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.

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CT Sendres: Browns and Ounts	Note: For all your notifi	cations, inclu	ding the Saved For Later transactions, click on the Full List butto	n then choose All Notifications from	the View drop	Full List
LCC Employee Self-Service	From	Туре	Subject	Sent -	Due	Contractor and a state of the s
and the second sec						
1 CC Employee Self-Service (P60 and P110)	Employee Mrs. Ann	HR	Payment Claims for Employee Mrs. Ann	15-May-2014		
LCC Employee Self-Service (P60 and P11D)	Employee Mrs. Ann Employee Mrs. Ann	HR	Payment Claims for Employee Mrs. Ann Qualification Update for Employee Mrs. Ann	15-May-2014 15-May-2014	29-May-2014	
LCC Employee Self-Service (P60 and P11D) LCC HRMS Manager	Employee Mrs. Ann Employee Mrs. Ann Employee Mrs. Ann	HR HR HR	Payment Claims for Employee Mrs. Ann Qualification Update for Employee Mrs. Ann Professional Membership Update for Employee Mrs. Ann	15-May-2014 15-May-2014 14-May-2014	29-May-2014 28-May-2014	
	Employee Mrs. Ann Employee Mrs. Ann Employee Mrs. Ann TIP Vacation Rules - Redire TIP Worklat Access Spec	HR HR HR HR HR HR HR HR HR	Payment Canns for Employee Miss. Ann Cyauffrathor Under for Employee Miss. Ann Professional Membership Ladate for Employee Miss. Ann in do notifications. In view and act upon your notifications.	15-May-2014 15-May-2014 14-May-2014	29-May-2014 28-May-2014	
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To set up a worklist access click on the Worklist Access link

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Oracle Applications Home Page >							
Worklist Access							
The following users have access to view and	fact upon your worklist						
Grant Worklist Access							
Name	Description	Start Date	End Date	Status	Update	Delete	
No results found.							
Return to Workist							

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

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Oracle Applications Home Page > Worklist Access >				
Grant Worklist Access				
Grant another user access to view and act upon your notifications via the Worklist.				Cancel Apply
Indicates required field				
	ame Employee -			
Desc	otion			
* Star	Date 19-Jun-2014			
900	(example: 19-3.a)-2014)			
Enc	Date			
Grant Acc	ss to 🗳 Al Item Types			
	Selected Item Types			

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

Search and Select: User or Role						
				Cance <u>l</u> 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						
Results						
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 an	nd Select: User o	r Role			
				Cance! S	elect
Search					
To find vo	our item, select a fi	ter item in the pulldown list a	ind enter a value in the tex	xt field, then select the "Go" button.	
Search By	v Name •	%empioyee%	GO		
Results					
Select	Quick Select	Name	User Name	Email	
0		Employee Miss Ann	EMPLOYEE001	mrsannemployee@lancashire.gov.uk	
				Cancel Se	lect
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Click on the Quick Select button to select the desired employee.

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Oracle Applications Home Page > Worklist Access >			
Grant Worklist Access			
Grant another user access to view and act upon your notifications via the Worldist.			Cancel Apply
* Indicates required field			
* N	ne Employee 🕶 Employee Miss Ann 🚽 🔍		
Descrip	on Access to manager worklist		
* Start D	ate 24-Jun-2014		
	(example: 24-Jun-2014)		
End I	ste 30-Jun-2015 🛛 🜆		
Grant Acces	to 🔹 Al 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							
The following users have access to v	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	1	Û	
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:

oracle Applications nome rage					
Main Menu	Worklist				
Personalize	Note: For all your notifications, including the Saved For Later transactions, click on th	e Full List button the	n choose All Notifica	tions from the Vie	w drop-down list
LCC Employee Self-Service					Full List
LCC Employee Self-Service (P60 and P11D)	From	Туре	Subject	Sent	Due
CC School Administrator All Actions Awaiting Your Attention Delegopte Team Access	TTP Vacation Rules - Referet or auto-respond to notifications. ✓TTP <u>Vacation Rules</u> - Refer to rauto-respond to notifications. ✓TTP <u>Worldst Access</u> - Specify which users can view and act upon your notifications.				
Delegate Single Access Work Incidents					
Ending Employment					
Self Service Payment Claims					
My Employee Information					
Quantization and Professional Details Probation Review					
Leave/Absence Management Assignment Management					

For this example, team access is selected.

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Name Go A	Ivanced Search My List				
Delegate Team Access: People in Hierarchy					
To update or add information, select the employed	e using the Action link. Use the Home link to	o return to the Main Menu.			
\$					
Focus Name	Assignment Number	Job	Position	Department	Action
Admin, Mrs. School					7
Previous					/
Admin Officer, Mrs. School	5419703	Education/Business Support	E05060252062 School Administrative Officer 2	E0506025 St Bernards Primary	10
Apprentice, Mr. PT	6012756	Trainees (Apprentice	E05060252036[Modern Apprentice]	E0506025 St Bernards Primary	113
Assistant, Miss Club	5324921	Non LCC[School Clubs	BC06025A5004 Club/Group Assistant	BC06025A St Bernard's Extra Ltd	18
Barlow, Mrs. Deirdre	6006948	Non LCC[School Clubs	BC06025AS004 Club/Group Assistant	BC06025A St Bernard's Extra Ltd	14
Barlow, Mrs. Derdre	6015221	Education Welfare Assistants	E05060253002 Welfare Assistant 255	E0506025 St. Bernards Primary	18
Cleaner, Miss A	9996835	Operational[Building Cleaning	E05060253005 Cleaner A	E0506025 St Bernards Primary	12
Cleaner, Mrs. B	6016118	Education Casual Welfare Assistant	E05060253102 Casual Welfare Assistant	E0506025 St Bernards Primary	18
Cleaner, Ms. C	6016122	Operational Building Cleaning	E05060253005 Cleaner A	E0506025 St. Bernards Primary	13
Connor, Miss Maria	5324942-2	Non LCC School Clubs	BC06025A5002 Club/Group Leader	BC06025A St Bernard's Extra Ltd	18
Connor, Miss Maria	5324942	Non LCC School Clubs	BC06025A5004[Club/Group Assistant]	BC06025A St Bernard's Extra Ltd	13
@Next 11 - 20 of 55					

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.

		Contraction of the second s				
Delegate Team Access: Extra Information						
Employee Name Admin, Mrs. School Employee Nambe 4571417 IMPORTANT; If you are a casual worker please cick here Cick update or Add to make changes to the sectore below. Cick hext to continue this action, cick Bick to retur	Organiz to the previous page, clock Cancel to cancel this action, or clock Save for Later to finsh this action 1	ation Email Address	Anne-Simpson@i	Cancel Save For Later	Back	Next
Delegate Access to Colleague						
Add select Statis No reads found.	Delegate Access To					
				Cancel Save For Later	Back	Next

Now click on Add.

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Delegate Access to Colleague		_
Employee Name Admin, Mms. School Employee Number 4571417	Crganization Email Address Anne.Simpson@lancathire.gov.uk	Apply
Enter any changes below. Click Apply to continue this action, click Cancel to cancel this action and return to the previous page.		
Delegate Access To Employee, Mss Ann (0166693)		
	Cancel	Apply

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:

Delegate Team Access: Extra Information			
IMPORTANT: If you are a casual worker please of Cick update or Add to make changes to the sections b	Employee Name Admin, Mrs. School Employee Number 4571417 Kickhere Gew. Click Next to continue this action, cick Back to return to the previous page, click Cancel to cancel this action, or click Save for Later to finish th	Organization Email Address	Cancel Save For Later Back Negt
Delegate Access to Colleague			
Select Object: Delete Update Add			
Select Status	Delegate Access To		
New	Employee, Mss Ann (0166693)		
			Cancel Save For Later Back Negt

Check the correct employee is selected, then click Next.

Delegate Team Access: Review	
Employee Name Admin, Mrs. School Review your changes and, if applicable, attach supporting documents. © Indicate During dom:	Cancel Printable Page Save For Later Back Submit Employee Number 4571417
Extra Information Type	
Delegate Access to Colleague	
Proposed	
Delegate Access To Employee, Miss Ann (0166693)	

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

BT Lancashire Services LCC School Administrator	🛱 Navigator 👻 📑 Favorites 👻	Home Logout Preferences Help
10 Confirmation		
Your changes have been applied,		
		Home

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.