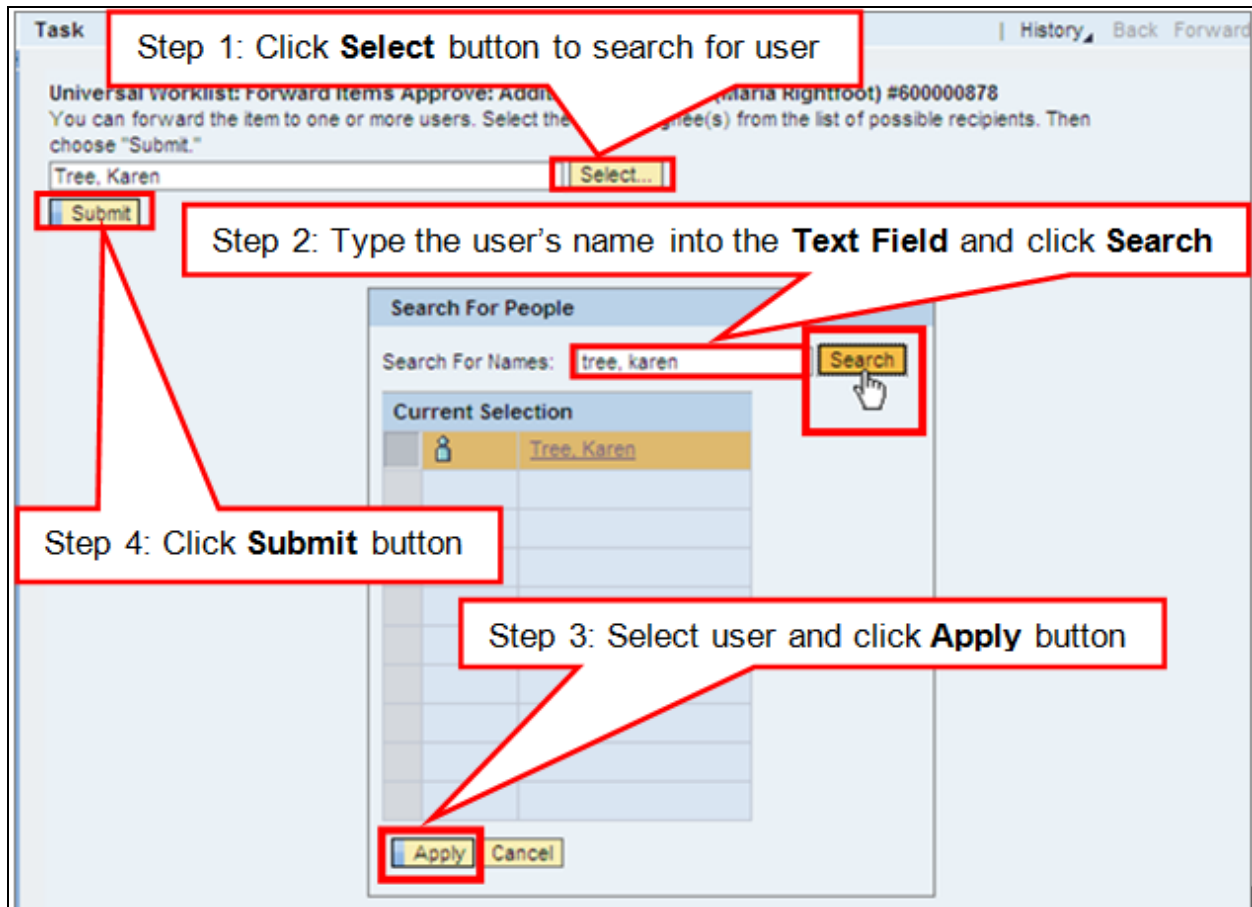
The screenshot shows the BUworks Central interface. At the top, there is a navigation bar with tabs for Home, Employee Self-Service, Manager Self-Service, Worklist, and WebGUI. Below this, there are sections for Tasks (1/1), Alerts, and Notifications. A 'Show:' dropdown menu is set to 'New and In Progress Tasks (1/1)' and another dropdown is set to 'All'. A table with a 'Subject' column is visible, containing one entry: 'Approve: Additional Payments (Maria Rightfoot) \$600'. A red callout box points to a small icon on the right side of this row, with the text: 'Click on  Icon from drop down menu to select **Forward** option'. A dropdown menu is open over this icon, showing two options: 'Forward' and 'Resubmit'.

The user selection screen will appear and you will have two options for selecting a user.

If you know the user name or ID, proceed with Option 1:



If you need to search for a user, proceed with Option 2:



Action	Description
Search for a user	Click the Select button to search for a user. Type the user's name into the Text Field and click Search .
Apply a user	Once you find the user you're looking for, click on the user and then click on the Apply button. This populates their name within the previous screen.
Submit a user	Click the Submit button. The approval task automatically appears as that user's Worklist - and disappears from yours.

How to Edit and Resubmit a Form "Returned" by a Workflow Approver

On Request Tracker screen:

The screenshot shows the Request Tracking interface. At the top, there are search filters for Tracking #, From, To, and Request Type. Below this is a table with the following columns: Tracking Number, Initiator, Request Type, Affected Person/Object, Request Date, Status, and Current A. The first row of data is highlighted in red, showing a tracking number of 600017970, initiated by James Dukes, for a New Hire - Staff Temporary request for CHANDRA FLYNN, dated 02/29/2012, with a status of 'Returned'.

Tracking Number	Initiator	Request Type	Affected Person/Object	Request Date	Status	Current A
600017970	James Dukes	New Hire - Staff Temporary	CHANDRA FLYNN	02/29/2012	Returned	James Du

The screenshot shows the BUworks Worklist interface. At the top, there are navigation tabs: Home, Employee Self-Service, Manager Self-Service, **Worklist**, and WebOut. Below the tabs, there are sections for Tasks (1), Alerts, and Notifications. A search bar shows 'Show: New and In Progress Tasks (1) All'. A table lists tasks, with one highlighted: 'Returned: Hire / Rehire / Additional Assignment (CHANDRA FLYNN) #600017970' by 'Lab 101, BUworks' on 'Feb 29, 2012' with status 'In Progress'. A callout box points to the 'Worklist' tab with the text 'Click the **Worklist** tab'. Another callout box points to the task link with the text 'Click the **Task** link for the returned item'. Below the table, there are buttons for 'Cancel Assignment' and 'Manager Substitution'. The task details section shows 'Returned: Hire / Rehire / Additional Assignment (CHANDRA FLYNN) #600017970' with 'Sent: Feb 29, 2012 by Lab 101, BUworks' and 'Status: In Progress'. A large red 'X' is overlaid on the 'Attachments' section. A warning message states: 'Do Not Use this section for HCM tasks and forms! To view/re-submit a HCM task or form in your worklist click on the task as shown above and follow the steps.' On the right, there are links: 'You can also: Display Details in SAP GUI, Manage Attachments, Create Ad-Hoc Request, View History'.

For Org Management “Position” forms and Personnel Administration “Hiring” forms:

The screenshot shows the 'Department Input' RoadMap. It consists of a horizontal sequence of eight numbered steps: 1. Action Type, 2. Position Details, 3. Cost Distribution, 4. Descriptions, 5. Essential Functions, 6. Requirements, 7. Additional Data, and 8. Overview. A callout box at the top says 'Click numbers of the **RoadMap** to view or edit information. Finish on **Overview** page'. The number '8' and the 'Overview' step are highlighted with a red box.

New Hire - Staff Temporary

Overview

Name: CHANDRA FLYNN N/A

Date of Hire: 02/29/2012
Hire Reason: New Position

Position Information | Personal Data | Home Address | Office Address | Work Schedule | Basic Pay | Cost Distribution | Recurring Payments

Position Information

Position Text:	Administrator Coordinator, Casual	Position ID:	50026021
Org. Unit:	CARS	Job:	Casual
Personnel Area:	Charles River Campus	Employee Group:	Staff-NonExempt FT
Personnel Subarea:	NREP-Staff	Employee Subgroup:	Casual

Comments

Previous Comments

New Comments

Submit Again | Reject | Save For Later | Edit

Scroll to the bottom of the **Overview** page. Click the **Submit Again** button

For Personnel Action forms:

Attachments

File Name	File Type

Select File: Browse...

Attach File | Delete File | Clear/Reset

Comments

Previous Comments

BUWLB101 (Submitter)03/14/2012 14:35:05
[-Form Submitted-]

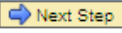
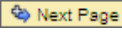
BUWLB104 (Approver)03/14/2012 14:36:57

New Comments

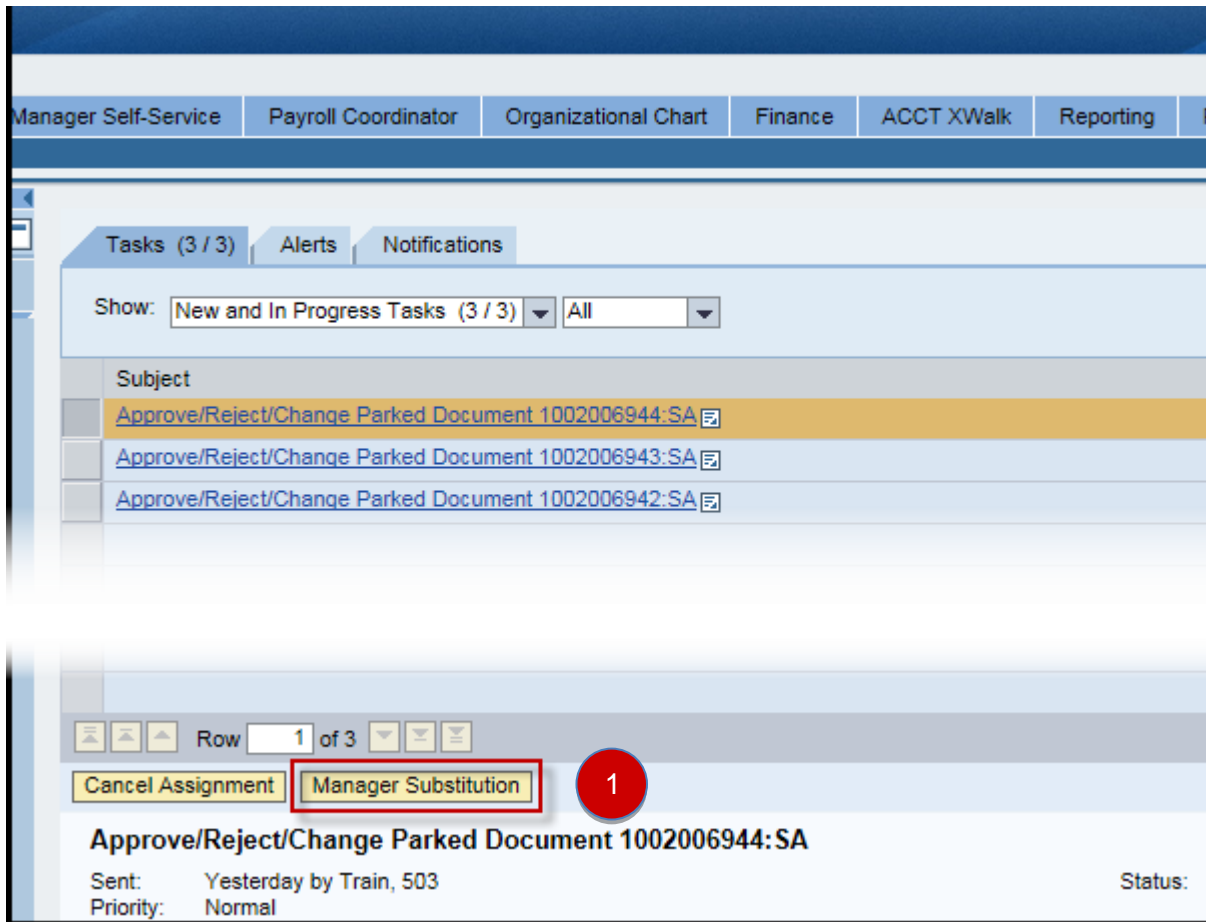
After editing, scroll to the bottom of the form. Click the **Review** button

A completed Salary Request Form must be attached when retroactive changes to sponsored programs are submitted.

Review | Exit | Cancel


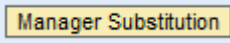

Action	Description
How to access and view a form "Returned" by a Workflow Approver	Click your Worklist tab then click on the Task link for the returned item. This opens the form. For HCM tasks or forms, DO NOT use the "Preview Pane" on the bottom of the screen to view, make changes to, or resubmit the form.
How to resubmit Org Management "Position" forms and Personnel Administration "Hiring" forms	<p>To resubmit the multiple-page Org Management "Position" forms (<i>Create Position, Maintain Position</i>) and Personnel Administration "Hire" forms (<i>Hire-Staff, Hire-Faculty, Hire-CRC Lecturer</i>):</p> <ul style="list-style-type: none"> • Select the numbered pages of the RoadMap to view or edit information on that particular page. • You can also click  Next Step button or  Next Page button to access other pages. <p>Once you have completed edits to the form, Overview is the last page:</p> <ul style="list-style-type: none"> • Scroll to the bottom of the Overview page. • Click Submit Again button. This MUST be done from the Overview page. The OM position or PA Hire form is re-submitted for approval in Workflow!
How to resubmit Personnel Actions forms	<p>After making any needed edits to the form returned to you, scroll to the bottom of the Personnel Action form.</p> <p>To resubmit all one-page Personnel Action forms: <i>Additional Payment, Leave of Absence/Return from LOA, Position Change, Position Revision, Recurring Payments, Salary Change, Salary Cost Distribution, Termination, and Transfer</i>:</p> <ul style="list-style-type: none"> • Click Review button. • Click ReSubmit button. The Personnel Action form is re-submitted for approval in Workflow!

Topic 3: Substitutions



Worklist Substitution

1 Click on **Manager Substitution** button.

 **Manager Substitution** can be access through the **Worklist** task via  button and is also available in the sub-tab area via  Icon (**Manager Substitution Rules**) located below the **Task**, **Alert**, and **Notification** tabs.

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off

2

2 Click on **Create Rule** button.

3 The **Create a Substitution Rule** screen will display

There are two options for selecting and entering a user email.

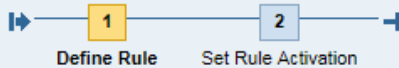
- **3a** - Option 1, Use this if the user name or ID is known.
- **3b** - Option 2, Use this if a search is required to select the user.

Task

History Back

3 Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)



Nominee: **3a**

Select...

3b

Check names and find people

Assign These Tasks: All

The nominee is the substitute for all tasks

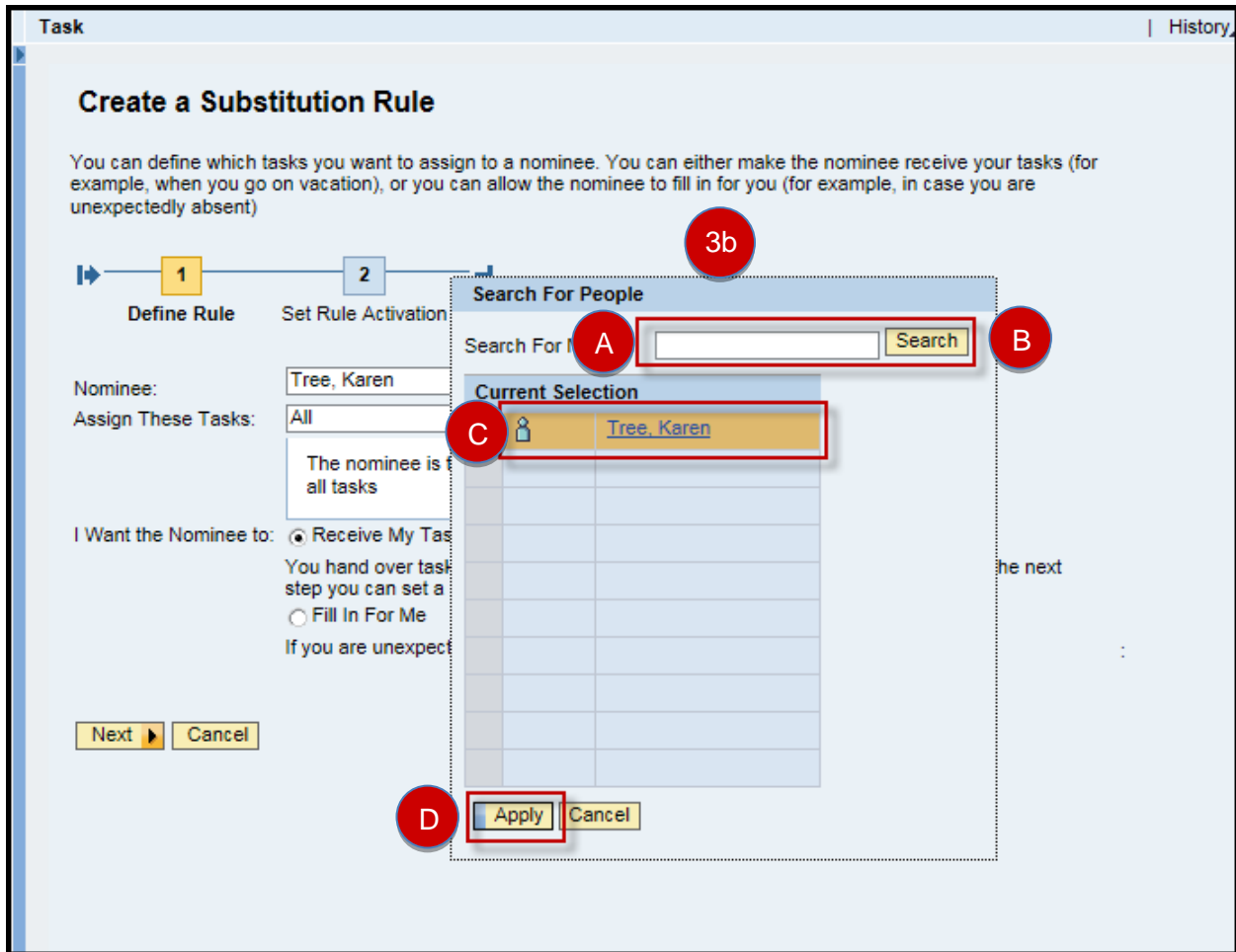
I Want the Nominee to: Receive My Tasks

You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

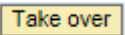

Fill In For Me

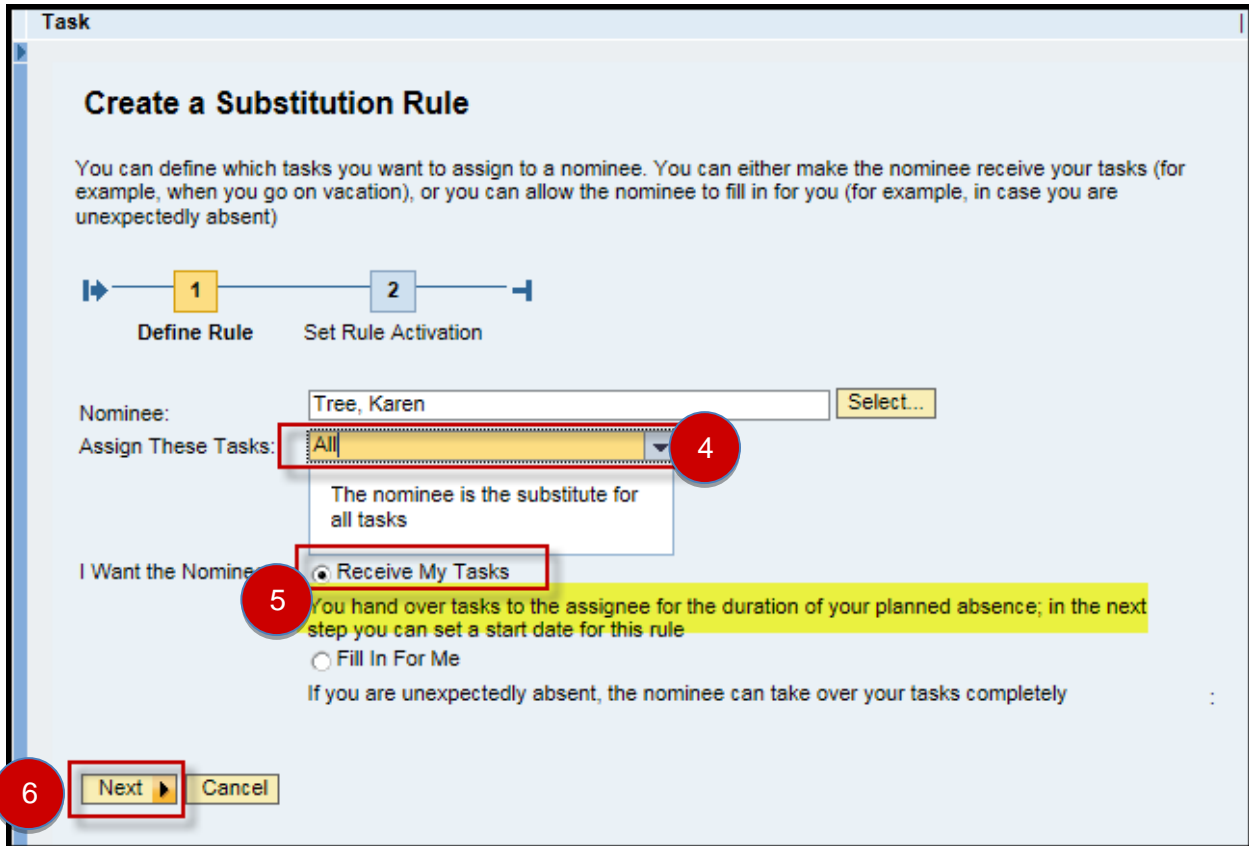
If you are unexpectedly absent, the nominee can take over your tasks completely

Next Cancel



3b	Option 2 - Use this if you a search is required to select a user. New window will appear, Search For People .
3b - A	Type user name into the Text Field labeled Search for Name .
3b - B	Click Search button.
3b - C	Next Click on the user name
3b - D	Then Click Apply button.

Action	Description
How to Assign a Substitute	<p>There are two types of substitutes you can setup:</p> <ul style="list-style-type: none"> • “Receive My Tasks”, an active substitute where you designate someone as your substitute at all times • “Fill in For Me”, a designated substitute for a limited time period, which you have control over in terms of turning on or off <p>For every substitution you need to create a substitution rule.</p>
“Receive My Tasks” – What the Assigned Substitute Sees	<p>This is an option where you designate someone as your substitute at all times.</p> <p>The “Receive my tasks” option allows the assignee to immediately start seeing designated tasks.</p> <ul style="list-style-type: none"> ✓ This process is called Active Substitution. ✓ Assignee also has the <u>option to not take over tasks</u>. ✓ The Receive My Tasks button is the default setting on the Create a Substitution Rule screen.
“Fill in For Me” - What the Assigned Substitute Sees	<p>This is an option in which you designate a substitute for a limited time period, and for which you have control over in terms of turning on or off.</p> <ul style="list-style-type: none"> ✓ This process is called “Passive Substitution”. <p>The “Fill in for me” option requires an additional step to be perform in Worklist tab to start receiving and seeing tasks.</p> <ul style="list-style-type: none"> ✓ The assignee will need to select “Take over”  button. ✓ This option does not allow assignee the choice to deny tasks take over. <p> An example of this would be for emergency (unplanned time off) situations were the assignee can take over tasks.</p> <p>In these types of circumstances if a rule has already been created for a particular user (assignee) and they have already selected the option to “Take over”, the assignee can go in and take over your tasks without creation of a new rule.</p>
How to Turn Off a Substitute You've Assigned	<p>You can turn off a Substitution Rule at any time by clicking the “Turn Off” button.</p>



Assigning a Substitute:

4 Select **All** to assign all tasks to the assignee.

To set-up a “Receive My Tasks” substitute:

5 Select the radio button for **Receive My Task** to assignee the **Nominee** tasks

6 Click the **Next** button to proceed

Task

Create a Substitution Rule

You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)

1
 Define Rule

2
 Set Rule Activation

Nominee:

Assign These Tasks:

The nominee is the substitute for all tasks

I Want the Nominee to: Receive My Tasks

You hand over tasks to the assignee for the duration of your planned absence; in the next step you can set a start date for this rule

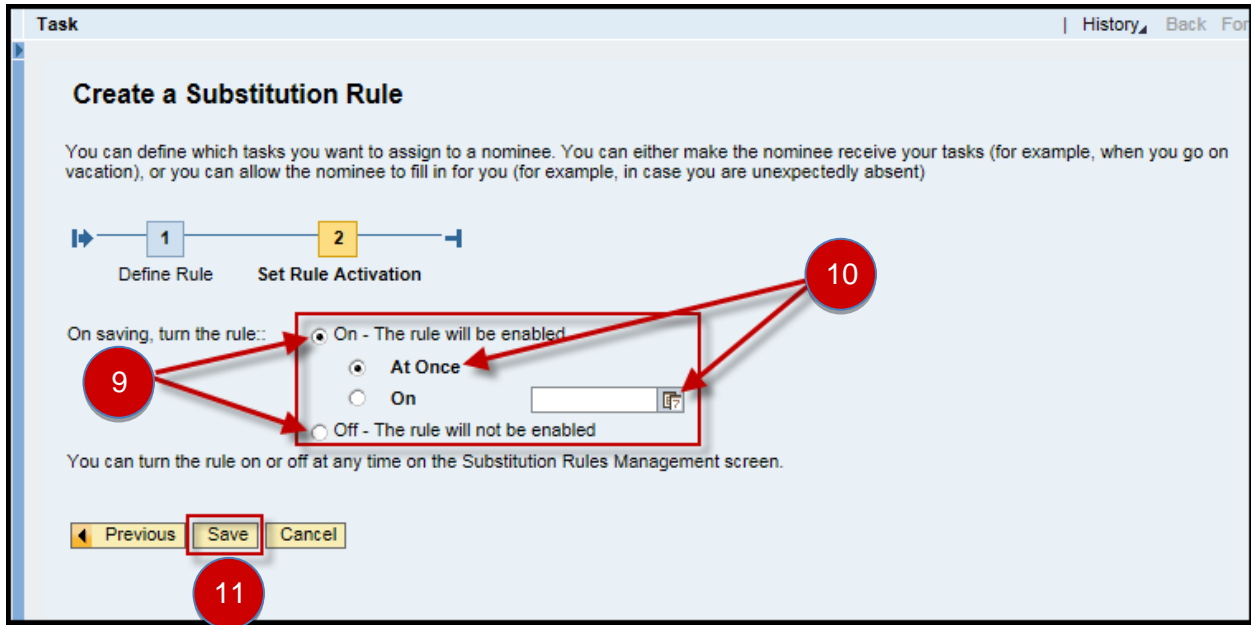
Fill In For Me:

if you are unexpectedly absent, the nominee can take over your tasks completely

Next
Cancel

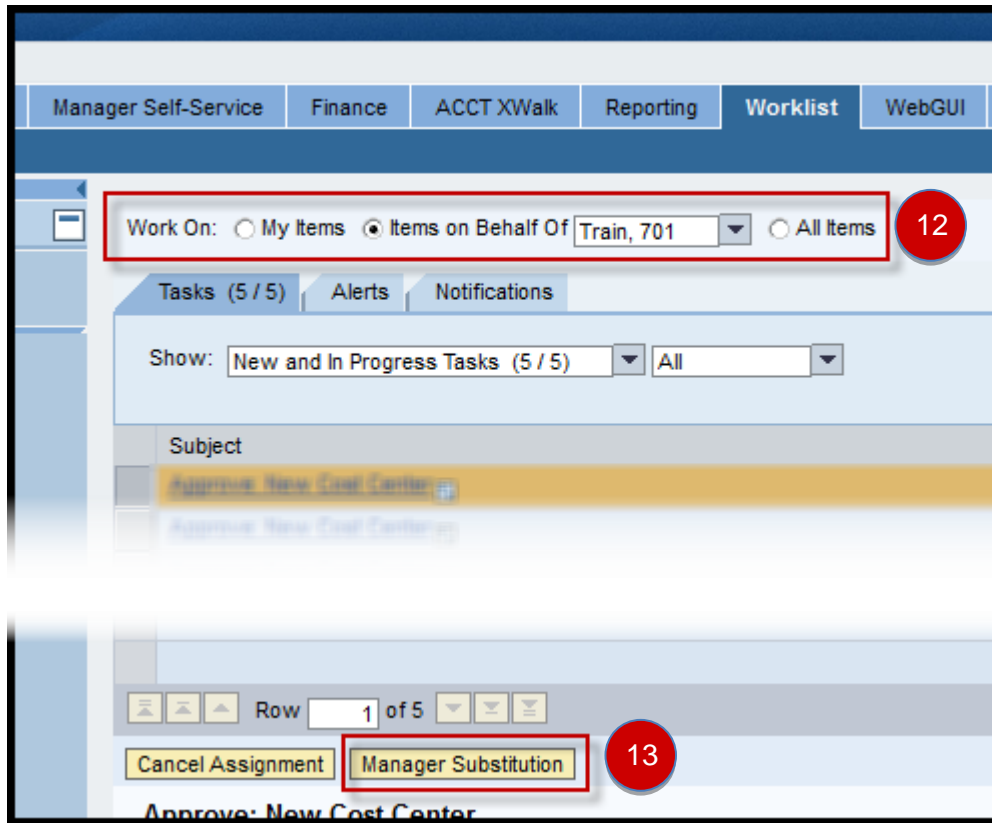
To set-up a "Fill In For Me" substitution:

7	Select the radio button for Fill In for Me to assignee the Nominee tasks
8	Click the Next button to proceed to set rules



For each substitution, there are three options to create rules in the **Set Rule Activation** screen:

9	<p>Select whether to turn the rule On or Off.</p> <p>Off = Leave substitution off for time being.</p>
10	<p>Select when to enable the substitution rule At Once or On a specific date (enter date or select the date from calendar).</p> <p>At Once = Turn substitution on immediately.</p> <p>On plus specific date = Turn substitution on a specified date.</p>
11	<p>Click the Save button once a selection is made.</p>



“Receive My Tasks” – What the Assigned Substitute Sees

<p>12</p>	<p>The designated substitute has three viewing options available to select from the Worklist screen:</p> <ul style="list-style-type: none"> • My Items – allows the designee tasks to display • Items on Behalf of – allows designee to display substitute requesters tasks • All Items – displays both the designee and substitute requesters tasks
<p>13</p>	<p>Click on Manager Substitution button for an additional view option</p>

To view “Other Users’ Substitution Rules, go to the Manager Substitution Rules screen:

14

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can create rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status
Train, 512	All	Receive	Ongoing

Row 1 of 1

To view “Other Users’ Substitution Rules, go to the Manager Substitution Rules screen:

14 Results from step 13 above displays substitute requester’s rule to designated substitute for review.



Note: Other Users’ Substitution Rules section cannot be altered.

Task | History | Back

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
Row 0 of 0					

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Train, 701	All	Fill In	Ongoing	Take over
Row 1 of 1				

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“Fill in For Me” - What the Assigned Substitute Sees:

When a designated substitute logs in, there will be a new substitution rule setup

15 To activate substitution, Click **Take over** button

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off
Row 0 of 0					

Other Users' Substitution Rules

Task Owner	Tasks	What To Do	Status	Take Over
Train, 701	All	Fill In	Ongoing	End take-over
Row 1 of 1				

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After substitution is activated, there will be the option to cancel the assignment:

16 To cancel assignment. Click **End take-over** button

Manage Substitution Rules

You can view and manage your task substitution rules. You can make an assignee receive your tasks, or you can set an assignee to fill in for you (for example, in case you are unexpectedly absent). You can create several substitution rules to cover all cases. You can also see other users' substitution rules involving you, and you can take over another user's tasks (if this user has allowed you to 'fill in').

My Substitution Rules

Create Rule ... Delete Refresh

Task	Nominee	What To Do	Status	Rule Activation	Turn On/Off
All	Guillermo, Isabel	Receives my tasks	Ongoing	Successful	Turn Off

Row 1 of 1

How to Turn Off a Substitute You've Assigned

17 Select and Click on Substitution Rule to turn off. Click on **Turn Off** button.

Results and Next Steps

This procedure is used to see and perform actions for approval items on the Worklist tab. In some cases, approval of an item is a shared task with one of your colleagues, which may requires additional steps to set-up, change, or turn on/off.