

## Workflow Approval Maintenance (WAM)

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WAM         Query         Roles         Reports         Help/FAQ           Org         Filter:	Log Off
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# Workflow Approval Maintenance (WAM)

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### Dollar thresholds set for an Approver to limit the Finance documents in their personal worklist are noted in the **Amount From** and **Amount To** fields

Workflow Approva	Maintenance	(WAM)

Organization	Document Type 🛛 🍦	Approver Name 🔶	BlazerID	🛊 Lvi 🌲 Grp 🍦	Amt From 🛛 🖨 Amt To	•
311102000	REQUISITION	Sheedy, Noelle Cooper	NECOOPER	1		
311102000	REQUISITION	Williams, David B.	DWILL3	1		
311102000	REQUISITION	Akins, Kristina E.	KEAKINS	2	\$25,000.00	
311102000	REQUISITION	Alexander, Samone M	SAM1	2	\$25,000.00	
311102000	REQUISITION	Glover, Blake Christopher	BGLOVER4	2	\$25,000.00	
311102000	REQUISITION	McNeil, Nikilya B	NIKI0204	2	\$25,000.00	
311102000	REQUISITION	Trotter, Faye M	MORROW	2	\$25,000.00	

**Note:** Dollar thresholds should be used with caution. Assigning threshold amounts for the Amount From/Amount To values <u>to every approver</u> could result in some dollar ranges being omitted. It will result in documents being rejected if they fall within the missing value range.

### WAM Central Path - Google Chr Org Filter: %113 To query the Central Path tralPath aspx?l istOfDocTypes=PAYMENT%20REOUEST REOUISITION Use % as a w UAB Organizations [Clear] approvers: WAM Central Path 111300000 Real Estate Office (Org Ret) Document Types Click Central Path 113000000 Office of UAB Chief Financial Offic PAYMENT REQUEST 113000010 Financial Affairs Training AEO/AUTH SIGNOR A new window will ntral O Central Organization NORTH PAVILION PROJECT 113001000 Financial Systems APOFESET 113006000 University Contracts SPECIAL HOSPITAL PROJECT OTHER FACILITIES PROJECTS HOSPITAL FINANCE BUDGET MODEL open, where you can 113200000 Exec Dir Financial Affairs IT SERVICES query the Central Path 113201000 Asset Management □JE Approver Name I vi Grn Amt Fro BlazerID 113201010 Surplus Warehouse Approver Name Luther, Sheila N Stewart, Joshua B Pennington, Craig Gentry Brandsema, Inmi Matsunaga Matsey, Tequilla Evans, Ronald A Busby, Sonya Loats, Jimmie Wayne Jr. Sandare Jup. PAYMENT REQUEST approvers by the 113201020 Shipping and Receiv BSTE\ POS/NEG INVOICE 113202000 Payroll Services selected document REQUISITION Document Types FN ⊟ <mark>⊢</mark> HR entral Path type(s) AEO/AUTH SIGNOR CHANGE JLOATS APOFFSET Sanders, Joy D Fancher, Christy IDSAND COSTING CHANGE BUDGET MODEL CSULFANC LBWRIGHT Fancher, Christy Wright, Leigh Eads, Dustin K Holt, Shavonne Lev Williams, Kelvin N Jennings, Susan Russell, John □ IT SERVICES DATA CHANGE DEADS SLHOLT ELEMENTS Find an Appro G FACULTY RECRUIT LLAMAS CDSMITH7 Smith, Christine D Horton, Jill Blackbr Clear Form Search CENTRAL ACCOUNTING SUPPORT CENTRAL SUPPORT Search Clear Form WAM Query Help/FAQ By clicking on the Roles tab, Find: Org Filter: %11300 ٦ WAM Roles Maintenance Organiza 11300000 Mullins, Stephanie E UAB Organizations [Clear] MULLINS Primary Workflow Officer opens Secondary Workflow Officer 113000000 ACF BANNER Lucas, Robin J 111300000 Real Estate Office (Org Ret) 113000000 Office of UAB Chief Financial Officer 113000000 ACE BANNER Lucas, Robin J Notify Person Use the search fields 113000010 Financial Affairs Training 113000000 ACF ORACLE Mullins, Stephanie B Primary Workflow Officer Lucas, Robin J 113000000 ACF ORACLE to search in the same 113001000 Financial Systems Secondary Workflow Officer Lucas, Robin J 113006000 University Contracts ACF ORACLE 113000000 Notify Person way as on the Query 113000000 AEO/AUTH SIGNOR Mullins, Stephanie B SMULLINS Primary Workflow Officer 310000000 School of Medicine Dean's Office 11300000 AEO/AUTH SIGNOR Lucas, Robin J RLBILES Secondary Workflow Office 311300000 Family & Community Medicine Chair Offi view 329113000 Postdoctoral Gen Dentistry 113000000 AEO/AUTH SIGNOR Lucas, Robin J Notify Person WAM Roles identifies 701130000 CCO-Bates-General 113000000 APOFESET Mullins Stephanie B Primary Workflow Officer 704113000 Fac Supp-Bioengineering-TKC 113000000 APOFFSET Lucas, Robin J Secondary Workflow Officer organizational 113000000 APOFFSET Lucas, Robin J Notify Person Document Types Central Path 113000000 BUDGET Mullins, Stephanie Primary Workflow Officer personnel assigned to ■ ✓ HR ✓ System 113000000 BUDGET Lucas, Robin J RLBILES Secondary Workflow Officer the workflow 113000000 BUDGET Lucas, Robin J Notify Person Primary Workflow Officer 113000000 BUDGET MODEL Mullins, Stephanie B MULLIN administrative roles 113000000 BUDGET MODEL Lucas, Robin J Secondary Workflow Office which are pertinent to 113000000 BUDGET MODEL Lucas, Robin J Notify Person Mullins, Stephanie B 113000000 CHANGE Primary Workflow Office Find a Person the workflow of the \$ Showing 1 to 91 of 91 entries selected Organization Clear Form Search and Document Type Primary Identifies the individual within the organization that maintains Workflow Officer and updates the end user approval paths via the Workflow (WFO) Approval Maintenance form. Individuals assigned to this role must be: Current employee with an assignment category of 01 Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee



### Workflow Approval Maintenance (WAM)

	<ul> <li>Selected at the School/VP level, or designee</li> <li>The <u>Workflow Administrator</u> sets up Workflow Officers in Oracle and associates the Workflow Officer with his or her Organizations</li> </ul>
	The Primary Workflow Officer can create Secondary Workflow Officer roles.
Notify Person	Identifies the individual within the organization that receives FYI 24-hour hold notifications. Individuals assigned to this role must be:
	<ul> <li>Current employees with an Assignment Category of 01Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee</li> </ul>
	<ul> <li>Assigned by the Workflow Officer (if not assigned, the WFO is the default)</li> </ul>

By clicking on the <b>Reports</b>	WAW	Query	Roles	Repo	rts	Help/FAQ
tab, the available ad hoc						
reports to run in WAM will	Repor	t			Descri	ption
appear	WAM	Approval Pat	h Details By	Org	Display include	/s approver details for an Organization/Document Type workflow path. Filters Organization, Document Type and Approver.
<ul> <li>Click on the report name link to open</li> </ul>	WAM	Approval Pat	h Details by /	Approver	Display Approv	vs approver details for any approver across all Organizations. Filters include ver and Document Type.
the report in a new	WAM	Roles			Display WFO.	/s persons associated with WAM roles; WFO, Notify Person, Secondary Filters include Organization, Document Type, and Role.
WIIdow	WAM	Central Path	S		Display	vs Central Path approver details. Filters include Document Type.
	WAM	Roles Histor	/		Display include	/s WAM Roles History for a given Organization/Document Type. Filters Organization, Document Type and Date Range.
	WAM	Approver His	tory		Display Organi	/s WAM History for a given Organization/Document Type. Filters include zation, Document Type and Date Range.
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The chosen report will open in a new window

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- Click View Rep •

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ORGANIZATION \$	DOCUMENT TYPE \$	NAME \$	BLAZERID	ROLE NAME	
113000000 Office of UAB Chief Financial Officer	AEO/AUTH SIGNOR	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	AEO/AUTH SIGNOR	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	AEO/AUTH SIGNOR	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	APOFFSET	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	APOFFSET	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	APOFFSET	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	BUDGET MODEL	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	BUDGET MODEL	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	BUDGET MODEL	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	IT SERVICES	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	IT SERVICES	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	IT SERVICES	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	JE	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	JE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	JE	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	PAYMENT REQUEST	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	PAYMENT REQUEST	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	PAYMENT REQUEST	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	POS/NEG INVOICE	Lucas, Robin J	RLBILES	Notify Person	
113000000 Office of UAB Chief Financial Officer	POS/NEG INVOICE	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	POS/NEG INVOICE	Lucas, Robin J	RLBILES	Secondary Workflow Officer	
113000000 Office of UAB Chief Financial Officer	REQUISITION	Lucas, Robin J	RLBILES	Notify Person	
112000000 Office of UAR Chief Eigensiel Offices	REQUISITION	Mullins, Stephanie B	SMULLINS	Primary Workflow Officer	
115000000 Office of OAB Chief Financial Officer					



### Workflow Basics

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

- Only one organization has the ability to approve a 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 *Level 1 Approvers* receive FYI 24-hour hold notifications in their personal 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 the requestor; <u>cannot</u> approve their 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.