Using the Worklist—Quick Reference Guide

The worklist serves as the central entry point for the processing of Human Capital Management (HCM), Finance (FI) and Shopping cart (SRM) related tasks that need your approval. An example of a Time Management actions would be a leave of absence request, and an example of Personnel Action (PA) would be approving an additional payment or accepting a transfer.

An example of a Finance Worklist task is a journal entry approval notification (Journal Entry Workflow). Another example of a Finance task is a purchase order invoice approval notification (PO Invoice Workflow).

In some cases, you may be sharing a task with other approvers. The task will show in the worklist of all the approvers sharing the task. Once you click on a task and open it, that task will disappear from the worklist of all the users until you approve/reject it or return it to the shared status.

Click here for instructions related to how a manager can set up another user as a substitute approver in the system.

Click here for instructions on how to personalize your worklist.

1. Log on to BUworks Central [https://ppo.buw.bu.edu]
2. Click on the Worklist tab
3. If you have tasks waiting for approval, they will be displayed in the tasks tab on the worklist
   Click on a displayed task link to open and review it
4. To approve the task

   a) Enter a meaningful comment with your initials in the Comments area.
   b) Click on Continue/Review/Validate Form Data
   c) Click on Submit for Approval to send the form over to the next department for approval.

To reject an OM form, click on Reject.

With Personnel Action (PA) forms such as Additional Payment, Leave of Absence/Return from LOA, Position Change, Position Revision, Recurring Payments, Salary Change, Salary Cost Distribution, Termination or Transfer, if you notice things that need to be corrected, you can return the form to the sender with comments by clicking on Return to Sender

5. If you have a returned Personnel Action (PA) form in your worklist:
   a) Click on the task link to open the form
   b) Click on the Review button
   c) Make the needed edits to the form returned to you and scroll to the bottom of the form
   d) Click on the Resubmit button
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**Worklist Task Options**

1. Highlight and select a task, right click to see available task options.

   The task options displayed may vary. In this example, the available task options are related to a Purchase Order approval.

   Common task options are:
   - Forward
   - Resubmit
   - Cancel Assignment
   - Assign to Me
   - Display Details in SAP GUI
   - Manage Attachments
   - Create Ad-Hoc Request
   - View History

2. The Forward option is used to send the task to another user.

   To forward a task to another user with the appropriate approval role, use the Forward function.
   - Highlight and select the task, then right click and double click on Forward task option.
   - **Step 6** and **Step 7**, above provides details on how to complete this task.

   The “Forward” task option is often used with PO Invoice Workflow approval notification. The notification sent to the Shopper who placed the shopping cart.
Often the shopper doesn’t have the appropriate roles to approve over $5,000 purchase order invoice and will need to “Forward” the task to the **Finance** approver in their department.

To view a quick reference guide on the PO Invoice Workflow process click [here](#).

### 3. Cancel Assignment task option

- Cancel Assignment task option is used to cancel the assignment of the task to yourself. It is used to return a task to “Shared” status.

To do this:
- Select item by clicking on the Task link.
- Click on the Cancel Assignment button.

If you select or open a task by mistake, you can use the Cancel Assignment button to return the task to workflow. This option allows another approver to select the task to review and approve.

An example of a **Finance** Worklist task where this option is used is the journal entry approval workflow notification.
4. The Assign to Me task option is used to when you want to assign the task to yourself.

To do this highlight and select task, right click and select by double clicking on “Assign To Me.”

Finance approver user uses this option to ensure they will be the only person to review and approve that task.

The system will omit “Logically Delete” the task from the other finance approver’s worklist task area.

To view the presentation on JE Workflow Worklist click here.

5. Display Details in SAP GUI options open a WebGUI ECC system window displaying details on the workflow notification and process.

To view the workflow details, highlight and select the journal entry task notification, then right click and select Display Details in SAP GUI task option.

You can drill down to view the Workflow Overview “Log” from here. Click on “Log” and a new WebGUI ECC window will display the Workflow Log.
6. The Manage Attachments option provides access you with a quick way to any attached PDF, Word or Excel documents. To view documents attachments to an entry, highlight and select the journal entry task notification, then right click and select Manage Attachment task option. Journal entries will typically have a document attachment to the entry.

7. Create Ad-Hoc Request option is used to create an additional workflow notification/task to forward to another BUworks user. To start the Ad Hoc-Request highlight, select the task and right click to access options. Click on “Ad Hoc-Request,” and a new window will display. Insert task directly into the table and press “Enter” key after each entry. The two Ad Hoc-Request Type:
   - An “Action Item” for example can be used to alert another user to complete a task outside of the system.
- An “Approval” type is used to add another user to approve the SAP document entry.
# Manager Substitution

1. To assign another employee in your department to act as a substitute, click on **Manager Substitution**

2. Click on **Create Rule**. The **Create, a Substitution Rule section**, will be displayed

3. Enter Username or ID for nominee. If you need to search for a user, click on **Select**
4. Type username into the **Text Field** labeled **Search for Name**.

5. Click on Search

6. Click on User’s Name

7. Click on Apply

There are two types of substitutes you can setup:

8. For your nominee to serve as your substitute **at all times**, click on “**Receive My Tasks.**”

9. For your nominee to serve as your substitute **for a limited time**, click on the “**Fill in For Me**” option. This option requires an additional step to be performed by the nominee in **Worklist tab** to start receiving and seeing tasks (See Step 13).

10. Click on **Next** after choosing the suitable option
11. Select the radio button to specify if the rule is enabled
   - At Once or
   - On a specific date

12. Click on Save to save the rule

13. The assigned nominee will need to go into Manager Substitution from worklist tab and click on Take Over button.
14. The nominee will need to select the radio button “**Items on Behalf of**” to see the tasks on behalf of the assigner.

<table>
<thead>
<tr>
<th><img src="image1.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Self-Service</td>
</tr>
</tbody>
</table>

```
Work On:  ○ My Items ○ Items on Behalf Of ○ All Items
```

15. After activation of substitution, a manager has the option of completely deleting a substitution rule.

To delete a substitution rule:
- a) Click on **Manager Substitution**
- b) Select an existing substitution rule by clicking on it
- c) Click on **Delete**

<table>
<thead>
<tr>
<th><img src="image2.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
</tr>
<tr>
<td>Manage Substitution Rules</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th><img src="image3.png" alt="Image" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Substitution Rules</td>
</tr>
</tbody>
</table>

```
My Substitution Rules
```

16. A manager can also cancel the substitution by going into Manager Substitution and clicking on **Turn Off**

The substitution rule can be turned on at a later point in time if needed.
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The worklist, available via the BUworks portal is used to view and approve HCM actions related to Time Management on OM & PA actions.

An example of a Time Management actions would be a leave of absence request, and an example of personnel action (PA) would be accepting a transfer.

The worklist is also used for approving SRM related tasks such as shopping carts and purchase orders and Finance related tasks such as journal entries and purchase order invoices as well as other central duties such as master data creation.

Personalize a Worklist

You can personalize your worklist to add or remove columns, to change the order of the columns that are displayed, to change sorting order as well as how many rows you want to see displayed on a page.

<table>
<thead>
<tr>
<th>Personalize a Worklist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Log on to BUworks Central <a href="https://ppo.buw.bu.edu">https://ppo.buw.bu.edu</a></td>
</tr>
<tr>
<td><strong>2.</strong> Click on the Worklist tab</td>
</tr>
<tr>
<td><strong>3.</strong> All the new and in-progress tasks are displayed. The icons located to the extreme right serve the functions of:</td>
</tr>
<tr>
<td>- Filtering tasks (funnel),</td>
</tr>
<tr>
<td>- Refreshing the screen (two arrows),</td>
</tr>
<tr>
<td>- Toggle preview display (looking glass)</td>
</tr>
<tr>
<td>- Personalizing the view and substituting managers (notepad).</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>---</td>
</tr>
<tr>
<td><strong>Using the Worklist—Quick Reference Guide</strong></td>
</tr>
</tbody>
</table>
|  | **4.** Click on the **Filter** icon (funnel) to select worklist items that have a specific value.  
Click on **Show Filter** and select any column (example: **Status**)  
Click on the arrow that appears below the column to select a suitable option. |
| ![Filter Icon](image1.png) |   |
|   | **5.** To turn off the Preview display OR to include it in the display, click on the looking glass icon on the right corner.  
It works as a toggle. |
| ![Preview Icon](image2.png) |   |
|   | **6.** Personalizing your worklist view allows you to add, remove, and re-order columns displayed, as well as, change the default sort, and customize select features.  
To personalize your worklist view, click on the **notepad** icon and select “Personalize View” from the list of available options. |
| ![Personalization Icon](image3.png) |   |
### Most Frequently Used Columns

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>The subject displays the type of request with the person’s name or position title and #tracker id. (Example: Maintain Position (Administrator) #600001953)</td>
</tr>
<tr>
<td>Initiator</td>
<td>Name of the employee initiating the request (Example: Doe, John).</td>
</tr>
<tr>
<td>Sent Date</td>
<td>Date the request was received by the approver. Note: Reminder notifications are based off of this date as well as the Due Date.</td>
</tr>
<tr>
<td>Status</td>
<td>The current status of the request (Example: New or In-Progress)</td>
</tr>
<tr>
<td>Due Date</td>
<td>The date by which the request should be processed.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The effective start date of the request.</td>
</tr>
<tr>
<td>BUID or Position ID</td>
<td>BU Identification number of the employee or Position Identification number impacted by the request.</td>
</tr>
<tr>
<td>Primary Org Unit</td>
<td>“Umbrella” Division, School, or Department where the position or employee is located.</td>
</tr>
<tr>
<td>Org Unit</td>
<td>Department/Organization Unit for employee (in PA forms) or position (OM forms).</td>
</tr>
<tr>
<td>Master Cost Center</td>
<td>The master cost center linked to the employee or position. Reminder: master cost center is used to pay the employee if there is an error with the employee’s cost distribution.</td>
</tr>
<tr>
<td>Date Request Initiated</td>
<td>Date on which the request was initiated by the initiator.</td>
</tr>
</tbody>
</table>

7. The list to the left displays the most frequently used columns in a worklist.
8. You can change the order in which the columns are displayed in the worklist.

To define the order in which columns should appear from left to right:

a) Click on a column “Current display attributes” section in the silver area to select it. The selected column will have the phrase <Selected> below it
b) Use the highlighted arrow to move it either to the left or right of where it is currently situated by clicking on the highlighted arrow
c) Click “Save” to save changes

9. To add a new column to your worklist (Example: Effective Date)

a) Select the location you would like to insert the field by clicking in the silver area of a column in the “Current display attributes” section
b) From the “Available Attributes not Displayed” drop-down, select the Effective Date column,
c) Click on “Add.” The newly added column will appear in the “Current display attributes.”
d) Click on Save under Personalize Tasks to save changes
10. To remove a column from the worklist:
   a) Select the column you would like to remove from “Current display attributes” by clicking on the silver area of a column listed
   b) Click on “Remove from Current View” to confirm changes
   c) Click on “Save” to Save changes

After saving, your worklist should no longer display the removed column (Effective Date).

NOTE: If you remove a column that you did not intend to, refer to step 6 if you want to add it back. After you have completed changes.

11. To specify how many rows (Example: 10 rows) you want to see displayed in your worklist:
   a) Go to the Data properties section of Personalize View
   b) Specify the number items to be displayed per page
   c) Click on “Save” to save your changes
12. To change the sort properties of each column:

a) Click on the column name you want to sort and the radio button “Ascending” or “Descending” next to it

b) Click on “Save” to save your changes