Workflow Approval Maintenance (WAM) Form

Documentation

Workflow is the routing of electronic documents within the HR and Finance Administrative (FN) Systems. Some workflow routing is programmatically controlled, such as self-service banking changes, effort reports, and invoices. Other workflow routing is defined by the user organizations using the **WORKFLOW APPROVAL MAINTENANCE (WAM)** form. Workflow from the requestor to Central Administration is referred to as the ***end user approval path***.

The ***end user approval path*** is controlled by the **WORKFLOW APPROVAL MAINTENANCE (WAM)** form. Each organizational unit has a ***Workflow Officer*** (***WFO)*** who is responsible for setting up and managing the **WAM** form**.** The Workflow Officer may use the same approval path for all document types, or the approval path may vary by document type, based on the needs of the organization.

The **WAM** form is a ***<u>view only</u>*** form and has no user restrictions on HR and FN end user responsibilities. The WAM form can be accessed via URL https://dcsapps.ad.uab.edu/WAM/Login.aspx?ReturnUrl=%2fwam%2fdefault.aspx.

The following documentation explains how to view the end user approval paths using the **WAM** form, and provides an explanation of the end user approval path.

UAB HR Officer → UAB Workflow → WAM - - Approval Paths

UAB Salary Reclass → UAB Workflow → WAM - - Approval Paths

UAB Timekeeper → UAB Workflow → WAM - - Approval Paths

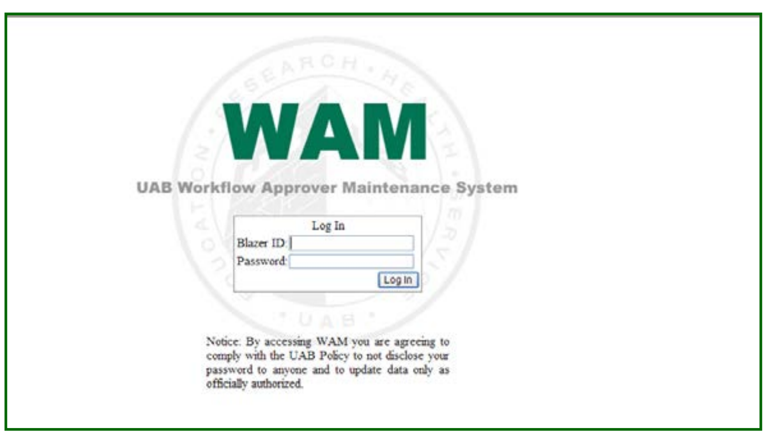
UAB FN Document Entry/Approval → WAM - - Approval Paths

UAB GA End User → UAB Workflow → WAM - - Approval Paths

UAB GL End User → UAB Workflow → WAM - - Approval Paths

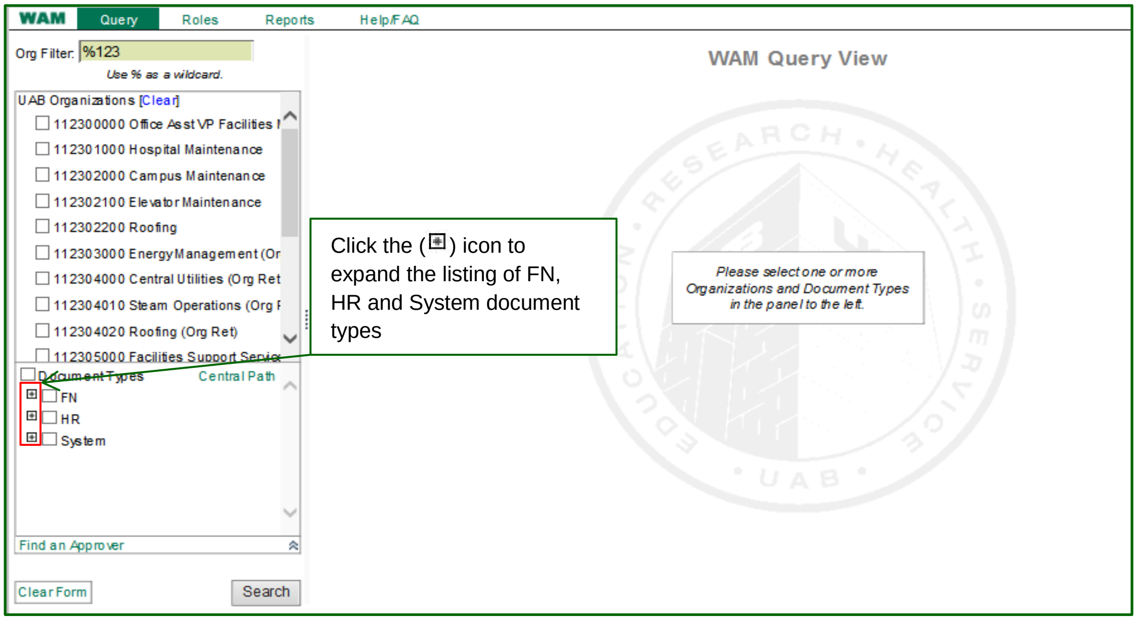
<u>Logging In</u>

After clicking on the **WAM - - APPROVAL PATHS** menu option a login window will display; enter your **BLAZER ID/PASSWORD** and click on the **LOG IN** button.



The **WAM** form will open.

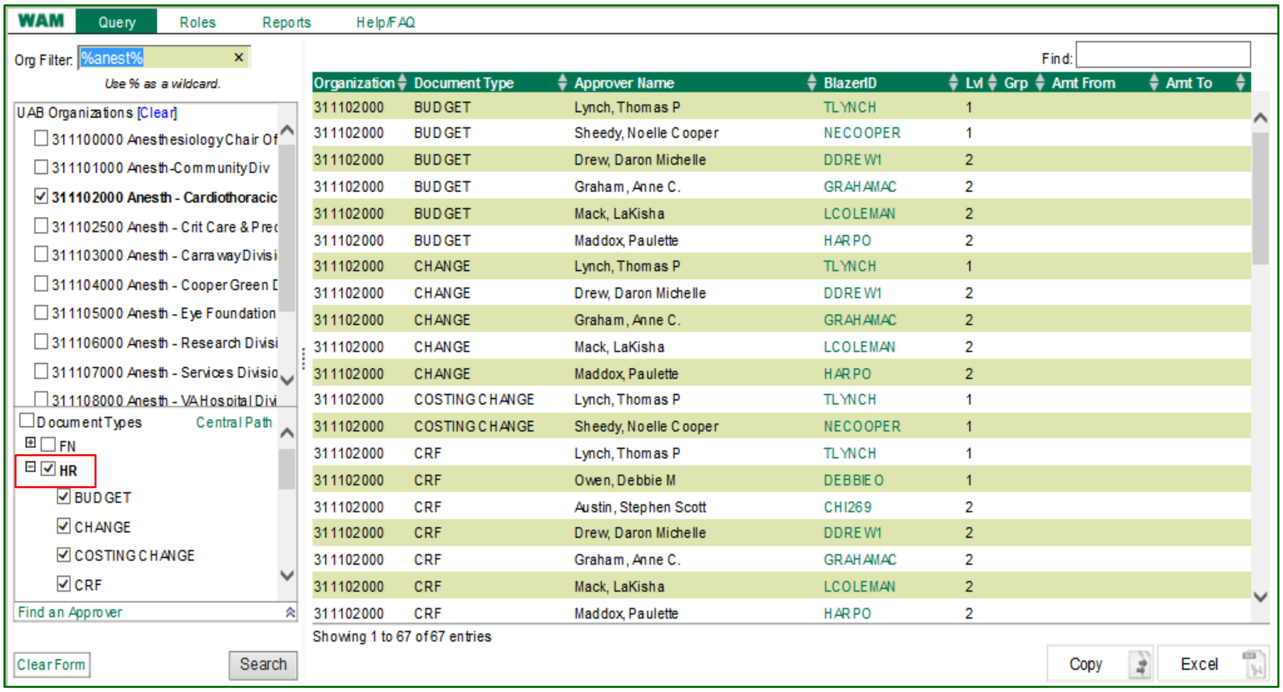
WAM Query View

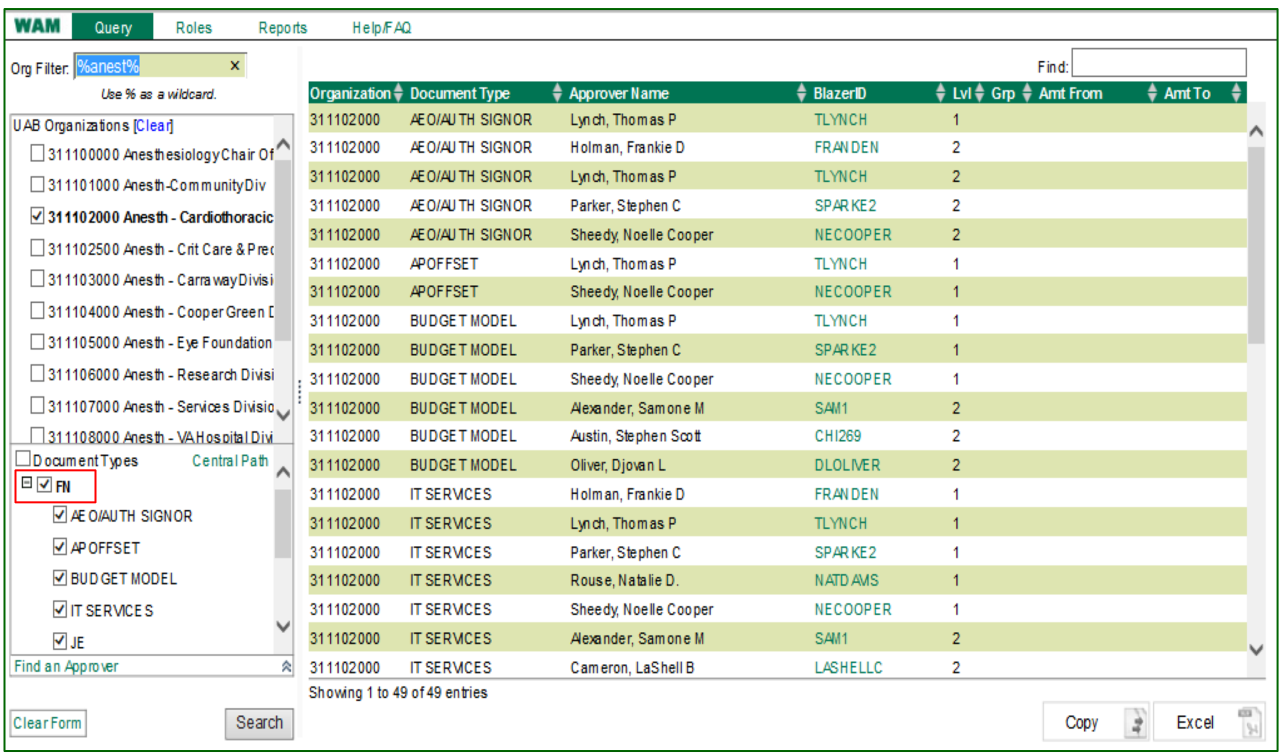


Where do I start?	Typical usage begins by first entering an organization value in the **Org Filter** field. This can be any part of an organization name or number; you can use the wildcard symbol '%' if needed. Select at least one organization and document type from the **Document Types** panel. Finally, click on **Search** to query the workflow approvers.
How is the wildcard symbol '%' used?	The **'%'** can be used as a wildcard when you only know a piece or part of a value.
What does the Clear button do in the UAB Organizations filter panel?	Clear is used to reset the items selected and displayed in the organization panel. Only use this option if you wish to reset and clear the entire organization list.
How do I select multiple Organizations or Document Types?	A selector checkbox is available that allows you to easily select multiple values. When this checkbox is selected (✓) the items below that area are selected. Remove the (✓) from the box to de-select organization or document type.
What does the 'Search' button do?	Search launches the primary Query and returns information in the center data grid panel. Selections made for Organization and Document Type are used to execute the query.

Workflow Approval Maintenance (WAM) Form Documentation

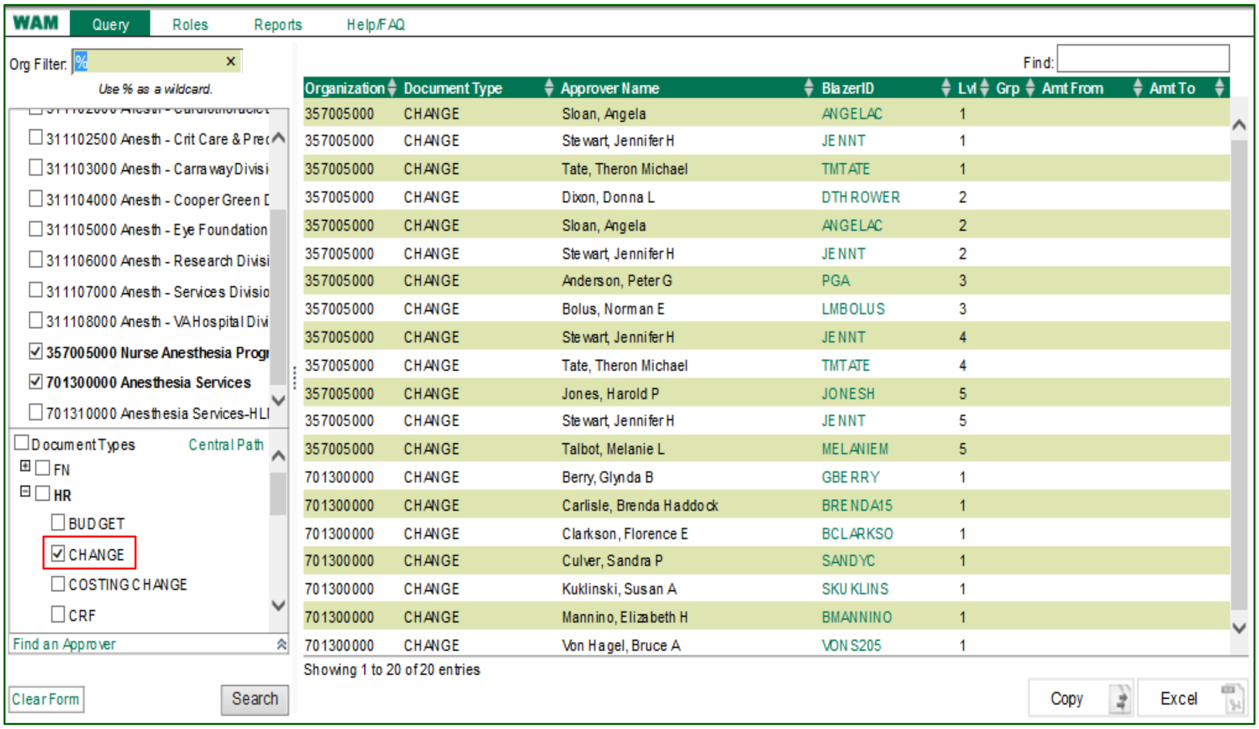
Picture # 1 displays query results for one organization with multiple document types.



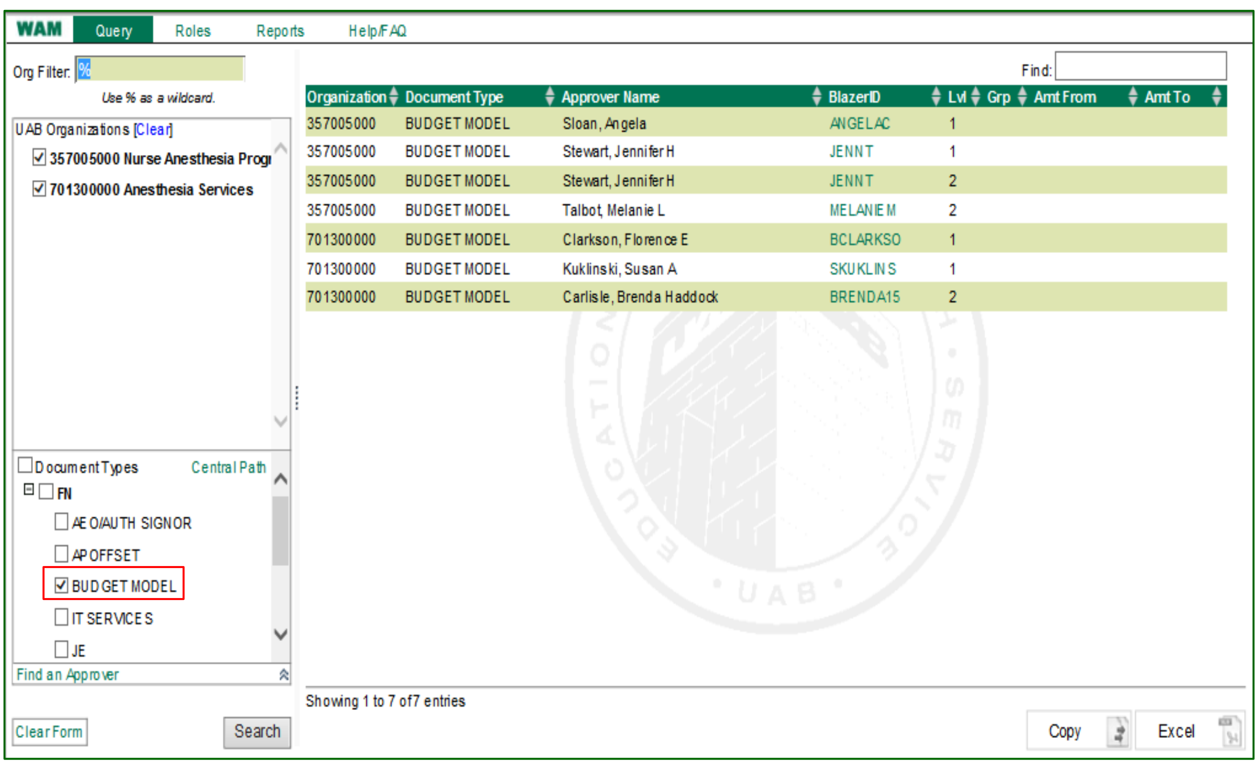


Workflow Approval Maintenance (WAM) Form Documentation

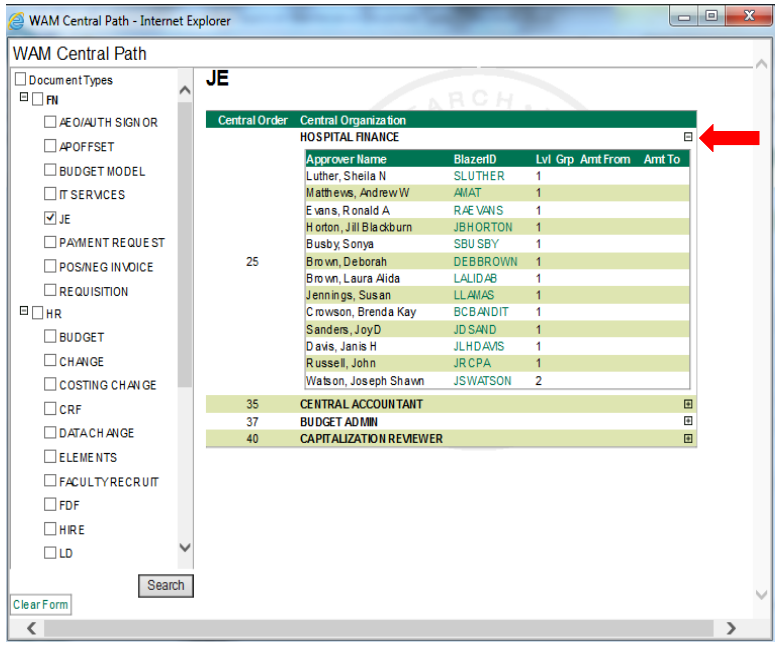
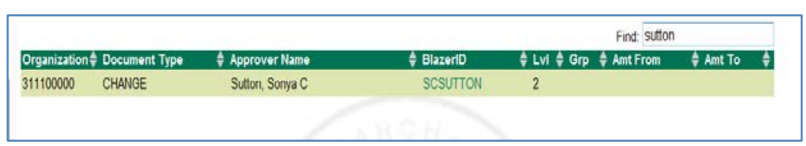
Picture #2 displays query results for multiple organizations and one document type.



Organization	Document Type	Approver Name	BlazerID	Lvl	Grp	Amt From	Amt To
357005000	CHANGE	Sloan, Angela	ANGELAC	1			
357005000	CHANGE	Stewart, Jennifer H	JENNT	1			
357005000	CHANGE	Tate, Theron Michael	TMTATE	1			
357005000	CHANGE	Dixon, Donna L	DTHROWER	2			
357005000	CHANGE	Sloan, Angela	ANGELAC	2			
357005000	CHANGE	Stewart, Jennifer H	JENNT	2			
357005000	CHANGE	Anderson, Peter G	PGA	3			
357005000	CHANGE	Bolus, Norman E	LMBOLUS	3			
357005000	CHANGE	Stewart, Jennifer H	JENNT	4			
357005000	CHANGE	Tate, Theron Michael	TMTATE	4			
357005000	CHANGE	Jones, Harold P	JONESH	5			
357005000	CHANGE	Stewart, Jennifer H	JENNT	5			
357005000	CHANGE	Talbot, Melanie L	MELANIEM	5			
701300000	CHANGE	Berry, Glynda B	GBERRY	1			
701300000	CHANGE	Carlisle, Brenda Haddock	BRENDA15	1			
701300000	CHANGE	Clarkson, Florence E	BCLARKSO	1			
701300000	CHANGE	Culver, Sandra P	SANDYC	1			
701300000	CHANGE	Kuklinski, Susan A	SKUKLINS	1			
701300000	CHANGE	Mannino, Elizabeth H	BMANNINO	1			
701300000	CHANGE	Von Hagel, Bruce A	VONS205	1			



Organization	Document Type	Approver Name	BlazerID	Lvl	Grp	Amt From	Amt To
357005000	BUDGET MODEL	Sloan, Angela	ANGELAC	1			
357005000	BUDGET MODEL	Stewart, Jennifer H	JENNT	1			
357005000	BUDGET MODEL	Stewart, Jennifer H	JENNT	2			
357005000	BUDGET MODEL	Talbot, Melanie L	MELANIEM	2			
701300000	BUDGET MODEL	Clarkson, Florence E	BCLARKSO	1			
701300000	BUDGET MODEL	Kuklinski, Susan A	SKUKLINS	1			
701300000	BUDGET MODEL	Carlisle, Brenda Haddock	BRENDA15	2			

What is the 'Central Path' option used for?	By clicking on the **Central Path** link, navigation will open a separate screen. The screen will display a query panel to query the Central Path approvers per appropriate document types.  Click the (⊞) icon to expand the listing of approvers. Hover over the name to display the approver contact information.
Can I 'Clear' the form and start over?	**Clear Form** is used to reset the entire screen. Only use this option if you wish to reset and clear the entire screen.
How do I use the Copy/Excel/Print options?	There are 3 choices for direct output of the information displayed in the data grid. ***Copy:*** Copies the contents of the data grid to your desktop clipboard. Information can then be copied using your desktop Paste function. ***Excel:*** Saves the contents of the data grid to a '.csv' file that can be opened using Microsoft Excel. ***Print:*** Launches your desktop Print dialogue allowing you to print the contents of the data grid.
What is the 'Find' field used for?	Find allows you to narrow the rows displayed in the data grid. As you type a value in the Find field the data grid is immediately filtered. 

Approver Details

The data grid identifies the organizational personnel assigned to the end user approval path for the specified HR, FN, and System document types.

Persons listed will receive an approval notification in their **Oracle Personal Worklist** and are given access to the document via the worklist link. Dollar thresholds can be set for an approver to limit the finance documents that an approver receives in their personal worklist using the **Amount From** and **Amount To** fields.

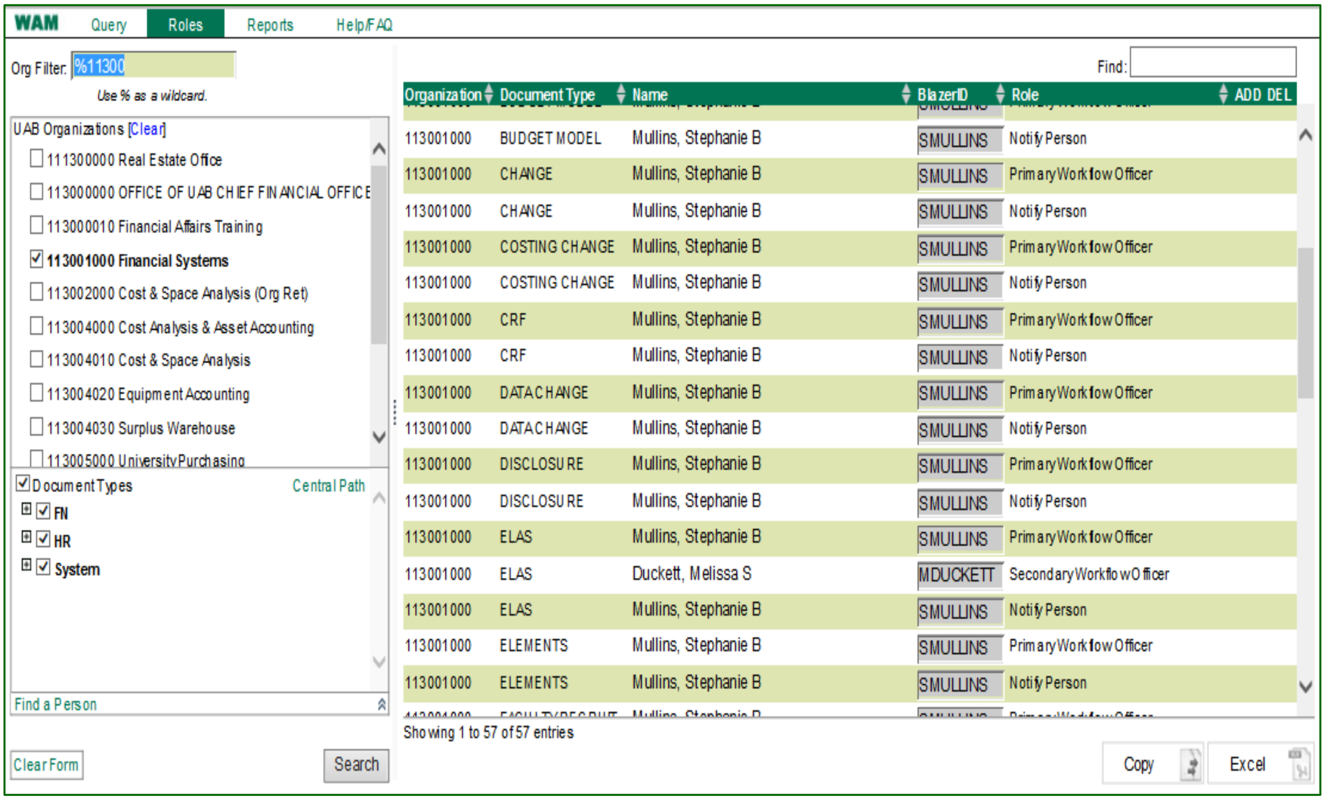
Organization	Document Type	Approver Name	BlazerID	Lvl	Grp	Amt From	Amt To
311102000	JE	Holman, Frankie D	FRANDEN	1			
311102000	JE	Lynch, Thomas P	TLYNCH	1			
311102000	JE	Parker, Stephen C	SPARKE2	1			
311102000	JE	Rouse, Natalie D.	NATDAVIS	1			
311102000	JE	Sheedy, Noelle Cooper	NECOOPER	1			
311102000	JE	Alexander, Samone M	SAM1	2		$25,000.00	
311102000	JE	Austin, Stephen Scott	CHI269	2		$25,000.00	
311102000	JE	Oliver, Djovan L	DLOLIVER	2		$25,000.00	
311102000	PAYMENT REQUEST	Holman, Frankie D	FRANDEN	1			
311102000	PAYMENT REQUEST	Lynch, Thomas P	TLYNCH	1			
311102000	PAYMENT REQUEST	Parker, Stephen C	SPARKE2	1			
311102000	PAYMENT REQUEST	Rouse, Natalie D.	NATDAVIS	1			
311102000	PAYMENT REQUEST	Sheedy, Noelle Cooper	NECOOPER	1			
311102000	PAYMENT REQUEST	Alexander, Samone M	SAM1	2		$25,000.00	
311102000	PAYMENT REQUEST	Austin, Stephen Scott	CHI269	2		$25,000.00	
311102000	PAYMENT REQUEST	Oliver, Djovan L	DLOLIVER	2		$25,000.00	
311102000	REQUISITION	Holman, Frankie D	FRANDEN	1			
311102000	REQUISITION	Lynch, Thomas P	TLYNCH	1			
311102000	REQUISITION	Parker, Stephen C	SPARKE2	1			
311102000	REQUISITION	Rouse, Natalie D.	NATDAVIS	1			

- **APPROVER NAME:** Identifies the organizational personnel assigned to approve a specific document type for each approval level. Individuals designated as approvers must meet the following requirements:
  - ❑ Current employees with an Assignment Category of 01 Full-time, 03 Part-time, 04 Retiree, or 59 Affiliate Employee
  - ❑ Access to the appropriate HR, FN, and System responsibilities
- **LVL**: Identifies the numerical routing order number ***(approval level)*** established by the Workflow Officer.
- **AMT FROM**: Only documents with a dollar amount equal to or greater than that value will be sent to that approver's personal worklist.
- **AMT TO**: Only documents with a dollar amount equal to or less than that value will be sent to that approver's personal worklist.

Note*: *Dollar thresholds should be used with caution. Placing threshold amounts for the* Amount From and Amount To *values for every approver, if not done properly, could result in some dollar ranges being omitted. It will result in documents being rejected, if they fall within the missing value range.

WAM Roles View

The WAM Roles View identifies organizational personnel assigned to the workflow administrative roles which are pertinent to the workflow of the selected organization and document type.



Organization	Document Type	Name	BlazerID	Role	ADD DEL
113001000	BUDGET MODEL	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	CHANGE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	CHANGE	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	COSTING CHANGE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	COSTING CHANGE	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	CRF	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	CRF	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	DATA CHANGE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	DATA CHANGE	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	DISCLOSURE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	DISCLOSURE	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	ELAS	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	ELAS	Duckett, Melissa S	MDUCKETT	Secondary Workflow Officer	
113001000	ELAS	Mullins, Stephanie B	SMULLINS	Notify Person	
113001000	ELEMENTS	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113001000	ELEMENTS	Mullins, Stephanie B	SMULLINS	Notify Person	

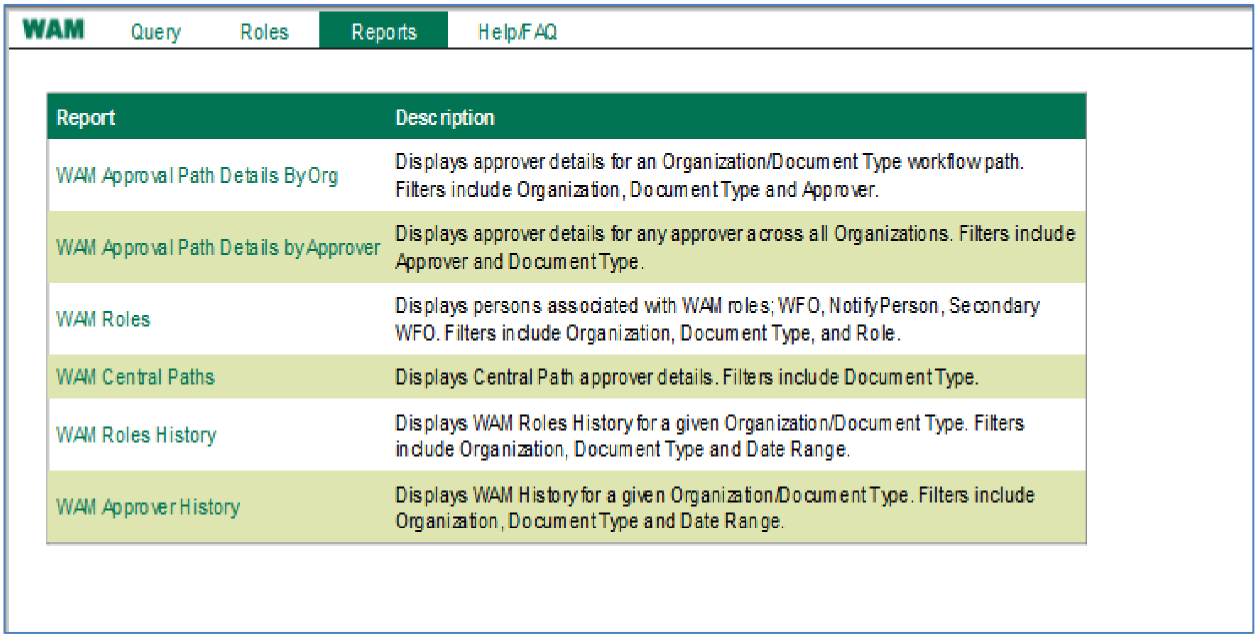
- The **PRIMARY WORKFLOW OFFICER** field identifies the individual within the organization that maintains and updates the end user approval paths via the Workflow Approval Maintenance form. Individuals assigned to this role must be:
  - Current employee with an assignment category of 01 Full-time, 03 Part-time, 04 Retiree, or 04 Affiliate Employee
  - Selected at the School/VP level, or designee
  - The ***Workflow Administrator*** sets up Workflow Officers in Oracle and associates the Workflow Officer with his or her Organizations

Note*: *The Primary Workflow Officer can create Secondary Workflow Officer roles.

- The **NOTIFY PERSON** field identifies the individual within the organization that receives FYI 24-hour hold notifications. Individuals assigned to this role must be:
  - Current employees with an Assignment Category of 01Full-time, 03 Part-time, 04 Retiree, or 59 Affiliate Employee
  - Assigned by the Workflow Officer (if not assigned, the WFO is the default)

WAM Reports

The following reports are available for you to run on an as needed basis. Simply click on the report name, login and select suitable parameters.



Report	Description
WAM Approval Path Details By Org	Displays approver details for an Organization/Document Type workflow path. Filters include Organization, Document Type and Approver.
WAM Approval Path Details by Approver	Displays approver details for any approver across all Organizations. Filters include Approver and Document Type.
WAM Roles	Displays persons associated with WAM roles; WFO, Notify Person, Secondary WFO. Filters include Organization, Document Type, and Role.
WAM Central Paths	Displays Central Path approver details. Filters include Document Type.
WAM Roles History	Displays WAM Roles History for a given Organization/Document Type. Filters include Organization, Document Type and Date Range.
WAM Approver History	Displays WAM History for a given Organization/Document Type. Filters include Organization, Document Type and Date Range.

Workflow Basics

The following information is pivotal to understanding how the approver details affect workflow:

- Only one organization has the ability to approve an HR document. Workflow follows the ***assignment organization (primary org)*** of the employee for which the document is being worked. All secondary organizations receive an FYI notification that the document has been submitted into Workflow. The document is placed ***on hold for 24 hours*** to allow secondary organizations time to reject the document. If after the 24-hour period no one rejects the document, it will continue down the workflow approval path.
- **24-Hour Notifications:** When multiple accounts, affiliated with different organizations, are entered on a document:
  - **Multiple GL accounts**: The organization paying the highest percentage of costs drives the workflow approval path.
  - **Multiple GA accounts**: The organization paying the highest percentage of costs drives the workflow approval path.
  - **Multiple GA/GL accounts**: The workflow is dictated by the GA account string.
- In addition to the ***Notify Person***, all ***Order No 1*** approvers receive FYI 24-hour hold notifications in their worklist; they also have the ability to reject the transaction during the 24 hour "response" period.
- Two unique end user approvals are required for all documents submitted into workflow, except for TEL documents submitted by a Timekeeper and GL journal entries.
- The ***Requestor*** counts as the approver except:
  - When the requestor uses UAB Requisitions Input
  - When document is for requestor; ***cannot*** approve own document
- Generally, only one level of approvers is required. However,
  - If the submitter uses the UAB Requisition Input, there must be at least two approval levels in order to obtain the two required signatures
  - If more than one level of approvers is established, the document will require a signature at each level, barring any dollar thresholds, even if the two required signatures have already been logged.
- Each approval level requires one approval to advance onto the next approval level.
- ***It is strongly recommended that multiple approvers be placed on each approval level. Failure to do so could result in delayed document processing should a single approver be unavailable to approve a document.***
- All documents without two unique end user approvals are returned to the requestor with a document status of ***"Open"***; re-opened documents must be resubmitted by the requestor and flow through the end user approval path before advancing to the Central Administration Workflow.

Return to Top