Quick Reference Guide

Worklist Access Steps

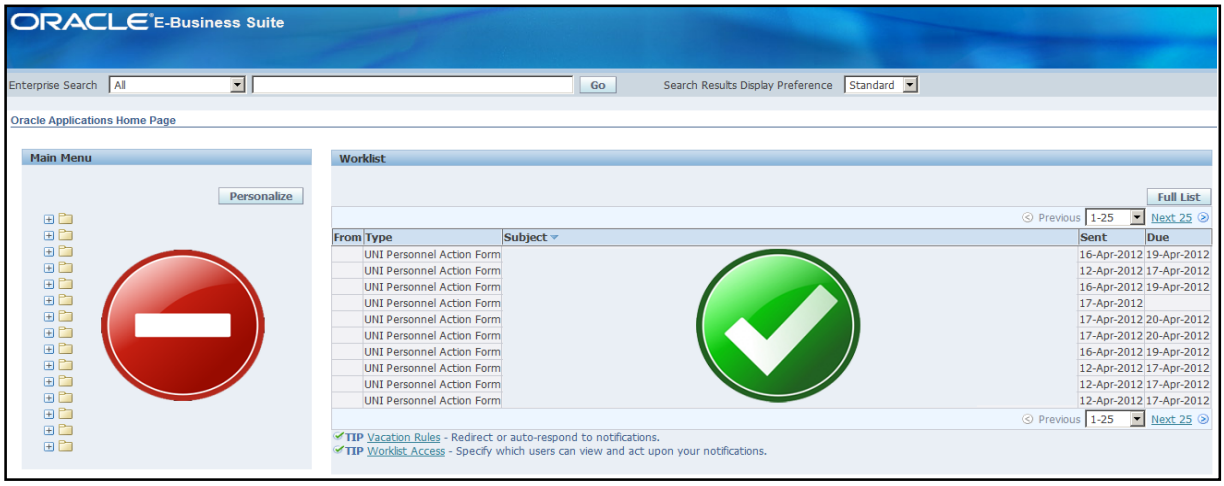
UNI e-Business Suite

NOTES

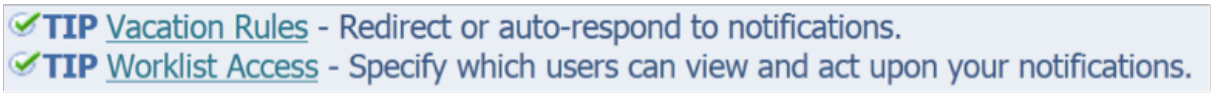
Worklist Access grants another user access to view and act upon your notifications via the Worklist.

Worklist Access does NOT grant another user access to view and act upon e-Business responsibilities

Full Screen Image

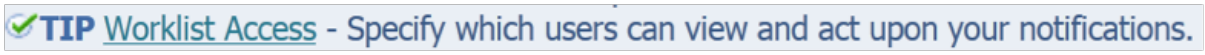


Difference? Vacation Rules is an auto redirect option to route notifications to another user(s); whereas, Worklist Access allows you and another user(s) to view and act upon your notifications via the Worklist.

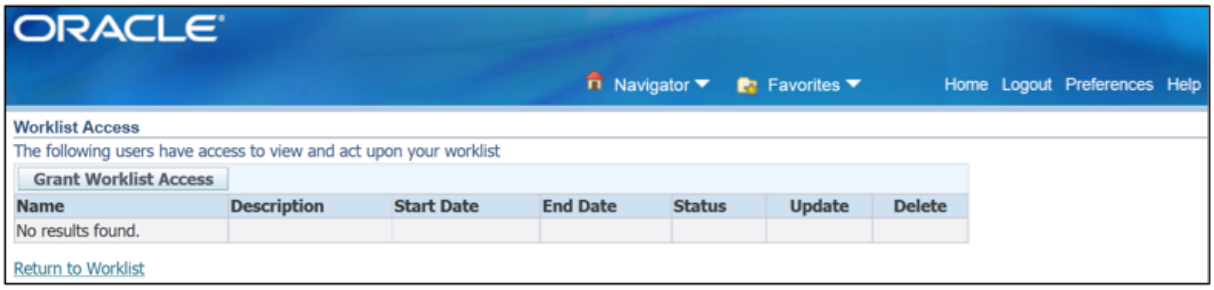


GRANTING WORKLIST ACCESS

1. Logon to UNI e-Business Suite
2. From the Worklist bottom pane, click once on the **"Worklist Access"** link.

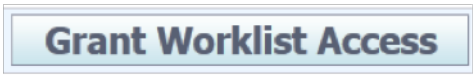


Full Screen Image

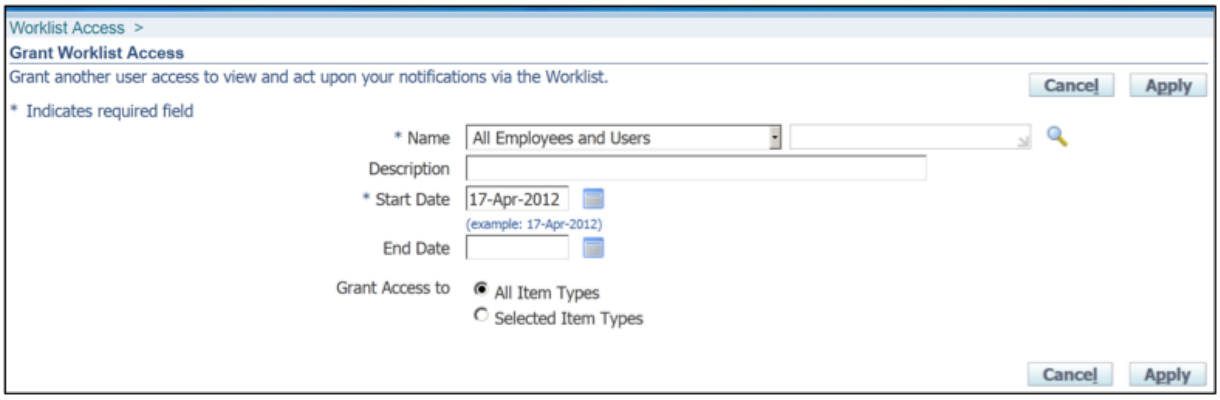


Worklist Access Steps

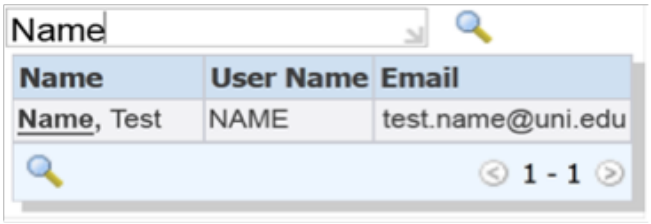
3. Click once on the **Grant Worklist Access** button.



Full Screen Image



4. In the **Name** User or Role field, type a last name.



5. To select a staff member click once on the desired staff member's name.

There is an additional option to conduct a full search for a staff member.

1. To begin a staff member full search, click once on the magnifying glass icon next to the Name User or Role field.

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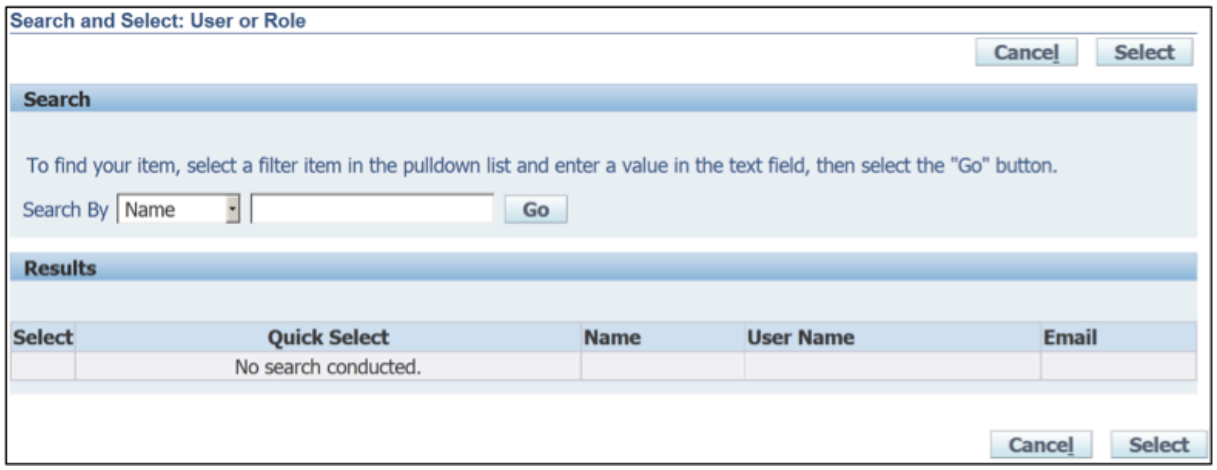
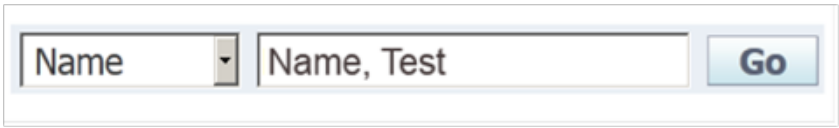
Full Screen Image



2. In the **Search By** Name field type a last name and then click once on the **Go** button.

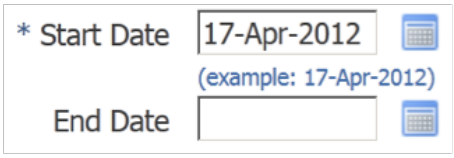


3. Locate the staff member's name in the **Results** table.

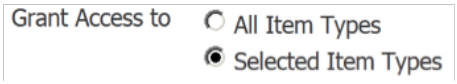
4. Directly across from the staff member's name, click on the **Select** radio button.

5. To confirm the staff member choice, click once on either the top or bottom **Select** buttons.

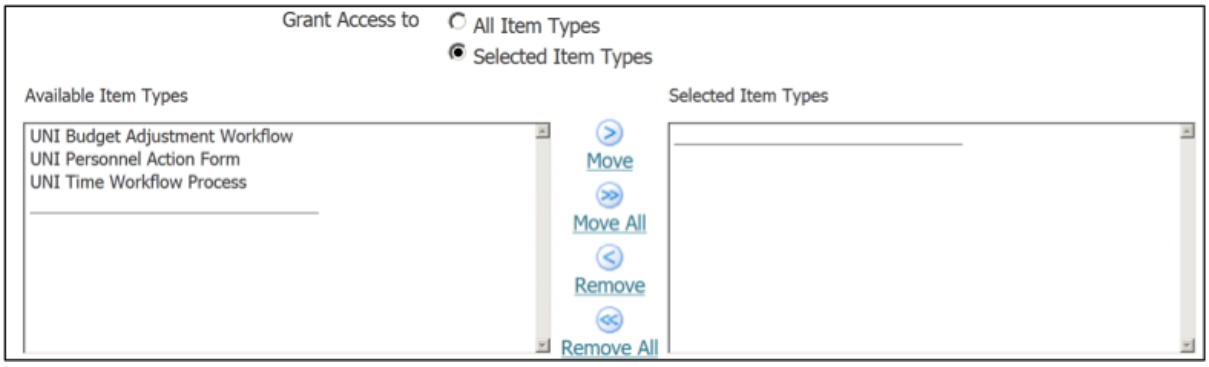
6. The **Description** field is optional, and, if provided, provides the user with Worklist access a brief description regarding the access.
7. At the **Start Date** field, use the calendar icon or type in an effective start date of the access. This is a required field.
8. The **End Date** field is optional, and, if provided, it will stop the Worklist Access on the date indicated. Use the calendar icon or type in an effective end date of the access.



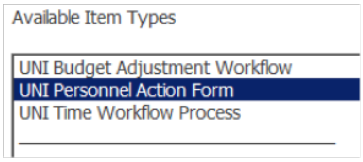
9. From the **Granted Access** section, click once in the **Selected Item Types** radio button.



Full Screen Image



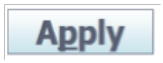
10. In the **Available Item Types** region, click once on the **UNI Personnel Action Form** option.



11. Click once on the **Move** button.

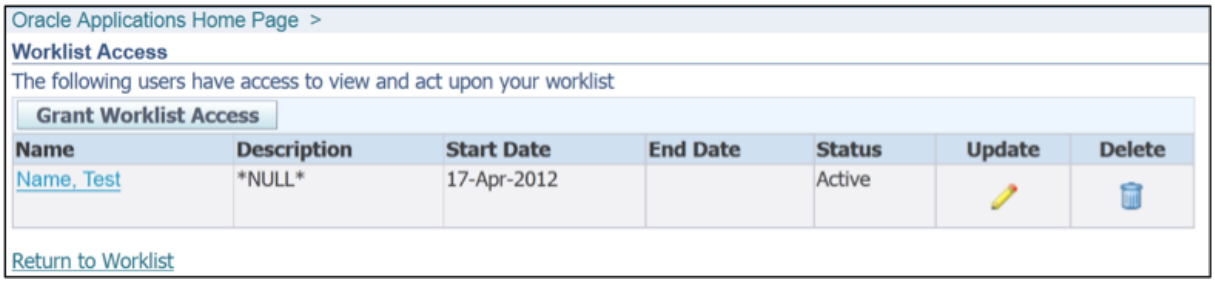
12. Verify that **UNI Personnel Action Form** option moved into the **Selected Item Types** region.

13. Click once on the **Apply** button.



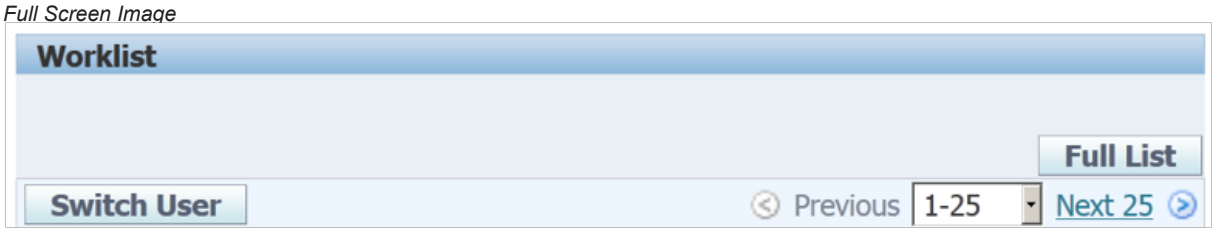
14. Verify that the Worklist Access has been correctly assigned.

Full Screen Image



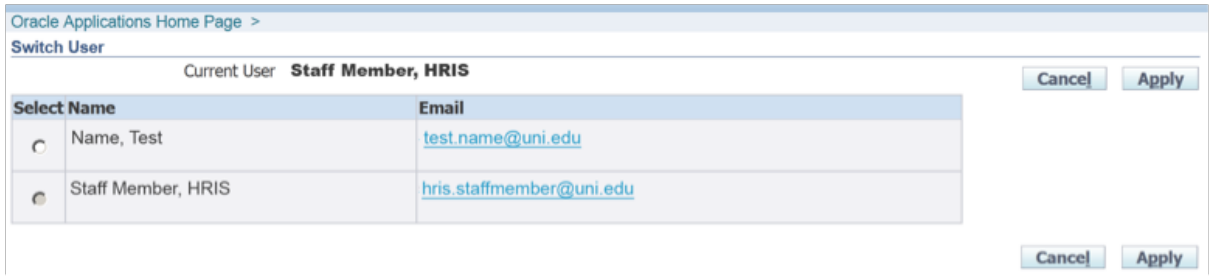
VIEWING ASSIGNED WORKLIST ACCESS

Full Screen Image



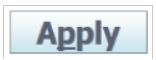
1. Logon to UNI e-Business Suite.
2. From the Worlist top pane, click once on the **Switch User** button.

Full Screen Image

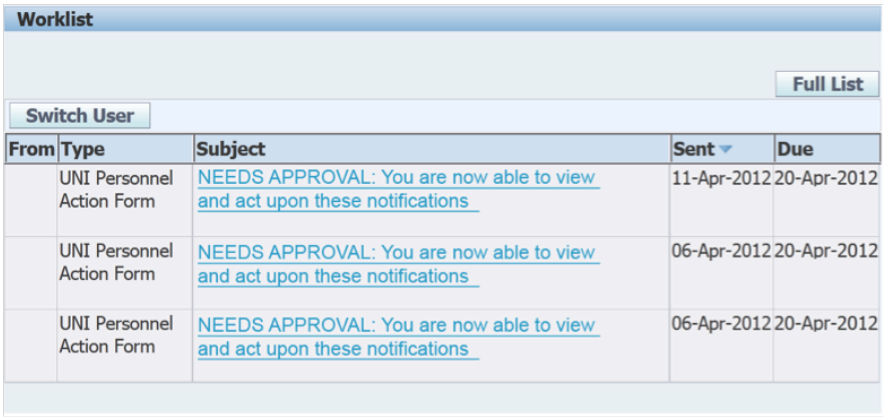


3. To the left of the staff member's name, click once on the **Select** radio button.

4. To confirm the staff member choice, click once on either the top or bottom **Apply** buttons.

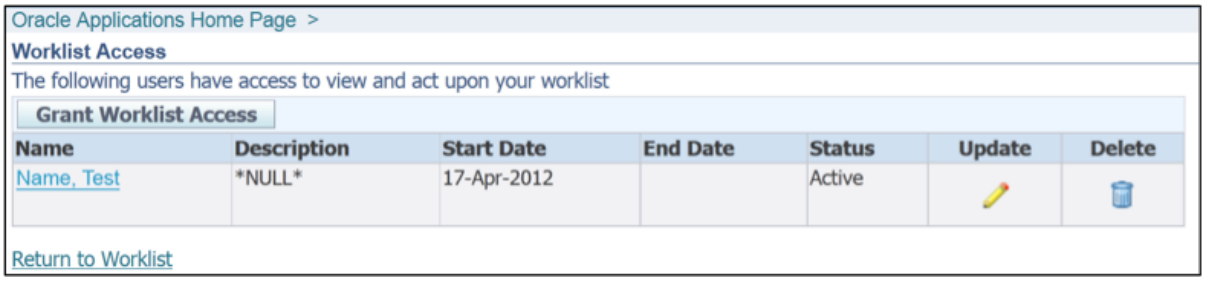


5. View and act upon your notifications through the assigned Worklist central pane.

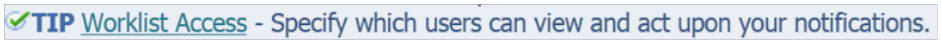


REMOVE ASSIGNED WORKLIST ACCESS

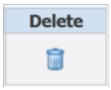
Full Screen Image



1. Logon to UNI e-Business Suite
2. From the Worklist bottom pane, click once on the "**Worklist Access**" link.



3. Click once on the **Delete** trash can directly across from the staff member's name.



4. A **Warning** message will appear asking you to confirm the request to remove Worklist access for the employee listed, click once on the **Apply** button to confirm and remove the Worklist access.

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