

Guide to Worklist Access and Delegation

Worklist access (and Vacation rules)

Worklist access allows you to grant access to another person to access your worklist notifications.

This will allow another person to view your notifications and open them to approve, reject etc.

The screenshot shows the Oracle Applications Home Page. On the left is a 'Main Menu' with various options. On the right is the 'Worklist' section, which contains a table of notifications. A blue arrow points to the 'TIP Worklist Access' link in the table.

From	Type	Subject	Sent	Due
Employee Mrs. Ann	HR	Payment Claims for Employee Mrs. Ann	15-May-2014	
Employee Mrs. Ann	HR	Qualification Update for Employee Mrs. Ann	15-May-2014	29-May-2014
Employee Mrs. Ann	HR	Professional Membership Update for Employee Mrs. Ann	14-May-2014	28-May-2014

To set up a worklist access click on the Worklist Access link

The screenshot shows the 'Grant Worklist Access' screen. It displays a table with columns: Name, Description, Start Date, End Date, Status, Update, and Delete. The table is currently empty, showing 'No results found.' A blue arrow points to the 'Grant Worklist Access' link.

This screen will show any people you have already given access to. To set up a new person, click on Grant Worklist Access

The screenshot shows the 'Grant Worklist Access' form. It includes fields for Name, Description, Start Date, End Date, and Grant Access to. A blue arrow points to the 'Name' field.

First, you need to select the employee you wish to grant access to by clicking on the spy glass here

The screenshot shows the 'Search and Select: User or Role' dialog box. It has a 'Search' section with a pulldown menu for 'Search By' (set to 'Name') and a text field. Below it is a 'Results' section with a table. A blue arrow points to the 'Go' button.

Select	Quick Select	Name	User Name	Email
	No search conducted.			

You need to search for the person you want to select. To do this you will need to use the wildcard which is %. For example if you wish to search for Andrew Greenwood, then if you enter %Greenwood% the system will retrieve all employees called Greenwood. If you enter %wood% the

system will retrieve employees called Wood, Greenwood, Woodhead, etc, i.e. any name containing "wood".

Once you have entered your search criteria click Go to return a list of names:

Search and Select: User or Role

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 Name %employee% Go

Results

Select	Quick Select	Name	User Name	Email
<input type="radio"/>	<input checked="" type="checkbox"/>	Employee Miss Ann	EMPLOYEE001	mrsannemployee@lancashire.gov.uk

Cancel Select

Click on the Quick Select button to select the desired employee.

Oracle Applications Home Page > Worklist Access >

Grant Worklist Access

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

* Indicates required field

Name Employee Miss Ann

Description Access to manager worklist

* Start Date 24-Jun-2014

End Date 30-Jun-2015

Grant Access to All Item Types Selected Item Types

Cancel Apply

The employee will now appear on your screen.

You may enter a description and end date if desired.

You should select All Item types to ensure the person has access to all HR related notifications.

Then click on Apply.

The employee will appear in your list as below:

Oracle Applications Home Page > Worklist Access >

Worklist Access

The following users have access to view and act upon your worklist

Grant Worklist Access

Name	Description	Start Date	End Date	Status	Update	Delete
Employee Miss Ann	Access to manager worklist	24-Jun-2014	30-Jun-2015	Active		

Return to Worklist

The person selected will now receive all your notifications. You will still receive them as well so you can both deal with any actions required.

You may also update, delete employees or add new employees to worklist access at any time.

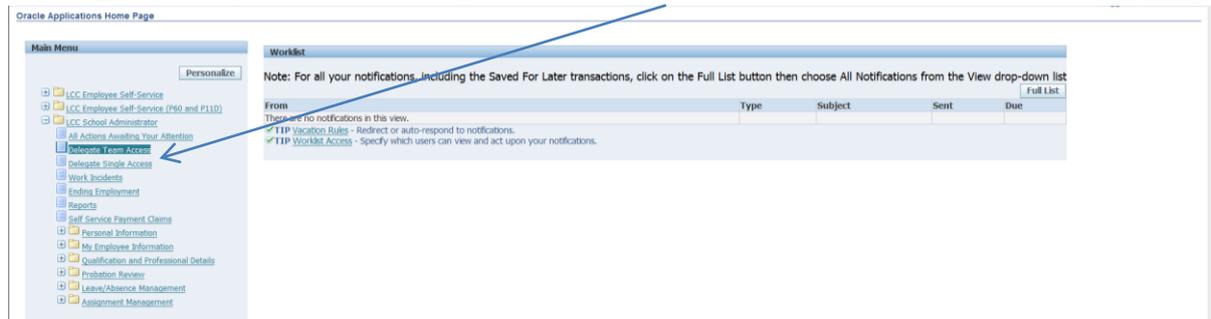
Vacation rules work in the same way but are intended for short term use when you are on annual leave.

Delegation

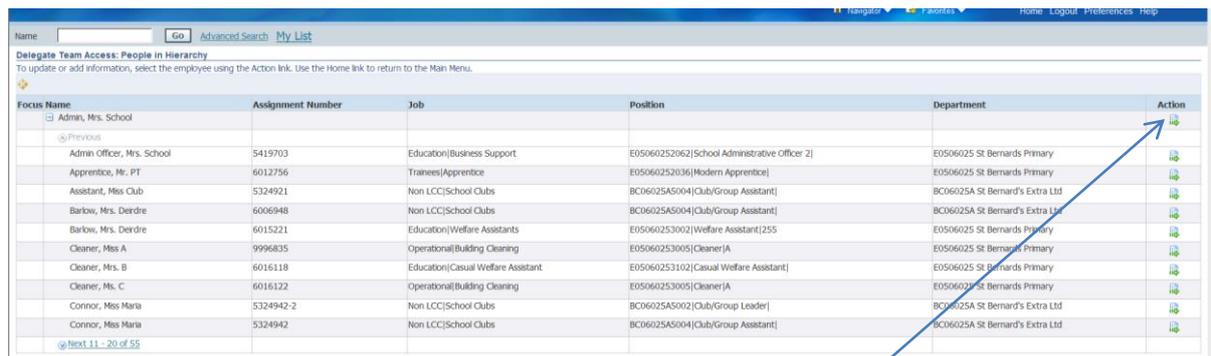
Delegation allows you to delegate authority to another person to access your employees for the purpose of entering absences, leave, changing assignment information, e.g. hours, etc.

You can delegate access to a single employee or to your whole team. The person you have delegated to will be able to view all your employees and input information for them.

To delegate access, select team or single access as below:



For this example, team access is selected.



Click on the Action button next to your name at the top of the hierarchy, this means the person you delegate to will have access to all employees below you in the hierarchy.

Single access works in the same way but you click on the Action button next to the individual employee name that you wish to grant access to.



Now click on Add.

Use the spy glass to select the employee you wish to delegate to as described earlier (under Worklist access guide). Then click Apply.

The following screen will appear:

Check the correct employee is selected, then click Next.

Check the details then click Submit. You will receive confirmation that your changes have been applied.

The employee you have delegated to must have manager self-service or school administrator access to be able to carry out functions such as absence. Contact AskHR to request this.

To enter absence or make other changes on your behalf, the employee will have to search for employees as the hierarchy will not be displayed for them. The search field is at the top of the screen as shown below

Delegated access can be updated or deleted at any time and additional employees may be added.