



University of the Philippines Financial Management Information System



User Guide

Description:

Script ID	
Script Name	Grant Worklist Access
Information System	Financial Management Information System
Functional Domain	Financial Management Module
Purpose	To Grant a trusted person, an OIC for example, access to your worklist. The person may then view and approve documents on the user's worklist.
Data Requirement	Name of the personnel Start date End date Item/document tpye
Dependencies	
Scenario	
Author	

Revision History:

Version Number	Date	Author	Description of Change



Review and Acknowledgement:

Date	Name	Position	Comments



STEP 1 From the **Home Page**, under the **Worklist**, click **Worklist Access**

Worklist				
				Full List
From ▲	Type	Subject	Sent	Due
Go-Aco, Kenneth	AP Invoice Approval	Invoice 8532 from Raj Inlayo requires your approval	22-Apr-2015	27-Apr-2015
<div style="border: 1px solid red; padding: 2px;"> ✓ TIP Vacation Rules - Redirect or auto-respond to notifications. </div> <div style="border: 1px solid red; padding: 2px;"> ✓ TIP Worklist Access - Specify which users can view and act upon your notifications. </div>				

STEP 2 You will be directed to the **Worklist Access** page. In this page, you may view the other people who can access your worklist. Click the **Grant Worklist Access** button.

Worklist Access
The following users have access to view and act upon your worklist

[Grant Worklist Access](#)

Name	Description	Start Date	End Date	Status	Update	Delete
No results found.						

[Return to Worklist](#)

STEP 3 Fill up all the fields

* Name:

Description:

* Start Date:

(example: 20-May-2015)

End Date:

Grant Access to: All Item Types Selected Item Types

Available Item Types

AP Invoice Approval

>

[Move](#)

>>

[Move All](#)

<

[Remove](#)

<<

[Remove All](#)

Selected Item Types



Field Name	Description	Remarks
Name	Name of the person whom you are granting access to your worklist.	Make sure that the selected person can be trust since he/she may act upon all the notifications on your worklist
Start Date	Start date of the worklist access grant.	
End Date	End date of the worklist access	Leaving this blank will grant the other person access to your worklist forever
Grant Access	Select item types that the other person may view	You may select specific item types for the other person to view or select All Item Types to grant access to all of your worklist.

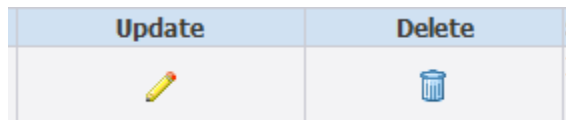
STEP 4 Click the **Apply** button.



STEP 5 You will be redirected to the **Worklist access** page displaying the selected person to view your worklist.

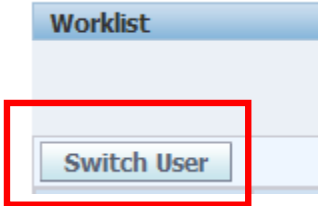
Grant Worklist Access						
Name	Description	Start Date	End Date	Status	Update	Delete
Inlayo, Raj	*NULL*	20-May-2015		Active		

STEP 6 To update the Worklist Access settings, change the date or the selected OIC, click the update button. To remove the Worklist Access Grant, click the delete button.





STEP 7 On the Worklist Access Grantee’s account, he/she will find a **Switch User** button on his/her worklist



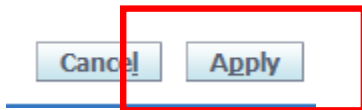
STEP 8 He/She may click this button and select another person’s worklist he/she can access.

Switch User

Current User **Inlayo, Raj**

Select Name	Email
<input type="radio"/> Sia, Efren Ver	emsia@up.edu.ph
<input type="radio"/> Go-Aco, Kenneth	
<input type="radio"/> Tan, Michael	
<input type="radio"/> Punzalan, Jaybee	
<input type="radio"/> Inlayo, Raj	

STEP 9 After selecting the user’s worklist he/she wants to view, click the apply button then he/she can view the selected person’s worklist.



Worklist

[Full List](#)

[Switch User](#)

From	Type	Subject	Sent ▾	Due
Go-Aco, Kenneth	AP Invoice Approval	Invoice 8532 from Raj Inlayo requires your approval	22-Apr-2015	27-Apr-2015



Result Information:

Expected Results

- Worklist access will be granted to another person
- The Worklist Access Grantee can view the other person's worklist. The Grantee may then act upon that person's worklist.



FMIS – Open GL Period

No.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.