Work/Manage Worklist

Trigger:

Concept

Job Aid and Business Process

Purpose
Many of the tasks that you perform throughout the day are part of larger tasks that involve several steps and several people working together. For example, when you enter an Incidental Pay Request, you are also initiating an approval and payment process: someone else reviews and approves it. The term workflow refers to this larger process.

To facilitate this type of multi-user process, PeopleSoft automatically triggers workflow routings—notifications to inform other people of the work awaiting them. So when you enter an Incidental Pay Request, PeopleSoft automatically notifies the appropriate approver that the entry has been submitted and is awaiting review.

Assumptions
→ You are set up as an Approver in PeopleSoft

Responsibility/Role
→ All Approvers
### Required Field(s)
- "Mark Worked" button once item is completed

### Output - Results
- Completion of Worklist items

### Additional Information
None
Procedure

The Worklist enables you to select work items you for which you are responsible. You can only view worklist items to which you are assigned. Managers will be approving Job Openings, Job Offers, Position Requests and Incidental Pay Requests.

In the Job Opening/Job Offer items, managers will need to approve the item and the system automatically will mark the item as worked (remove it from your worklist). In the case of the Incidental Pay and Position Requests items, managers will need to navigate back to the worklist and check the "Mark Worked" button for that item in order for the task to be removed from the worklist. The following screens will explain this in greater detail.

Let’s approve an Incidental Pay Request.

Home > Worklist

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to your Worklist. From the Home page, click the Worklist link.</td>
</tr>
</tbody>
</table>
**Step 2**

The *Worklist* displays. Notice the right side of the page is truncated.

**TIP:** To view more information on the screen, click the **Collapse Menu** button.
### Step 3

You are now able to view the entire page on the screen.

Notice that there are 1-25 of 29 items displayed. To view all 29 items on one page, click the **View All** link.
Step 4. All 29 items are displayed on one page.

You can set a priority for each task based on importance or urgency. Click the **Priority** dropdown for that item to activate the menu.
5. Click an entry in the list that best describes the priority of the item.

Click an entry in the list. Choose 1-High
Step 6. When a header is underlined (for example Priority), this indicates the header is an active link. If clicked, the sort order will change. This is true throughout the system.

To organize all of the worklist items by priority, click the Priority link once to change the sort order to descending. Click a second time to change the sort order to ascending.
Step | Action
--- | ---
7. | The **Priority** column sort order has changed to descending. Now change the **From** sort order. Click the **From** header link.
<table>
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</thead>
<tbody>
<tr>
<td>8.</td>
<td>The work tasks are now sorted according to the alphabetical order (by FIRST name) in the <strong>From</strong> column.</td>
</tr>
</tbody>
</table>

*Let's approve the Incidental Pay Request item.*

Click the **10000000388..0..0.NEW** link.

10000000388..0..0.NEW
Step | Action
--- | ---
9. | The *Incidental Pay Request* page displays.

Carefully review the information you are about to approve. Click the **Manager Status** dropdown button to activate the menu.
Step | Action
--- | ---
10. | Click an entry in the list that describes the approval status. Choices include:

- **Approved** - the request is approved. You must enter comments specific to funding information for the additional pay, i.e. FRS number, position number, department id, etc – anything that will define the source of funding for the additional pay.

- **Denied** - the request is denied. It will be cancelled by the system and cannot be reused. You must enter comments justifying the denial.

- **Recycled** - the request is denied but sent back to the requestor. **You must enter comments justifying the recycle with instructions for change.** After the requestor makes the changes it can be resubmitted through workflow for approval.

Choose **Approved**
11. In the Justification and Comments section, notice there are 1 of 1 rows displayed. You must add a justification and/or comment before you click Save.

To add space for your comments, click the Add a new row at row 1 button (plus mark).
12. Enter comments to justify approval, explain a denial, or give instructions if you want changes made to this request.

Enter the desired information into the **Justification and Comments** field. Enter “Enter Approval Justification and/or Comments”.
Step | Action
--- | ---
13. | Use the right-hand vertical **Scroll** Bar to move to the bottom of the page.
Step | Action
--- | ---
14. | Click the **Save** button.
Step | Action
--- | ---
15. | To return to the worklist, click the **View Worklist** button.

(You could also use the **Worklist** link at the top of the page.)
16. The Worklist returns. Sort the worklist by **From** column.

Click the **From** link.

**From**
17. Notice the **Mark Worked** button.

   * For Incidental Pay and Position Requests you must complete the task (by approving the request, recycling it or denying it), and then navigate back to the worklist to and click on the ‘Mark Worked’ button.

   * In the case of approving Job Opening/Job Offer items, all you will need to do is process the request (approve, recycle or deny), and the system will mark the item worked (remove it from the worklist).

Locate the item you just approved - **1000000038.0..0.NEW**
Click the **Mark Worked** button.
Step | Action
--- | ---
18. | The item has been removed from your worklist.

Click the **Home** link to return to the **Home** page.
<table>
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| 19.  | Congratulations! You have completed the Work/Manage Worklist process. **End of Procedure.**