Tracking Transactions and Using the BPM Worklist

This guide will cover:

- How to use the worklist to track any type of transaction (HCM or Financial Management) through the approval process.
- Approvers in WyoCloud regularly use the Worklist to review and approve transactions, however it can be used by anyone to see the status of their submitted transactions.
- Approvers can also view the current status of transactions they have previously approved.

In order to utilize the features included in this guide, you must either be the initiator of the transaction or have received the transaction for approval.

Navigating to the BPM Worklist

Access WyoCloud via WyoWeb then navigate to the BPM Worklist.
- Access the BPM Worklist by first clicking on the bell icon at the top of the page.
- Click Show All.
- From the Notifications page you can quickly see items assigned to you as well as created by you. You can click on the item title to obtain more details.
- Additional details and sorting features are available from the BPM Worklist. To access it click **Worklist** in the upper right corner of the page.

- The **BPM Worklist** pop-up will appear. By default, any transactions needing your attention will appear. To review and take action on one, click on the item **Title**.
  - See the **Approval Process Quick Reference Guide** for full details on how to approve, reject and request more information on transactions currently assigned to you for your approval.
**View Transactions You’ve Previously Approved**

To review transactions that you did not initiate but previously took action on (approved, rejected, etc.), toggle the **Status** drop down to **Any**.

- By default the Status drop down shows transactions currently assigned. To view transactions you’ve already taken action on, click the drop down arrow next to **Assigned** then select **Any**.

**View Transactions You Initiated**

You can also view the status of the transactions you initiated (submitted) whether you are an approver for the transaction or not.

- Click **Initiated Tasks** from the left side of the BPM Worklist.
By default this page will also show transactions assigned to you. Use the **Status drop down** to adjust to **Any** to view all transactions you have initiated, no matter if you are in the approval line (workflow) for them or not.

**Viewing Where a Transaction is In Approvals (Workflow)**

There are two ways to see where a transaction is currently in the line of approvals (workflow). The first way provides an at a glance look at whom the transaction is currently with for approval.

- From any screen on the BPM Worklist, you can add columns to your view by clicking the **pencil icon** to the right of **Views**.
- This opens the **Edit Settings** pop up. The columns currently included in your view are to the right, columns available to be added are on the left.

- **Available to be added.**

- **Currently included in your view.**

- Use the **arrows** located between the two lists to add and subtract columns from your view.
- To be able to see where a transaction is currently resting at a glance, you will want to add **Assignees**.
- To see the outcome of any action the current assignee took, you may also want to add the **Outcome** column. This allows you to see if the current person took an action on the transaction (such as approval or rejection).
After making all desired adjustments, click **OK** at the bottom of the pop up.

These settings are page specific within the BPM Worklist, so you will need to make desired edits to each page you utilize. However, once edits are made they will remain each time you access WyoCloud.

- Upon returning to the main BPM Worklist, you will see Assignee and Outcome have been added as columns.
- **Assignee** notes whom the transaction is currently with, waiting for their action (approval, rejection, etc.).
- **Outcome** notes what action, if any, the assignee has taken. If the Outcome column says **Assigned**, no action has yet been taken.
- The second option allows you to see additional details of the transaction, as well as the full approval chain (workflow).
- Click on the transaction title.

A pop up will display including many details of the transaction, exactly what is included varies by transaction type.
- To view the full approval chain, including current status, scroll to the **History** section at the bottom of the page. In some cases you may have to click the triangle to the left of History to expand details.
The approval chain (workflow) displays in two ways. The first is a more technical explanation of the route the transaction takes. The second is a less technical depiction of the route.
In the lower section, as the transaction reaches each step in the approval process that step becomes shaded blue.

A check mark appears to the left of the approver after that approver has completed their approval.

Adjusting the timeframe of transactions displayed
You can also adjust the length of historical time viewed on each screen of the BPM Worklist.

From any screen on the BPM Worklist, use the Views options in the lower left corner of the page to increase/decrease the historical timeframe displayed.

You have now completed the steps of Tracking Transactions and Using the BPM Worklist.