

UNI Workflow

Chapter 4

UNI Workflow

In order to process the approvals on the timecards, UNI Time will use the standard UNI Workflow processes provided by Oracle. The system generates messages called notifications that can be viewed through UNI Workflow. Notifications are either informational, e.g., 'Your Timecard has been Approved', or are requests for action, e.g., 'Timecard for John Smith needs your approval'.

A timecard can be submitted for approval by the employee or Timecard Manager (TCM). If the employee has no designated Timecard Approver, the timecard information is sent to the supervisor as a notification for approval. If the employee has a designated Timecard Approver, the timecard information will be sent as a notification for approval to the Timecard Approver. In both cases an FYI notification will be sent to the employee stating that their timecard has been submitted for approval, to whom and when.

If no action is taken to a Timecard Approval Notification within a given period of time, the notification will time out.

- On timeout, if the notification was initially sent to a Timecard Approver, a Timecard Approval Notification will be sent to the supervisor of the assignment. If the notification to the supervisor times out, then a Timecard Final Approval Notification will go to the supervisor's supervisor for the assignment.
- On timeout, if the notification was initially sent to a supervisor, a Timecard Final Approval Notification will go to the supervisor's supervisor for the assignment.

If there is no response to a Timecard Final Approval Notification, the timecard is set to a timed out status and returned to the employee for resubmission or approval by a Timecard Manager (TCM). The employee may contact their TCM to perform the approval or resubmit their timecard for approval. Timecard Managers do not receive email notifications regarding timed out timecards.

In all cases, the timecard will only require one level of approval in order to be processed by payroll for payment.

Weekly Timecards will follow the following time out schedule:

1. Tuesday at 12:00 noon
2. Wednesday at 12:00 noon
3. Wednesday at 5:00 pm

Users will also have the option of establishing Routing Rules (a.k.a. Setting a Proxy). Staff who will be out of the office and wish to have their notifications sent to someone else should use Routing Rules to establish a proxy.

Viewing Notifications

1. Note: The first five notifications appear at the top of the page under Worklist. To view the notification details, click **UNI Workflow User** or **Full List**.

The screenshot shows the Oracle E-Business Suite Home page. At the top, there is a navigation bar with 'Logout', 'Preferences', and 'Help' links. Below this is a purple header bar. The main content area is divided into several sections:

- Worklist:** A table with columns 'From', 'Subject', and 'Sent'. It contains two entries:

From	Subject	Sent
	Timecard for (28-NOV-2004 to 04-DEC-2004) has been submitted to Morris Monthly for approval	27-Sep-2004
	Purchase Requisition 23397	28-May-2004
- Favorites:** A section with an 'Edit Favorites' button and a message: 'You have not selected any favorites. Please use the "Edit Favorites" button to setup your favorites.'
- Applications:** A list of application links: 'Info Tech Svcs', 'ITS Administration', 'ITS Administration Timecard Reviewer', 'UNI Employee Self Service', and 'UNI Workflow User'. A note says: 'Please click on a responsibility link to display the list of available applications.'

At the bottom, there is a copyright notice: 'Copyright 2000-2004 Oracle Corporation. All rights reserved.' and another set of navigation links: 'Logout | Preferences | Help' and 'Privacy Statement'.

2. The system will display a list of all open notifications.

The screenshot shows the Oracle Workflow page. At the top, there is a navigation bar with 'Home', 'Logout', 'Preferences', and 'Help' links. Below this is a purple header bar. The main content area contains:

- A message: 'Select one or more notifications from the list and Open or Reassign them using the appropriate buttons. You may also click on the notification subject to open a particular notification.'
- A 'View' dropdown menu set to 'Open Notifications' and a 'Go' button.
- A table with columns 'Select', 'Type', 'From / Subject', and 'Sent'. It contains two entries:

Select	Type	From / Subject	Sent
<input type="checkbox"/>	UNI Time Workflow Process	Timecard for (12-DEC-2004 to 18-DEC-2004) has been submitted to Mary A Merit for app...	08-Sep-2004
<input type="checkbox"/>	PO Send Notifications for Purchasing Documents	Purchase Requisition 20355 requires your approval	22-Jan-2004
- Buttons for 'Open' and 'Delegate'.
- Links for 'Select All' and 'Select None'.
- A 'Routing Rules' section with a checked checkbox and the text: 'TIP: Use Routing Rules to redirect or auto-respond to notifications'.

3. Select the notification you want to view by clicking in the box under Select and clicking the **Open** button or click on subject underlined text. You can select all notifications by clicking **Select All** and then clicking the **Open** button.
4. Not all notifications require action. The comment displayed below tells you "This notification does not require a response".

Timecard for (12-DEC-2004 to 18-DEC-2004) has been submitted to **Mary A Merit** for approval

This notification does not require a response.

Close

Delegate

From
To Student, Joe
Sent 08-Sep-2004 11:15:02
Notification ID 351425

The timecard for (12-DEC-2004 to 18-DEC-2004) has been submitted to **Mary A Merit** for approval. **Approval History**

Sequence	Who	Action	Date	Note
1		Null	08-SEP-2004	
0	Student, Joe	Submit	08-SEP-2004	

[Return to Worklist](#)

Step 1 of 2

Next

This notification does not require a response.

Close

Delegate

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

5. Select one of the following buttons:

Close – closes the notification

Delegate – forward this notification to someone else for their action (normally, FYI notifications are not forwarded). The following box will appear:

Subject(s) • **Timecard for Joe Student** (12-DEC-2004 to 18-DEC-2004) requires approval

* Delegate


Comments


Message will display with each reassigned notification.

[Return to Worklist](#) Cancel Submit

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#) Privacy Statement

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6. Select a person to delegate to by clicking on the **flashlight** .

7. Enter the last name. Click  next to the name and click **select**.

Search and Select: Delegate

Cancel

Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Go

Results

Select	Display Name	User Name	Originating System
<input checked="" type="radio"/>	Sammy Supervisor	supervis	Employee

Cancel

Select

8. Add comments if needed and click **Submit**.

Setting a Proxy

ORACLE

E-Business Suite Home

[Logout](#) [Preferences](#) [Help](#)

Applications

- [Info Tech Svcs](#)
- [UNI Student Employee Self Service](#)
- [UNI Workflow User](#)

Please click on a responsibility link to display the list of available applications.

Favorites

[Edit Favorites](#)

You have not selected any favorites. Please use the "Edit Favorites" button to setup your favorites.

[Logout](#) | [Preferences](#) | [Help](#)

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1. Click **UNI Workflow User**.

Select one or more notifications from the list and Open or Reassign them using the appropriate buttons. You may also click on the notification subject to open a particular notification.

View

Previous Next

Select Type

There are no notifications in this view.

From

Subject

Sent

[Routing Rules](#)

TIP: Use Routing Rules to redirect or auto-respond to notifications

2. Click **Routing Rules**.

Notification Routing Rules

You have not setup any notification routing rules. Please use the Create Rule button to create a new notification routing rule.

[Return to Worklist](#)

[Create Rule](#)

3. Click the **Create Rule** button.



Activating Type of Notification

Select the type of notification that will activate this rule.


Item Type

If "--All--" is selected, you will skip to Step 3.



[Return to Routing Rules](#)

Step 1 of 3 [Next](#)

4. Using the drop down menu, select which types of notifications you want to create a proxy for.
 - All (to create a Proxy for All types of notifications)
 - UNI Time Workflow Process (to create a Proxy for your UNI Time notifications only)
5. Click the **Next** button.



6. Enter the **Start Date**. Note that email notifications are created at 7:00 a.m. Monday – Friday.
7. Enter the **End Date**.
8. Enter a **Message** that you would like to include with each notification (optional).
9. Using the **flashlight**  select the person who you want to be your proxy. Enter the person's last name. Do not select anyone with a HZ_PARTY Username.
10. Click **Submit**.

Notification Routing Rules

Notification Routing Rules					
Rule Name	Item Type	Notification	Update	Delete	Status
<u>Delegate: Supervisor, Sammy</u>	<All>	<All>			Active

[Return to Worklist](#) Create Rule

[Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

11. To Update an existing Routing Rule, click on the **Update**  icon.
12. Delete a Routing Rule; click on the **Trashcan**  icon.