HCM Newsletter

May 2016

From the Editor:

Hope you are enjoying the warm weather. This month's newsletter addresses the topic of Worklists. Every BUworks portal user should see a "Worklist" tab on their BUworks Central portal homepage. Worklists show you work items that require your approval. These work items can be shopping cart approvals, financial transactions and approvals related to hiring personnel or approving a request for leave of absence. In addition to your own worklist items, ***if*** any other manager has chosen you to be the nominee to receive tasks for approval either as a permanent substitute or for a short period of time, you may see those tasks in your worklist as well. You can forward the tasks to a colleague if necessary.

To access a help guide please visit the HCM training resources page located at
http://www.bu.edu/tech/support/buworks/help/hcm

To access this month's payroll related deadlines please visit
http://www.bu.edu/cfo/comptroller/departments/payroll/resources/monthly-payroll-calendars/

To access the archive of previous HCM newsletter issues please visit

http://www.bu.edu/tech/support/buworks/newsletters/hcm-newsletter-archive/

Please feel free to email me at srao22@bu.edu with your comments or suggestions regarding this newsletter.

Shuchita Rao

(HCM Trainer)

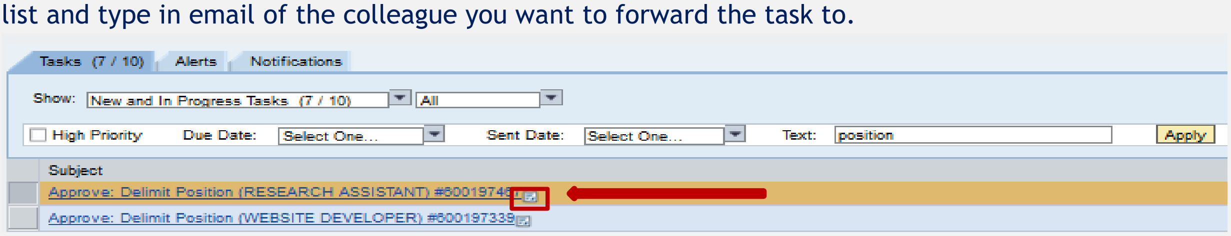
FAQs

1. **My worklist is empty. Is something wrong?**

A. Worklists can be empty for two reasons. If you are a manager and you have no outstanding items to approve, your worklist will be empty. If you do not have the authority to approve work items because you are not a manager/payroll coordinator or you have not been nominated to substitute as an approver by another manager colleague, your worklist will remain empty.

2. **I share responsibility of approving tasks with other co-workers. When I approve a shared task, will my co-workers be able to see it?**

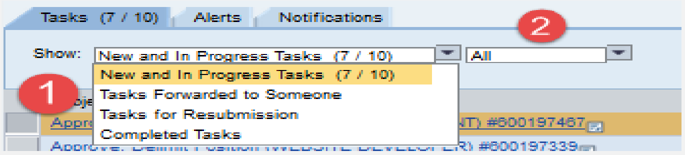
A. Once you click on a task and open it, it disappears from the worklist of your co-workers. If you share a list with a coworker and have clicked on an item that no one is able to view anymore, highlight the item in the worklist. Click on the drop down list shown inside a red rectangle in the screenshot below. Choose the resubmit button to make it available to everyone. To forward a task to a colleague, click on forward task from the dropdown list and type in email of the colleague you want to forward the task to.



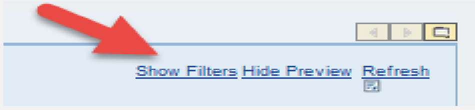
3. **Can I customize my worklist? Also, how can I filter worklist items?**

A. By default, your worklist will display your "new" and "in-progress" tasks. You can choose to view other tasks by making a new selection via the "Show" drop down menu, such as tasks which have been forwarded to someone.

You can also look for tasks that are "Due Today" or "Overdue" by clicking on the second drop-down list.



B. Click on Show Filters and use drop-down lists to select due date/sent date.

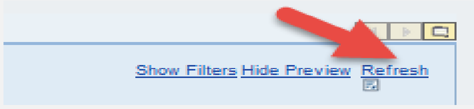


If you type text in the "text" field" as shown is the example below, the search return will return worklist items that contain the text.

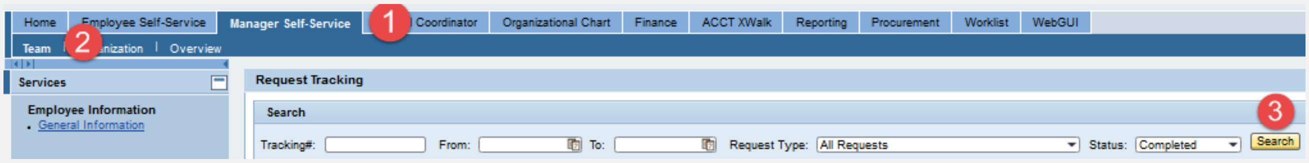
4. If I want to setup a substitute to approve worklist items, how do I do it? Does the nominee have to be a manager?
   A. To setup a permanent substitute who fills in for you during unexpected absences or for a specific time period when you will be away, you can assign a nominee to substitute in your absence. The nominee can be a responsible person in your department and not necessarily a manager. Here is a link to a Quick Reference Guide to the process of setting up a substitute.
   http://www.bu.edu/tech/files/2016/04/Setting_up_substitute_for_worklist_item.pdf

Tips & Tricks

1. Click on "Refresh" button located on the extreme right of the worklist tab to see the most current items in your worklist.



2. To review a history of all approved items in your worklist, go to the Request Tracking screen in the Team Tab of Manager Self Service (MSS). Search for tasks that are in "Completed" status.



Upcoming Training Sessions (Sign up at http://www.bu.edu/tech/training)

1. HCM Overview Training on Tuesday May 24 at 10AM in Room HR244 (25 Buick St, 2nd floor).This training provides an overview of Org. Management tasks such as Create/Maintain/Delimit Positions and Personnel Actions such as Salary Change/Employee Position Update/Retirement/Termination and Hiring forms.

2. Nakisa Org Chart/PPOSE transaction Training on Tuesday, May 17 at 10AM in Room HR244 (25 Buick St, 2nd floor) and on Tue, May 31 at 3pm in Room L1110 in BUMC(11th floor Instructional Building, 72 E. Concord Ave). This training provides an introduction to two tools that provide a graphic display of BU's Organizational and Staffing plan and show reporting hierarchies as well as detailed information about Org Units/Positions/Persons.