

Accessing the Worklist

Chapter 3 Section 2

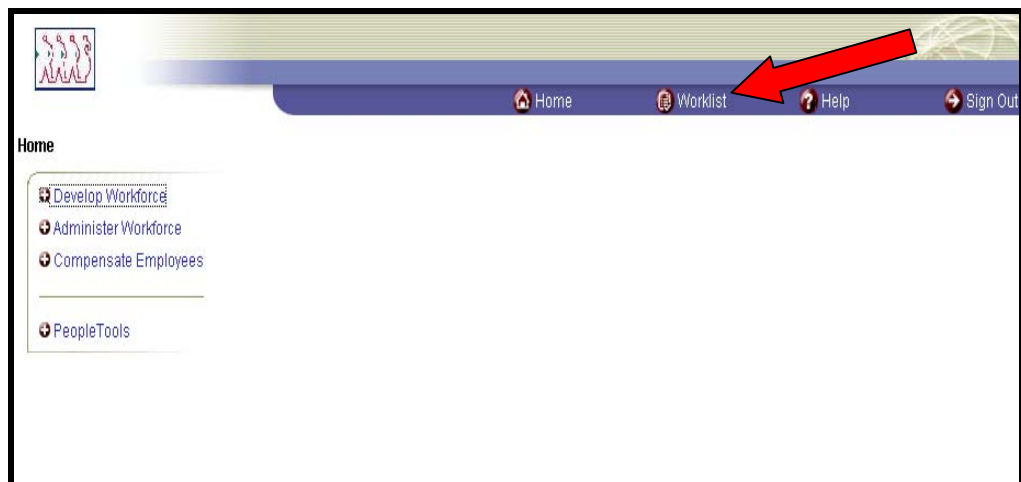
Worklist

A user's worklist is unique to his or her EHRP User ID and is based upon the user's role in the system. The worklist populates with items to be worked by the user. The effectiveness of workflow in EHRP is based on users consistently monitoring and actively managing their worklists.

NOTE: If a manager needs to review a task once it has been removed from their worklist, they will need to contact their Workflow Administrator to gain access to that task again.

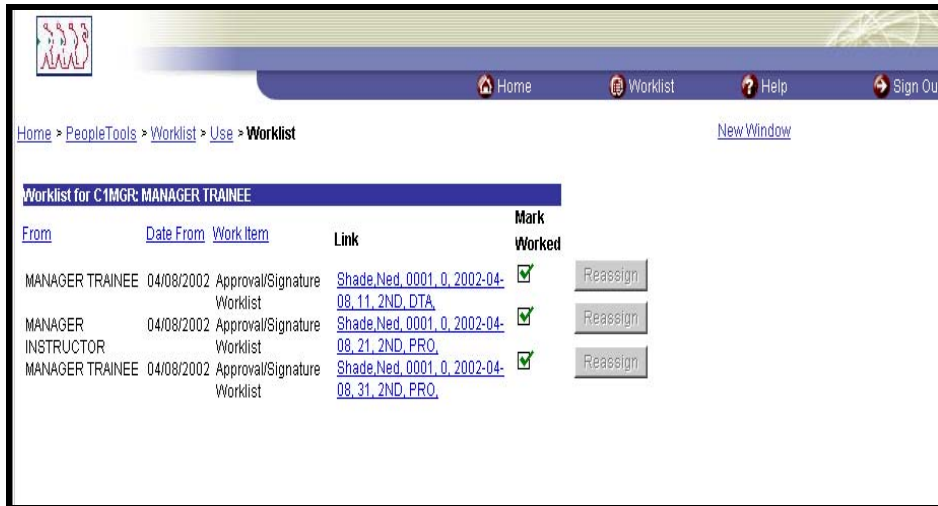
Worklist Access

The Worklist can be accessed by using the hyperlink on the main menu of EHRP:



Worklist Example

The following **Worklist** page appears:



Worklist fields

Listed below are the field names and descriptions of each field on the worklist.

From – Name of person who routed the action to you. This can be used as sort criteria when looking at multiple actions.

Date From – Date action routed to you. This can be used as sort criteria when looking at multiple actions.

Work Item – Workflow role under which you are receiving the action (applicable only for users with multiple roles).

Link – Hyperlink contains Employee name, EmplID, Record number, Effective date of action, Transaction/sequence number, Current PAR status, Action code, and Department ID. The link provides access to the Data Control page for that action

Mark Worked – Enables user to manually delete items from worklist.

Management of the Worklist During an Absence

If an employee will be away from his or her desk for an extended period of time, the system's **Alternate User** functionality can be activated.

When logged into EHRP, use the following steps to set up the **Alternate User** in a user's profile.

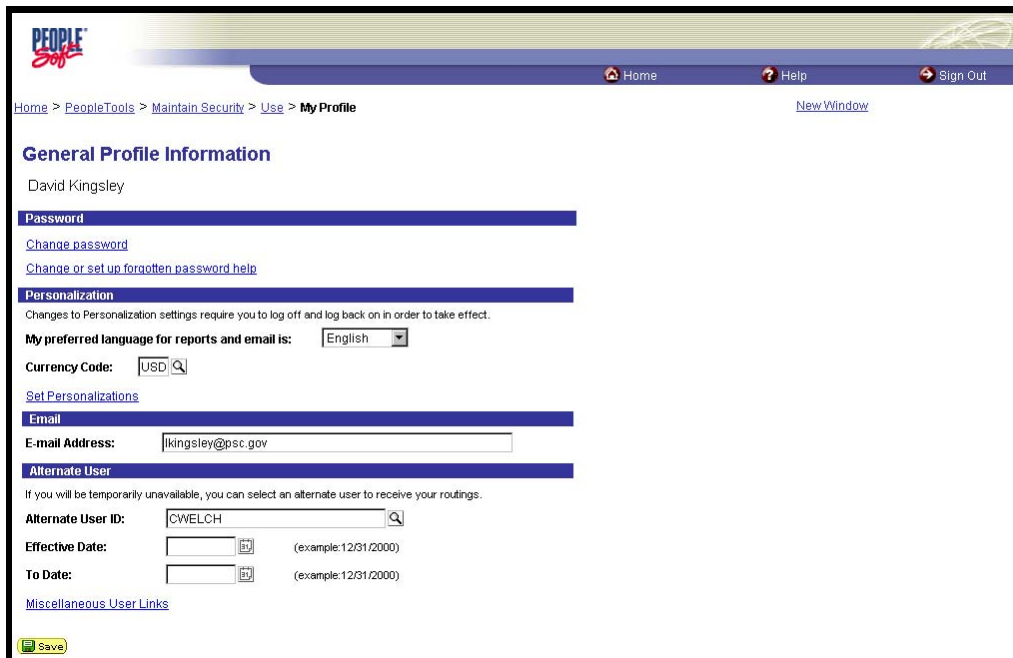
Procedure

Setting up an alternate user

Navigational Path

Home → PeopleTools → Maintain Security → Use → My Profile

The following **General Profile Information** page appears:



PEOPLE'Soft

Home Help Sign Out

Home > PeopleTools > Maintain Security > Use > My Profile [New Window](#)

General Profile Information

David Kingsley

Password

[Change password](#)
[Change or set up forgotten password help](#)

Personalization

Changes to Personalization settings require you to log off and log back on in order to take effect.

My preferred language for reports and email is:

Currency Code:

[Set Personalizations](#)

Email

E-mail Address:

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

Effective Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

[Miscellaneous User Links](#)

- 1 In the **Alternate User** area of the page, enter the **Alternate User ID** of the individual who will receive your routings.
- 2 Enter the **Effective Date** when the alternate user will begin to receive your routings.
- 3 If known, enter the date when this alternate routing should end in the **To Date** field. During the time specified, all actions will be routed to the alternate, and to the original user's worklist.

4

Click  .

Managing the worklist

Requesters, 1st and 2nd Authorizers, and Approvers manually delete worklist items by checking on the **Marked Worked** checkbox. Doing so generates the message below:

