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

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Employee Self-Service	Manager Se	IT-Service	Payroll Coordinator	Finance	ACCT XWalk	Reporting	Procurement	Worklist	WebGUI	FI Request Tracker	BU DSA			
•														
ated Links	Tasks (12	2 / 14)	Alerts Notification	3										
- Worklist User Gui	Show: New a	and In Progr	ess Tasks (12 / 14)	All	¥									¢ 77 (
	Subject						Initiator			Sent Date	₹ D	ue Date		Status
	JE 1004759)111 : ZJ rea	dy for CENTRAL approva	1			Kelly, Stepher	ı		Dec 8, 2020				New
	JE 1004759	039 : SA rea	ady for CENTRAL approv	<u>3</u>			Malone, Tyler	James		Nov 13, 2020			1	New
	Rejected: N	lew Cost Cer	nter				Train 610, BU	works		Nov 12, 2020			1	New
	JE 1004758	3916 : SA rea	ady for CENTRAL approv	<u>al</u>			Malone, Tyler	James		Nov 12, 2020				New
	JE 1004758	3914 : SA rea	ady for CENTRAL approv	1			Malone, Tyler	James		Nov 11, 2020			1	New
	JE 1004758	912 : SA rea	ady for CENTRAL approv	<u>1</u>			Malone, Tyler	James		Nov 11, 2020				New
	JE 1004758	892 : SA rea	ady for CENTRAL approve	<u>1</u>			Malone, Tyler	James		Nov 7, 2020				In Progress
			Statement GL Account				Train 610, BU			Nov 3, 2020				New
			ady for CENTRAL approv				Malone, Tyler			Oct 29, 2020				New
			ady for CENTRAL approv	al			Malone, Tyler	James		Oct 29, 2020				New
			ager Substitution											
			eady for CENTRAL ap											
	Sent Date:		Nov 13, 2020 by Malone,	Tyler James					Status:	New				
	Priority:		Medium											
	Description:		Parked document is to be release.	released. Rel	ease the parked do	ocument or deny	the							
	Attachments:													
	Туре Т	Title				Cr	eated On	Created By						

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.

Tasks (12 / 14) Alerts Notifications	
Show: New and In Progress Tasks (12 / 14) New and In Progress Tasks (12 / 14)	All
Subje Tasks Forwarded to Someone	
JE 10 Completed Tasks	
JE 10	

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

Tasks (12 / 14) Alerts Notifications	
Show: New and In Progress Tasks (12 / 14)	¢ <mark>7</mark> 45

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

ow: New and In Progress Tasks (12 / 14)	¥			
subject	Initiator	Sent Date	Ŧ	Due Date
E 1004759111 : ZJ ready for CENTRAL approval	Kelly, Stephen			
E 1004759039 : SA ready for CENTRAL approval	Malone, Tyler James	Today		
Rejected: New Cost Center	Train 610, BUworks	Yesterday Last 7 Days		
E 1004758916 : SA ready for CENTRAL approval	Malone, Tyler James	Last 30 Days		
E 1004758914 : SA ready for CENTRAL approval	Malone, Tyler James	Last 90 Days		
E 1004758912 : 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.

w: New and In Progress Tasks (12 / 14) All	¥				ଦ ୱ <mark>ି ଓ</mark>
ubject	Initiator	Sent Date			
			*	•	
E 1004758916 : SA ready for CENTRAL approval	Maione, Tyler James	Nov 12, 2020		New	
E 1004758914 : SA ready for CENTRAL approval	Maione, Tyler James	Nov 11, 2020		New	
E 1004758912 : SA ready for CENTRAL approval	Maione, Tyler James	Nov 11, 2020		New	
E 1004758892 : SA ready for CENTRAL approval	Malone, Tyler James	Nov 7, 2020		In Progress	
ejected: New Income Statement GL Account	Train 610, BUworks	Nov 3, 2020		New	
E 1004752571 : SA ready for CENTRAL approval	Maione, Tyler James	Oct 29, 2020		New	
E 1004752570 : SA ready for CENTRAL approval	Maione, Tyler James	Oct 29, 2020		New	
E 1004752551 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 22, 2020		In Progress	
E 1004752529 : SA ready for CENTRAL approval	Maione, Tyler James	Oct 9, 2020		New	
E 1004752527 : SA ready for CENTRAL approval	Maione, Tyler James	Oct 9, 2020		New	
el Assignment Manager Substitution					
1004759039 : SA ready for CENTRAL approval					
t Date: Nov 13, 2020 by Malone, Tyler James	8	Status:	New		
rity: Medium					
cription: Parked document is to be released. F release.	Release the parked document or deny the				
chments:					

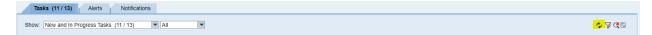
Approving or Rejecting an Item

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 🖌 📔	🔽 🖣 🚱 🚱 🎦 🎦 🚯 🖀 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.

Cannot connect to the provider Tasks (11 / 13) Alerts Notifications		Details	
Iow: New and In Progress Tasks (11 / 13)			¢ 77 C
Subject	Initiator	Sent Date	.≞ Status
JE 1004759111 : ZJ ready for CENTRAL approval	Kelly, Stephen	Dec 8, 2020	New
Rejected: New Cost Center	Train 610, BUworks	Nov 12, 2020	New
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 1004752671 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 29, 2020	New
JE 1004752670 : SA ready for CENTRAL approval	Malone, Tyler James	Oct 29, 2020	New
	Malone, Tyler James	Oct 22, 2020	In Progress

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').

Μ	ly Substitution	Rules					
	Create Rule	Delete Refresh					
	Tasks	Nominee	What To Do	Status	Rule Activation	Turn On/Off	
							-

Other Users' Substitution Rule	s				
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					
	sks you want to assign to a assignee. You can either make the assignee receive your tasks go on vacation), or you can allow the assignee to fill in for you (for example, in case you are				
I∳1 Define Rule	2 Set Rule Activation				
Nominee:	Select				
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 assignee can take over your tasks completely.				
Next Cancel					