Using the Worklist–Quick Reference Guide

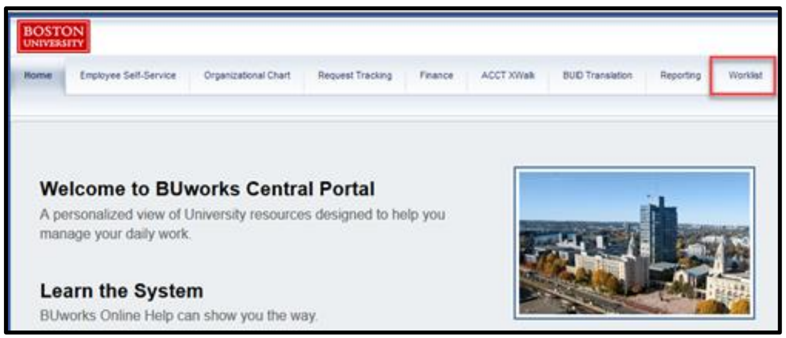
The worklist serves as the central entry point for the processing of Human Capital Management (HCM), Finance (FI) and Shopping cart (SRM) related tasks that need your approval. An example of a Time Management actions would be a leave of absence request, and an example of Personnel Action (PA) would be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

<table>
<tr>
<td>


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1. Log on to **BUworks Central** https://ppo.buw.bu.edu
2. Click on the **Worklist** tab

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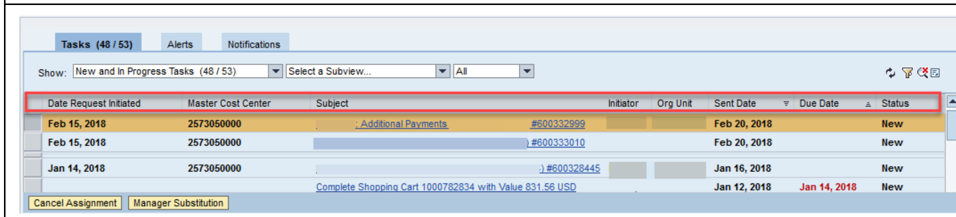

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3. If you have tasks waiting for approval, they will be displayed in the tasks tab on the worklist

Click on a displayed **task link** to open and review it

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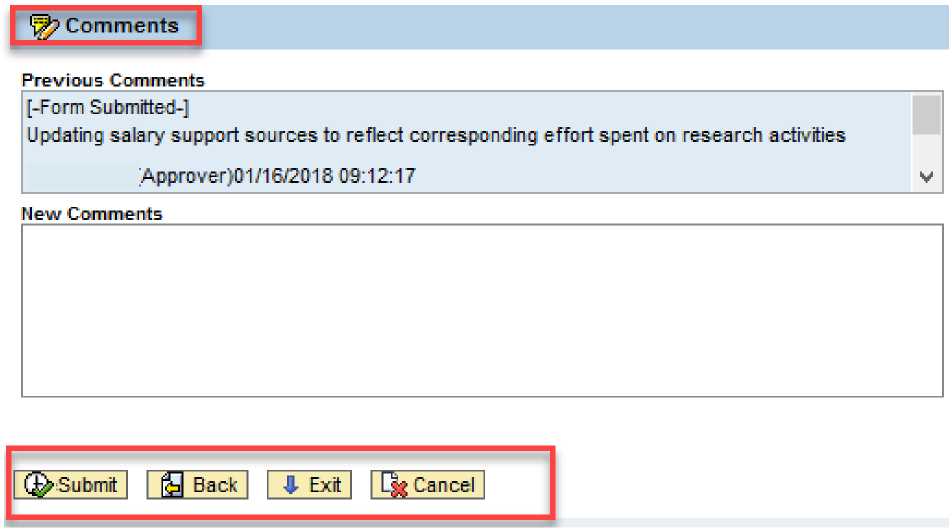
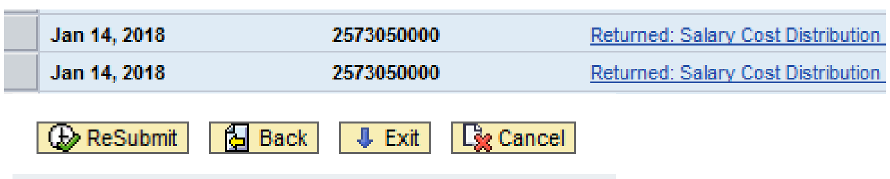


4. To approve the task

   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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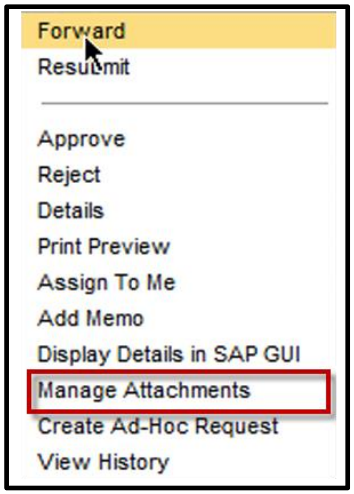
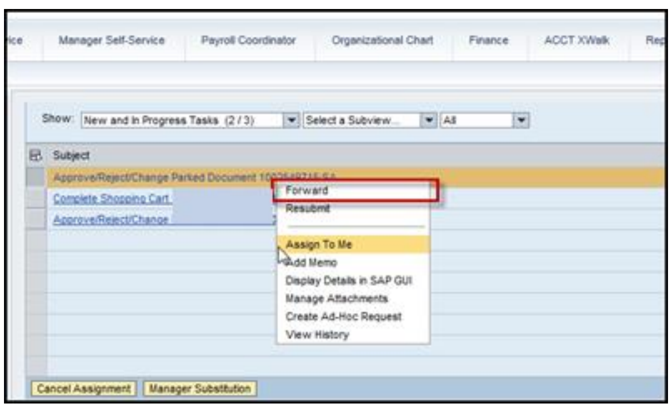
Worklist Task Options	
	1. Highlight and select a task, right click to see available task options. The task options displayed may vary. In this example, the available task options are related to a Purchase Order approval. Common task options are: - Forward - Resubmit - Cancel Assignment - Assign to Me - 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.

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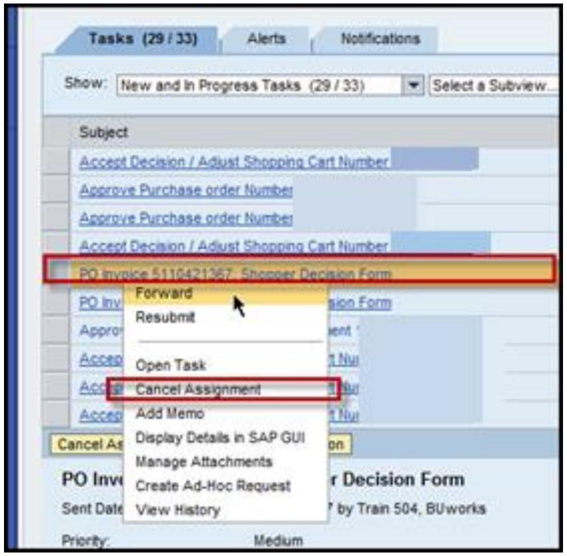
Often the shopper doesn't have the appropriate roles to approve over $5,000 purchase order invoice and will need to "Forward" the task to the *Finance* approver in their department.

To view a quick reference guide on the PO Invoice Workflow process click here.



3. Cancel Assignment task option 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.

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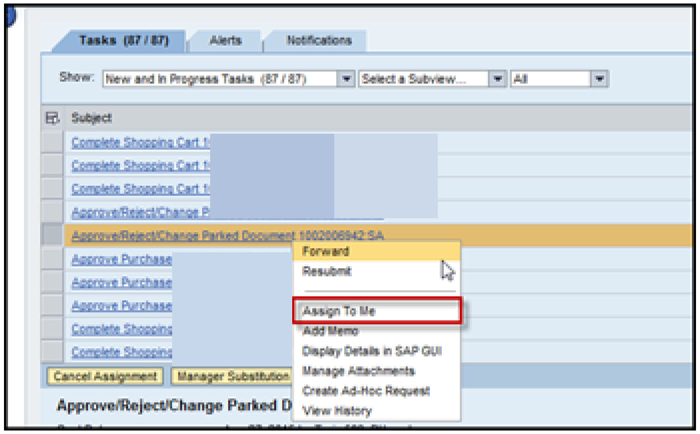


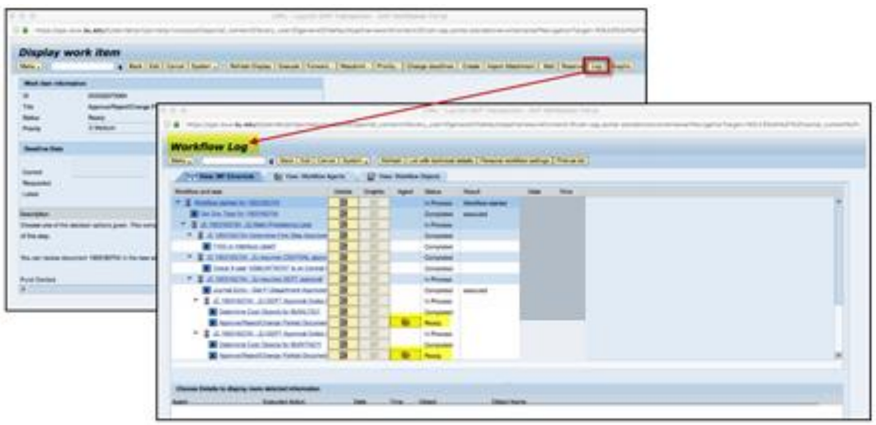
4. The Assign to Me task option is used to when you want to assign the task to yourself.

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.

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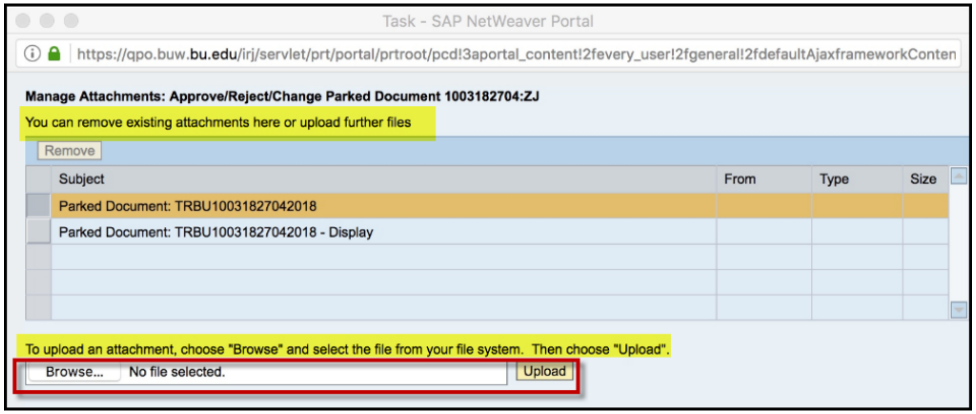
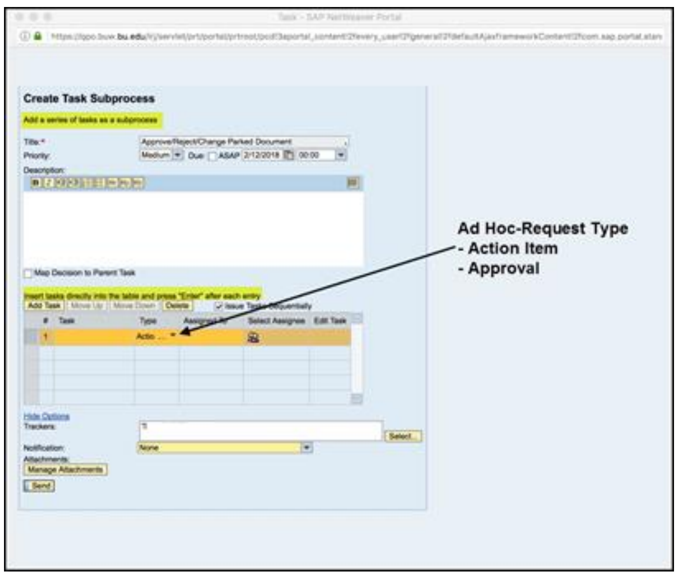


6. The Manage Attachments option provides access you with a quick way to any attached PDF, Word or Excel documents.

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.

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https://qpo.buw.bu.edu/irj/servlet/prt/portal/prtroot/pcd!3aportal_content!2fevery_user!2fgeneral!2fdefaultAjaxframeworkContent!2fcom.sap.portal.standalonecontentarea?NavigationTarget=ROLES%3A%2F%2Fportal_content%2Fevery_user%

JE 1003182704 : ZJ requires DEPT approval	In Progress	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
Journal Entry - Get FI Department Approvers for 1003182704	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
				WF-BATCH	Dec 8, 2017 4:07 PM	executed
JE 1003182704 : ZJ DEPT Approval (Index 000001)	In Progress	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
Determine Cost Objects for BUWLT031	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
Approve/Reject/Change Parked Document 1003182704:ZJ	New	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
JE 1003182704 : ZJ DEPT Approval (Index 000002)	In Progress	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
Determine Cost Objects for BUWTN211	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
Approve/Reject/Change Parked Document 1003182704:ZJ	New	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
JE 1003182704 : ZJ DEPT Approval (Index 000003)	In Progress	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
Determine Cost Objects for BUWTN503	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
Approve/Reject/Change Parked Document 1003182704:ZJ	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				Train 503, BUworks	Jan 5, 2018 12:51 PM	Work Item Reserved
				Train 503, BUworks	Jan 5, 2018 12:51 PM	Work Item Processing Complete
				Train 503, BUworks	Jan 5, 2018 12:51 PM	Processed
				WF-BATCH	Jan 5, 2018 12:51 PM	Change
Change Parked Document 1003182704	New	Medium				
				Train 707, BUworks	Jan 5, 2018 12:51 PM	Created
JE 1003182704 : ZJ DEPT Approval (Index 000004)	In Progress	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
Determine Cost Objects for BUWTN512	Completed	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created
				WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
Approve/Reject/Change Parked Document 1003182704:ZJ	New	Medium				
				Train 707, BUworks	Dec 8, 2017 4:07 PM	Created

- An “Approval” type is used to add another user to approve the SAP document entry.

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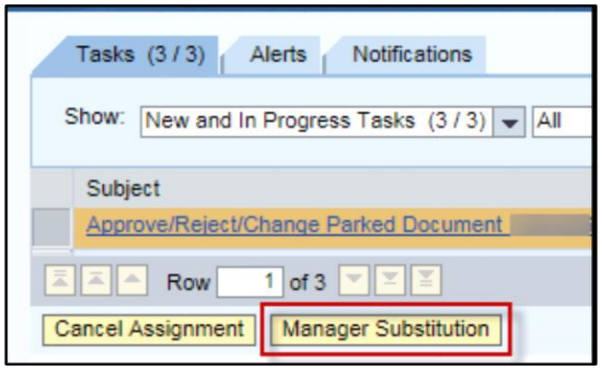
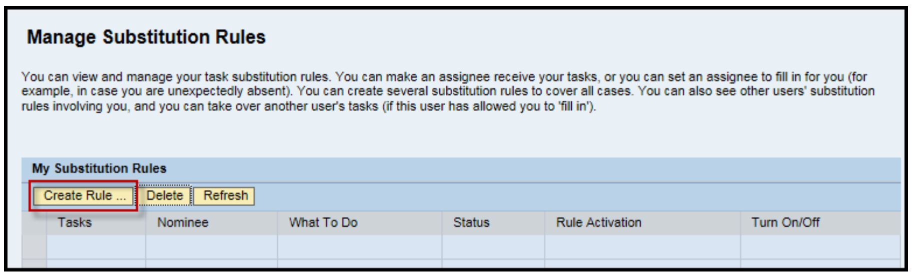
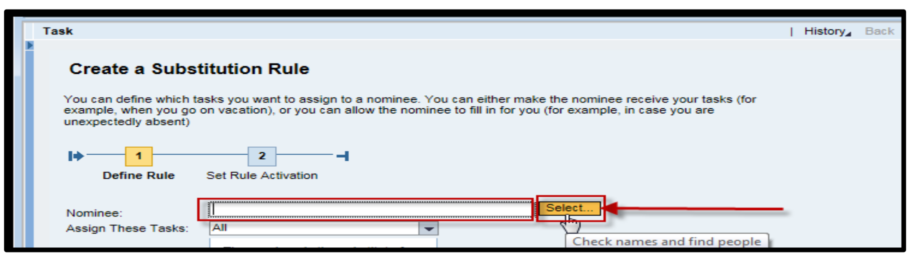
Manager Substitution



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**

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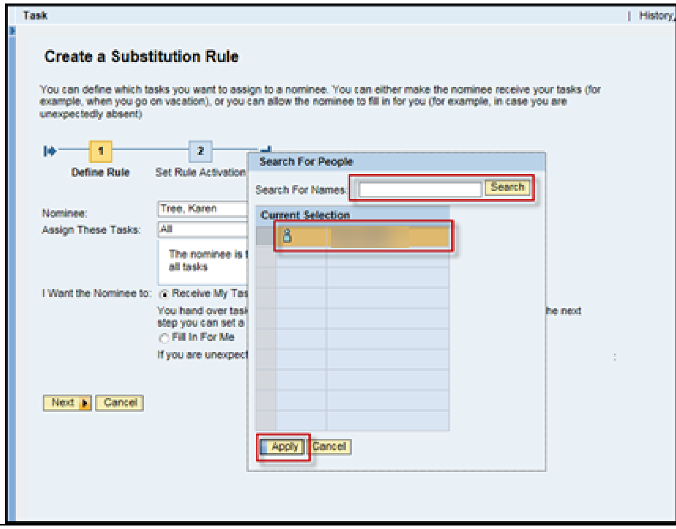
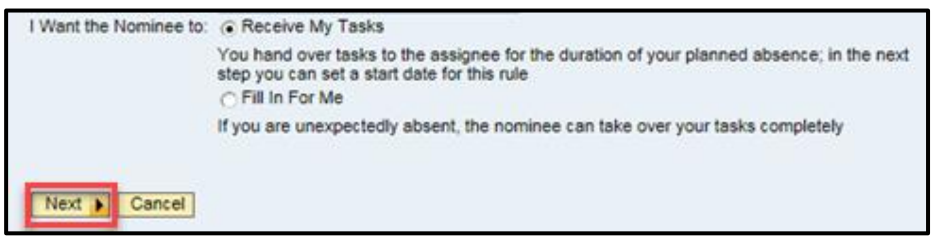


4. Type username into the **Text Field** labeled **Search for Name**.

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

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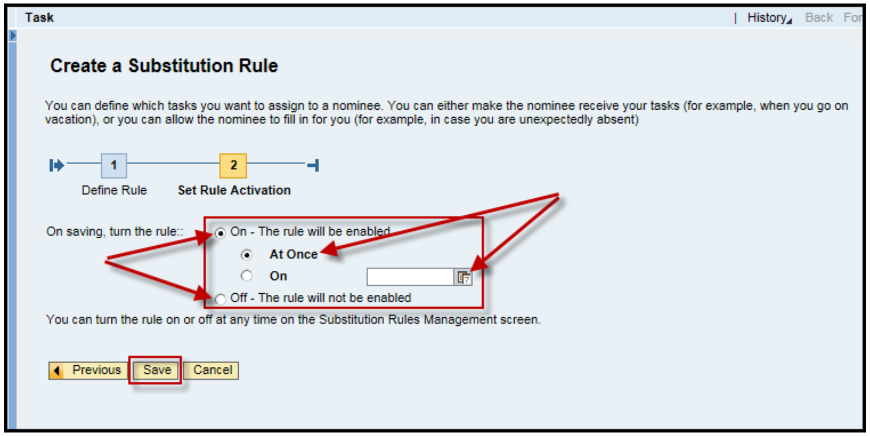
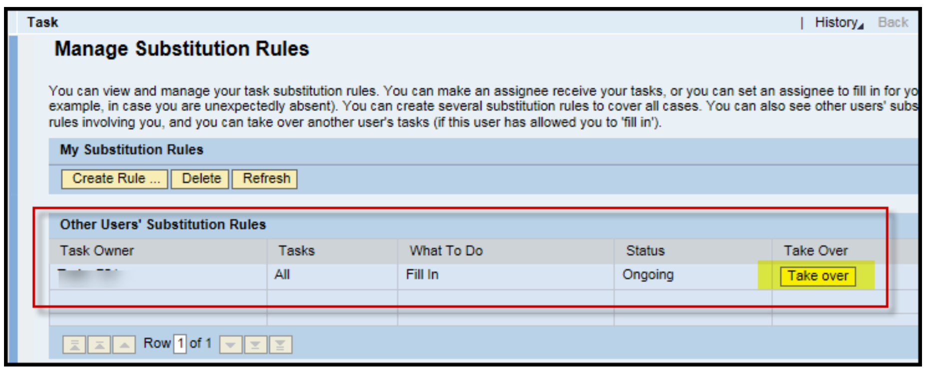


11. Select the radio button to specify if the rule is enabled
    - At Once or
    - On a specific date

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.

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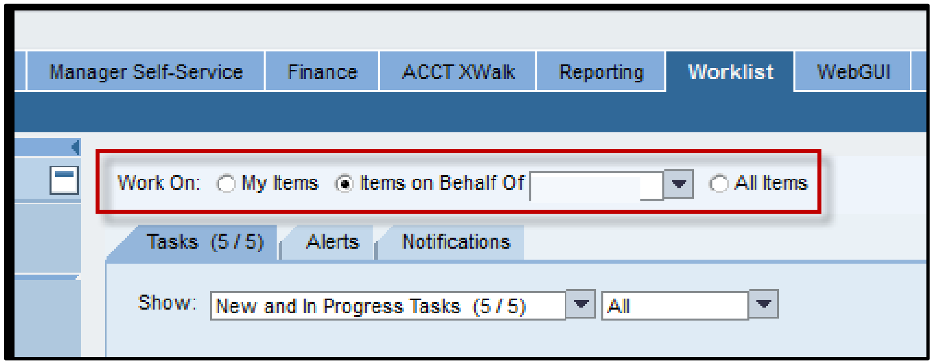
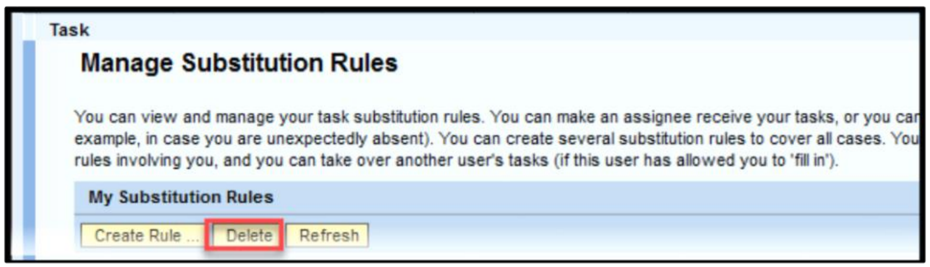


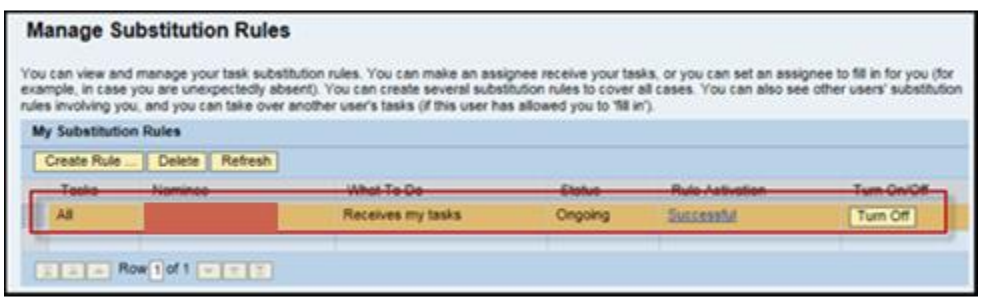
14. The nominee will need to select the radio button "**Items on Behalf of**" to see the tasks on behalf of the assigner



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**



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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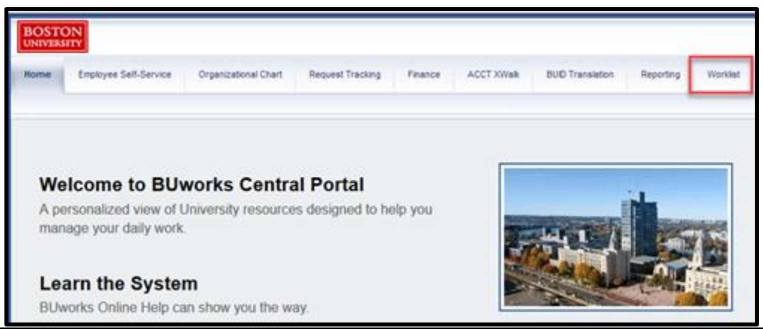
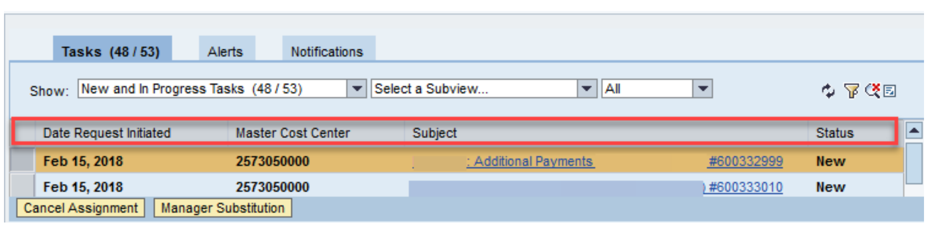
The worklist, available via the BUworks portal is used to view and approve HCM actions related to Time Management on OM & PA actions.
An example of a Time Management actions would be a leave of absence request, and an example of personnel action (PA) would be accepting a transfer.

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

Personalize a Worklist	
	1. Log on to **BUworks Central** https://ppo.buw.bu.edu 2. Click on the **Worklist** tab
	3. All the new and in-progress tasks are displayed. The icons located to the extreme right serve the functions of: - Filtering tasks (funnel), - Refreshing the screen (two arrows), - Toggle preview display (looking glass) - Personalizing the view and substituting managers (notepad).

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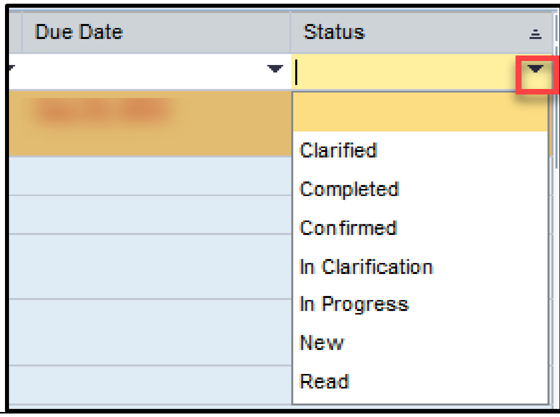

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4. Click on the **Filter** icon (funnel) to select worklist items that have a specific value.

   Click on **Show Filter** and select any column (example: **Status**)

   Click on the arrow that appears below the column to select a suitable option.

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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.

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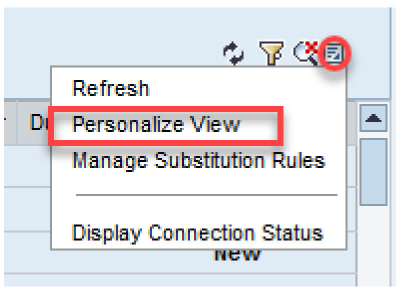

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6. Personalizing your worklist view allows you to add, remove, and re-order columns displayed, as well as, change the default sort, and customize select features.

To personalize your worklist view, click on the **notepad** icon and select “Personalize View” from the list of available options.

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Most Frequently Used Columns	Description
Subject	The subject displays the type of request with the person's name or position title and #tracker id. (Example: Maintain Position (Administrator) #600001953
Initiator	Name of the employee initiating the request (Example: Doe, John).
Sent Date	Date the request was received by the approver. Note: Reminder notifications are based off of this date as well as the Due Date.
Status	The current status of the request (Example: New or In-Progress)
Due Date	The date by which the request should be processed.
Effective Date	The effective start date of the request.
BUID or Position ID	BU Identification number of the employee or Position Identification number impacted by the request.
Primary Org Unit	"Umbrella" Division, School, or Department where the position or employee is located.
Org Unit	Department/Organization Unit for employee (in PA forms) or position (OM forms).
Master Cost Center	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.
Date Request Initiated	Date on which the request was initiated by the initiator.

7. The list to the left displays the most frequently used columns in a worklist.

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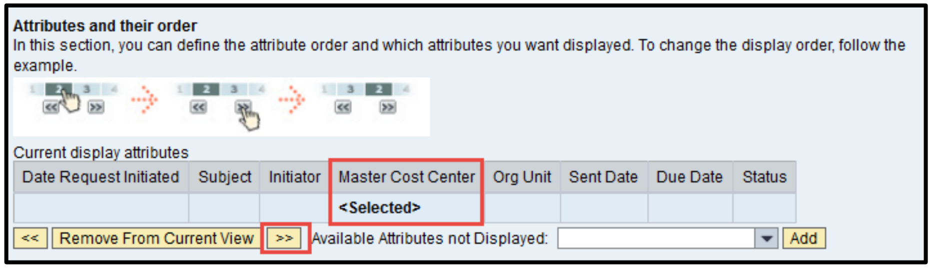
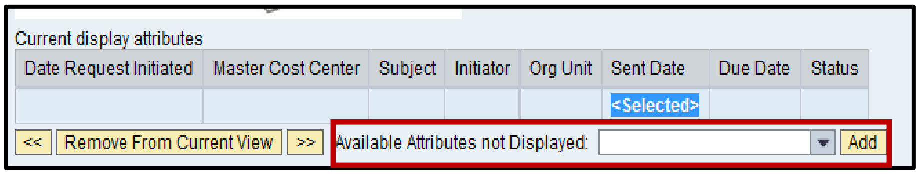
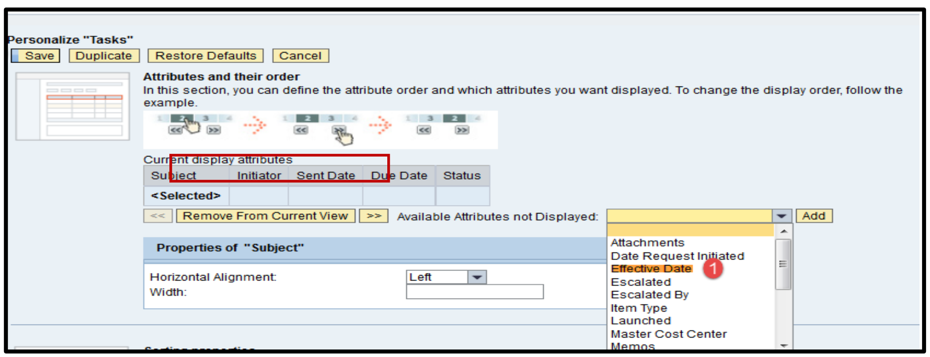


8. You can change the order in which the columns are displayed in the worklist.

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

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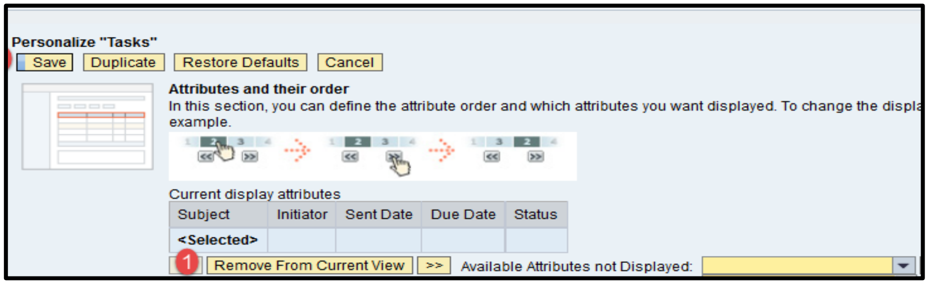
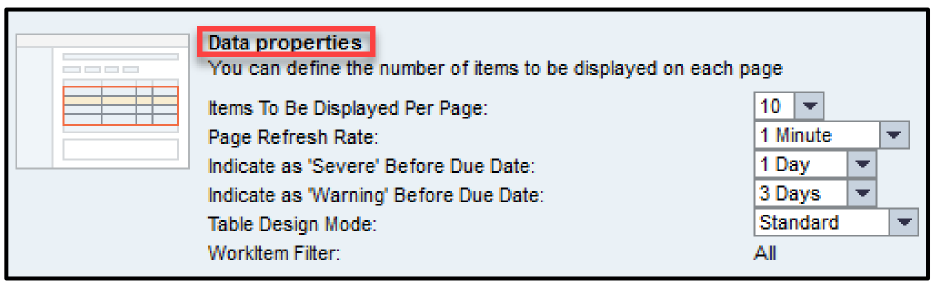


10. To remove a column from the worklist:
    a) Select the column you would like to remove from "**Current display attributes**" by clicking on the silver area of a column listed
    b) Click on " **Remove from Current View**" to confirm changes
    c) Click on "**Save**" to Save changes

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

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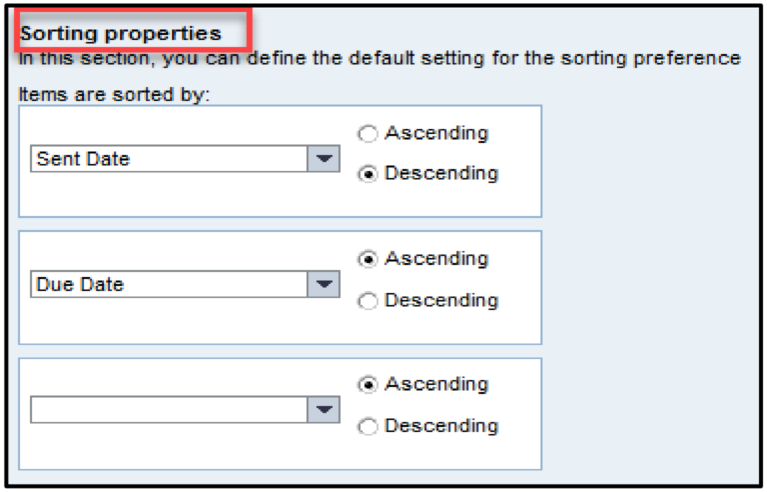	12. To change the **sort properties** of each column: a) Click on the **column name** you want to sort and the radio button “Ascending” or “Descending” next to it b) Click on “**Save**” to save your changes