

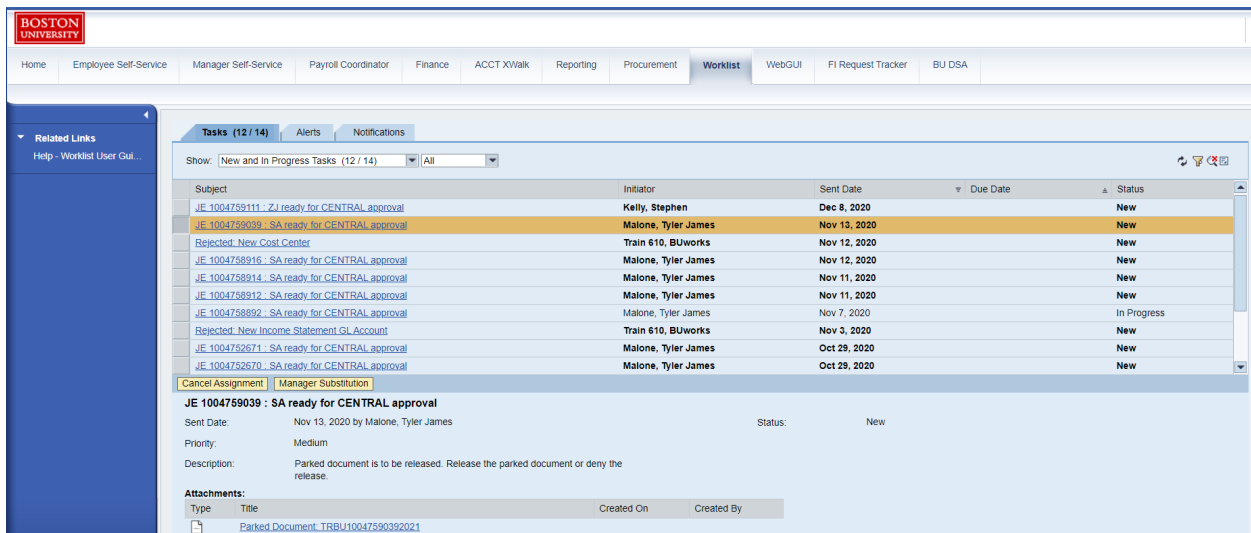
How to use the Worklist

Getting Started

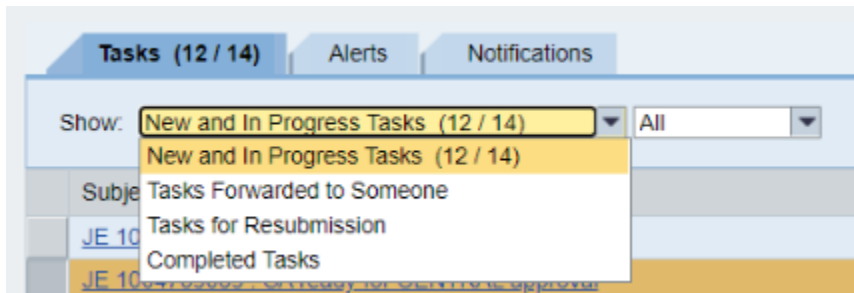
- To access the worklist, go to ppo.buw.bu.edu
- After logging in, go to the worklist tab at the top of the screen.
- On the worklist tab, you can see all items or tasks for your approval.

Fundamentals of the Task Tab

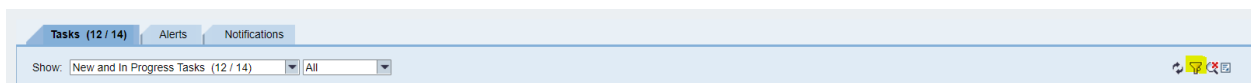
There are three sub-tabs on the worklist tab: Tasks, Alerts, and Notifications



By default, you will see your new and in progress tasks. You can click on the dropdown arrow to access the other options shown below.



You can add a filter by clicking on the highlighted filter button shown in the top right corner of the screenshot below.



You can then filter fields such as the sent date as shown in the screenshot below.

Subject	Initiator	Sent Date	Due Date
JE 1004759111 : ZJ ready for CENTRAL approval	Kelly, Stephen		
JE 1004759039 : SA ready for CENTRAL approval	Malone, Tyler James	Today	
Rejected: New Cost Center	Train 610, BUworks	Yesterday	
JE 1004758916 : SA ready for CENTRAL approval	Malone, Tyler James	Last 7 Days	
JE 1004758914 : SA ready for CENTRAL approval	Malone, Tyler James	Last 30 Days	
JE 1004758912 : SA ready for CENTRAL approval	Malone, Tyler James	Last 90 Days	
JE 1004758892 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 11, 2020	
JE 1004758892 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 7, 2020	

You can click on the show preview button highlighted in the top right corner in the screenshot below to show you a preview of the item in your worklist as shown in the black box in the screenshot below.

Subject	Initiator	Sent Date	Due Date	Status
JE 1004758916 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 12, 2020		New
JE 1004758914 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 11, 2020		New
JE 1004758912 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 11, 2020		New
JE 1004758892 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 7, 2020		In Progress
Rejected: New Income Statement GL Account	Train 610, BUworks	Nov 3, 2020		New
JE 1004752571 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 29, 2020		New
JE 1004752570 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 29, 2020		New
JE 1004752551 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 22, 2020		In Progress
JE 1004752529 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 9, 2020		New
JE 1004752527 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 9, 2020		New

JE 1004759039 : SA ready for CENTRAL approval

Sent Date: Nov 13, 2020 by Malone, Tyler James Status: New

Priority: Medium

Description: Parked document is to be released. Release the parked document or deny the release.

Attachments:

Type	Title	Created On	Created By
	Parked Document: TRBU10047590392021		

Approving or Rejecting an Item

There are some items that may be sent to more than one user for approval. These work items will disappear from your worklist if someone else approves them first. Also, an item will disappear from your worklist if one of the other approvers has it open. The item will reappear if the user closes out of the work item without approving.

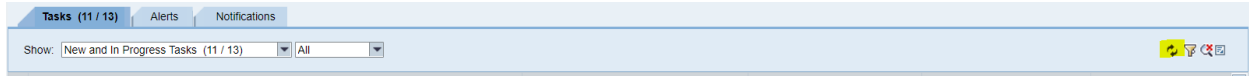
Users have the option to approve (release) or reject the work item.

Release Parked G/L Account Document 1004759039 TRBU 2021

Menu | [Dropdown] | [Refresh] | [Home] | [Close] | [Print] | [Save] | [Tree on] | Processing Options | **Release** | **Reject**

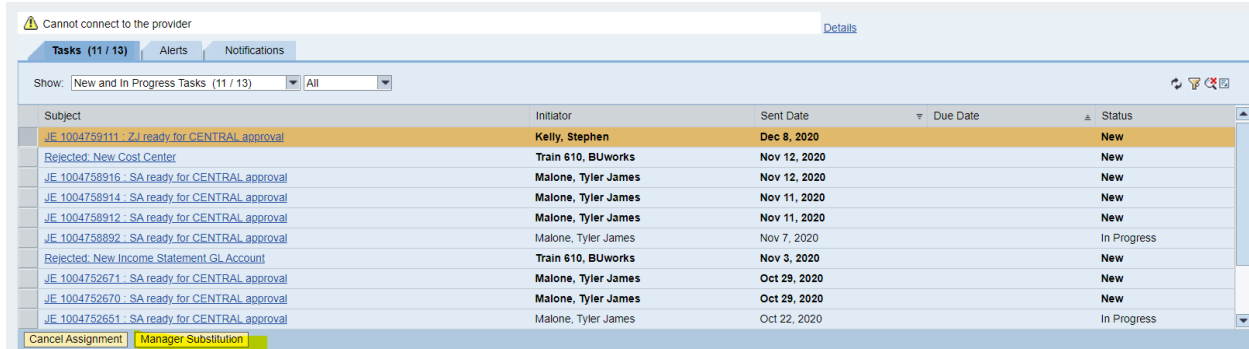
Basic Data | Details | Workflow

After approving or rejecting an item in your worklist, be sure to press the refresh button highlighted below in the right corner to see an updated version of your worklist.



Manager Substitution

By clicking on the manager substitution button, you can make an assignee receive your tasks.



You need to create a rule in order to create a substitution.

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').

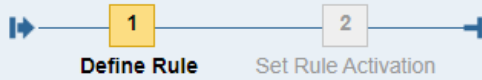
My Substitution Rules						
Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off	

Other Users' Substitution Rules				
Task Owner	Tasks	What To Do	Status	Take Over
Train 801, BUworks	All	Receive	Ongoing	

You will be brought to the page below when you click on the “create rule” button.

Create a Substitution Rule

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



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 assignee can take over your tasks completely.