

Accessing the Worklist

Chapter 5 Section 2

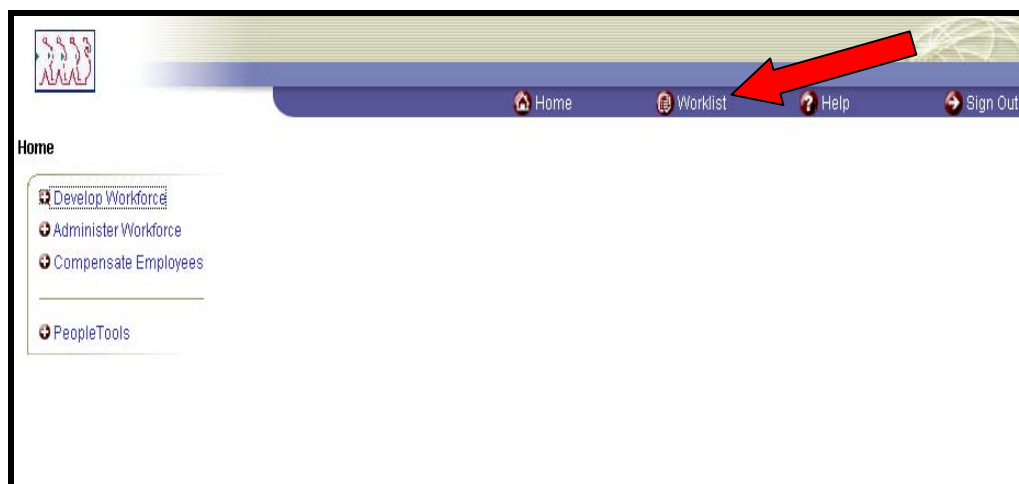
Worklist

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:

From	Date From	Work Item	Link	Mark Worked	Reassign
MANAGER TRAINEE	04/08/2002	Approval/Signature Worklist	Shade.Ned.0001.0.2002-04-08.11.2ND.DTA	<input checked="" type="checkbox"/>	Reassign
MANAGER INSTRUCTOR	04/08/2002	Approval/Signature Worklist	Shade.Ned.0001.0.2002-04-08.21.2ND.PRO	<input checked="" type="checkbox"/>	Reassign
MANAGER TRAINEE	04/08/2002	Approval/Signature Worklist	Shade.Ned.0001.0.2002-04-08.31.2ND.PRO	<input checked="" type="checkbox"/>	Reassign

Recruit Actions on the Worklist

All actions that have been routed to a user will appear on the worklist. This includes both PAR actions and Recruit actions. The PAR actions will have an employee name associated with them, but the Recruit Actions will not.

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.

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: English

Currency Code: USD

[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  .

NOTES: