

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

Click <u>here</u> for instructions on how to personalize your worklist.

BOSTON					1.	Log on to BUworks Central https://ppo.buw.bu.edu
Nome Employee Self-Service Organizational Cha	rt Request Tracking Finance ACC	7 XWaik BUD Translation Reporting	Worklad		2.	Click on the Worklist tab
Welcome to BUworks Cen A personalized view of University resou manage your daily work. Learn the System BUworks Online Help can show you the	tral Portal rces designed to help you way.					
Tasks (48 / 53) Alerts Notifications					3.	If you have tasks waiting for approval, they will be
Show: New and In Progress Tasks (48 / 53)	ielect a Subview 💌 🔺	V		\$ 7 C		displayed in the tasks tab on the worklist
Date Request Initiated Master Cost Center	Subject	Initiator Org Unit S	Sent Date ⊽ Due Dat	e ≟ Status 🔺		
Feb 15, 2018 2573050000	: Additional Payments	#600332999	eb 20, 2018	New	(	Click on a displayed <b>task link</b> to open and review it
Feb 15, 2018 25/3050000		<u>)#600333010</u>	eb 20, 2018	New		ener on a displayed task mink to open and leview it
Jan 14, 2018 2573050000		<u>)#600328445</u>	lan 16, 2018	New		
Cancel Assignment Manager Substitution	complete snopping Cart 1000782834 with Va	ue 031.30 USU	ian 12, 2010 Jan 14,	2010 New		



			4. To approve the task	
👦 Comments				
Previous Comments [-Form Submitted-] Updating salary support sources to reflect corresponding effort spent on research activities Approver)01/16/2018 09:12:17  New Comments			<ul> <li>a) Enter a meaningful comment with your initials in the Comments area.</li> <li>b) Click on Continue/Review/Validate Form Data</li> <li>c) Click on Submit for Approval to send the form over to the next department for approval.</li> <li>To reject an OM form, click on Reject.</li> <li>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 William Payments.</li> </ul>	
			cheking on Keturn to Sender	
Jan 14, 2018 Jan 14, 2018	2573050000 2573050000 Back Exit Ca	Returned: Salary Cost Distribution Returned: Salary Cost Distribution	<ul> <li>5. If you have a returned Personnel Action (PA) form in your worklist:</li> <li>a) Click on the task link to open the form</li> <li>b) Click on the <b>Review</b> button</li> <li>c) Make the needed edits to the form returned to you and scroll to the bottom of the form</li> <li>d) Click on the <b>Resubmit</b> button</li> </ul>	



Worklist Task Opt	tions
Forward Resubmit Approve Reject Details Print Preview Assign To Me Add Memo Display Details in SAP GUI Manage Attachments Create Ad-Hoc Request View History	<ol> <li>Highlight and select a task, right click to see available task options.</li> <li>The task options displayed may vary. In this example, the available task options are related to a Purchase Order approval.</li> <li>Common task options are:         <ul> <li>Forward</li> <li>Resubmit</li> <li>Cancel Assignment</li> <li>Assign to Me</li> <li>Display Details in SAP GUI</li> <li>Manage Attachments</li> <li>Create Ad-Hoc Request</li> </ul> </li> </ol>
ce       Manager Self-Service       Payroll Coordinator       Organizational Chart       Finance       ACCT XWaik       Rep         Show:       New and in Progress Tasks       (2 / 3)       Select a Subview       All       Image: Subject         Subject       ApproveRepetit/Change Parked Document Incidence is an operation of the Conditional Chart       Forward       Forward         Complete Shooping Cart       Resubmet       Porward       Resubmet       Disptay Details in SAP OUI         Manager Attachments       Organization       Use History       View History       View History	<ul> <li>2. The Forward option is used to send the task to another user.</li> <li>2. The Forward option is used to send the task to another user.</li> <li>To forward a task to another user with the appropriate approval role, use the Forward function.</li> <li>Highlight and select the task, then right click and double click on Forward task option.</li> <li>Step 6 and Step 7, above provides details on how to complete this task.</li> <li>The "Forward" task option is often used with PO Invoice Workflow approval notification. The notification sent to the Shopper who placed the shopping cart.</li> </ul>



	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 <i>Finance</i> approver in their department. To view a quick reference guide on the PO Invoice Workflow process click <u>here</u> .
Tasks (29 / 33)     Alerts     Notifications       Show:     New and in Progress Tasks (29 / 33)     Select a Subview	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.
Subject Accept Decision / Adust Shopping Cart Number Approve Purchase order Number Approve Purchase order Number Accept Decision / Adust Shopping Cart Number Polinypice 5110421367. Shopper Decision Form Poliny Forward Resubmit ent	<ul> <li>To do this:</li> <li>Select item by clicking on the Task link.</li> <li>Click on the Cancel Assignment button.</li> </ul> If you select or open a task by mistake, you can use the Cancel
Access Add Memo Nur Cancel As Display Details in SAP GUI on	Assignment button to return the task to workflow. This option allows another approver to select the task to review and approve.
PO Invi         Create Ad-Hoc Request         r Decision Form           Sent Date         View History         r by Train 504, BUworks           Priority:         Medium	An example of a <i>Finance</i> Worklist task where this option is used is the journal entry approval workflow notification.



Tasks (87 / 87)       Alerts       Notifications         Show:       New and in Progress Tasks (87 / 87)       Select a Subview       All         El:       Subject       Image: Substance Carl 1       Select a Subview       All         Complete Shooping Carl 1       Complete Shooping Carl 1       Select a Subview       All         Assocrue/Reset/Change Parised Document M00200842/SA.       Assocrue/Reset/Change Parised Document M00200842/SA.         Assocrue Purchase       Resubmit       Resubmit         Complete Shooping       Complete Shooping       Document M00200842/SA.         Assocrue Purchase       Resubmit       Resubmit         Assocrue Purchase       Assocrue Purchase       Resubmit         Complete Shooping       Doplay Details in SAP GU       Manage Attachments	<ul> <li>4. The Assign to Me task option is used to when you want to assign the task to yourself.</li> <li>To do this highlight and select task, right click and select by double clicking on "Assign To Me."</li> <li>Finance approver user uses this option to ensure they will be the only person to review and approve that task.</li> <li>The system will omit "Logically Delete" the task from the other finance approver's worklist task area.</li> </ul>	
Approve/Reject/Change Parked D View History	To view the presentation on JE Workflow Worklist click <u>here</u> .	
	5. Display Details in SAP GUI options open a WebGUI ECC system window displaying details on the workflow notification and process.	
Name allow     Name allow       Version     Name allow  <	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.	
A de tombe. P	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.	



Task - SAP NetWeaver Portal         Image Attachments: Approve/Reject/Change Parked Document 1003182704:2J         You can remove existing attachments here or upload further files         Remove         Subject       From         Parked Document: TRBU10031827042018         Parked Document: TRBU10031827042018         To upload an attachment, choose "Browse" and select the file from your file system. Then choose "Upload".         Image Browse			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 th entry.	
				<ul> <li>7. Create Ad-Hoc Request option is used to create an additional workflow notification/task to forward to another BUworks user.</li> <li>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.</li> <li>Insert task directly into the table and press "Enter" key after each entry.</li> <li>The two Ad Hoc-Request Type: <ul> <li>An "Action Item" for example can be used to alert another user to complete a task outside of the system.</li> </ul> </li> </ul>



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sumal Entry - Get FI Department Approvers for 1003182704	Completed	Modium			
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			WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
			WF-BATCH	Dec 8, 2017 4:07 PM	executed
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Determine Cost Objects for BUWLT031	Completed	Modium			
			Train 707. BUworks	Dec 8, 2017 4:07 PM	Created
			WF-BATCH	Dec 8, 2017 4:07 PM	Work Item Processing Complete
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• An "Approval" type is used to add another user to approve the SAP document entry.



Manager Subst	itution
Tasks (3 / 3)       Alerts       Notifications         Show:       New and In Progress Tasks (3 / 3)       All         Subject       Approve/Reject/Change Parked Document         Approve/Reject/Change Parked Document       Cancel Assignment         Manager Substitution       Manager Substitution	<ol> <li>To assign another employee in your department to act as a substitute, click on Manager Substitution</li> </ol>
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       Create Rule       Delete       Refresh         Tasks       Nominee       What To Do       Status       Rule Activation       Turn On/Off	2. Click on Create Rule. The Create, a Substitution Rule section, will be displayed
Task       History       Back         Create a Substitution Rule       You can define which tasks you want to assign to a nominee. You can either make the nominee receive your tasks (for example, when you go on vacation), or you can allow the nominee to fill in for you (for example, in case you are unexpectedly absent)       Image: Comparison of the	<ol> <li>Enter Username or ID for nominee. If you need to search for a user, click on Select</li> </ol>



Task   History,	4. Type username into the <b>Text Field</b> labeled <b>Search for Name</b> .
Create a Substitution Rule         You can define which fashs you want to assign to a nominee. You can either make the nominee receive your fashs (for example, when you go on vication), or you can allow the nominee to fill in for you (for example, in case you are unsupportedly absent)         Image: Set Rule Activation Search For People Search For People Search For Names Search For Name Search For Search For Search For Search For Search For Name Search For Nam Search For Nam Search For Nam Search For Nam	<ul> <li>5. Click on Search</li> <li>6. Click on User's Name</li> <li>7. Click on Apply</li> </ul>
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 nominee can take over your tasks completely      Next     Cancel	<ul> <li>There are two types of substitutes you can setup:</li> <li>8. For your nominee to serve as your substitute <i>at all times</i>, click on "Receive My Tasks."</li> <li>9. For your nominee to serve as your substitute <i>for a limited time</i>, 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).</li> <li>10. Click on Next after choosing the suitable option</li> </ul>



Task         Create a Substitution Rule         You can define which tasks you want to assign to a nominee. You can either my vacation), or you can allow the nominee to fill in for you (for example, in case you are the fill in the rule will be enabled being the set Rule Activation         On saving, turn the rule:       On - The rule will be enabled         On saving, turn the rule:       On - The rule will not be enabled         On saving, turn the rule:       Off - The rule will not be enabled         You can turn the rule on or off at any time on the Substitution Rules Management         Previous       Save	History, Back For ake the nominee receive your tasks (for example, when you go on u are unexpectedly absent) nt screen.	<ul> <li>11. Select the radio button to specify if the rule is enabled</li> <li>At Once or</li> <li>On a specific date</li> <li>12. Click on Save to save the rule</li> </ul>
Task         Manage Substitution Rules         You can view and manage your task substitution rules. You can make an ass example, in case you are unexpectedly absent). You can create several substrules involving you, and you can take over another user's tasks (if this user have a substitution Rules         My Substitution Rules         Create Rule Delete Refresh         Other Users' Substitution Rules         Task Owner       Tasks         All       Fill In         Example Row 1 of 1 Y Y	History, Back ignee receive your tasks, or you can set an assignee to fill in for yo itution rules to cover all cases. You can also see other users' subs is allowed you to 'fill in'). Status Take Over Ongoing Take over	13. The assigned nominee will need to go into Manager Substitution from worklist tab and click on Take Over button.



Manager Self-Service       Finance       ACCT XWalk       Reporting       Worklist       WebGUI         Work On:       My Items       Items on Behalf Of       All Items         Tasks       (5 / 5)       Alerts       Notifications         Show:       New and In Progress Tasks       (5 / 5)       All	14. The nominee will need to select the radio button "Items on Behalf of" to see the tasks on behalf of the assigner
Task         Manage Substitution Rules         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').         My Substitution Rules         Create Rule       Delete	<ul> <li>15. After activation of substitution, a manager has the option of completely deleting a substitution rule.</li> <li>To delete a substitution rule: <ul> <li>a) Click on Manager Substitution</li> <li>b) Select an existing substitution rule by clicking on it</li> <li>c) Click on Delete</li> </ul> </li> </ul>
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 'Bl in').         My Substitution Rules       Create Rule       Delete       Refresh         Tasks       Namece       What To Do       Statue       Rule Assistion         All       Receives my tasks       Ongoing       Successful       Tum Ori	<ul> <li>16. A manager can also cancel the substitution by going into Manager Substitution and clicking on <b>Turn Off</b></li> <li>The substitution rule can be turned on at a later point in time if needed</li> </ul>



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

Perse	onalize a Worklist
Weise       Employee Self-Service       Organizational Chart       Request Tracking       Finance       ACCT XWeil       BUD Translation       Reporting       Workst         Weilcome to BUworks Central Portal         ACCT XWeil       BUD Translation       Reporting       Workst         Weilcome to BUworks Central Portal         Acct xweil       BUD Translation       Reporting       Workst         Learn the System         BUworks Online Helip can show you the way.       BUWorks       Description       Description	<ol> <li>Log on to BUworks Central <u>https://ppo.buw.bu.edu</u></li> <li>Click on the Worklist tab</li> </ol>
Tasks (48 / 53)       Alerts       Notifications         Show:       New and In Progress Tasks (48 / 53) <ul> <li>Select a Subview</li> <li>All</li> <li>Date Request Initiated</li> <li>Master Cost Center</li> <li>Subject</li> </ul> <ul> <li>Feb 15, 2018</li> <li>2573050000</li> <li>Additional Payments</li> <li>#600332999</li> <li>Feb 15, 2018</li> <li>2573050000</li> <li>#600333010</li> <li>Cancel Assignment</li> <li>Manager Substitution</li> </ul>	<ul> <li>3. All the new and in-progress tasks are displayed. The icons located to the extreme right serve the functions of:         <ul> <li>Filtering tasks (funnel),</li> <li>Refreshing the screen (two arrows),</li> <li>Toggle preview display (looking glass)</li> <li>Personalizing the view and substituting managers (notepad).</li> </ul> </li> </ul>







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.



Attributes and their order         In this section, you can define the attribute order and which attributes you want displayed. To change the display order, follow the example.         Image:	<ul> <li>8. You can change the order in which the columns are displayed in the worklist.</li> <li>To define the order in which columns should appear from left to right: <ul> <li>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</selected></li> <li>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</li> <li>c) Click "Save" to save changes</li> </ul> </li> </ul>
Current display attributes Date Request Initiated Master Cost Center Subject Initiator Org Unit Sent Date Due Date Status << Remove From Current View >> Available Attributes not Displayed:           <	<ul> <li>9. To add a new column to your worklist (Example: Effective Date)</li> <li>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</li> <li>b) From the "Available Attributes not Displayed" dropdown, select the Effective Date column,</li> <li>c) Click on "Add." The newly added column will appear in the "Current display attributes."</li> <li>d) Click on Save under Personalize Tasks to save changes</li> </ul>



Personalize "Tasks"         Save       Duplicate         Restore Defaults       Cancel         Attributes and their order         In this section, you can define the attribute order and which attributes you want displayed. To change the displayed.         In this section, you can define the attribute order and which attributes you want displayed. To change the displayed.         In this section, you can define the attribute order and which attributes you want displayed. To change the displayed.         Interview       Interview         Interview       Interview         Interview       Interview         Interview       Interview         Interview       Interview         Interview       Interview	<ul> <li>10. To remove a column from the worklist:</li> <li>a) Select the column you would like to remove from "Current display attributes" by clicking on the silver area of a column listed</li> <li>b) Click on "Remove from Current View" to confirm changes</li> <li>c) Click on "Save" to Save changes</li> <li>After saving, your worklist should no longer display the removed column (Effective Date).</li> </ul>
Data properties         You can define the number of items to be displayed on each page         Items To Be Displayed Per Page:         Page Refresh Rate:         Indicate as 'Severe' Before Due Date:         Indicate as 'Warning' Before Due Date:         Table Design Mode:         Worktem Filter:	<ul> <li>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.</li> <li>11. To specify how many rows (Example: 10 rows) you want to see displayed in your worklist: <ul> <li>a) Go to the Data properties section of Personalize View</li> <li>b) specify the number items to be displayed per page</li> <li>c) Click on "Save" to save your changes</li> </ul> </li> </ul>



In this section, you can define the items are sorted by:	default setting for the sorting p	refere
Sent Date	<ul> <li>Ascending</li> <li>Descending</li> </ul>	
Due Date 💌	<ul> <li>Ascending</li> <li>Descending</li> </ul>	
· · ·	<ul> <li>Ascending</li> <li>Descending</li> </ul>	

- 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