**Log in to WAM**
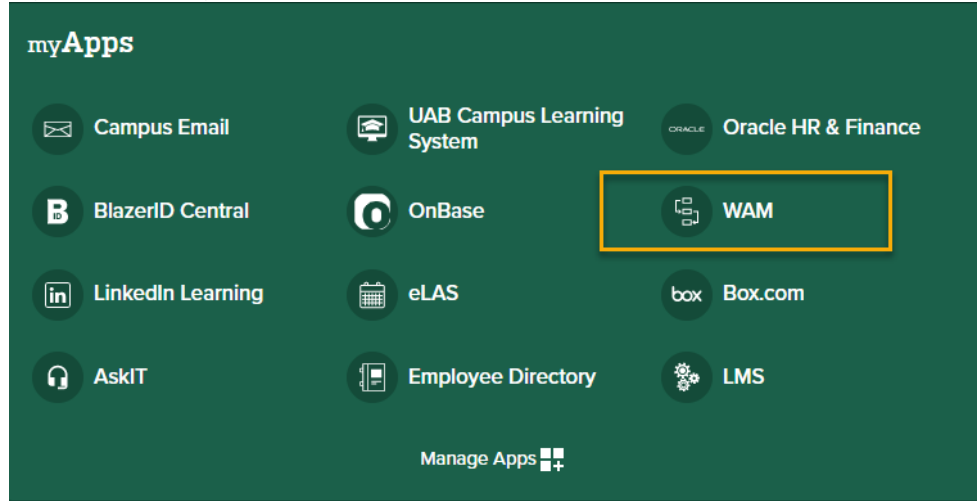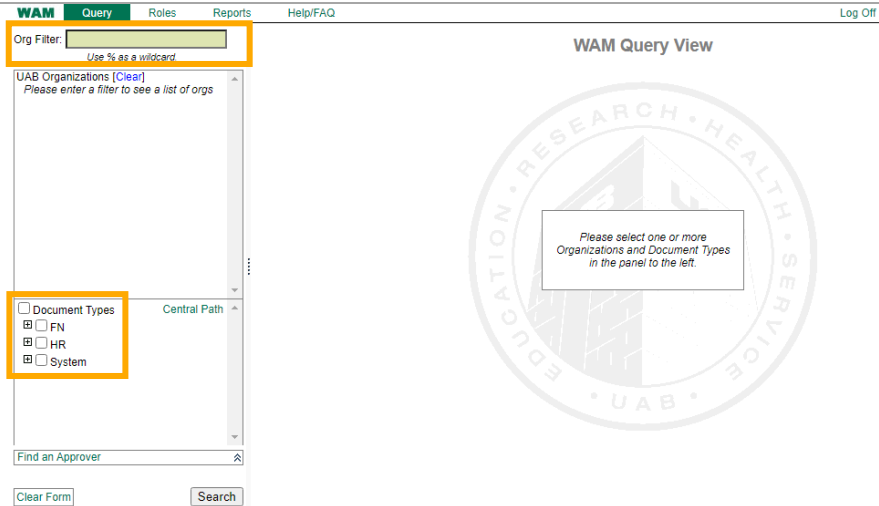
- Navigate to **myUAB**
- Locate and click **WAM**
- **Log in** using your BlazerID and strong password

**myUAB Portal (my.uab.edu)**

myApps

- ✉ Campus Email
- 🖥 UAB Campus Learning System
- ⊘ Oracle HR & Finance
- 🅱 BlazerID Central
- ⊙ OnBase
- ⊡ WAM
- in LinkedIn Learning
- 📅 eLAS
- box Box.com
- 🎧 AskIT
- 📖 Employee Directory
- ⚙ LMS

Manage Apps ▤

---

WAM opens in the **Query View**

- Use the **Org Filter** field to search for an Organization
  - *The % wildcard can be used when searching a part of a value*
- Choose **Document Type(s)** by clicking the [+] next to FN (Finance), HR (Human Resources), or System

WAM  Query  Roles  Reports  Help/FAQ                          Log Off

Org Filter: [            ]
*Use % as a wildcard*

WAM Query View

UAB Organizations [Clear]
*Please enter a filter to see a list of orgs*

☐ Document Types          Central Path
⊞ ☐ FN
⊞ ☐ HR
⊞ ☐ System

*Please select one or more Organizations and Document Types in the panel to the left.*

Find an Approver                    ⊼

Clear Form                    Search

Select **Organization(s)** and **Document Type(s)**

- Click to select the checkbox to the left of the desired **Org** and **Document Type**
  - *To clear the WAM form and restart your query, click Clear Form*
- Click **Search** to populate results based on the selected parameters

Org Filter: %113
*Use % as a wildcard.*

UAB Organizations [Clear]
- ☐ 11300000 Real Estate Office (Org Ret)
- ☑ 13000000 Office of UAB Chief Financial Offic
- ☐ 13000010 Financial Affairs Training
- ☐ 13001000 Financial Systems
- ☐ 13006000 University Contracts
- ☐ 13200000 Exec Dir Financial Affairs
- ☐ 13201000 Asset Management
- ☐ 13201010 Surplus Warehouse
- ☐ 13201020 Shipping and Receiving
- ☐ 13202000 Payroll Services

☐ ⊟ ☐ FN
- ☐ AEO/AUTH SIGNOR
- ☐ APOFFSET
- ☐ BUDGET MODEL
- ☐ IT SERVICES
- ☐ JE
- ☑ PAYMENT REQUEST

Find an Approver

2 records found.

Clear Form          Search

Results will display based on chosen Org(s) and Document Type(s)

- Columns can be sorted
- Note the **Organization** and **Document Type** column if searching multiples
- Approver Level (numerical routing order for the document) is displayed in the **Lvl** column

Org Filter: %113
*Use % as a wildcard.*

UAB Organizations [Clear]
- ☐ 111300000 Real Estate Office (Org Ret)
- ☑ 113000000 Office of UAB Chief Financial Offic
- ☐ 113000010 Financial Affairs Training
- ☐ 113001000 Financial Systems
- ☐ 113006000 University Contracts
- ☐ 113200000 Exec Dir Financial Affairs
- ☐ 113201000 Asset Management
- ☐ 113201010 Surplus Warehouse
- ☐ 113201020 Shipping and Receiving
- ☑ 113202000 Payroll Services

- ☐ BUDGET MODEL
- ☐ IT SERVICES
- ☐ JE
- ☑ PAYMENT REQUEST
- ☐ POS/NEG INVOICE
- ☑ REQUISITION
⊞ ☐ HR

Find an Approver

| Organization | Document Type | Approver Name | BlazerID | Lvl |
|---|---|---|---|---|
| 113000000 | PAYMENT REQUEST | Hollis, Andy | AHOLLIS | 1 |
| 113000000 | PAYMENT REQUEST | Mullins, Stephanie B | SMULLINS | 1 |
| 113000000 | REQUISITION | Lucas, Robin J | RLBILES | 1 |
| 113000000 | REQUISITION | Mullins, Stephanie B | SMULLINS | 1 |
| 113202000 | PAYMENT REQUEST | Ragland, Jennifer S | JRAGLAND | 1 |
| 113202000 | PAYMENT REQUEST | Hollis, Andy | AHOLLIS | 2 |
| 113202000 | REQUISITION | Lucas, Robin J | RLBILES | 1 |
| 113202000 | REQUISITION | Mullins, Stephanie B | SMULLINS | 1 |

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

| Organization | Document Type | Approver Name | BlazerID | Lvl | 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.

To query the Central Path approvers:

- Click **Central Path**
- A new window will open, where you can query the Central Path approvers by the selected document type(s)



By clicking on the **Roles** tab, **WAM Roles Maintenance** opens

- Use the search fields to search in the same way as on the Query view
- WAM Roles identifies organizational personnel assigned to the workflow administrative roles which are pertinent to the workflow of the selected Organization and Document Type



| **Primary Workflow Officer (WFO)** | 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: <br><br> • Current employee with an assignment category of 01 Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee |
|---|---|

| | |
|---|---|
| | • Selected at the School/VP level, or designee<br>• The <u>Workflow Administrator</u> sets up Workflow Officers in Oracle and associates the Workflow Officer with his or her Organizations<br><br>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:<br>• Current employees with an Assignment Category of 01Full-time, 03 Part-time, 04 Irregular (Retiree), or 59 Affiliate Employee<br>• Assigned by the Workflow Officer (if not assigned, the WFO is the default) |

By clicking on the **Reports** tab, the available ad hoc reports to run in WAM will appear

• Click on the **report name** link to open the report in a new window

**WAM**   Query   Roles   **Reports**   Help/FAQ

| 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. |
| WAM Terminated Approvers | Displays terminated approver details. |

The chosen report will open in a new window

• Enter all desired report **parameters**
• Click **View Report**

Report Title: WAM: Workflow Roles    Document Type: ALL FN    View Report

Organization From: 113000000 Office of UAB Chief Financial Officer    Organization Number To: 113000000 Office of UAB Chief Financial Officer

Role: ALL    Role Person: ALL

| 1 | of 1 |  | 100% |  |  | Find | Next |

| 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 |
| 113000000 Office of UAB Chief Financial Officer | REQUISITION | Mullins, Stephanie B | SMULLINS | Primary Workflow Officer |
| 113000000 Office of UAB Chief Financial Officer | REQUISITION | Lucas, Robin J | RLBILES | Secondary Workflow 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,
    - o If the submitter uses the UAB Requisition Input, there must be at least two approval levels in order to obtain the two required signatures
    - o 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.