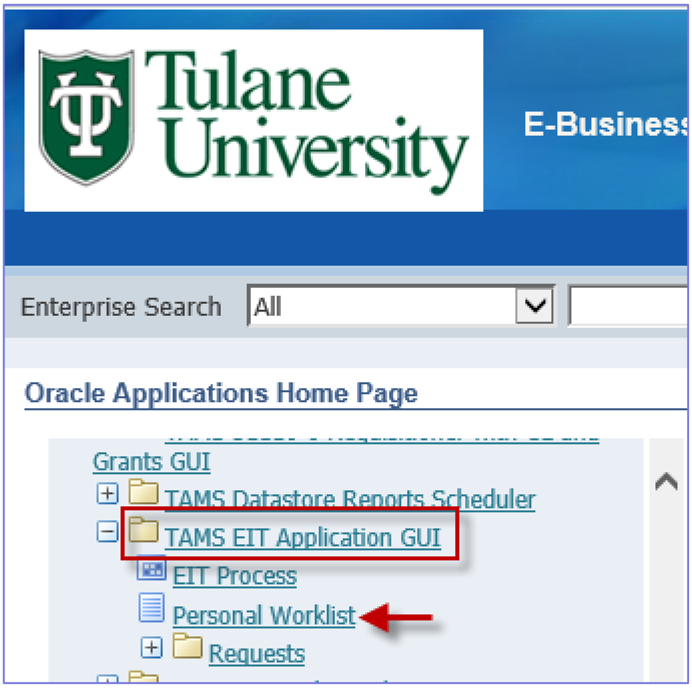
Approvers Manual

How to approve, reject or reassign for further approvals

Approvers General Information:

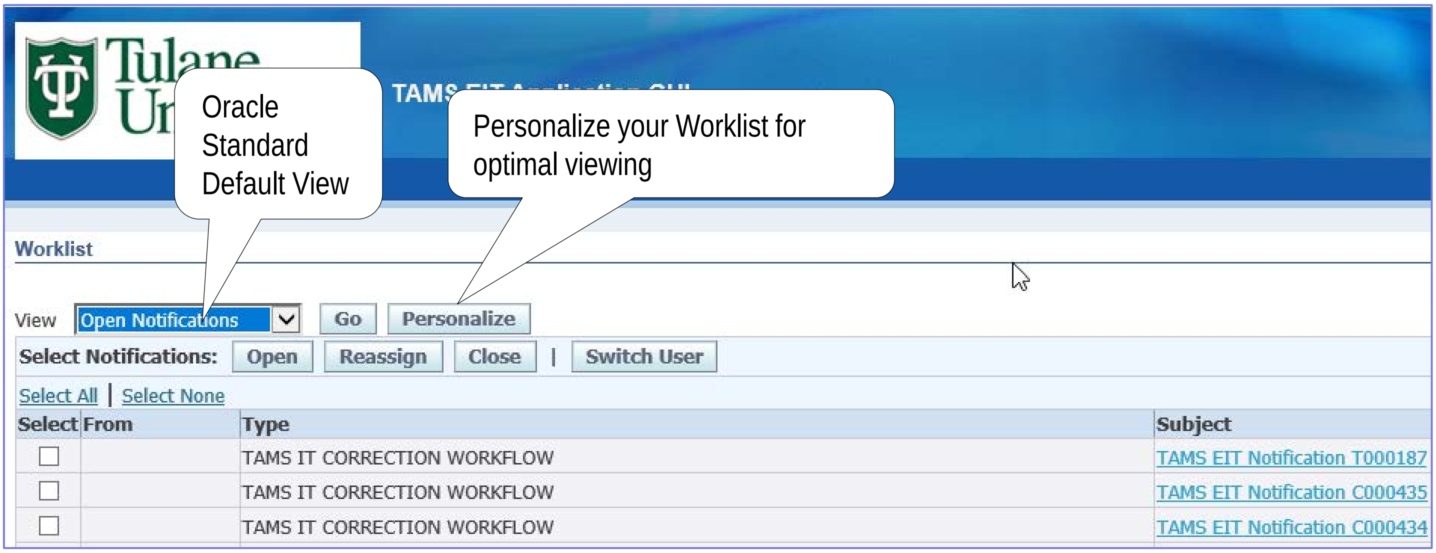
- Approvers will be alerted of an EIT awaiting their action via an email and by viewing their Worklist
  - You can create a personalized Worklist that displays a filtered list for easier management
  - The Worklist is similar to the To Do List and the Watch List in the current BPM system
- Approvers will have the option to either Approve, Return with Comments (reject), Reassign (request further approvals) or Request Information
  - Requesting Information will return the IT to the initiator with your question(s), but will not require the IT to go through approvals again

Checking Your Worklist



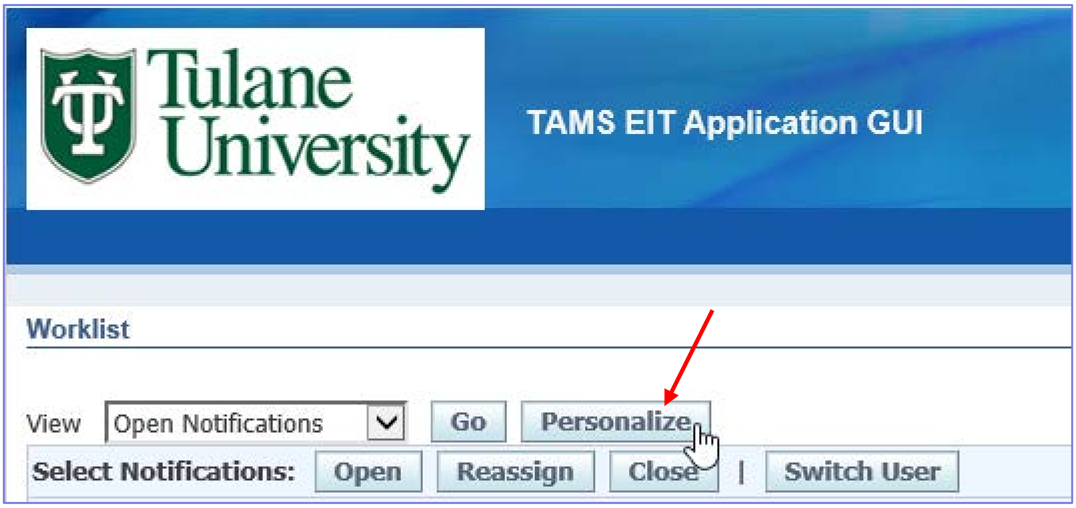
- To check for ITs that require your attention, you can go to your Worklist in EBS
- To go to your Worklist, log into EBS and click on your TAMS EIT Application GUI responsibility from your Home Page
- Click the Personal Worklist link

Checking Your Worklist



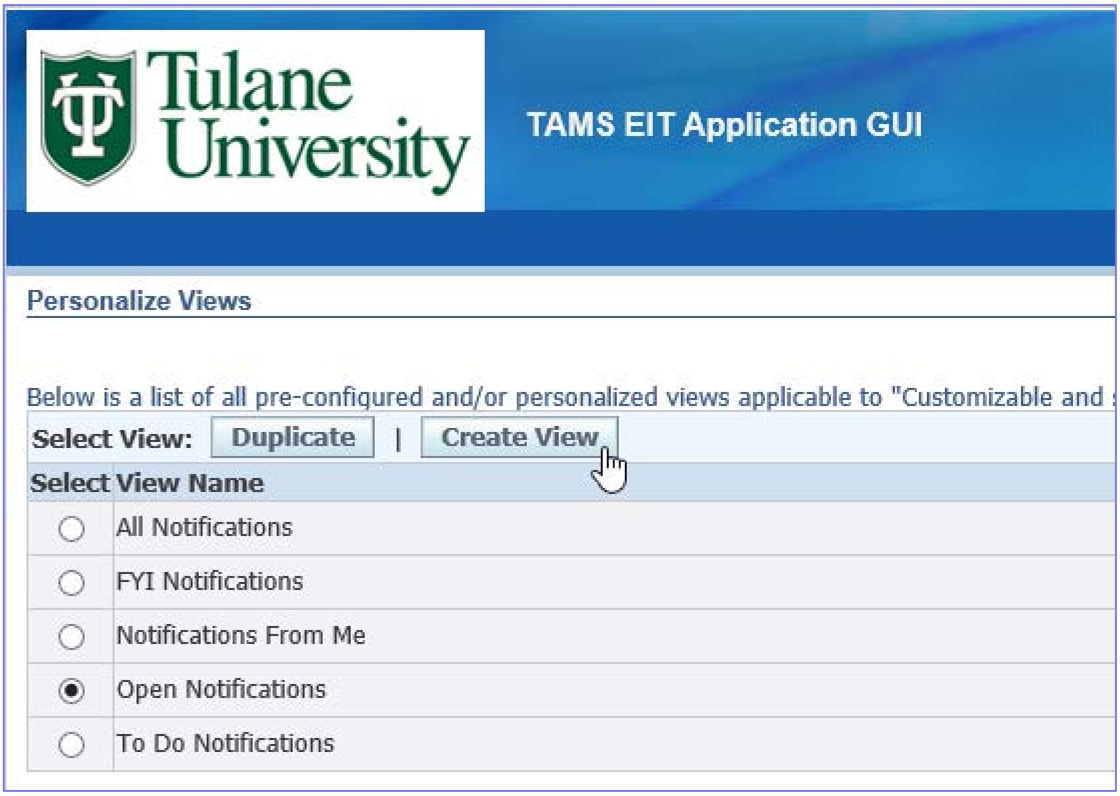
- The Oracle EBS default Worklist view will open
- For optimal viewing and navigation of your Worklist, you will need to Personalize your view
  - Personalizing your Worklist is a simple, one-time procedure
  - See following pages for instructions
- If you've already personalized your Worklist, you can skip to page 10

Personalizing Your Worklist



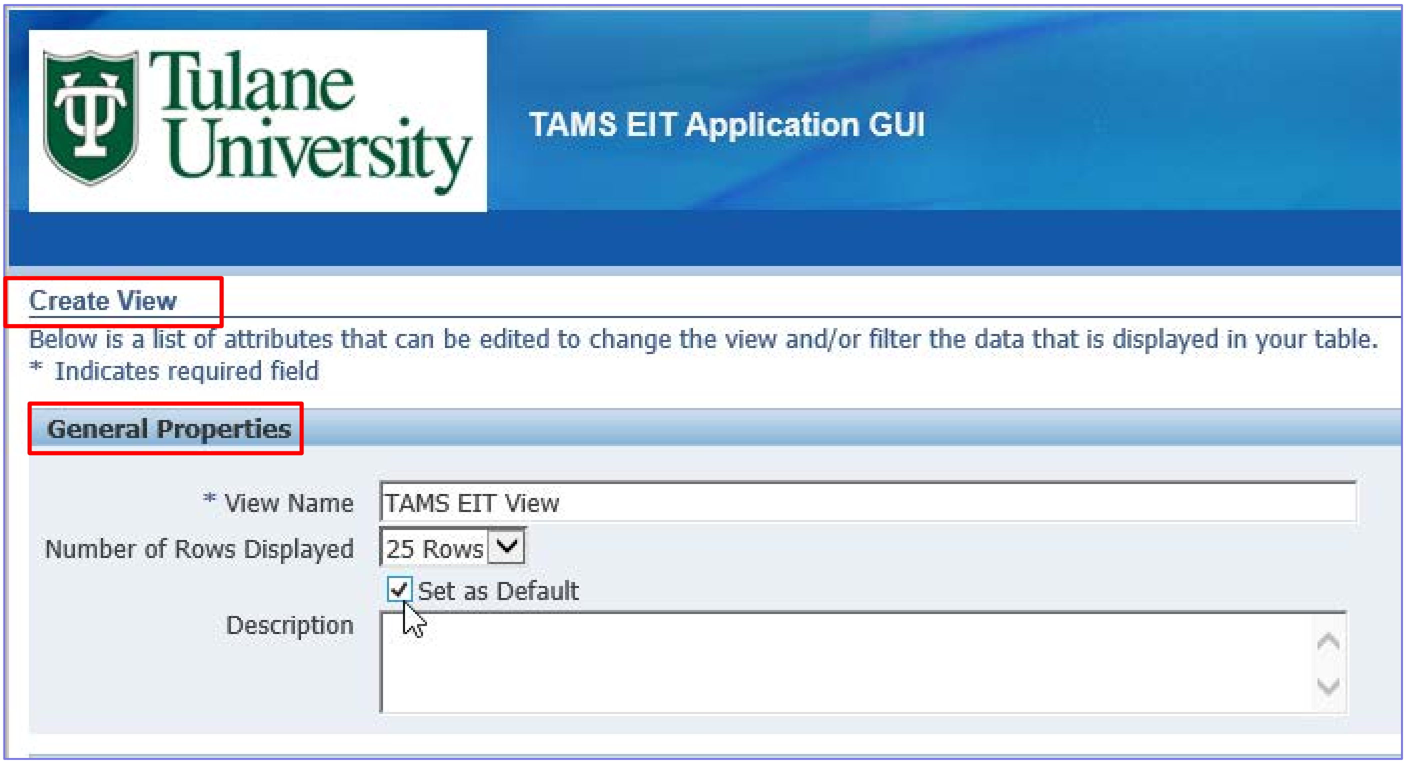
- To Personalize your Worklist for optimal viewing, click the Personalize button

Personalizing Your Worklist

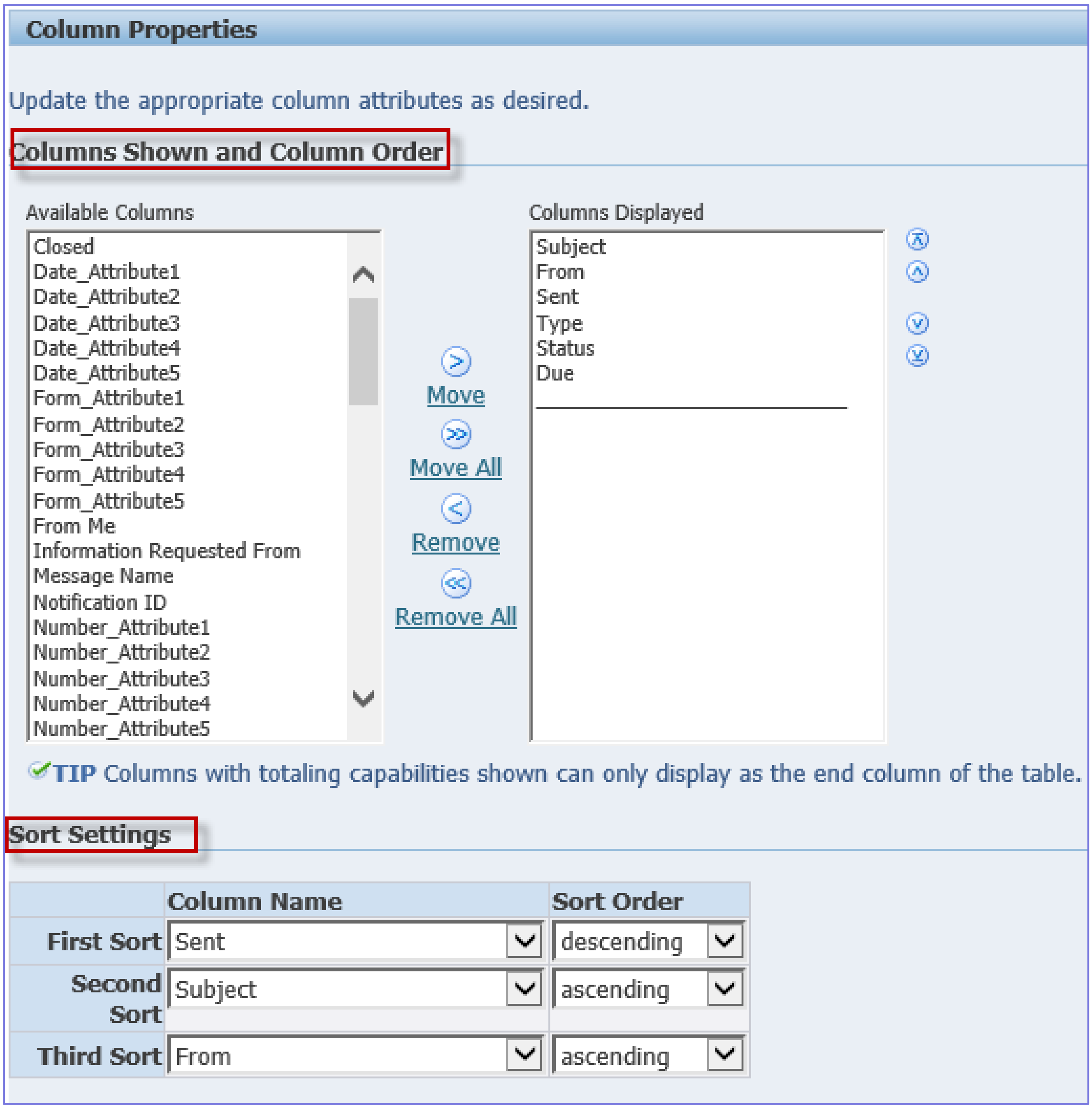


- When the Personalize Views screen opens, you will see a list of all of the Oracle EBS standard views
  - These views are not as practical as personalizing your own view
- Click the Create View button

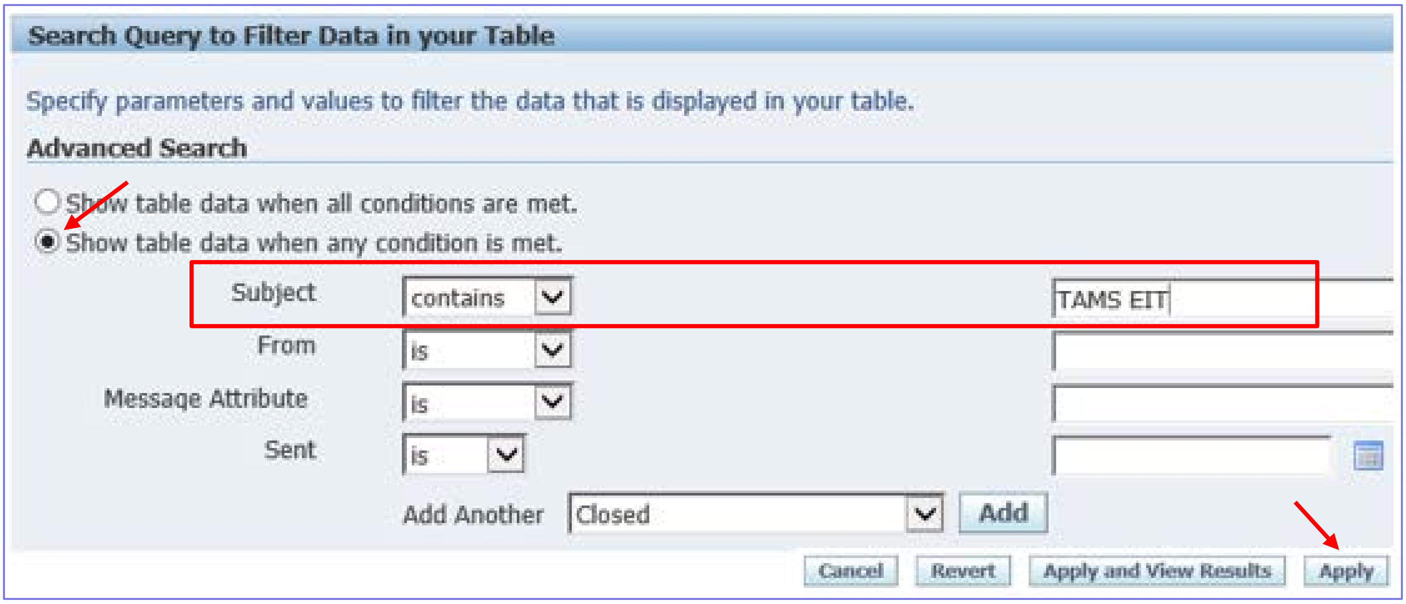
Personalizing Your Worklist



- Under the **General Properties** heading of the **Create View** screen, type a personal view name in the View Name field
  - "TAMS EIT View" is recommended but not required
- For Number of Rows Displayed, accept the default of 25 Rows
- Click the "Set as Default" box so your personalized view will open automatically every time you access your Worklist
- You can leave the Description field blank

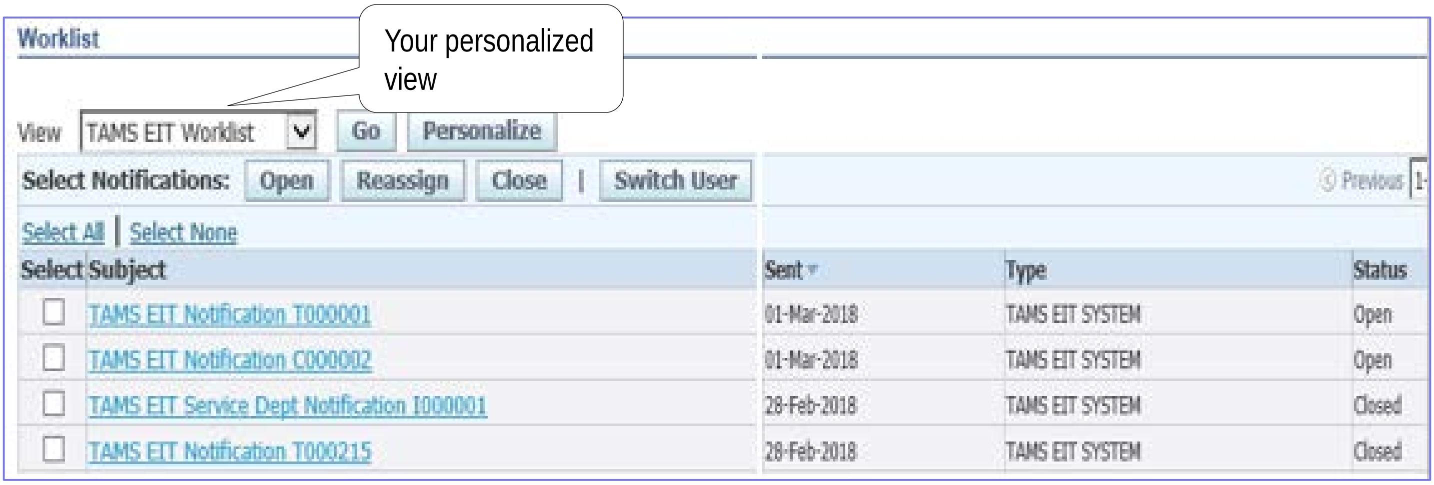


- Under **Columns Shown and Column Order** and **Sort Settings**, accept all defaults



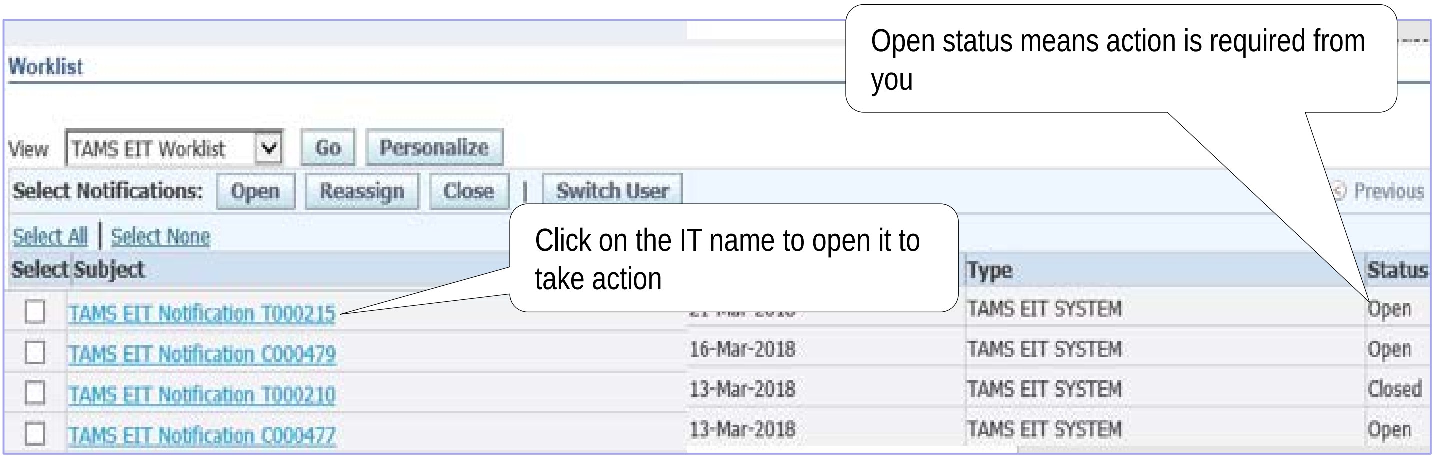
- Under **Advanced Search**, click "Show table data when any condition is met"
- Change the Subject field to "contains" and type "TAMS EIT" (without quotes) in the blank field to the right of the Subject field
- Click the Apply button to save your changes
- The next time you open your Personal Worklist from the Navigator, your personalized view will open as the default view

Checking Your Worklist



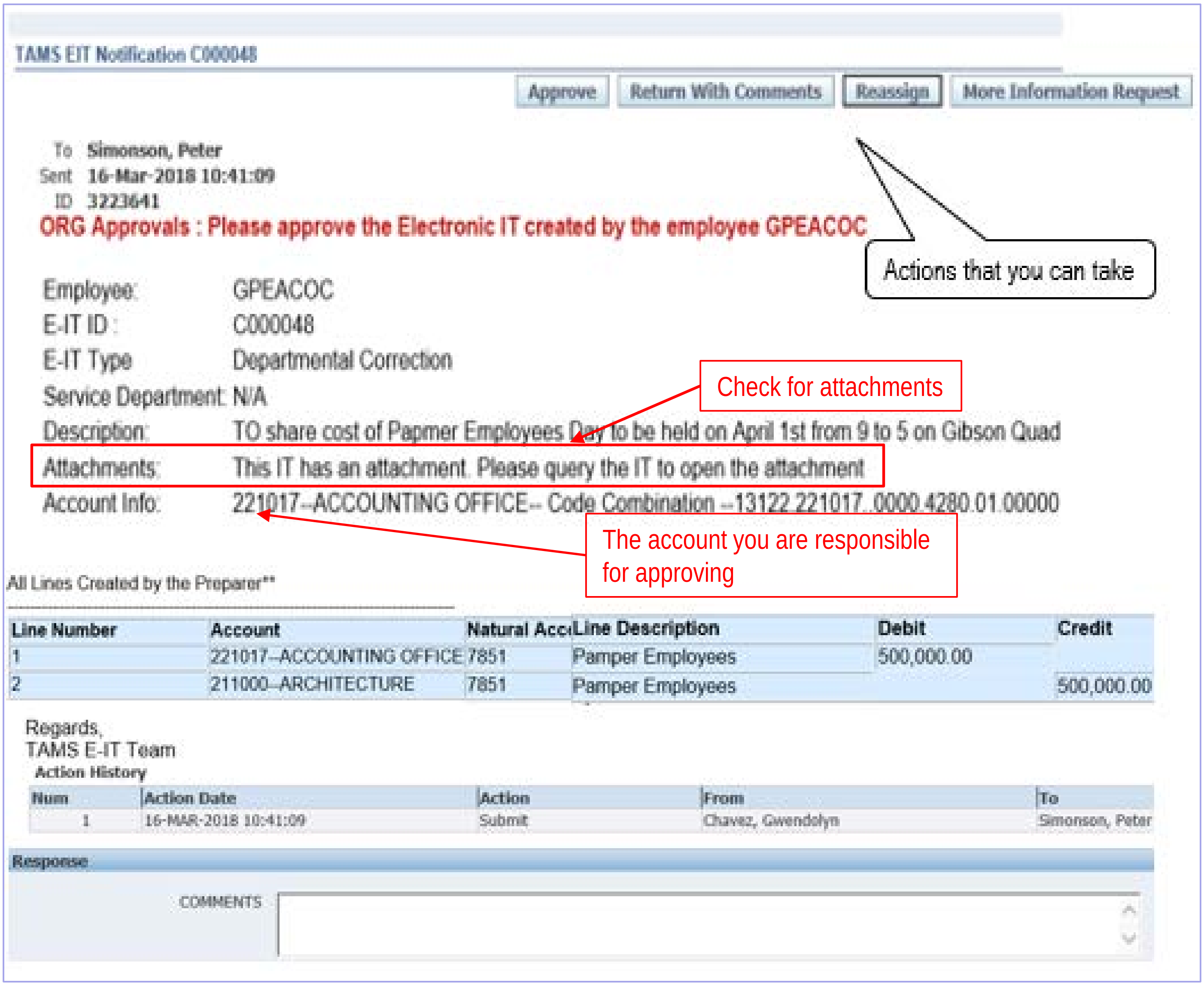
- Your personalized view of the Worklist will display the following columns:
  - Subject: This column contains a hyperlink to the IT that is either awaiting your approval or that you have already interacted with; you can click on the hyperlink to open the IT to approve, reject, reassign for further approvals or request more information from the initiator
  - From: If you initiated an IT and one of the approvers sends it back to you, their name will appear in this column
  - Sent: The day the IT was submitted
  - Type: Since this is your filtered, personalized view, the only type you should see is TAMS EIT SYSTEM
  - Status: "Open" status means your action is still required (similar to the To Do List in the BPM system); "Closed" status does not mean the IT has been completed and processed, but that you have already taken action on the IT so no further action is required from you (similar to the Watch List in the BPM system)

Checking Your Worklist



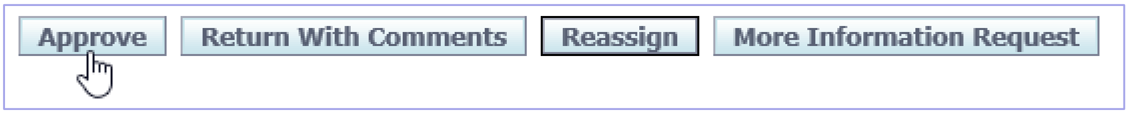
- Once you open your Personal Worklist, you can take action on an IT by clicking on the IT Notification under the Subject heading
- Open Status indicates that your action is required
  - HINT: You can sort the status to bring all Open ITs on top of the list by clicking on the word “Status” in the heading

Checking Your Worklist



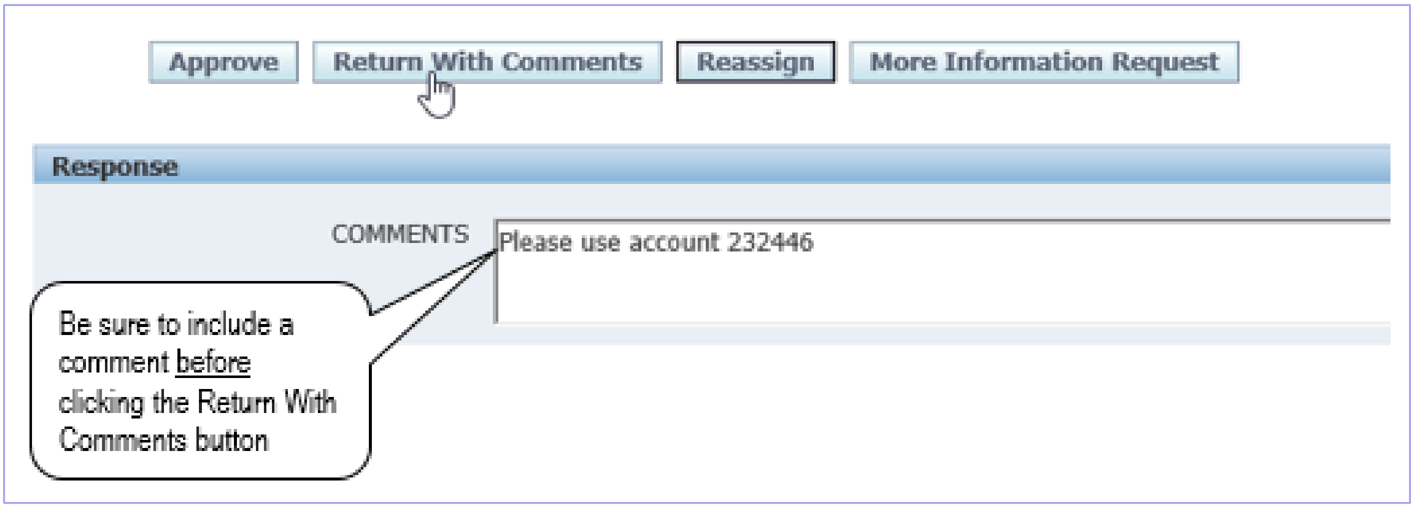
- When the IT notification opens, all header and line distribution information will be displayed
  - The Attachments notification in the header will let you know if the IT has an attachment
  - If there is an attachment, you will need to query the IT to open it (See manual Querying ITs)
- From the IT notification, you can use the buttons at the top of the form to Approve, Return With Comments (reject), Reassign (for further approvals) or Request More Information

Checking Your Worklist - Approve



- If you decide to approve the IT based on the details provided in the IT notification, click the Approve button
- Once you click Approve, the IT will move to the next level in the approval workflow and the status of the IT in your Worklist will change from Open to Closed
- After you approve the IT, you can query it to check the status (See the manual Querying ITs)

Checking Your Worklist – Return with Comments (Reject)

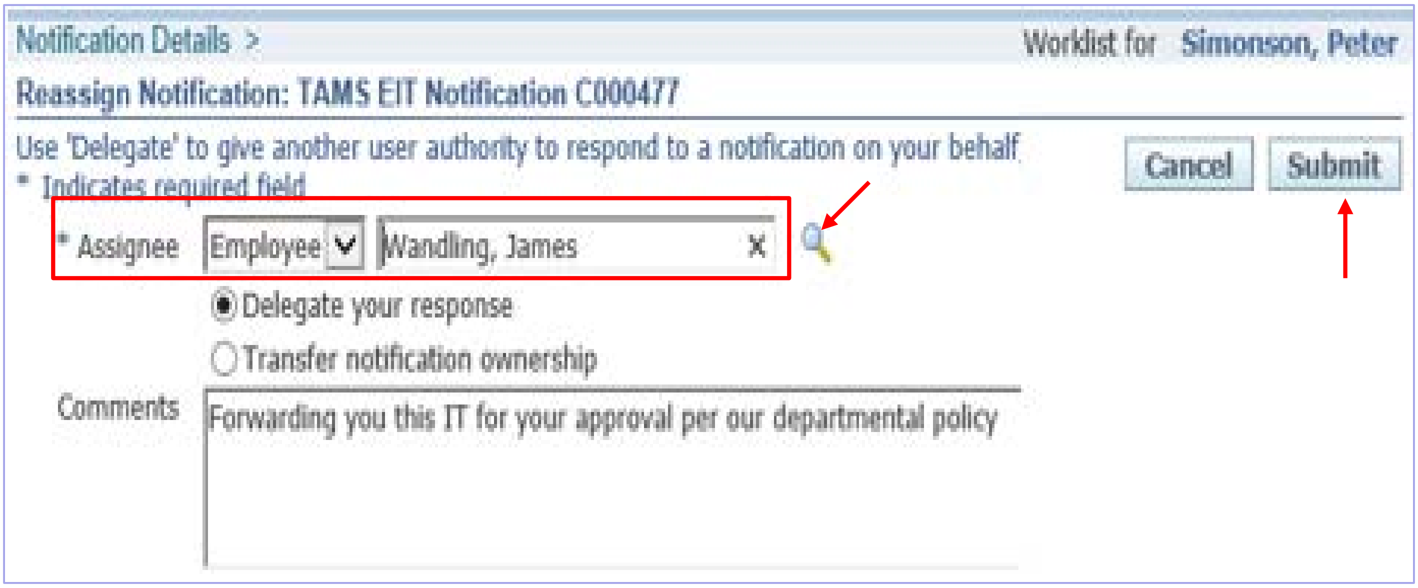


- If you decide to reject the IT, click the Return With Comments button
  - In this system, Return With Comments is the same as rejecting an IT
  - Be sure to include a comment <u>before</u> clicking this button
- When you click the Return With Comments button, the IT will go back to the initiator and will be removed from your personalized Worklist
  - To review all ITs that you have either returned, reassigned or requested more information for, you can change your Worklist view to Notifications From Me (see page 19)
- When the initiator receives the IT, he or she can edit the IT if necessary and resubmit it
  - Once the IT is resubmitted after being rejected, it will start the approval workflow process from the beginning and will reappear on your personalized Worklist with Open status if you are still in the approval workflow

Checking Your Worklist - Reassign

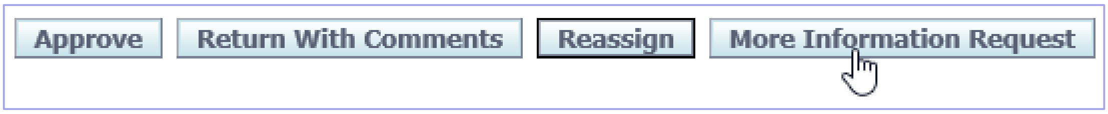
- If you decide that further approvals are required for the IT, you can click the Reassign button and send it to anyone in the Tulane network
  - Once you reassign an IT, it is understood that you approved
  - The reassignment will appear in the audit trail

Checking Your Worklist - Reassign



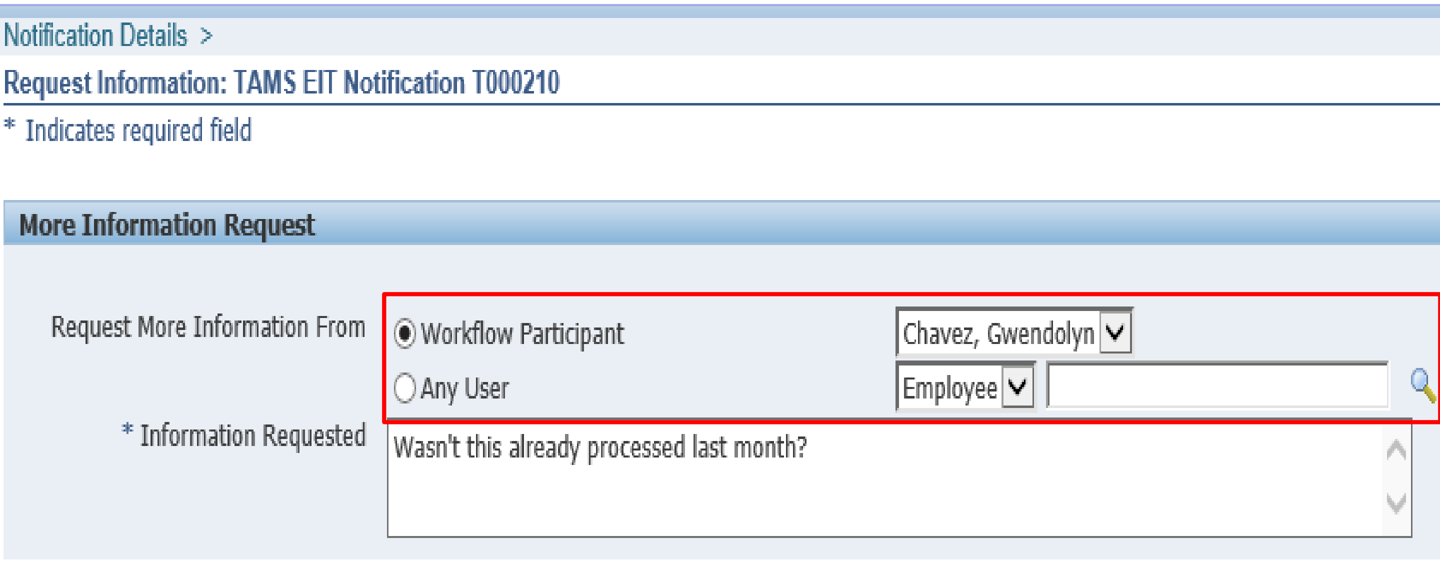
- When you click the Reassign button, the Notification Details box appears
- Select the person to whom you'd like to reassign the IT by typing their last name in the Assignee box and clicking the Search (magnifying glass) button
- Choose the person's name from the list that pops up
- Keep the default of "Delegate your response"
- Add a comment (not required but recommended for audit trail purposes)
- Click Submit
- Once submitted, the IT will be removed from your personalized Worklist view
  - To review all ITs that you have either returned, reassigned or requested more information for, you can change your Worklist view to Notifications From Me (see page 19)

Checking Your Worklist – More Information Request

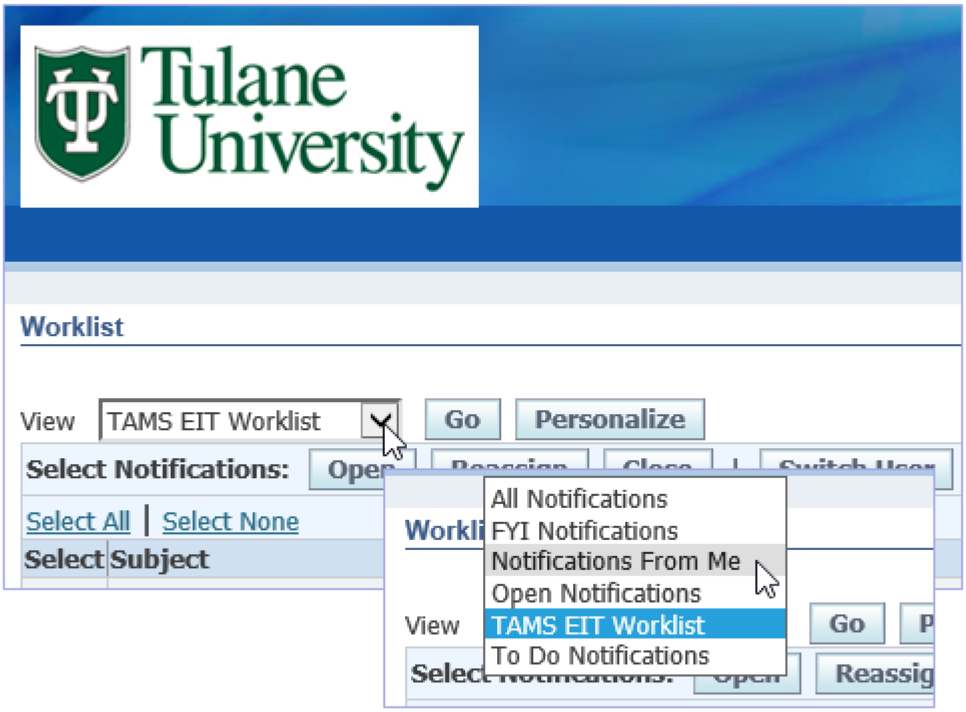


- If you would like to request more information regarding the IT before approving it, you can click the More Information Request button
  - When you Request More Information, you have the opportunity to send the IT back to the Initiator (or anyone else in the workflow) with a question
  - The recipient can answer your question without the IT having to go through the approval workflow again

Checking Your Worklist – More Information Request



- When you click the More Information Request button, the Notification Details box opens
- The name of the initiator defaults into the Workflow Participant field
  - You can click on the down-arrow button on the field to choose another workflow participant
  - You can also click the Any User button to choose anyone in the Tulane network by entering their last name and clicking on the Find (magnifying glass) icon
  - The Initiator, or whomever you choose to request more information from, can answer your question without the IT having to go through the approval workflow again
- Once you've selected the person you want to request more information from, type your request in the Information Requested box (required)
- Click Submit
  - To review all ITs that you have either returned, reassigned or requested more information for, you can change your Worklist view to Notifications From Me (see page 19)

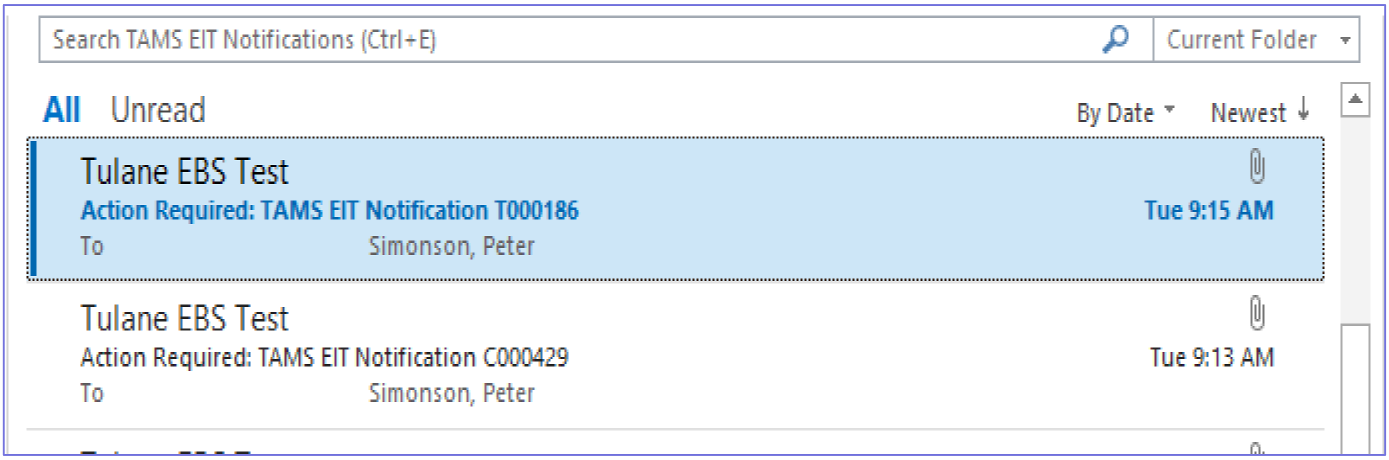


- Your personalized Worklist view will only show ITs awaiting your approval (Open status), ITs you have already approved (Closed status) and notifications from other approvers either reassigning the IT to you or requesting more information from you
- To review all ITs that you have sent to others (either returned, reassigned or requested more information for), you will need to change your Worklist view to Notifications From Me
- At the top of your Worklist screen, click the down-arrow on the View field
- Choose Notifications From Me from the list

- The Notifications From Me view will show the following columns:
  - To: The person to whom you sent the IT (returned, reassigned or requested more information from)
  - Type: Items related to the E-IT system will always show TAMS EIT SYSTEM
  - Subject: Contains the IT number of the IT being sent to you
  - Sent: The date the IT was sent to you

HINT: You can click on the column heading to sort the column data; alternate clicks sort the date in descending or ascending order.

Email Notification



- When an IT first appears on your Worklist, you will also receive an email from Tulane EBS alerting you
- You can open the email to view the details of the IT and to click on a link to open the IT from your Worklist to act on it

RECOMMENDATION: Create an email folder specifically for notification emails generated from the IT system. When you create your folder rule, include the condition that the subject line contains “TAMS EIT” (without quotes)

Email Notification

To Simonson, Peter
Sent 21-FEB-2018 11:01:00
ID 3220630

ORG Approvals : Please approve the Electronic IT created by the employee GPEACOC

Employee: GPEACOC
E-IT ID : T000187
E-IT Type Transfer of Funds
Service Department: N/A
Description: To help cover a deficit in the account for Pamper Employee Day
Attachments: This IT has an attachment, please query the open attachment
Account Info: 221017--ACCOUNTING OFFICE-- Code Combination --13122.221017..0000.4280.01.00000

Check for attachments

The account you are responsible for approving

All Lines Created by the Prepaper**

Line Number	Account	Natural Account	Dept Use	Task	Award	EXP type	Line Description	Debit	Credit
1	221017--ACCOUNTING OFFICE	9259	0000				Pamper Employee Day	500,000.00	
2	211000--ARCHITECTURE	9259	0000				Pamper Employee Day		500,00

Regards,
TAMS E-IT Team

Action History

Num	Action Date	Action	From	To	Details
1	21-FEB-2018 17:01:00	Submit	Chavez, Gwendolyn	Simonson, Peter	

Please click here to Respond

Please click here to Respond

- The email notification will contain detailed information of the IT

  NOTE: Check for Attachments; if there are attachments, you will need to query the IT in the Find Journals box to open the attachment (See manual Querying ITs)
- Click the "Please click here to respond" hyperlink to open the IT in EBS Worklist to be able to act on it
  - Alternately, you can log into EBS and access the IT from your Worklist
- When the IT opens from your Worklist in EBS, you will have the option to approve, reassign for further approvals or to reject the IT