

# Approvers Manual

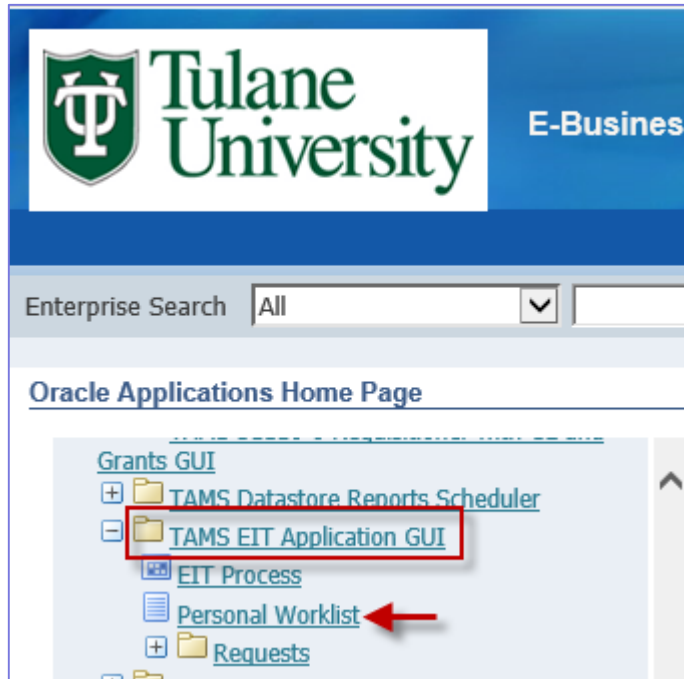
How to approve, reject or  
reassign for further approvals

## 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

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- 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

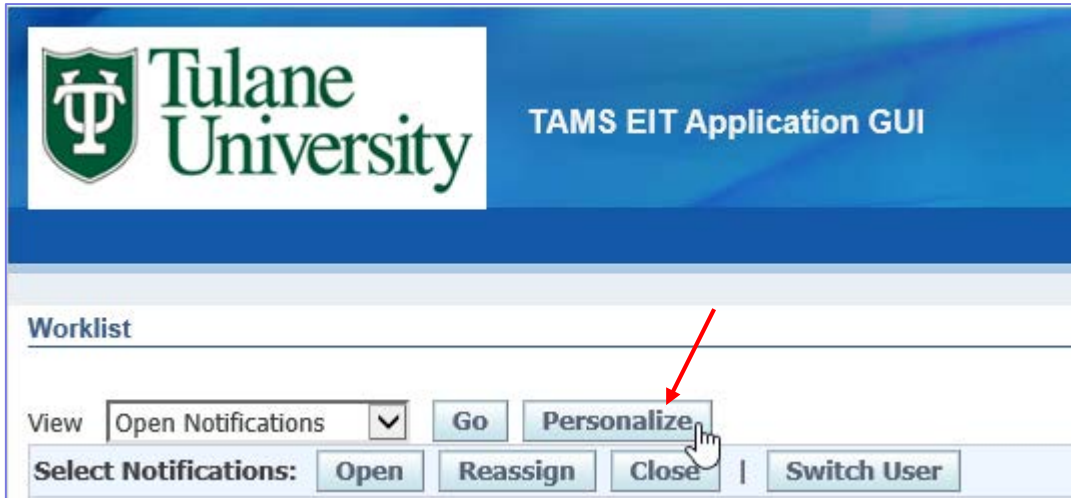
The screenshot shows the Oracle EBS Worklist interface. At the top left is the Tulane University logo. The main header area contains the text 'TAMS EIT A...'. Below this, the 'Worklist' section is visible. A callout bubble points to the 'Open Notifications' dropdown menu, stating 'Oracle Standard Default View'. Another callout bubble points to the 'Personalize' button, stating 'Personalize your Worklist for optimal viewing'. The interface includes a 'View' section with a dropdown menu set to 'Open Notifications', a 'Go' button, and a 'Personalize' button. Below this is a 'Select Notifications:' section with buttons for 'Open', 'Reassign', 'Close', and 'Switch User'. There are also links for 'Select All' and 'Select None'. The main content area is a table with three columns: 'Select From', 'Type', and 'Subject'. The table contains three rows, each with a checkbox in the 'Select From' column, 'TAMS IT CORRECTION WORKFLOW' in the 'Type' column, and a notification ID in the 'Subject' column.

Select From	Type	Subject
<input type="checkbox"/>	TAMS IT CORRECTION WORKFLOW	<a href="#">TAMS EIT Notification T000187</a>
<input type="checkbox"/>	TAMS IT CORRECTION WORKFLOW	<a href="#">TAMS EIT Notification C000435</a>
<input type="checkbox"/>	TAMS IT CORRECTION WORKFLOW	<a href="#">TAMS EIT Notification C000434</a>

- 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

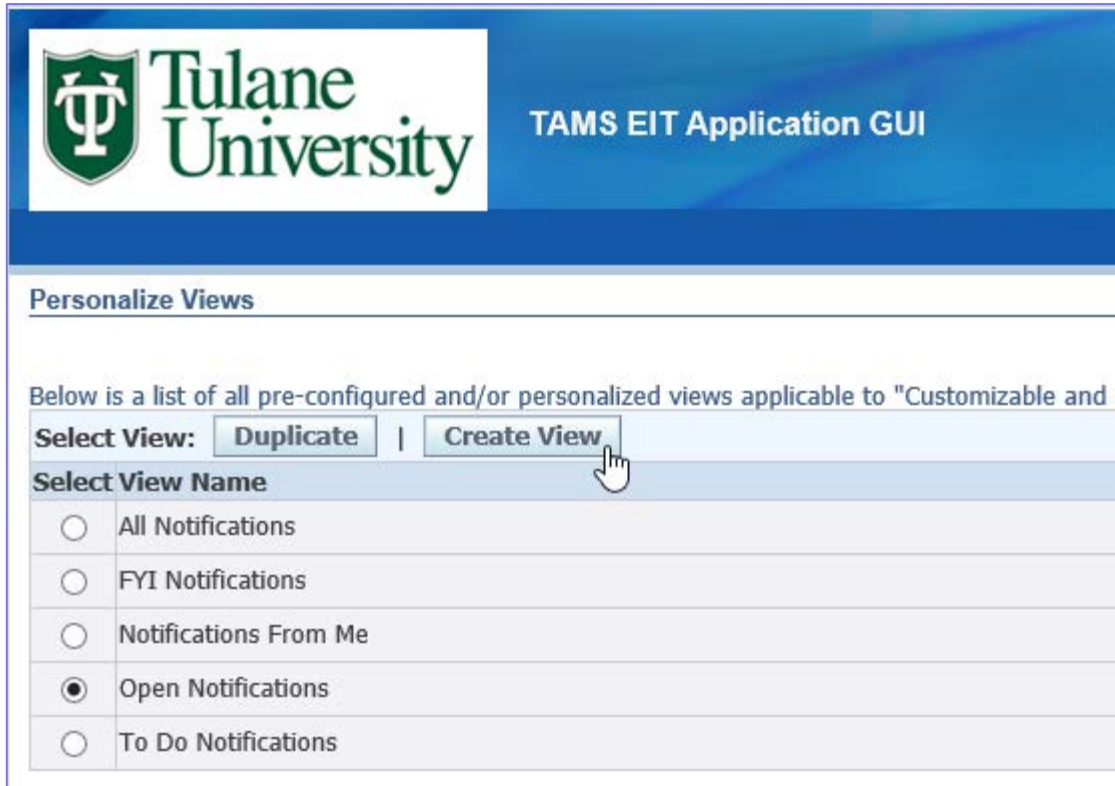
# Personalizing Your Worklist

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

# Personalizing Your Worklist



**Tulane University** TAMS EIT Application GUI

### Personalize Views

Below is a list of all pre-configured and/or personalized views applicable to "Customizable and :

Select View: Duplicate | Create View

Select View Name
<input type="radio"/> All Notifications
<input type="radio"/> FYI Notifications
<input type="radio"/> Notifications From Me
<input checked="" type="radio"/> Open Notifications
<input type="radio"/> To Do Notifications

- 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

**Tulane University** TAMS EIT Application GUI

**Create View**

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table.  
\* Indicates required field

**General Properties**

\* View Name TAMS EIT View

Number of Rows Displayed 25 Rows

Set as Default

Description

- 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

# Personalizing Your Worklist

**Column Properties**

Update the appropriate column attributes as desired.

**Columns Shown and Column Order**

Available Columns

- Closed
- Date\_Attribute1
- Date\_Attribute2
- Date\_Attribute3
- Date\_Attribute4
- Date\_Attribute5
- Form\_Attribute1
- Form\_Attribute2
- Form\_Attribute3
- Form\_Attribute4
- Form\_Attribute5
- From Me
- Information Requested From
- Message Name
- Notification ID
- Number\_Attribute1
- Number\_Attribute2
- Number\_Attribute3
- Number\_Attribute4
- Number\_Attribute5

Columns Displayed

- Subject
- From
- Sent
- Type
- Status
- Due

**TIP** Columns with totaling capabilities shown can only display as the end column of the table.

**Sort Settings**

	Column Name	Sort Order
First Sort	Sent	descending
Second Sort	Subject	ascending
Third Sort	From	ascending

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



# Personalizing Your Worklist

**Search Query to Filter Data in your Table**

Specify parameters and values to filter the data that is displayed in your table.

**Advanced Search**

Show table data when all conditions are met.

Show table data when any condition is met.

Subject contains TAMS EIT

From is

Message Attribute is

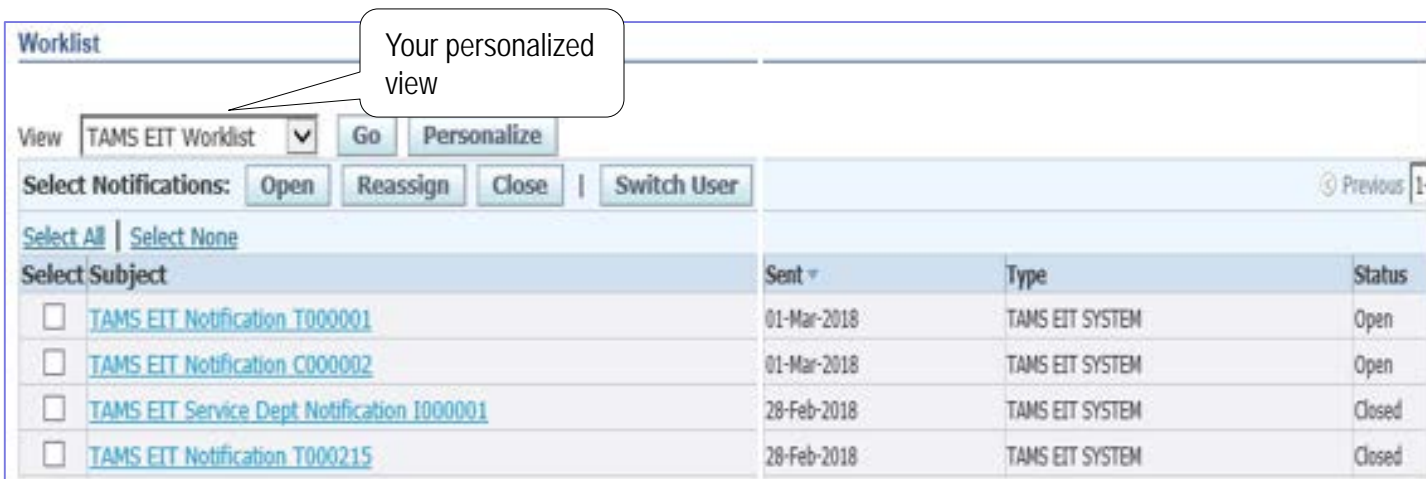
Sent is

Add Another Closed Add

Cancel Revert Apply and View Results Apply

- 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



The screenshot shows the 'Worklist' interface. At the top, there is a 'View' dropdown menu set to 'TAMS EIT Worklist', with 'Go' and 'Personalize' buttons next to it. A callout box points to the 'Personalize' button with the text 'Your personalized view'. Below the view menu are buttons for 'Select Notifications: Open', 'Reassign', 'Close', and 'Switch User'. There are also 'Select All' and 'Select None' options. The main table has columns for 'Select Subject', 'Sent', 'Type', and 'Status'. The table contains four rows of notifications.

Select Subject	Sent	Type	Status
<input type="checkbox"/> <a href="#">TAMS EIT Notification T000001</a>	01-Mar-2018	TAMS EIT SYSTEM	Open
<input type="checkbox"/> <a href="#">TAMS EIT Notification C000002</a>	01-Mar-2018	TAMS EIT SYSTEM	Open
<input type="checkbox"/> <a href="#">TAMS EIT Service Dept Notification I000001</a>	28-Feb-2018	TAMS EIT SYSTEM	Closed
<input type="checkbox"/> <a href="#">TAMS EIT Notification T000215</a>	28-Feb-2018	TAMS EIT SYSTEM	Closed

- 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

The screenshot shows a 'Worklist' interface. At the top, there's a 'View' dropdown set to 'TAMS EIT Worklist' and buttons for 'Go' and 'Personalize'. Below that are 'Select Notifications' buttons: 'Open', 'Reassign', 'Close', and 'Switch User'. There are also 'Select All' and 'Select None' options. The main table has columns for 'Subject', 'Type', and 'Status'. The 'Subject' column contains links to IT notifications. The 'Status' column shows 'Open', 'Open', 'Closed', and 'Open' for the four rows. Two callout boxes are present: one pointing to the 'Open' status in the first row with the text 'Open status means action is required from you', and another pointing to the first notification link 'TAMS EIT Notification T000215' with the text 'Click on the IT name to open it to take action'.

	Subject	Type	Status
<input type="checkbox"/>	<a href="#">TAMS EIT Notification T000215</a>	TAMS EIT SYSTEM	Open
<input type="checkbox"/>	<a href="#">TAMS EIT Notification C000479</a>	TAMS EIT SYSTEM	Open
<input type="checkbox"/>	<a href="#">TAMS EIT Notification T000210</a>	TAMS EIT SYSTEM	Closed
<input type="checkbox"/>	<a href="#">TAMS EIT Notification C000477</a>	TAMS EIT SYSTEM	Open

- 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

TAMS EIT Notification C000048

To: Simonson, Peter  
 Sent: 16-Mar-2018 10:41:09  
 ID: 3223641

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

Employee: GPEACOC  
 E-IT ID: C000048  
 E-IT Type: Departmental Correction  
 Service Department: N/A  
 Description: TO share cost of Pamper Employees Day to be held on April 1st from 9 to 5 on Gibson Quad  
 Attachments: This IT has an attachment. Please query the IT to open the attachment  
 Account Info: 221017--ACCOUNTING OFFICE-- Code Combination --13122 221017 .0000 4280.01.00000

Actions that you can take

Check for attachments

The account you are responsible for approving

All Lines Created by the Preparer\*\*

Line Number	Account	Natural Acc	Line Description	Debit	Credit
1	221017--ACCOUNTING OFFICE	7851	Pamper Employees	500,000.00	
2	211000--ARCHITECTURE	7851	Pamper Employees		500,000.00

Regards,  
 TAMS E-IT Team

Action History

Num	Action Date	Action	From	To
1	16-MAR-2018 10:41:09	Submit	Chavez, Gwendolyn	Simonson, Peter

Response

COMMENTS

- 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

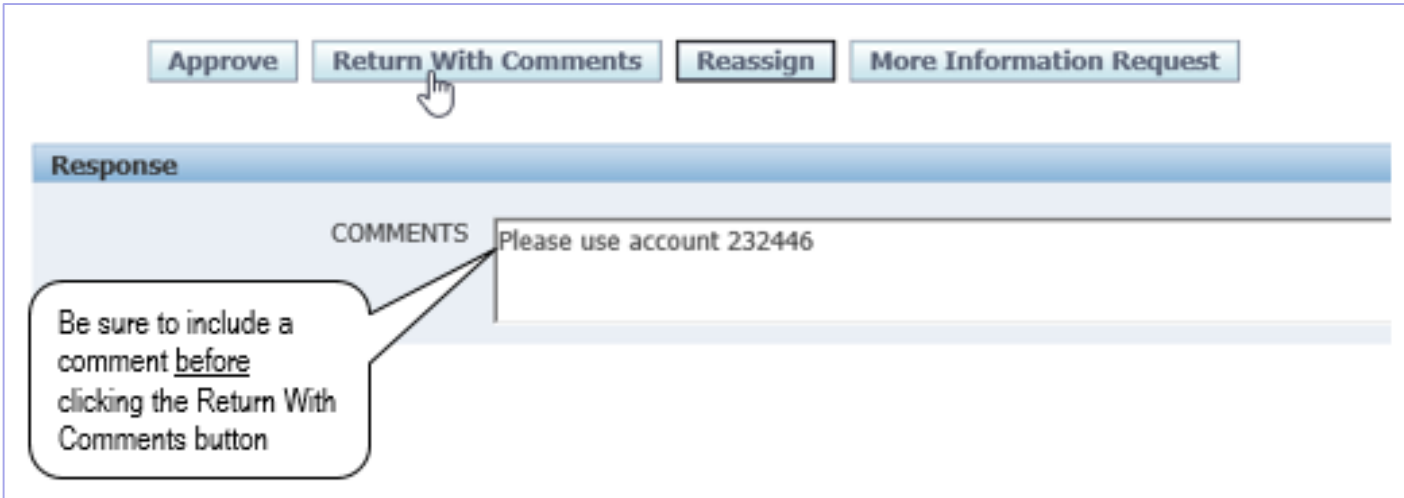
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- If you decide to approve the IT based on the details provided in the IT notification, click the Approve button
- Once you click Approve, the IT will move to the next level in the approval workflow and the status of the IT in your Worklist will change 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)

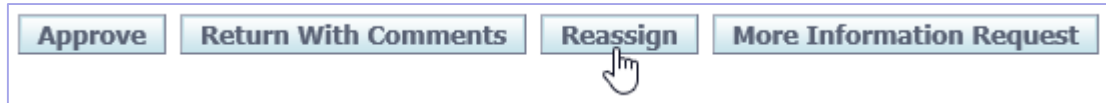
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- If you decide to reject the IT, click the Return With Comments button
  - In this system, Return With Comments is the same as rejecting an IT
  - Be sure to include a comment before clicking this button
- When you click the Return With Comments button, 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

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- 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

Notification Details > Worklist for Simonson, Peter

Reassign Notification: TAMS EIT Notification C000477

Use "Delegate" to give another user authority to respond to a notification on your behalf

\* Indicates required field

\* Assignee Employee Wandling, James X

Delegate your response

Transfer notification ownership

Comments Forwarding you this IT for your approval per our departmental policy

Cancel Submit

- 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

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- 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

Notification Details >

Request Information: TAMS EIT Notification T000210

\* Indicates required field

## More Information Request

Request More Information From

Workflow Participant

Chavez, Gwendolyn ▼

Any User

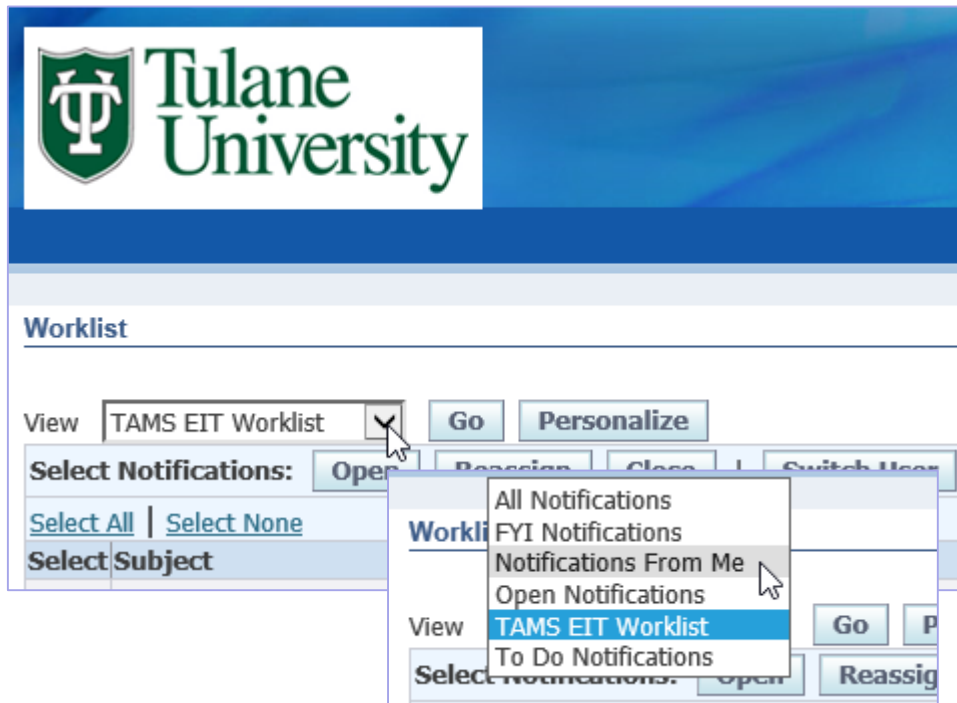
Employee ▼



\* Information Requested

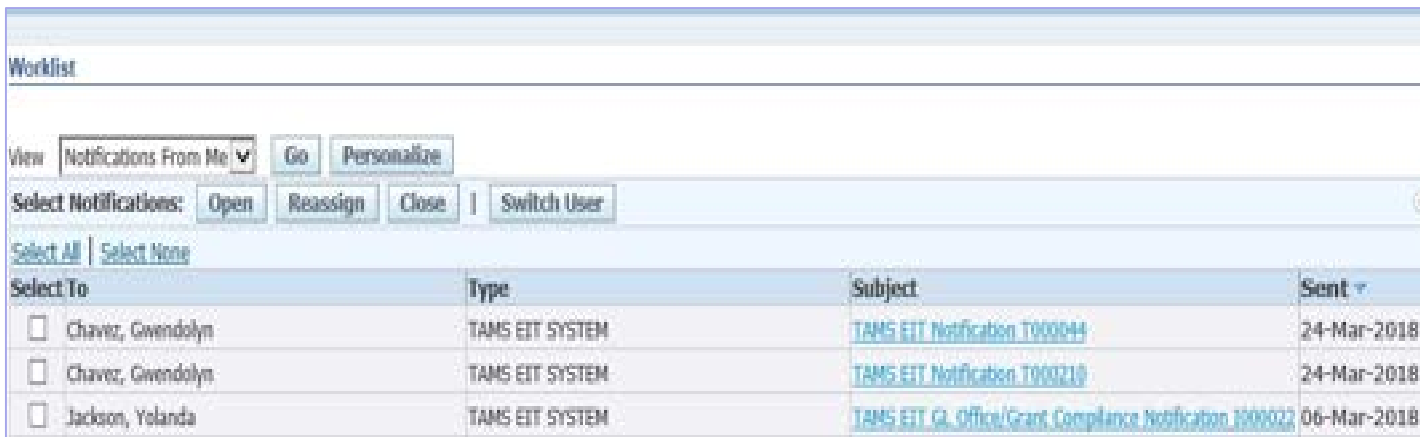
Wasn't this already processed last month?

- 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

# Checking Your Worklist – ITs You Have Returned or Reassigned



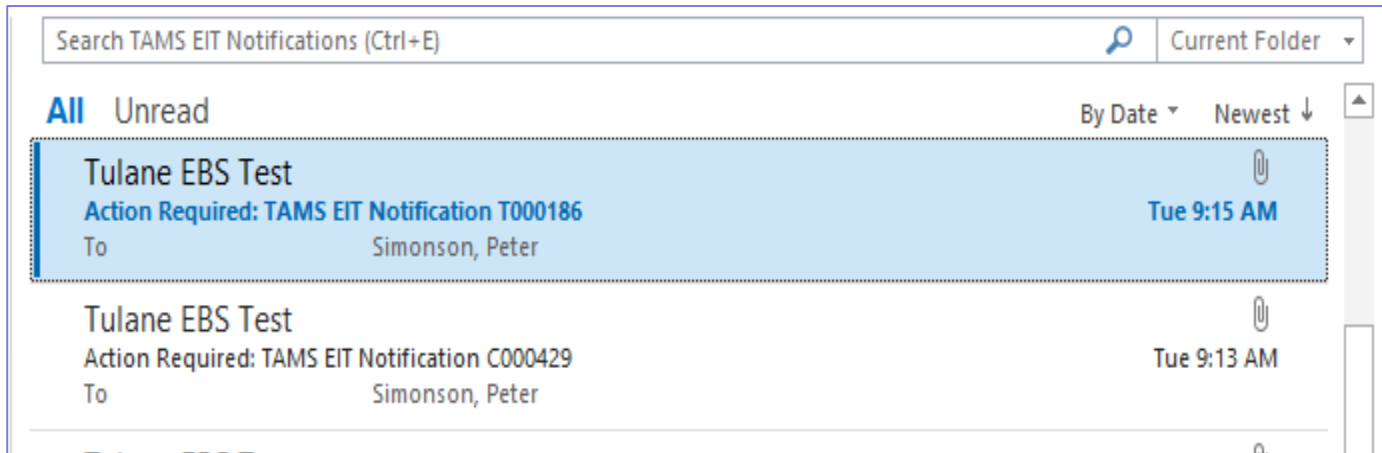
The screenshot shows a 'Worklist' interface. At the top, there is a 'View' dropdown menu set to 'Notifications From Me', with 'Go' and 'Personalize' buttons. Below this is a 'Select Notifications:' section with 'Open', 'Reassign', 'Close', and 'Switch User' buttons. There are also 'Select All' and 'Select None' links. The main part of the interface is a table with four columns: 'Select To', 'Type', 'Subject', and 'Sent'. The table contains three rows of notification data.

Select To	Type	Subject	Sent
<input type="checkbox"/> Chavez, Gwendolyn	TAMS EIT SYSTEM	<a href="#">TAMS EIT Notification T00004</a>	24-Mar-2018
<input type="checkbox"/> Chavez, Gwendolyn	TAMS EIT SYSTEM	<a href="#">TAMS EIT Notification T00020</a>	24-Mar-2018
<input type="checkbox"/> Jackson, Yolanda	TAMS EIT SYSTEM	<a href="#">TAMS EIT GL Office/Grant Compliance Notification T00022</a>	06-Mar-2018

- 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		500,000.00

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