

Used for: *Budget Journals*
General Ledger Journals

Vouchers
Purchase Requisitions

Please make sure that you are set up for the workflow process for your user ID.

This is a one-time process only, once you are set up, you will remain so unless your email address or user ID changes.

All Financial documents will be submitted electronically.

To Get Set-up on Workflow process please verify your e-mail address if it's correct. Do the following:

- 1.) Log-in to Pass
- 2.) Select P.A.S.S. site

UNIVERSITY OF HOUSTON SYSTEM

Thu, May 15, 08 10:55 AM



[P.A.S.S. Site](#)

Access Employee Self Service functionality.



[UHV Self-Service](#)

Access to Self-Service functionality for the University of Houston-Victoria



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- 3.) Select Personal Information



Employee Self Service

2008.05.15 10:52 AM

Enterprise Menu

- ▷ Personal Information
- ▷ Benefits
- ▷ Payroll Information
- ▷ Training
- [UH Victoria HR Dept](#)
- [Change My Password](#)
- [My System Profile](#)
- [HR & Campus Solutions 8.9](#)
- [To Portal Hub](#)

4. Verify if e-mail address preferred is correct.

Employee Self Service
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Menu

- Personal Information
 - Personal Information Summary
 - Home and Mailing Address
 - Work Address
 - Phone Numbers
 - Email Addresses**
 - Emergency Contacts
 - Marital Status
 - Name Change
- Benefits
- Payroll Information
- Training
 - UH Victoria HR Dept
 - Change My Password
 - My System Profile
 - HR & Campus Solutions

Email Addresses

Maria Kolesar

*Email Type	*Email Address	Preferred
Business	KOLESARM@UHV.EDU	<input checked="" type="checkbox"/>
UH - Victoria	MEK001@uhv.edu	<input type="checkbox"/>

Add an Email Address

* Required Field

Save

After you have verified your e-mail address, return to Portal Hub and select UHS Finance:

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To put the customized Worklist pagelet on your Home page:

➤ Click the **Content** link on Home page above the Menu.

Personalize **Content** | Layout

Menu

Search:

My Favorites

Business Processes

Custom Reports

Computer Operations

➤ Click the [Budget Journal worklist](#), [Journal worklist](#), [Payable worklist](#), and [Requisition worklists](#) box.

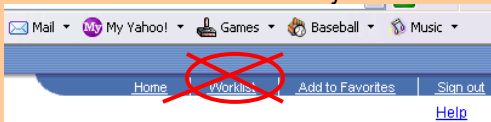
➤ Click  Save.

To change the position of your worklist on your Home page,

➤ Click on Layout above the Menu.

In the Personalize Layout window, choose 2 or 3 columns and choose which pagelets appear in which column.

NOTE: Do **NOT** use the Worklist in the menu bar. This Worklist may contain erroneous journals.



Select a Worklist by highlighting it and then select the right, left, up, or down arrow to move the pagelet to the desired location on the Home Page.

Personalize Layout

Basic Layout:
 2 columns 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)
 # = Required - fixed position pagelet
 * = Required - moveable pagelet

Left Column:

- Menu
- Journal Worklist

Right Column:

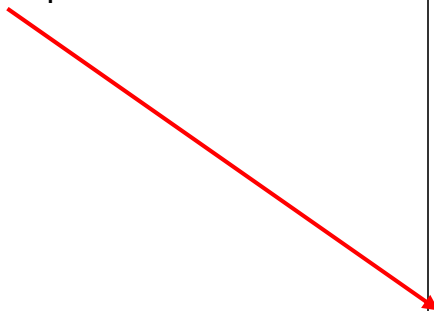
My Reports

Delete Pagelet

Save [Return to Home](#)

Notify

➤ Click Save



Personalize Layout

Basic Layout:
 2 columns 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)
 # = Required - fixed position pagelet
 * = Required - moveable pagelet

Left Column:

- Menu

Right Column:

My Reports

- Journal Worklist

Delete Pagelet

Save [Return to Home](#)

Notify

Now Navigate to appropriate panels through the PeopleSoft menu.

Personalize [Content](#) | [Layout](#)

Menu

Search:

- ▶ My Favorites
- ▶ Business Processes
- ▶ Custom Reports
- ▶ Computer Operations
- ▶ Employee Self-Service
- ▶ Vendors
- ▶ Purchasing
- ▶ Accounts Payable
- ▶ Asset Management
- ▶ Commitment Control
- ▶ General Ledger
- ▶ Set Up Financials/Supply Chain
- ▶ Worklist
- ▶ Application Diagnostics
- ▶ Tree Manager
- ▶ Reporting Tools
- ▶ PeopleTools
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

My Reports

Report	Folder
UGLS1074	General Ledger 2006-04-18-15.03.3
UGLS1074	General Ledger 2006-04-18-15.00.2
UGLS1074	General Ledger 2006-04-18-14.44.5
UGLS1074	General Ledger 2006-04-18-10.18.2
UGLS1074	General Ledger 2006-04-17-16.16.1

[Report Manager](#)

Journal Worklist

No Journals

Worklists will include documents that have been approved, denied, or recycled.

Departments should check their Worklist daily to look for any documents that have been approved, denied, or recycled on the Home Page.

The screenshot shows the 'Payable worklist' with a table of entries. Below it are 'Requisition Worklist' and 'Journal Worklist', both showing 'No Requisitions' and 'No Journals' respectively.

Bank Code	From	Date From	Source	Work List Name	BU	Voucher ID	Invoice Number	Approve Doc
CHASV	Densman, Mary	10/08/2007	AAF	Route for Additional Approvals	00785	00047832	T780491	Approve Doc
CHASV	Densman, Mary	10/08/2007	AAF	Route for Additional Approvals	00785	00047831	T780492	Approve Doc

NOTE: To get to Home page, click on Home in upper right hand corner

The header bar shows the UHS Finance logo, the user name 'HELLO! KATHYYYY!', and navigation links: Home, Worklist, Add to Favorites, Sign out, and Help. The 'Home' link is circled in red.

NOTES: _____
