University of Technology, Sydney
Project neo
Setting up WorkList access.

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Worklist Access

Worklist Access

- Specify which users can view and act upon your notifications. Grant another user access to view and act upon your notifications via the Worklist.

Worklist Access

A user can grant access to his or her worklist to another user. That user can then act as a proxy to handle notifications on the owner’s behalf. The worklist access feature lets one user allow another user to handle his or her notifications without giving the second user access to any other privileges or responsibilities that the first user has in Oracle Applications.

However, note that a user who has access to another user’s worklist can view all the details of that user’s notifications and take most actions that the owner can take on the notifications. Ensure that your users take all necessary security considerations into account when they choose to grant worklist access to another user.

Setting up Worklist Access

1. Log onto Neo> UTS Employee Self Service> notifications

The page below will be displayed with your open notifications

1. At the bottom of the page above you will see “Worklist Access” click on it and the page below will display.
2. Click on “Grant Worklist access”
4. Enter the name of the employee you are granting access (Last name is first). For example, if you wanted Natalie Dean to have access you would enter “Dean%” and then click on the torch and select the correct employee name from the List of Values.

5. You can enter a description or you can leave this field blank.

6. The start date will default to today’s date; you can either leave as today’s date or enter a date in the future.

7. The end date can be left blank if you want this setup ongoing.

8. In the Grant Access field click on “Selected Items”. Your worklist contains Personal HR information that you may not want to share but may want another employee to look after your expenses and requisition/procurement notifications.

9. When you click on “Selected Item Types”, the below screen will display.

10. In the above example, Natalie Dean now has access to all notifications except HR, UTS Leave Alerts and UTS Generic Workflow notification which are all personal (HR related).

11. Click on Apply to save and activate the transaction.

12. You will then see the rule. If you need to update to change dates or to change “Grant Access”, click on Update.

13. If you want to delete someone’s access, just click on Delete.
**Worklist Access for proxy**

If you have been given Worklist Access to act as a proxy on the owner's behalf a Switch User button will appear in Notifications.

1. Log into **Neo > UTS Employee Self Service> Notifications**. When the page displays, these are all your notifications.

2. You will now see a button called “Switch User”. Click on this button. The screen below will appear and select the user you are acting on behalf of.

3. Click Apply and you will be directed to that employee's notifications. Note, you will not see any HR notifications as this worklist access was setup only for expenses and procurement.

4. When you wish to return to your notifications, just click on “Switch User” and follow steps 2 and 3 above.