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 <u>https://dcsapps.ad.uab.edu/WAM/Login.aspx?ReturnUrl=%2fwam%2fdefault.aspx</u>.

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 \rightarrow UAB Workflow \rightarrow WAM - - Approval Paths UAB Salary Reclass \rightarrow UAB Workflow \rightarrow WAM - - Approval Paths UAB Timekeeper \rightarrow UAB Workflow \rightarrow WAM - - Approval Paths UAB FN Document Entry/Approval \rightarrow WAM - - Approval Paths UAB GA End User \rightarrow UAB Workflow \rightarrow WAM - - Approval Paths UAB GL End User \rightarrow UAB Workflow \rightarrow WAM - - Approval Paths

Logging In

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

WAM Query Roles Report	s Help/FAQ
Org Filter: <mark>%123</mark> Use % as a wildcard.	WAM Query View
UAB Organizations [Clear] 112300000 Office Asst VP Facilities 112301000 Hospital Maintenance 112302000 Campus Maintenance 112302100 Elevator Maintenance 112302000 Roofing 112303000 Energy Management (Or 112304000 Central Utilities (Org Ret 112304010 Steam Operations (Org F 112304020 Roofing (Org Ret) 112305000 Facilities Subgot Service DocumentTypes Entral Path HR System	Click the (I) icon to expand the listing of FN, HR and System document types
ClearForm Search	

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 <u>Document Types</u> 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 (\checkmark) the items below that area are selected. Remove the (\checkmark) 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.

Picture #1	displays query	results for	one organization	with multiple	document types.
			5		21

WAM Query Roles Report	ts Help/F/	4Ω							_
Org Filter. %anest% ×						Find:]
Use % as a wildcard.	Organization	Document Type	Approver Name	🔶 BlazerID	🔷 🕈 Lvi 🔷 Grp	Amt From	🔷 🌲 Amt T	ío 🍦	
UAB Organizations [Clear]	311102000	BUD GET	Lynch, Thomas P	TLYNCH	1				~
311100000 AnesthesiologyChair Of	311102000	BUD GET	Sheedy, Noelle Cooper	NECOOPER	1				
311101000 Anesth-CommunityDiv	311102000	BUD GET	Drew, Daron Michelle	DDRE W1	2				
311102000 Anesth - Cardiothoracic	311102000	BUD GET	Graham, Anne C.	GRAH AMAC	2				
	311102000	BUD GET	Mack, LaKisha	LCOLEMAN	2				
311102500 Anesth - Cht Care & Prec	311102000	BUD GET	Maddox, Paulette	HARPO	2				
311103000 Anesth - CarrawayDivisi	311102000	CHANGE	Lynch, Thomas P	TLYNCH	1				
311104000 Anesth - Cooper Green [311102000	CHANGE	Drew, Daron Michelle	DDRE W1	2				
311105000 Anesth - Eye Foundation	311102000	CHANGE	Graham, Anne C.	GRAH AMAC	2				
311106000 Anesth - Research Divisi	311102000	CHANGE	Mack, LaKisha	LCOLEMAN	2				
311107000 Anesth - Services Divisio	311102000	CHANGE	Maddox, Paulette	HARPO	2				
311108000 Anesth - VA Hospital Divi	311102000	COSTINGCHANGE	Lynch, Thomas P	TLYNCH	1				
Document Types Central Path	311102000	COSTINGCHANGE	Sheedy, Noelle Cooper	NECOOPER	1				
I FN	311102000	CRF	Lynch, Thomas P	TLYNCH	1				
□ 🗹 HR	311102000	CRF	Owen, Debbie M	DEBBIEO	1				
BUD GET	311102000	CRF	Austin, Stephen Scott	CH1269	2				
CHANGE	311102000	CRF	Drew, Daron Michelle	DDRE W1	2				
COSTING CHANGE	311102000	CRF	Graham, Anne C.	GRAH AMAC	2				
✓ CRF	311102000	CRF	Mack, LaKisha	LCOLEMAN	2				
Find an Approver 🔹	311102000	CRF	Maddox, Paulette	HARPO	2				~
	Showing 1 to @	37 of 67 entries							
Clear Form Search						Сору	a Ex	cel	8

WAM	Query	Roles	Report	s Help/F/	4Q						
Org Filter.	%anest%	x						Find:			
	Use % as a	a wildcard.		Organization	Document Type	🕈 Approver Name	븆 BlazeriD	🔷 🛊 Lvi 🖨 Grp 🖨 Amt	From 🛔	AmtTo	\$
U AB Orga	nizations [Clea	arj		311102000	AEO/AUTH SIGNOR	Lynch, Thomas P	TLYNCH	1			~
3111	100000 Anest	hesiologyChai	r 0f^	311102000	AEO/AUTH SIGNOR	Holman, Frankie D	FRANDEN	2			
3111	101000 Anest	h-Community[Div	311102000	AEO/AUTH SIGNOR	Lynch, Thomas P	TLYNCH	2			
2 34 44	102000 Anest	th - Cardiothor	acie	311102000	AEO/AUTH SIGNOR	Parker, Stephen C	SPAR KE2	2			
	102500 /400			311102000	AEO/AUTH SIGNOR	Sheedy, Noelle Cooper	NECOOPER	2			
	102500 Allest	n - Chi Care an		311102000	APOFFSET	Lynch, Thomas P	TLYNCH	1			
	103000 Anest	h - CarrawayD	IVISI	311102000	APOFFSET	Sheedy, Noelle Cooper	NECOOPER	1			
3111	104000 Anest	h - Cooper Gre	en [311102000	BUDGET MODEL	Lynch, Thom as P	TLYNCH	1			
3111	105000 Anest	h - Eye Foun da	tion	311102000	BUDGET MODEL	Parker, Stephen C	SPAR KE2	1			
3111	106000 Anest	h - Research D	ivisi :	311102000	BUDGET MODEL	Sheedy, Noelle Cooper	NECOOPER	1			
3111	107000 Anest	h - Services Div	visio 🗸 🗄	311102000	BUDGET MODEL	Alexander, Samon e M	SAM1	2			
3111	108000 Anest	h - VA Hospital	Divi	311102000	BUDGET MODEL	Austin, Stephen Scott	CH1269	2			
	ientTypes	Central P	ath 🔪	311102000	BUDGET MODEL	Oliver, Djovan L	DLOLIVER	2			
🗉 🗹 FN				311102000	IT SERVICES	Holman, Frankie D	FRANDEN	1			
✓ A	AE O/AUTH SIG	GNOR		311102000	IT SERVICES	Lynch, Thomas P	TLYNCH	1			
✓ /	4P OFFSET			311102000	IT SERVICES	Parker, Stephen C	SPAR KE2	1			
🗹 E	BUD GET MOD	EL		311102000	IT SERVICES	Rouse, Natalie D.	NATD AMS	1			
V (TSERVICES			311102000	IT SERVICES	Sheedy, Noelle Cooper	NECOOPER	1			
🗹 J	JE		~	311102000	IT SERVICES	Alexander, Samon e M	SAM1	2			
Find an A	pp rover		*	311102000	IT SERVICES	Cameron, LaShell B	LASHELLC	2			*
				Showing 1 to 4	9 of 49 entries						
Clear Form	m	Se	earch						Сору 🚽	Excel	R

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

WAM Query Roles Report	ts Help <i>I</i> F	AQ						
Org Filter. <u>%</u>					F	ind:		
Use % as a wildcard.	Organization	Document Type	🕈 Approver Name	🔶 Bla zeriD	🔷 🛊 Lvi 🌲 Grp 🗧	Amt From	🜲 Amt To	•
Cardionoraciet	357005000	CHANGE	Sloan, Angela	ANGELAC	1			
□ 311102500 Anesth - Crit Care & Pre 🔨	357005000	CHANGE	Ste wart, Jennifer H	JENNT	1			
🗌 311103000 An esth - Carra way Divisi	357005000	CHANGE	Tate, Theron Michael	TMTATE	1			
311104000 Anesth - Cooper Green E	357005000	CHANGE	Dixon, Donna L	DTH ROWER	2			
311105000 Anesth - Eye Foundation	357005000	CHANGE	Sloan, Angela	ANGELAC	2			
311106000 Anesth - Research Divisi	357005000	CHANGE	Ste wart, Jennifer H	JENNT	2			
311107000 Anesth - Services Divisio	357005000	CHANGE	Anderson, Peter G	PGA	3			
	357005000	CHANGE	Bolus, Norman E	LMBOLUS	3			
	357005000	CHANGE	Ste wart, Jennifer H	JENNT	4			
✓ 357005000 Nurse Anestnesia Progr	357005000	CHANGE	Tate, Theron Michael	TMTATE	4			
✓ 701300000 Anesthesia Services	357005000	CHANGE	Jones, Harold P	JONESH	5			
701310000 Anesthesia Services-HLI	357005000	CHANGE	Ste wart, Jennifer H	JENNT	5			
Document Types Central Path	357005000	CHANGE	Talbot, Melanie L	MELANIEM	5			
E I FN	701300000	CHANGE	Berry, Glyn da B	GBERRY	1			
	701300000	CHANGE	Carlisle, Brenda Haddock	BRENDA15	1			
BUD GET	701300000	CHANGE	Clarkson, Florence E	BCLARKSO	1			
CHANGE	701300000	CHANGE	Culver, Sandra P	SANDYC	1			
COSTING CHANGE	701300000	CHANGE	Kuklinski, Susan A	SKU KLIN S	1			
	701300000	CHANGE	Mannino, Elizabeth H	BMANNINO	1			
Find an Approver 🔗	701300000	CHANGE	Von Hagel, Bruce A	VON S205	1			v
	Showing 1 to 2	20 of 20 entries						
Clear Form Search						Сору	Excel	81



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.
	WAM Central Path - Internet Explorer
	WAM Central Path
	□ BUDGET MODEL Luther, Shell N SLUTHER 1 □ IT SERVICES Mathews, AndrewW AMAT 1 ☑ JE E vans, Ronald A RAE VANS 1 □ PAYMENT REQUEST Busby, Sonya SBU SBY 1
	POS/NE G INVOICE 25 Brown, Deborah DEBBROWN 1 REQUISITION Brown, Laura Alda LAUD AB 1 HR Crawson, Brenda Kay BCBANDT 1 BUDGET Sanders, JoyD JD SAND
	CHANGE Russell, John JRCPA 1 COSTING CHANGE Watson, Joseph Shawn JSWATSON 2 CRF 35 CENTRAL ACCOUNTAINT III DATACH ANGE 40 CAPITALIZATION REVIEWER III
	□ ELEMENTS □ FACULTYRECRUIT □ FDF □ HRE □ LD
	Clear Form
	Click the (\blacksquare) 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. <i>Copy:</i> Copies the contents of the data grid to your desktop clipboard. Information can then be copied using your desktop
	Paste function. <i>Excel</i> : Saves the contents of the data grid to a '.csv' file that can be opened using Microsoft Excel. <i>Print</i> : 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.
	Organization Document Type Approver Name Organization Document Type Approver Name

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	🔶 Lvi 🌲 Grp	ə 🌲 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.	NATDAMS	1			
311102000	JE	Sheedy, Noelle Cooper	NECOOPER	1			
311102000	JE	Alexander, Sam on e M	SAM1	2	\$25,000.00		
311102000	JE	Austin, Stephen Scott	CH1269	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, Thom as P	TLYNCH	1			
311102000	PAYMENT REQUEST	Parker, Stephen C	SPARKE2	1			
311102000	PAYMENT REQUEST	Rouse, Natalie D.	NATDAMS	1			
311102000	PAYMENT REQUEST	Sheedy, Noelle Cooper	NECOOPER	1			
311102000	PAYMENT REQUEST	Alexander, Sam on e M	SAM1	2	\$25,000.00		
311102000	PAYMENT REQUEST	Austin, Stephen Scott	CH1269	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.	NATDAMS	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.

WAM Query Roles Reports Help/FAQ							
Org Filter. %11300					Find:		
, Use % as a wildcard.	Organization	Document Type	Name	🕈 BlazeriD 🗧	Role	ADD DEL	
UAB Organizations [Clear]	113001000	BUDGET MODEL	Mullins, Stephanie B	SMULLINS	Notify Person		^
111300000 Real Estate Office	113001000	CHANGE	Mullins, Stephanie B	SMULLINS	PrimaryWork fow Officer		
113000000 OFFICE OF UAB CHIEF FIN ANCIAL OFFICE	113001000	CHANGE	Mullins, Stephanie B	SMULLINS	Notify Person		
113000010 Financial Affairs Training	113001000	COSTING CHANGE	Mullins, Stephanie B	SMULLINS	PrimaryWork flow Officer		
✓ 113001000 Financial Systems	113001000	COSTING CHANGE	Mullins, Stephanie B	SMULLINS	Notify Person		
113002000 Cost & Space Analysis (org Ret)	113001000	CRF	Mullins, Stephanie B	SMULLINS	PrimaryWork flow Officer		
113004000 Cost & Snace Analysis	113001000	CRF	Mullins, Stephanie B	SMULLINS	Notify Person		
113004020 Equipment Accounting	113001000	DATACHANGE	Mullins. Stephanie B	SMULLINS	Primary Work flow Officer		
113004030 Surplus Warehouse	113001000	DATACHANGE	Mullins, Stephanie B	SMULLINS	Notify Person		
113005000 UniversityPurchasing	113001000	DISCLOSU RE	Mullins, Stephanie B	SMULLINS	Primary Work flow Officer		
Document Types Central Path	113001000	DISCLOSURE	Mullins, Stephanie B	SMULLINS	Notify Person		
⊎ ⊻ FN E ⊂ vp	113001000	FLAS	Mullins, Stephanie B		Primary Work fow Officer		
□ V nR □ V Svstem	113001000	FLAS	Duckett Melicea S		Second an Work fow O ficer		
	113001000	ELAS	Mulline Stanbania B	OMULLING	Notify Person		
	112001000	ELEMENTS	Mullins, Stephanie B	SMULLING	Drimon/Work fow Officer		
\sim	113001000	ELEMENTS	Mullina, Otephanie D	SMULLINS	Primary work tow Onicer		
Find a Person 🖄	113001000		Mullins, Stephanie D	SMULLINS	Nouly Person		~
	Showing 1 to 5	7 of 57 entries					
ClearForm					Сору	Excel	4

- The <u>PRIMARY WORKFLOW OFFICER</u> 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 <u>Workflow Administrator</u> 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 <u>NOTIFY PERSON</u> 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 ByOrg	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 a cross all Organizations. Filters include Approver and Document Type.
WAM Roles	Displays persons associated with WAM roles; WFO, NotifyPerson, 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