

EX.030.410 – UPDATING WORKLIST ENTRY STATUS

Purpose	To determine if a Worklist transaction is stuck and needs to be updated, and update if needed.
Description	<p>If a Worklist item has already been paid, but continues to show up in an Approver’s Worklist, review the Worklist entries and details using the specified Search criteria.</p> <p>Pull up the Worklist entries for that approver. Look for any entries that have not been worked.</p> <p>By pulling up the context of the entry, you can see the Transaction ID that is stuck in the Worklist.</p> <p>Once you confirm the transaction ID, you can then update the status to “Worked.” The item should no longer be in that Approver’s Worklist.</p>
Security Role	BOR_PT_WORKFLOW_ADMIN
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are instructions on how to update worklist entry statuses.

In this example, an Expense Report has been paid, but is stuck in a user's worklist. Update the Entry Status for this item so that it is removed from this Approver's Worklist.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu link.
3.	Click the PeopleTools link.
4.	Click the Workflow link.
5.	Click the Monitor Worklist link.
6.	Click the Review Work Items link.
7.	Click the Bus Proc / WL checkbox to deselect it.
8.	Click the WL Datetime Range checkbox to deselect it.
9.	Click the WL Status checkbox to deselect it. Only the User Assigned checkbox should be selected.
10.	Enter the user in the User ID field. Ex) Enter " JHARRIS ".
11.	Click the Search button.
12.	Click the Worklist Entries tab.
13.	Click the View All link.
14.	Look for any that have NOT been Worked and select the " C " for Context. Click the C button.
15.	The WL Context Box will contain the transaction ID. Find the ID that is stuck in the Worklist, and select U to update the status. This will open a new window to the Update Worklist Entries page. Click the U button.
16.	Now, you can change the status to " Worked. " The transaction will now be removed from the user's Worklist. Click the Worked option.
17.	Click the Save object.
18.	Follow this procedure when items have been paid but continue to show in an approver's Worklist.