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

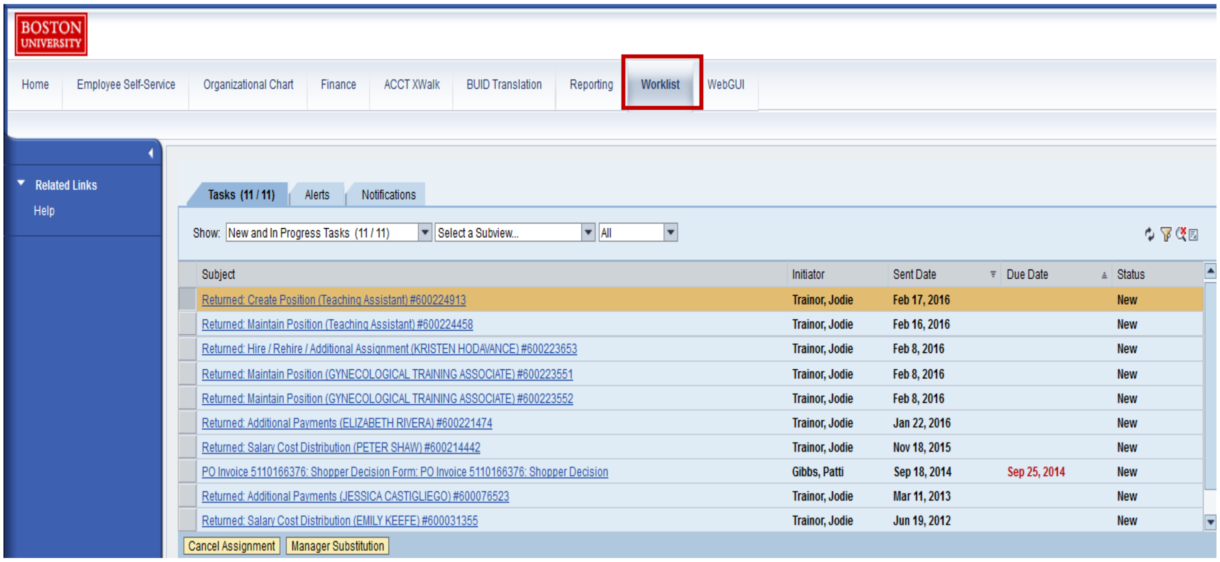
Procedure

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. • Refresh screen • Add/Remove columns to personalize • Sort columns • Show Filter to select time period
2	**Shared Approval Items**	Working with “shared” approval tasks. • 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. • 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

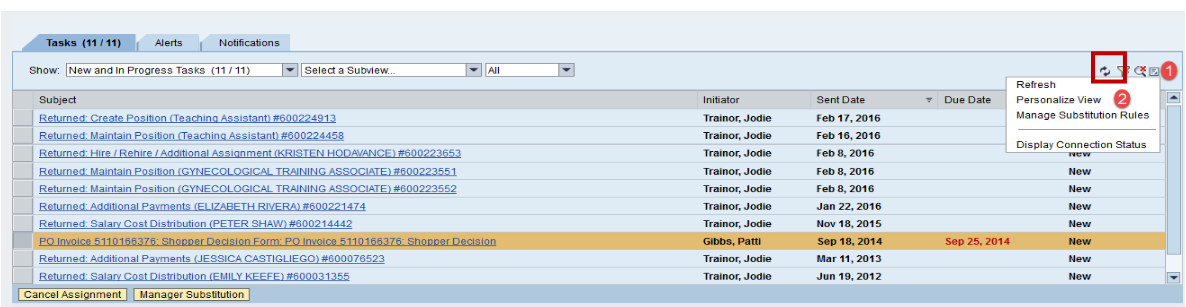
1. Login to BUworks Central Portal and click on Worklist tab.



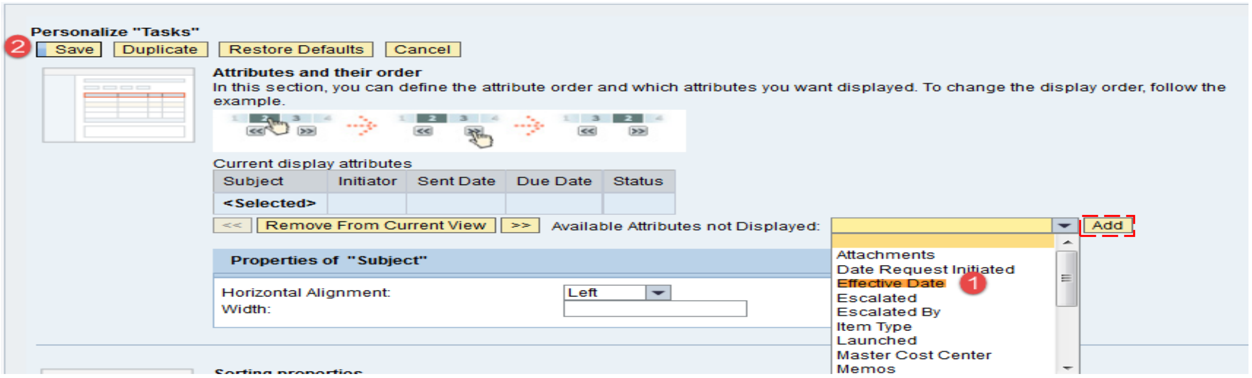
2. From the drop-down menu, select Refresh to get the most up-to-date list of tasks waiting to be approved.

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

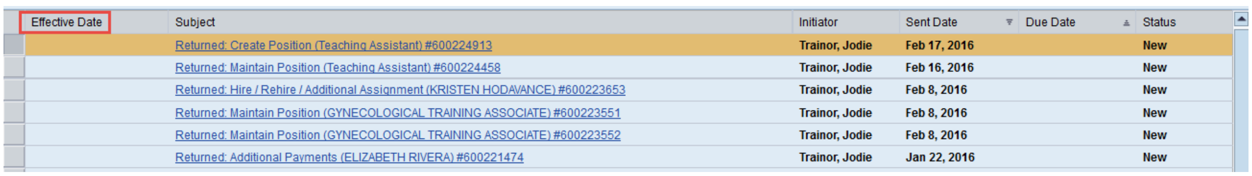
3. To personalize your view by adding new columns or deleting existing columns, select the "Personalize View" option from the drop-down menu.



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".

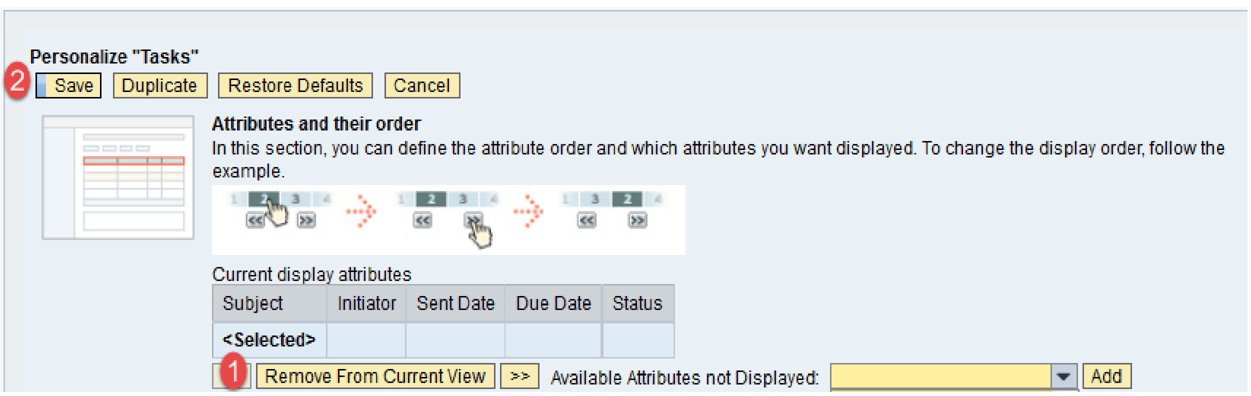


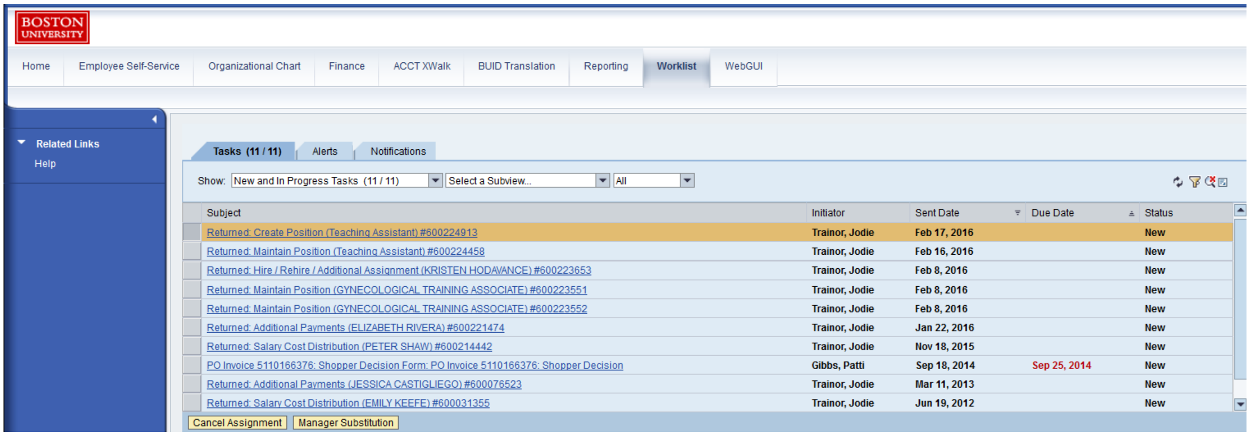
5. You can now see the Effective Date column appear as the first column in the worklist**.**



Effective Date	Subject	Initiator	Sent Date	Due Date	Status
	Returned: Create Position (Teaching Assistant) #600224913	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

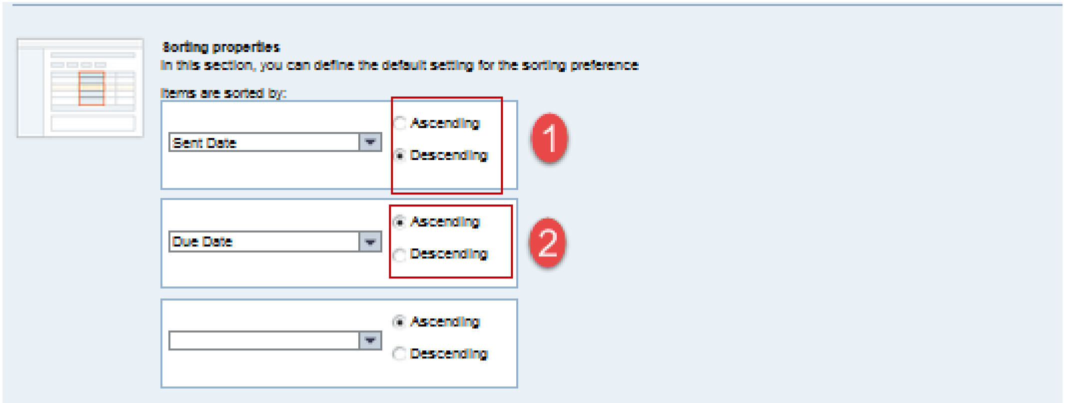
6. To remove a column from the worklist, click on “1” Remove from Current View and choose a column you do not want to see in the display, such as Effective Date. Click on “2” “Save”. The column disappears from the worklist display.



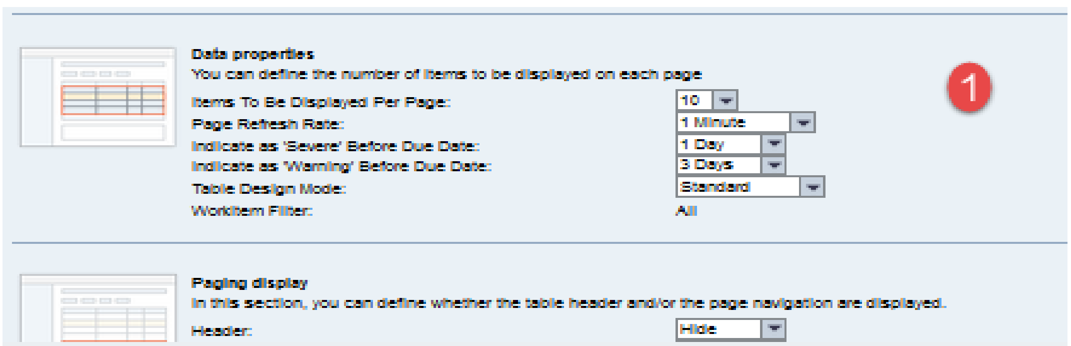


Available Columns for Adding or Removing	Description
Effective Start Date	The effective start date for the transaction.
BUID or Position ID	Employee's BU Identification number or Position Identification.
Primary Org Unit	"Umbrella" Division, School, or Department where the position or employee is located 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.

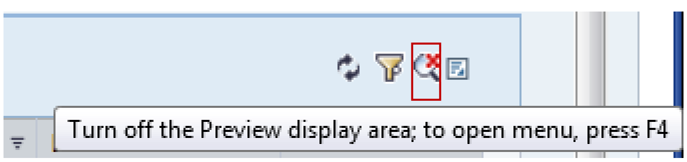
7. You can also change the sort properties on each column. Click on the radio button "Ascending" or "Descending" next to each column to specify the sort order.

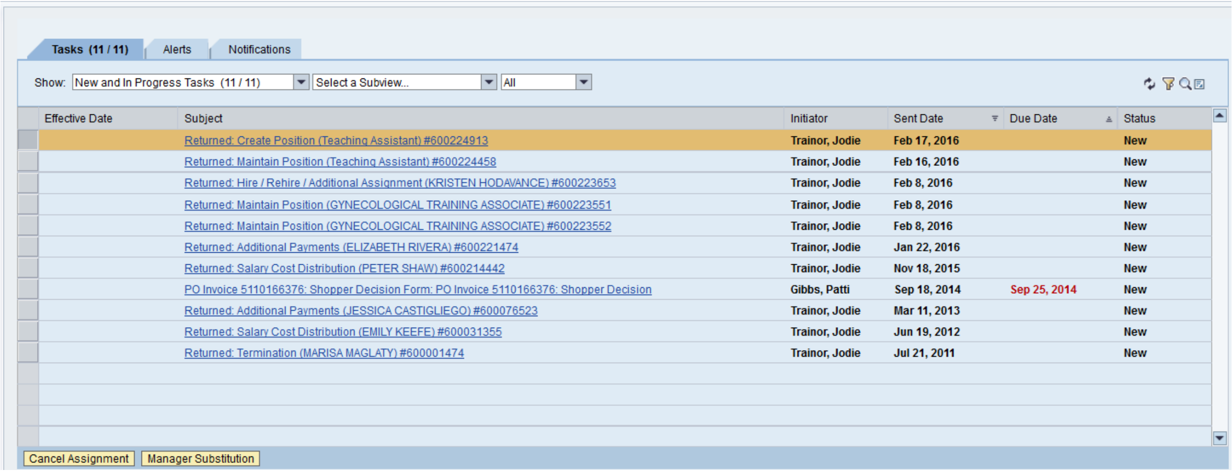


8. You can customize other features, such as specifying how many rows (10 in the example below) you want to see displayed in your worklist in Data properties section of Personalize View.

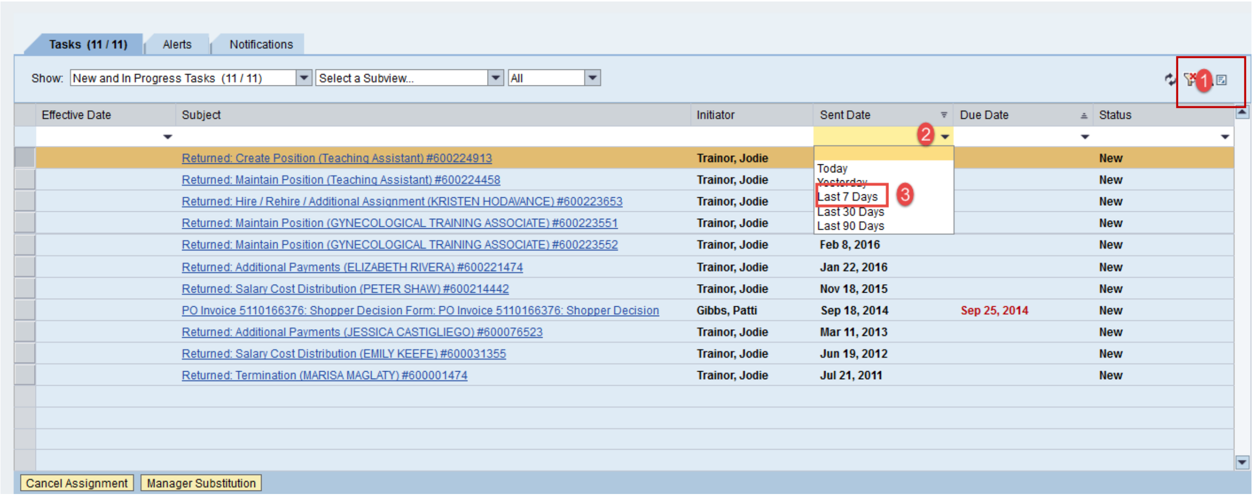


9. To turn off the Preview display area or to include it in the display, the looking glass icon on the right corner works as a toggle.





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.

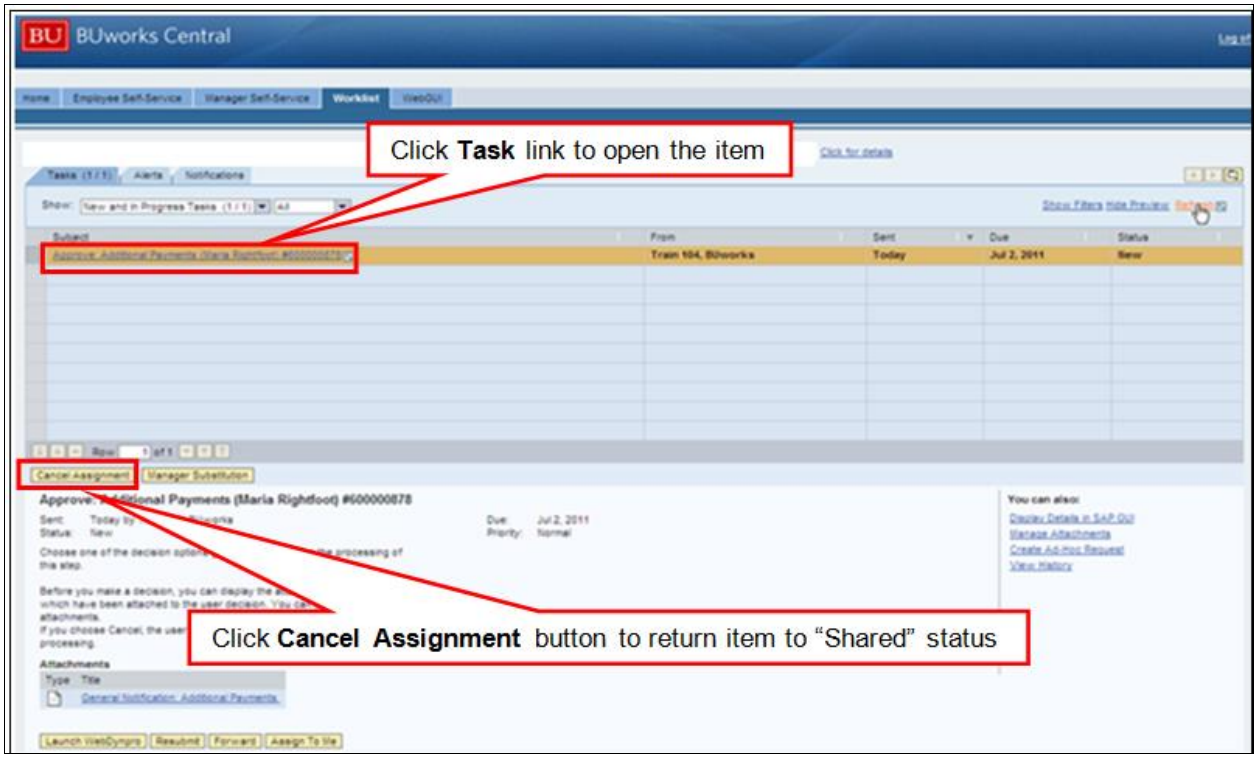


You have successfully changed the display of the worklist to suit your working style.

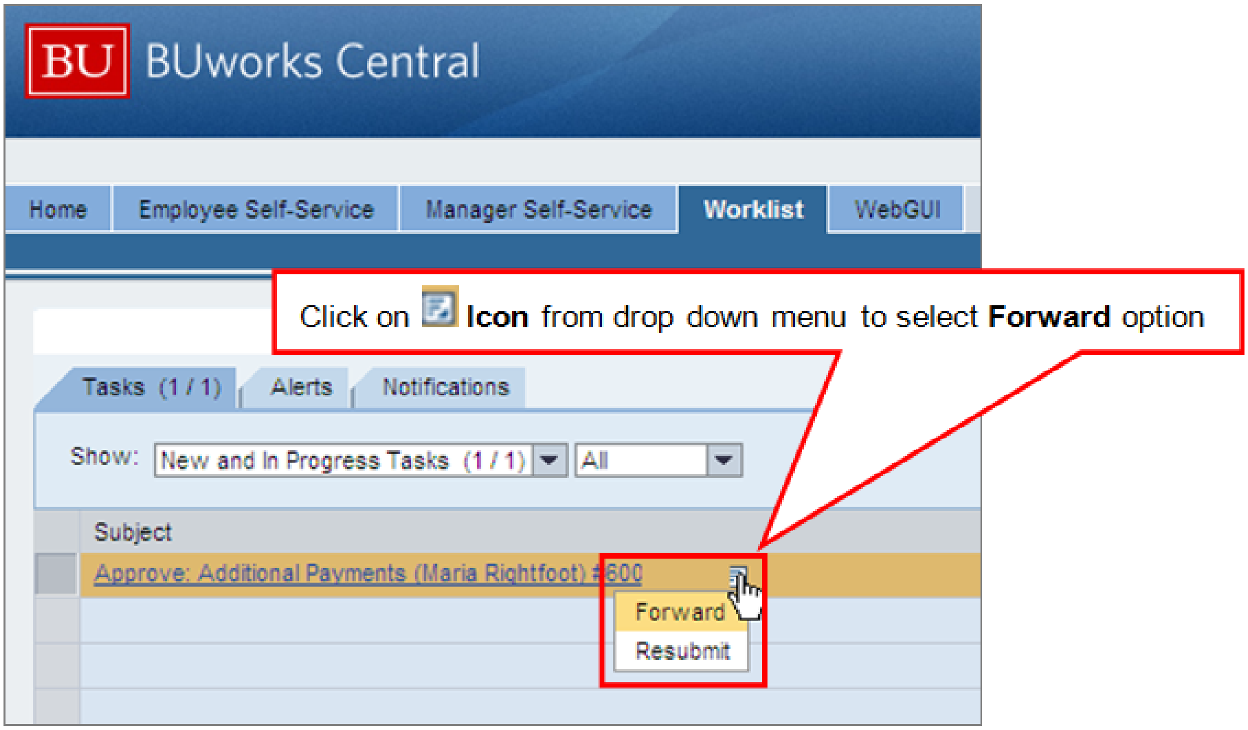
Topic 2: Shared Approval Items

Action	Description
How to Return a Task to "Shared" Status	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: • Select item by clicking on the **Task** link • Click on the **Cancel Assignment** button
How to Forward an Approval Task to Another User	Should you wish to forward an approval task to any other user in the SAP: • Click on the small, white **Icon** appearing to the right of the task link • From the dropdown menu that appears, select **Forward** You can also click on the **Forward** button in the bottom of the screen within the Preview section.
How to Edit and Resubmit a Form "Returned" by a Workflow Approver	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.

How to Return a Task to "Shared" Status

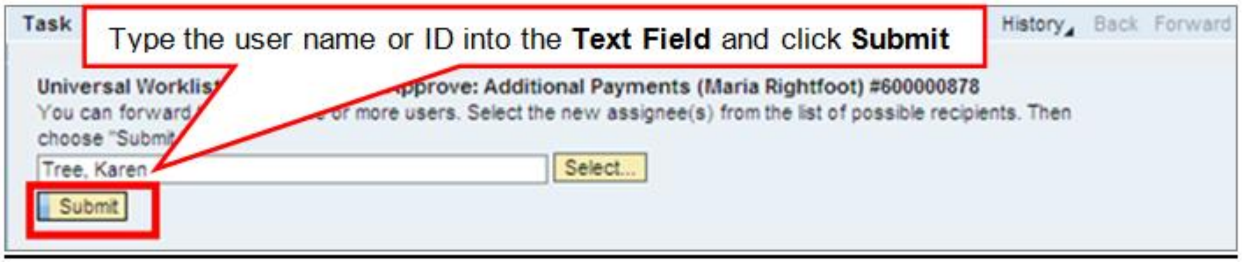


How to Forward an Approval Task to Another User

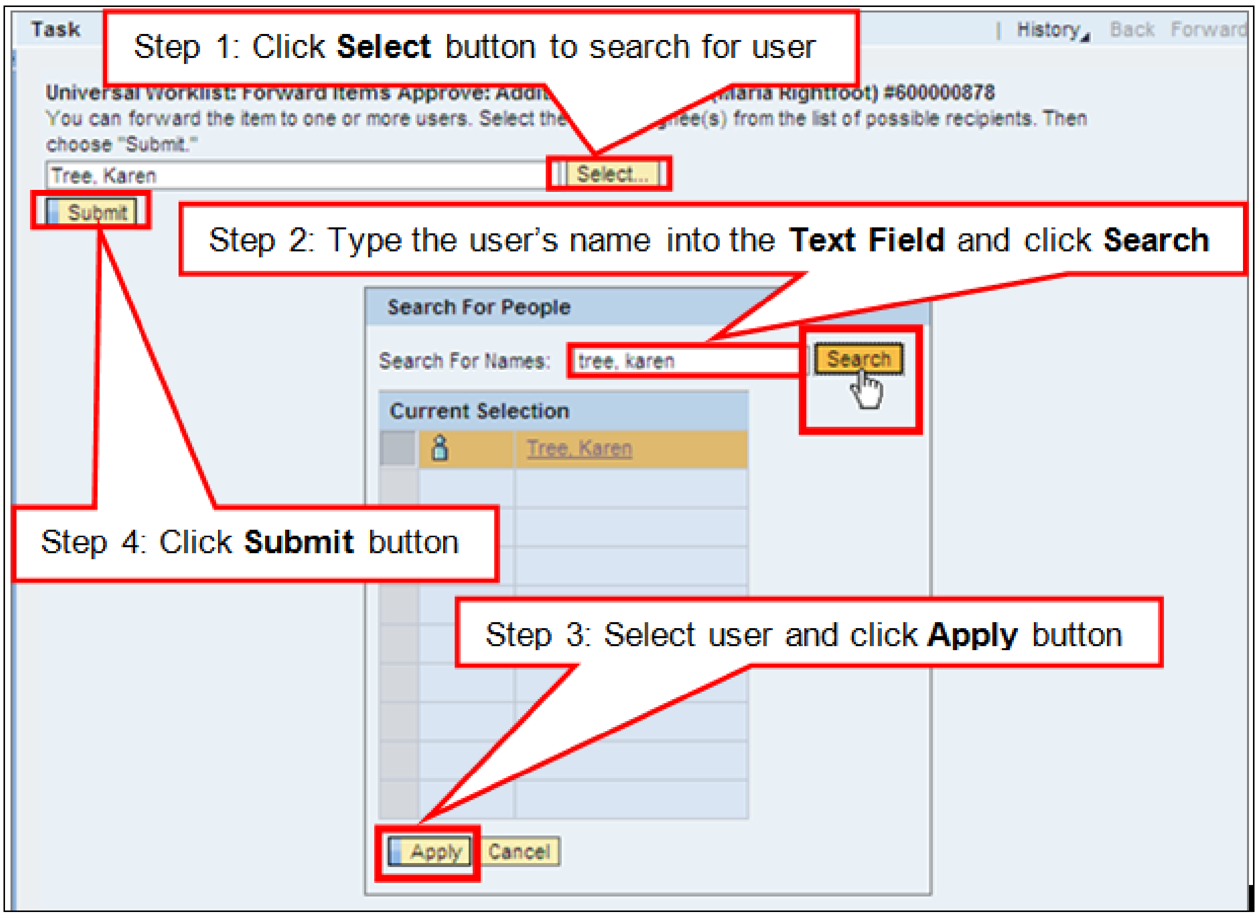

BU BUworks Central
Home
Employee Self-Service
Manager Self-Service
Worklist
WebGUI
Click on Icon from drop down menu to select Forward option
Tasks (1 / 1)
Alerts
Notifications
Show:
New and In Progress Tasks (1 / 1)
All
Subject
Approve: Additional Payments (Maria Rightfoot) #600
Forward
Resubmit

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:



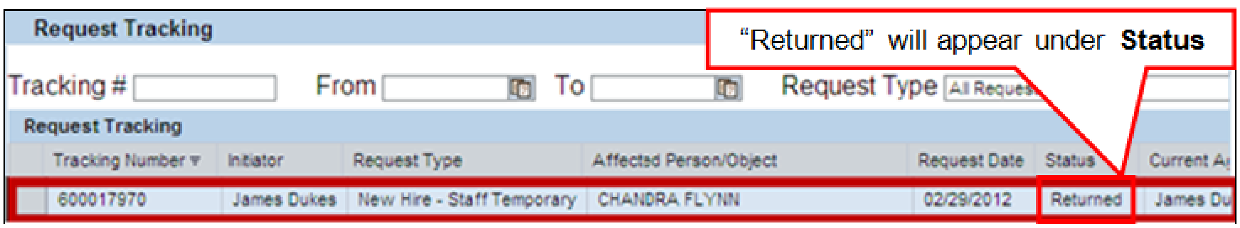
If you need to search for a user, proceed with Option 2:

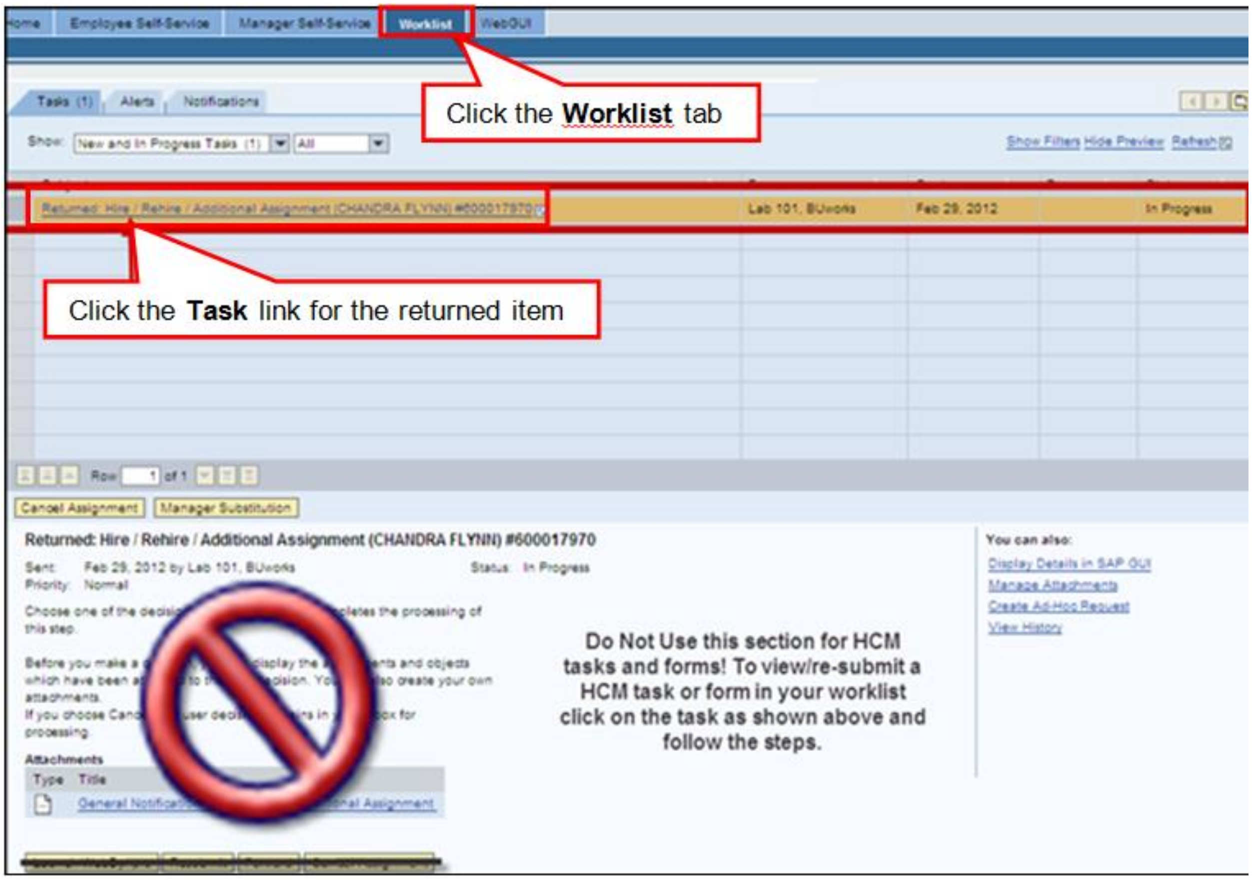


Action	Description
Search for a user	Click the **Select** button to search for a user. Type the user's name into the **Text Field** and click **Search.**
Apply a user	Once you find the user you're looking for, click on the user and then click on the **Apply** button. This populates their name within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

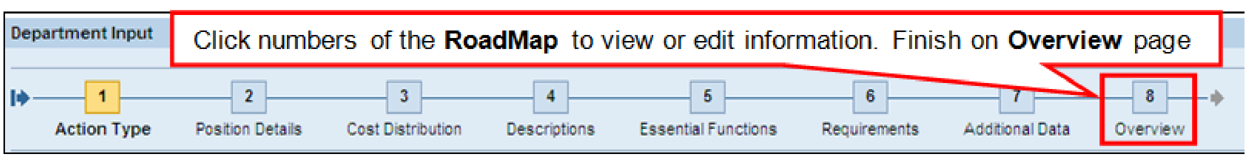
How to Edit and Resubmit a Form "Returned" by a Workflow Approver

On Request Tracker screen:

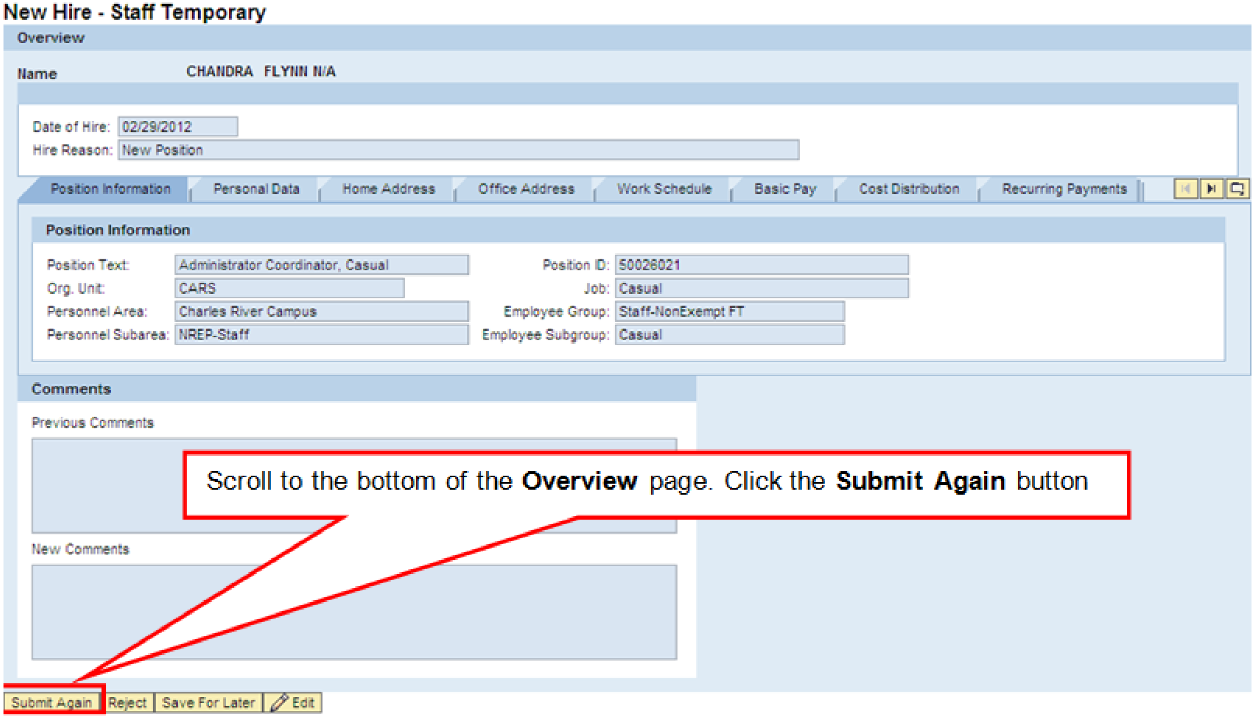




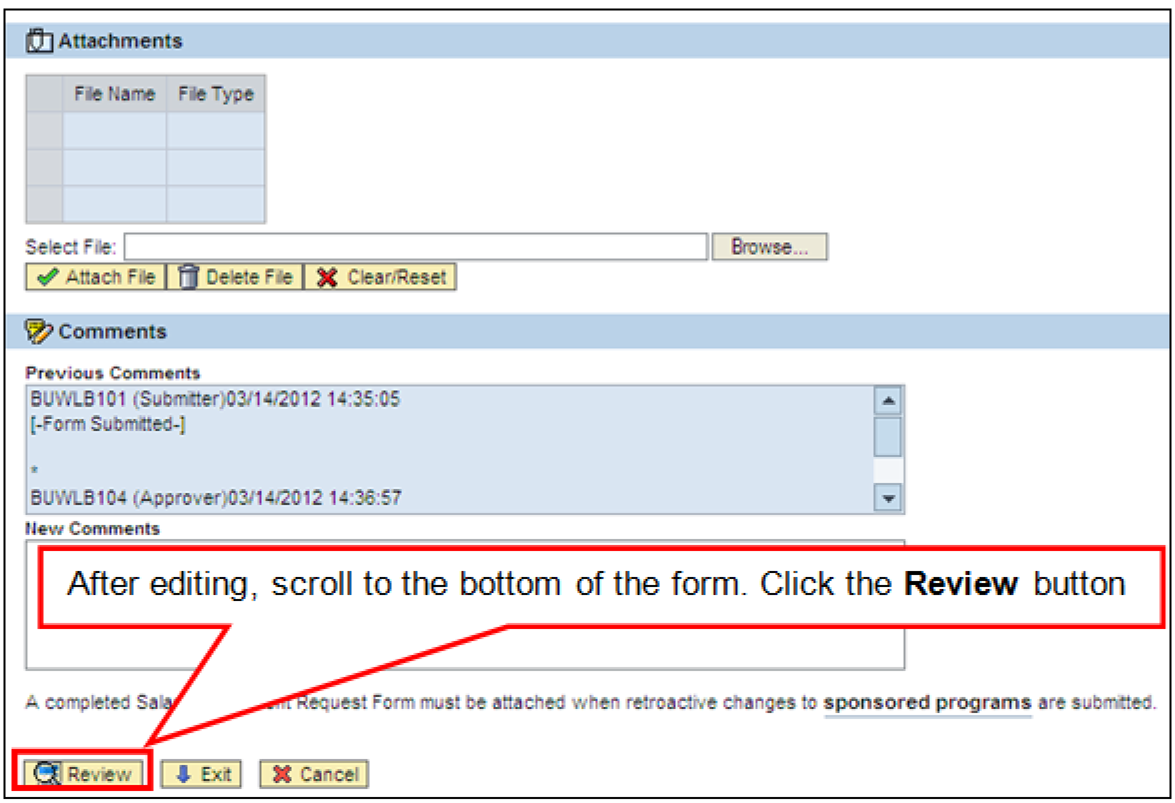
For Org Management "Position" forms and Personnel Administration "Hiring" forms:

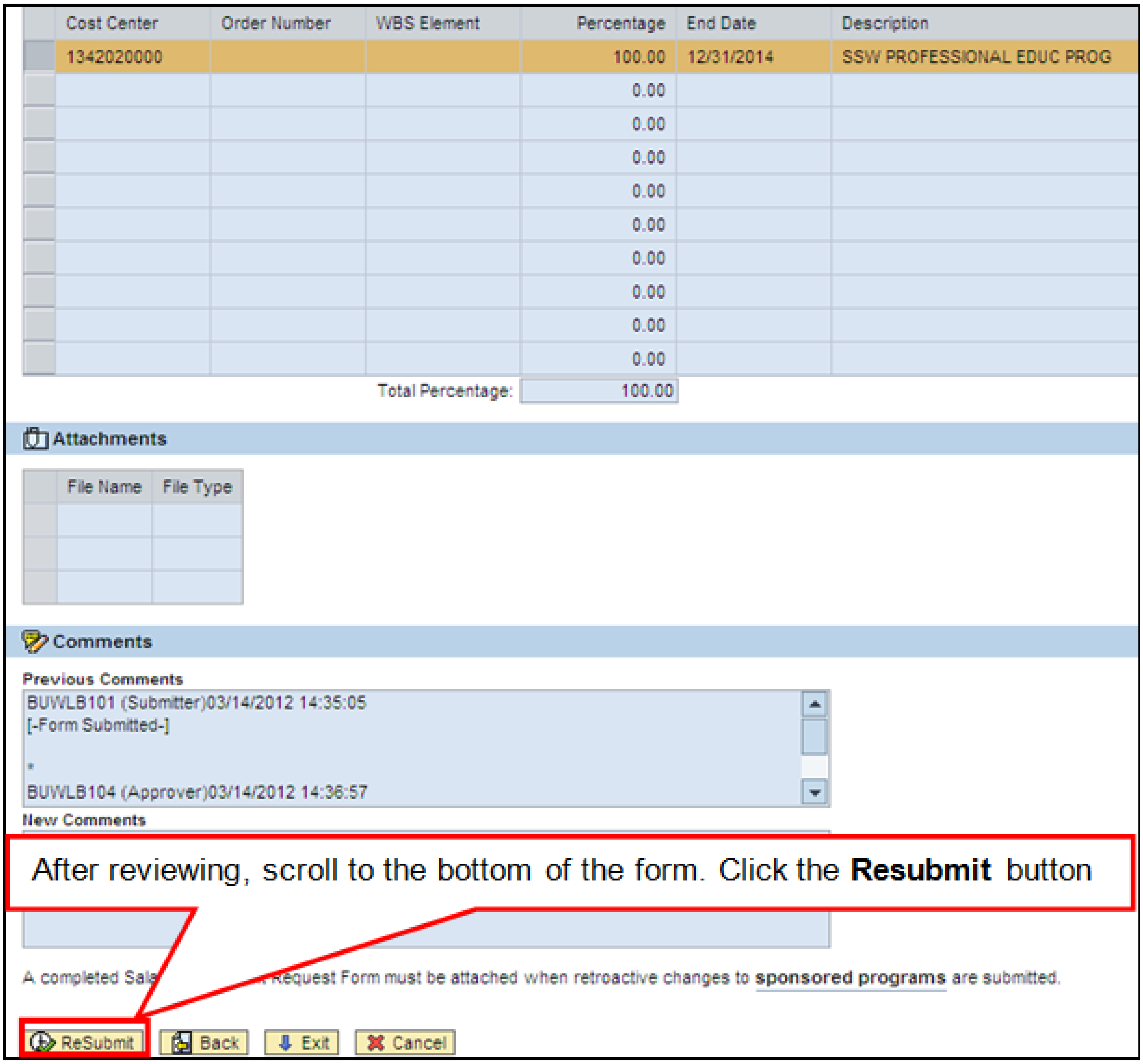


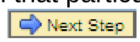
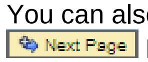
New Hire - Staff Temporary



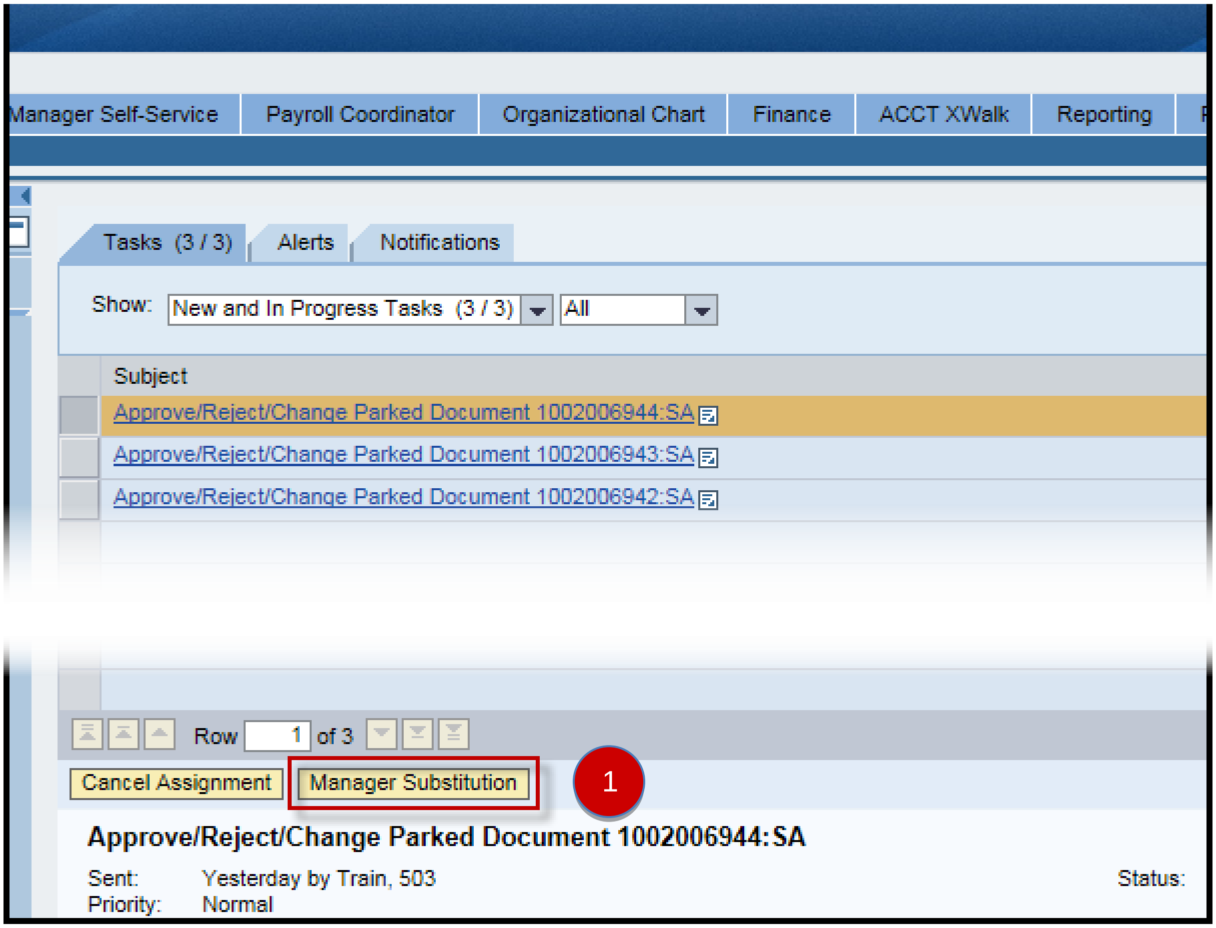
For Personnel Action forms:



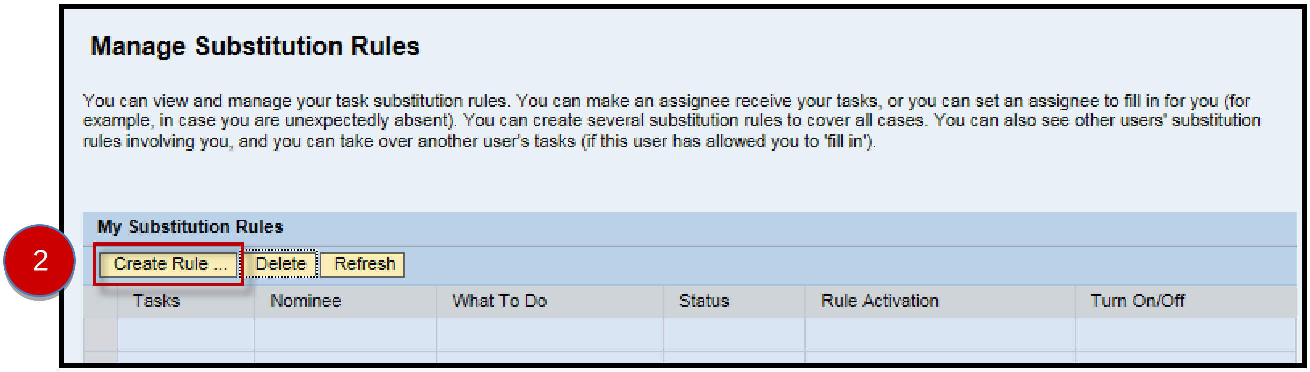

Cost Center
Order Number
WBS Element
Percentage
End Date
Description
1342020000
100.00
12/31/2014
SSW PROFESSIONAL EDUC PROG
0.00
Total Percentage:
100.00
Attachments
File Name
File Type
Comments
Previous Comments
BUWLB101 (Submitter)03/14/2012 14:35:05
[-Form Submitted-]
BUWLB104 (Approver)03/14/2012 14:36:57
New Comments
After reviewing, scroll to the bottom of the form. Click the Resubmit button
A completed Sal
Request Form must be attached when retroactive changes to sponsored programs are submitted.
ReSubmit
Back
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	To resubmit the multiple-page Org Management "Position" forms (*Create Position, Maintain Position)* and Personnel Administration "Hire" forms (*Hire-Staff, Hire-Faculty, Hire-CRC Lecturer*): • 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. Once you have completed edits to the form, Overview is the last page: • 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	After making any needed edits to the form returned to you, scroll to the bottom of the **Personnel Action** form. To resubmit all one-page **Personnel Action** forms: *Additional Payment, Leave of Absence/Return from LOA, Position Change, Position Revision, Recurring Payments, Salary Change, Salary Cost Distribution, Termination, and Transfer:* • Click **Review** button. • Click **ReSubmit** button. The Personnel Action form is re-submitted for approval in Workflow!

Topic 3: Substitutions



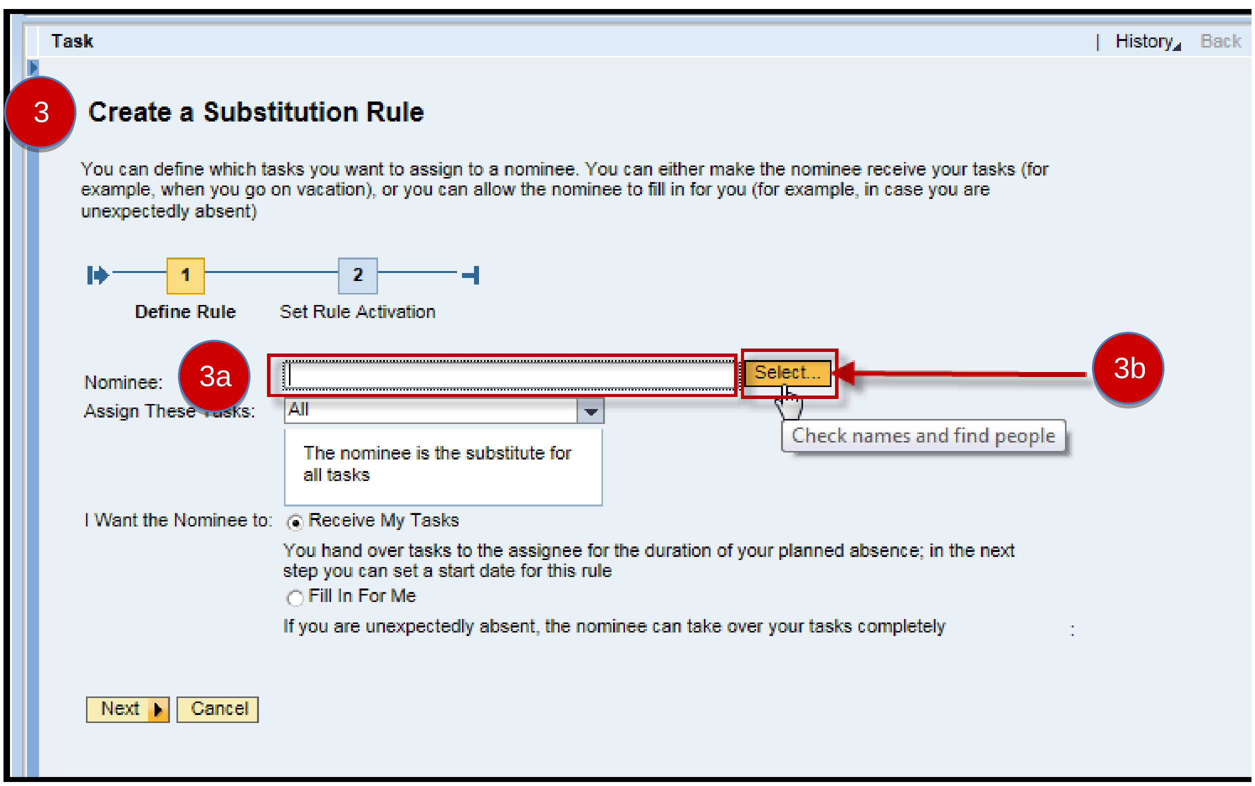
Worklist Substitution	
1	Click on **Manager Substitution** button.
Manager Substitution can be access through the **Worklist** task via Manager Substitution button and is also available in the sub-tab area via Icon (**Manager Substitution Rules**) located below the **Task**, **Alert**, and **Notification**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

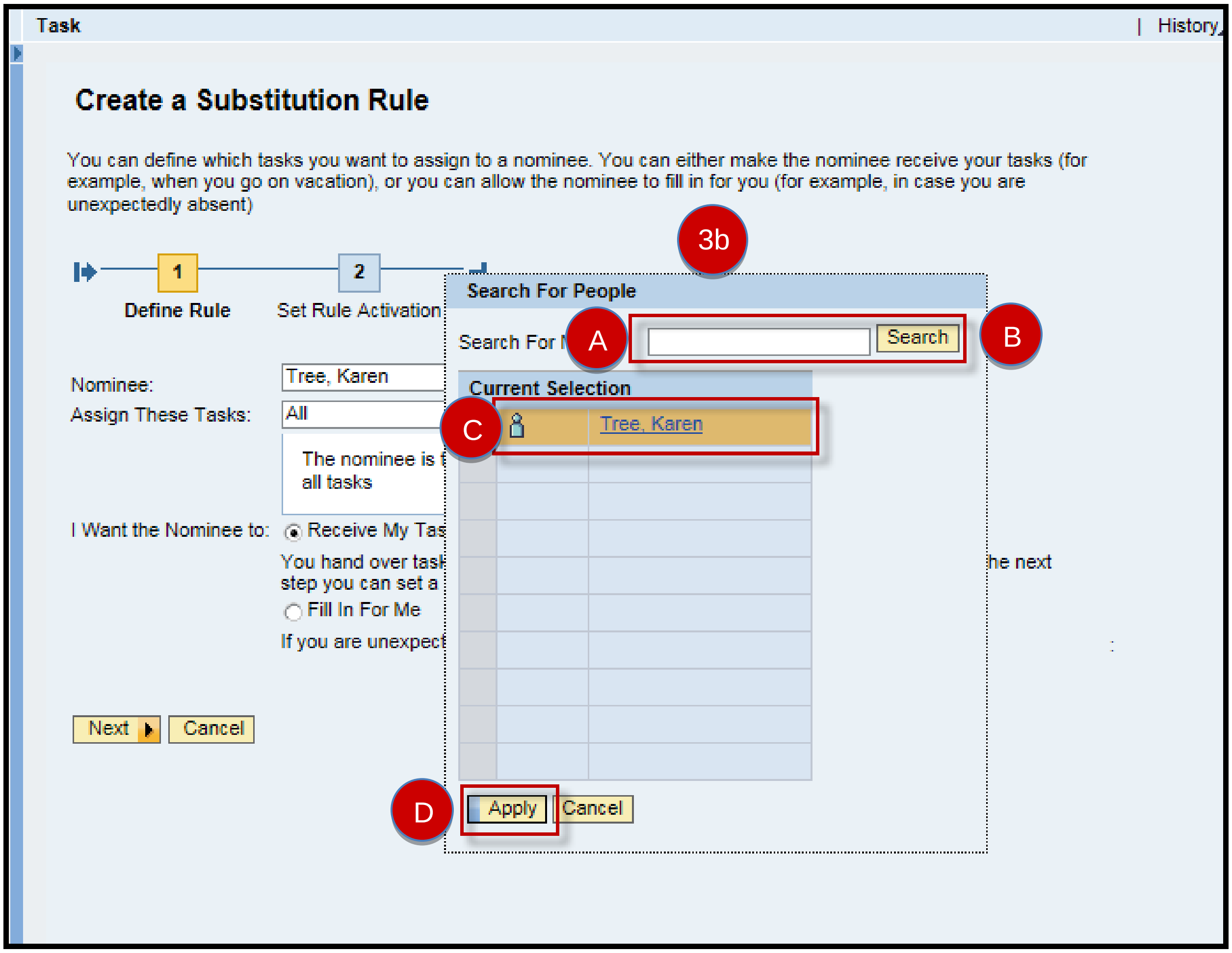


2	Click on **Create Rule** button.
3	The **Create a Substitution Rule** screen will display

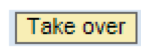
There are two options for selecting and entering a user email.

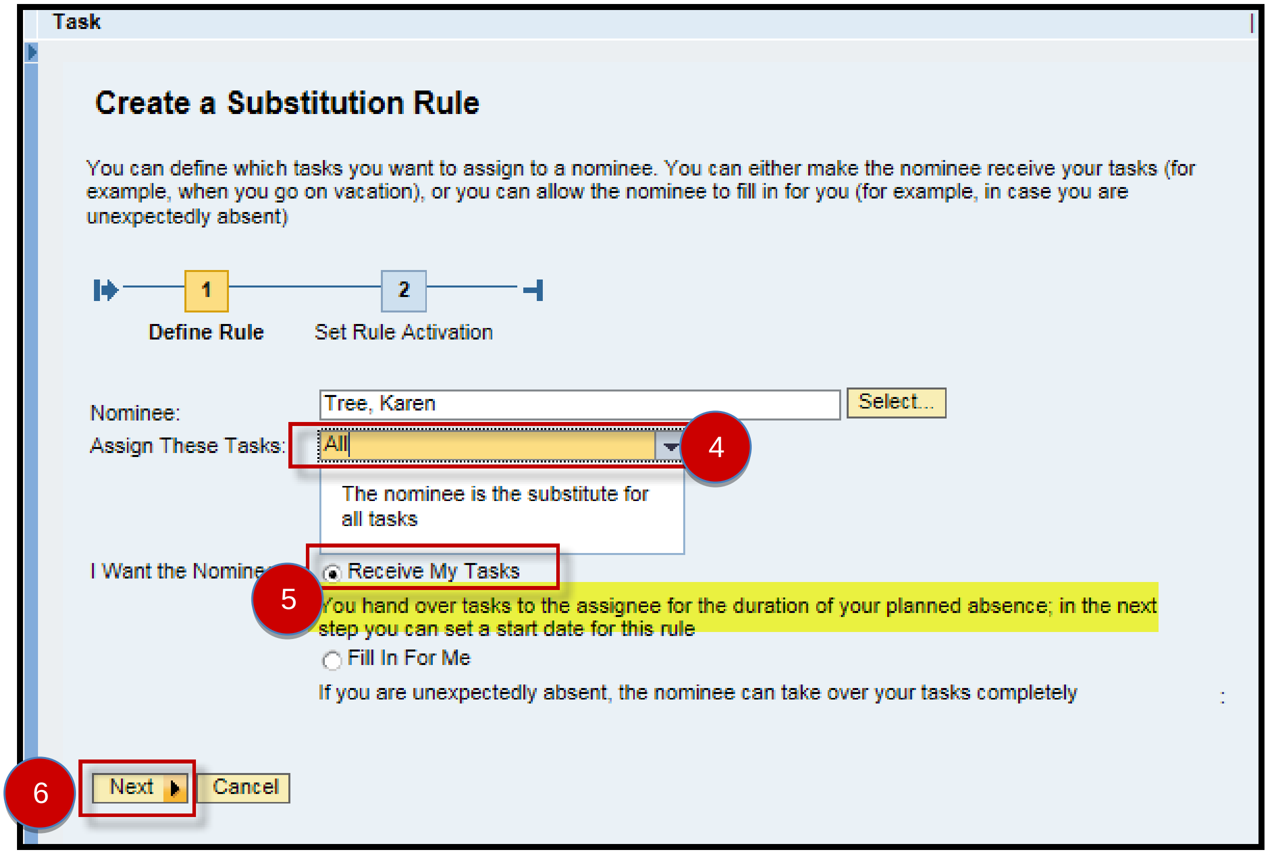
- **3a** - Option 1, Use this if the user name or ID is known.
- **3b** - Option 2, Use this if a search is required to select the user.



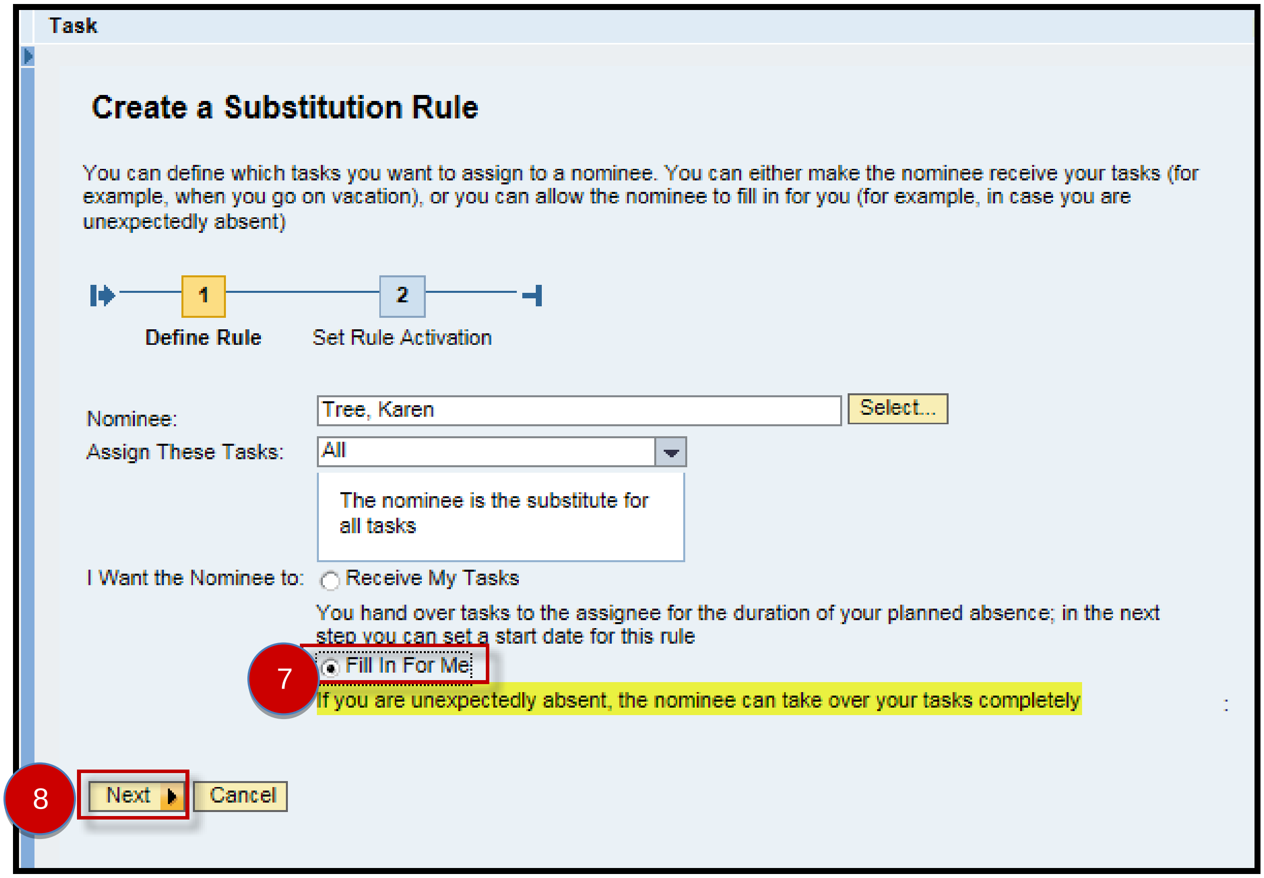


3b	Option 2 - Use this if you a search is required to select a user. New window will appear, **Search For People**.
3b - A	Type user name into the **Text Field** labeled **Search for Name**.
3b - B	Click **Search** button.
3b - C	Next Click on the user name
3b - D	Then Click **Apply** button.

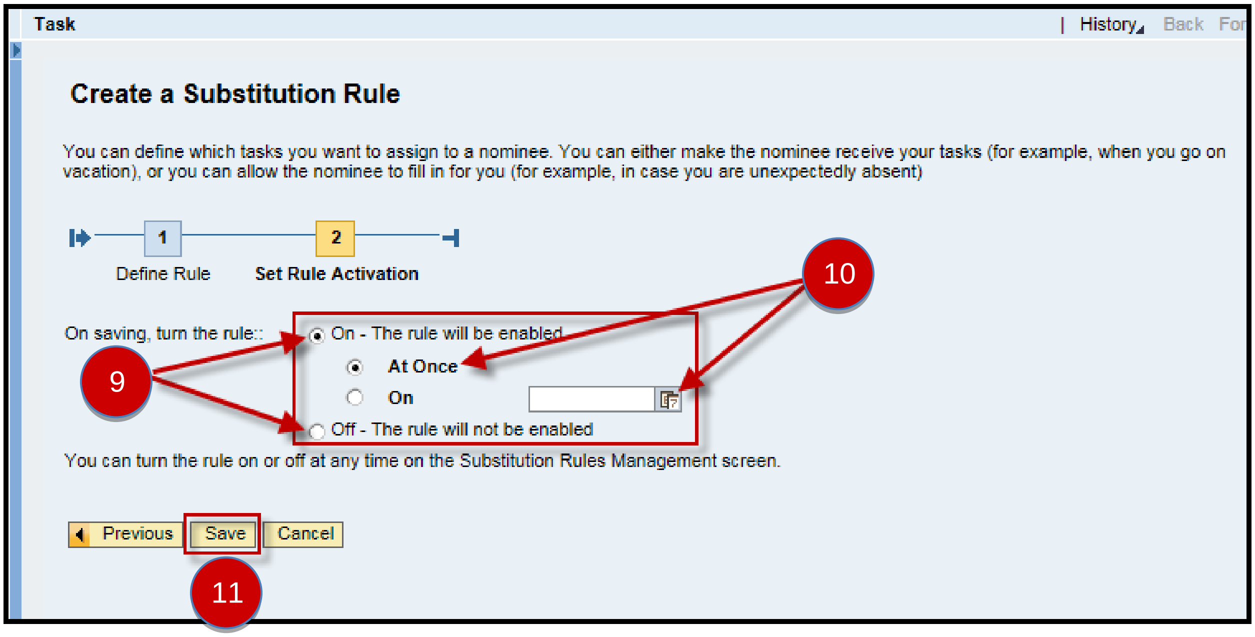
Action	Description
[How to Assign a Substitute]()	There are two types of substitutes you can setup: • **“Receive My Tasks”**, an active substitute where you designate someone as your substitute at all times • **“Fill in For Me”**, a designated substitute for a limited time period, which you have control over in terms of turning on or off For every substitution you need to create a substitution rule.
[“Receive My Tasks” – What the Assigned Substitute Sees]()	This is an option where you designate someone as your substitute at all times. The “**Receive my tasks”** option allows the assignee to immediately start seeing designated tasks. ✓ This process is called **Active Substitution**. ✓ Assignee also has the option to not take over tasks. ✓ 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]()	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. ✓ This process is called **“Passive Substitution”.** The **“Fill in for me”** option requires an additional step to be perform in **Worklist tab** to start receiving and seeing tasks. ✓ The assignee will need to select **“Take over”**  button. ✓ This option does not allow assignee the choice to deny tasks take over. An example of this would be for emergency (unplanned time off) situations were the assignee can take over tasks. 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.
[How to Turn Off a Substitute You’ve Assigned]()	You can turn off a Substitution Rule at any time by clicking the “Turn Off” button.



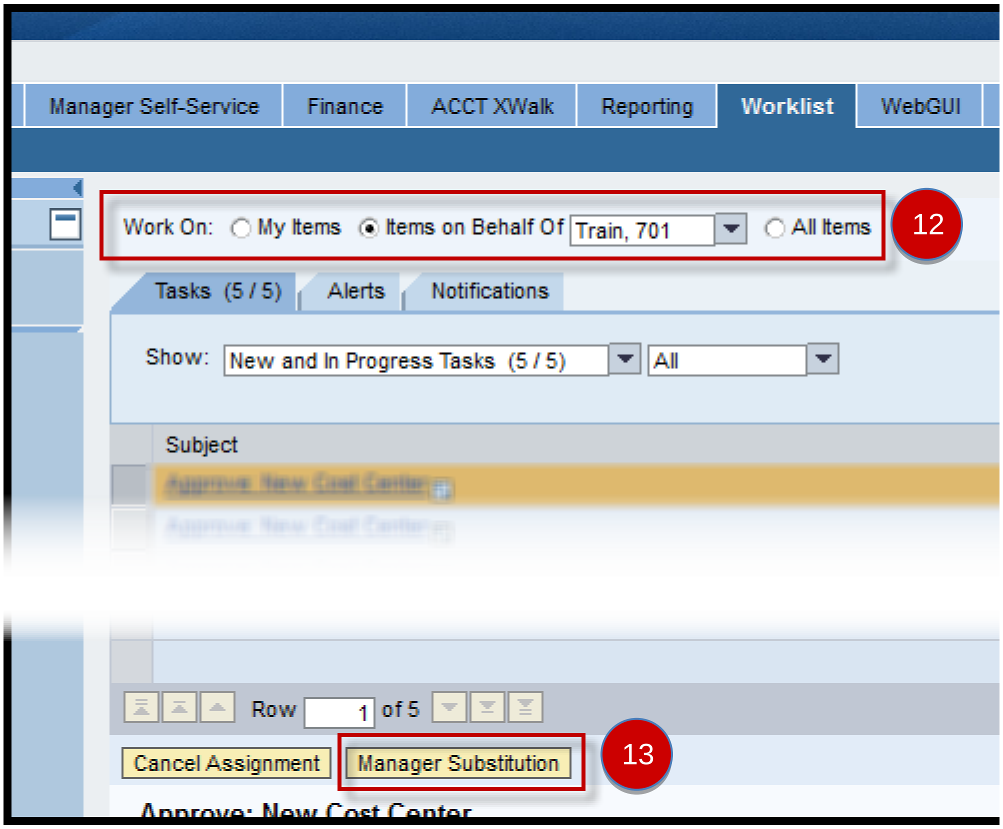
Assigning a Substitute:	
4	Select **All** to assign all tasks to the assignee.
To set-up a "Receive My Tasks" substitute:	
5	Select the radio button for **Receive My Task** to assignee the **Nominee** tasks
6	Click the **Next** button to proceed



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

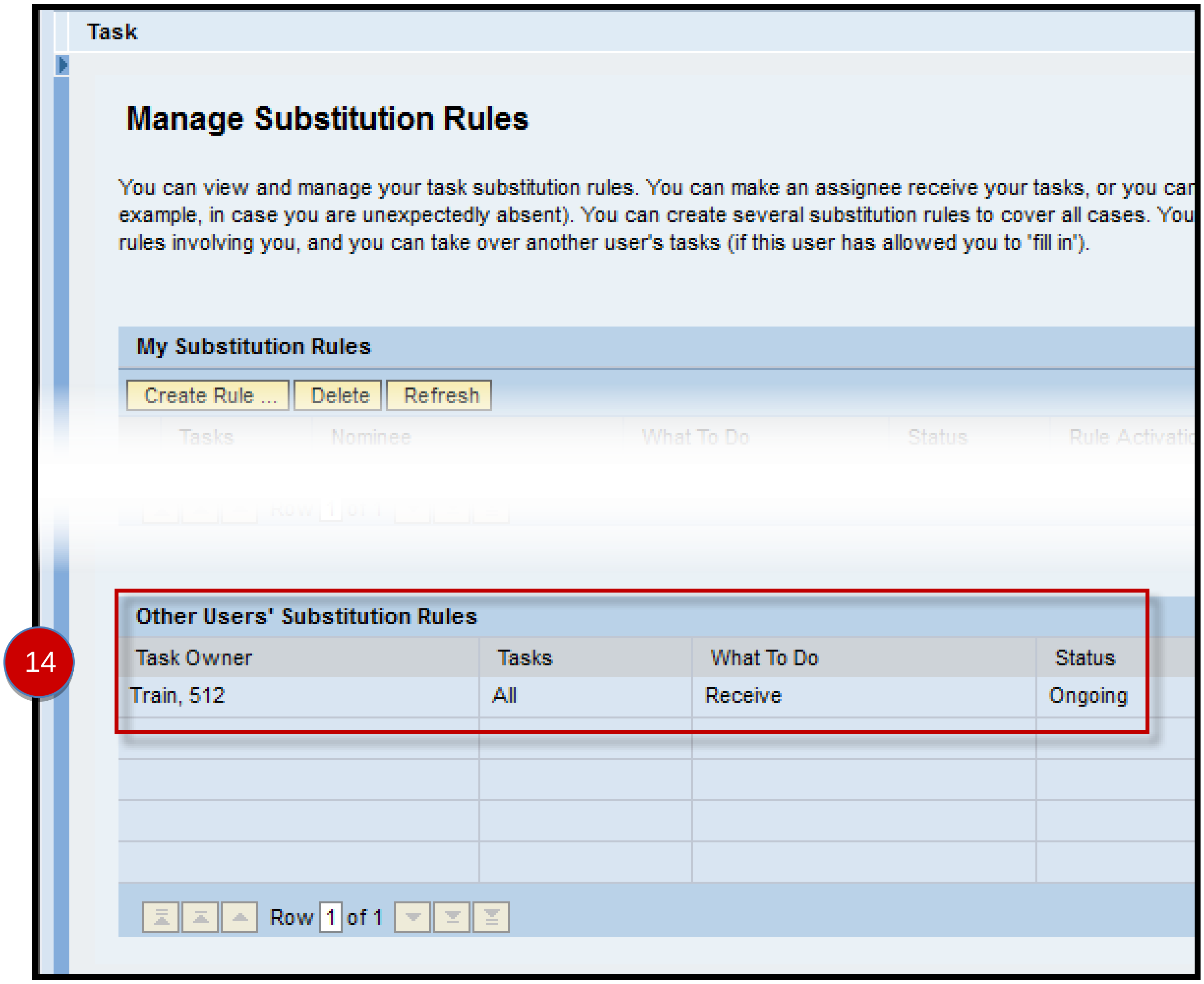


For each substitution, there are three options to create rules in the **Set Rule Activation** screen**:**	
9	Select whether to turn the rule **On** or **Off**. **Off =** Leave substitution off for time being.
10	Select when to enable the substitution rule **At Once** or **On** a specific date (enter **date** or select the **date** from calendar). **At Once =** Turn substitution on immediately. **On** plus specific date **=** Turn substitution on a specified date.
11	Click the **Save** button once a selection is made.

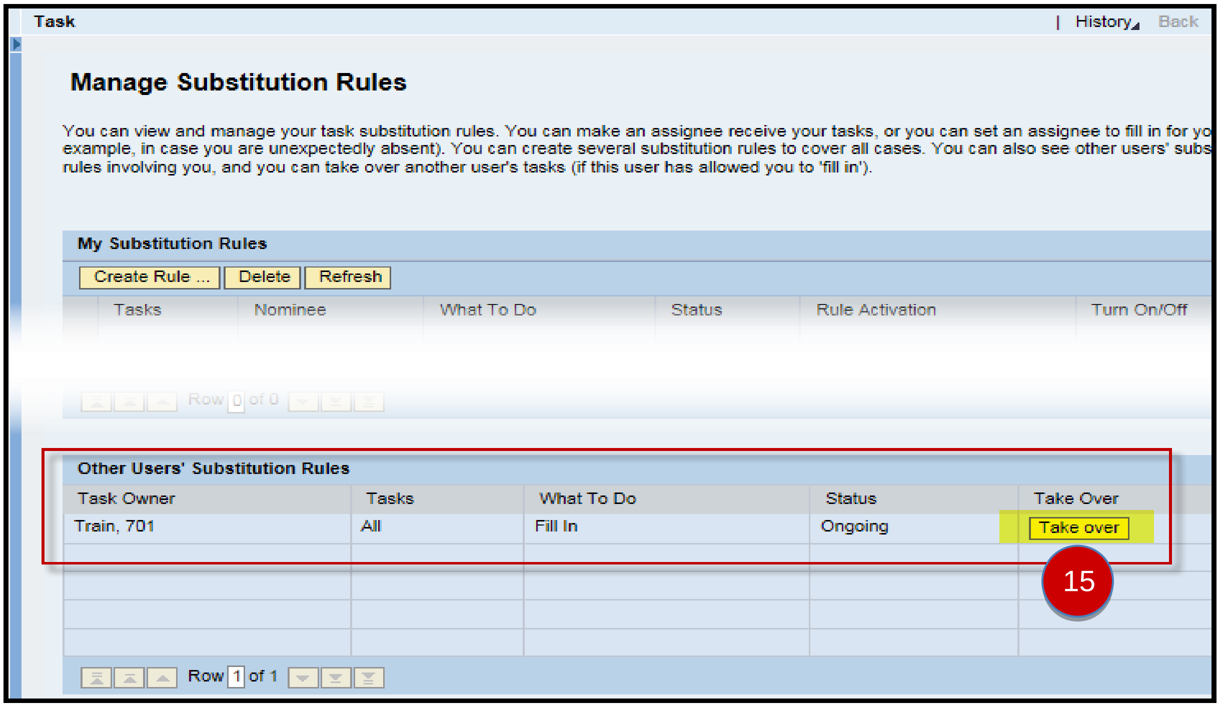


“Receive My Tasks” – What the Assigned Substitute Sees	
12	The designated substitute has three viewing options available to select from the Worklist screen: • My Items – allows the designee tasks to display • Items on Behalf of – allows designee to display substitute requesters tasks • All Items – displays both the designee and substitute requesters tasks
13	Click on **Manager Substitution** button for an additional view option

To view "Other Users' Substitution Rules, go to the Manager Substitution Rules screen:



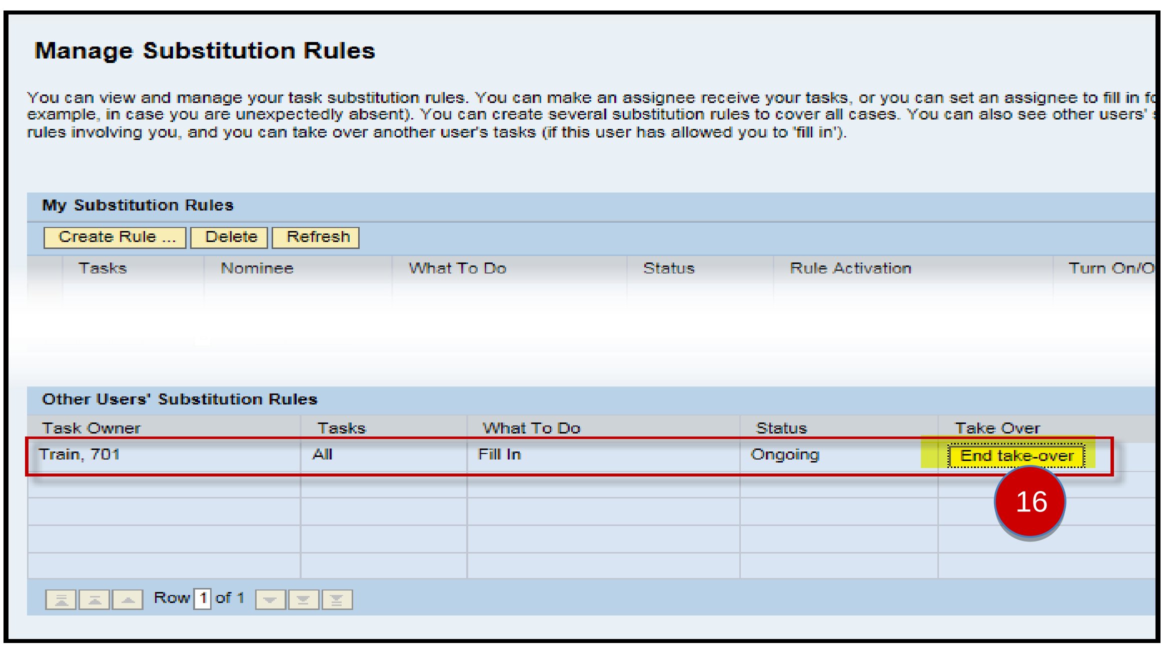
To view "Other Users' Substitution Rules, go to the Manager Substitution Rules screen:	
14	Results from step 13 above displays substitute requester's rule to designated substitute for review. **Note**: **Other Users' Substitution Rules** section cannot be altered.



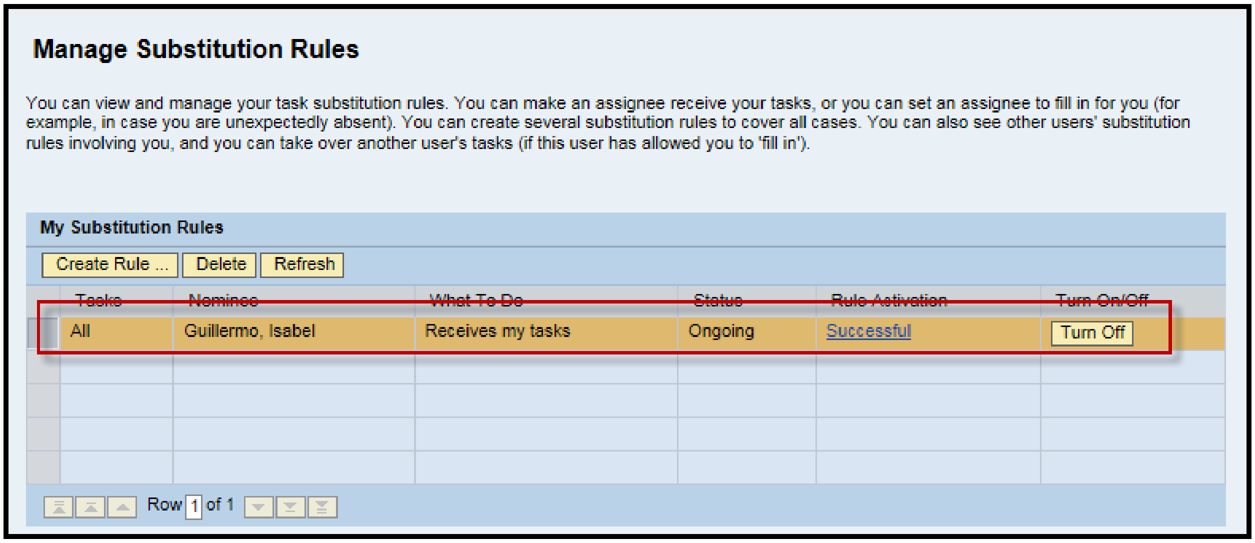
"Fill in For Me" - What the Assigned Substitute Sees:

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

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



After substitution is activated, there will be the option to cancel the assignment:	
16	To cancel assignment. Click **End take-over** button



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.