




UIS User Manual

Granting Responsibility and Worklist Access to an Authorized Staff

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Creation Date:	03 June 2022
Last Updated:	03 June 2022
Document Ref:	UIS User Manual – Granting Responsibility and Worklist Access to an Authorized Staff
Version:	1.0





Granting Responsibility and Worklist Access to an Authorized Staff



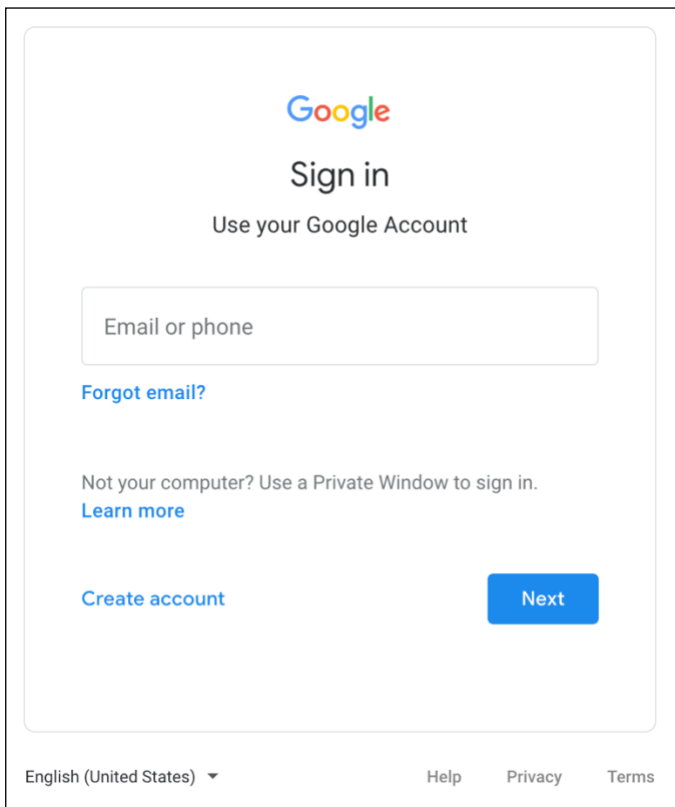
1. DOCUMENT CONTROL

1.1 Change Record

Date	Author	Version	Change Reference:
12 September 2021	Cherie Anne R. Pasco	1.0	Initial

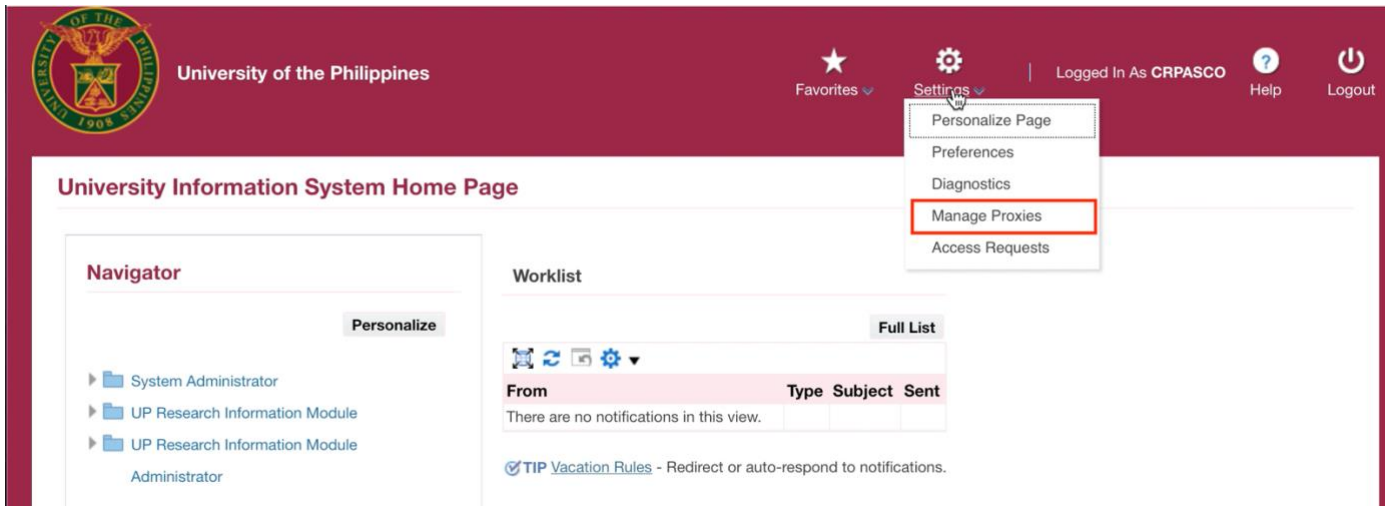
1.2 Description

Process ID	
Process Name	Granting Responsibility and Worklist Access to An Authorized Staff
Functional Domain	University Information Systems
Responsibility	Custom responsibilities defined for the University of the Philippines
Purpose	To provide an authorized staff access to an approver's UIS worklist and responsibilities
Data Requirement	Active UIS accounts (Approver and Authorized Staff)
Dependencies	An approver must have active workflow items
Scenario	An approver or an authorized representative will review and act on UIS worklist notifications.



Step 1. The grantor will go to <https://uis.up.edu.ph>

Step 2. Log-in your UP Mail credentials (e.g. **username** and **password**)



Step 3. From *UIS Home Page* proceed to **Settings**, then click **Manage Proxies**.

Proxy Configuration

Manage the people that can access your account and act on your behalf.

Add Proxy Run Proxy Report | [Refresh] [Print] [Settings]

Details	Last Name	First Name	User Name	Start Date	End Date	Update
No results found.						

Step 4. Proxy Configuration page will appear.

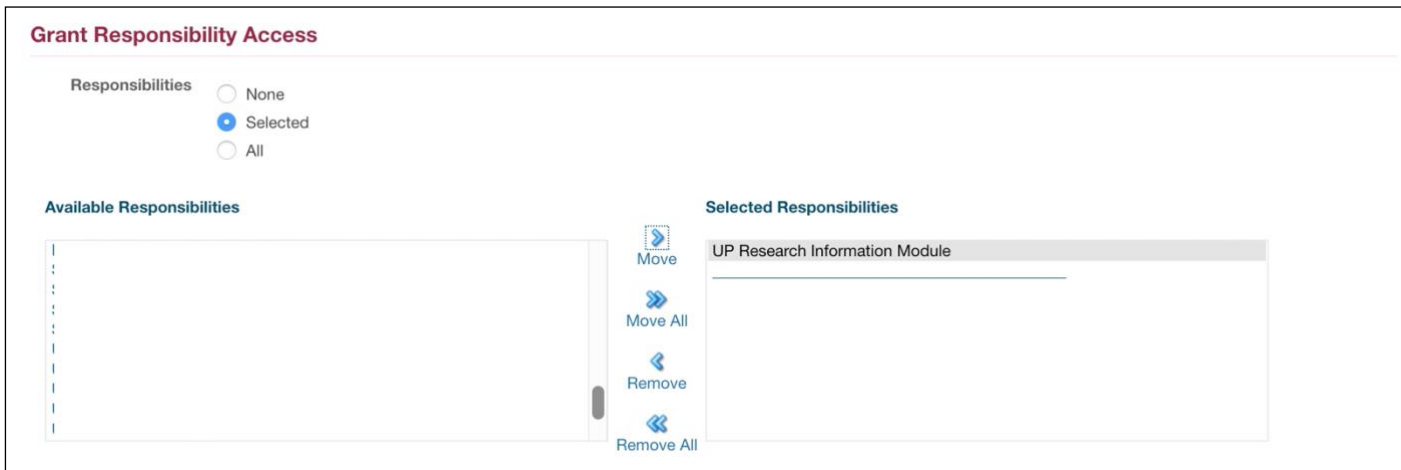
Then, click **Add Proxy**.

The screenshot shows the University of the Philippines system interface. At the top, there is a navigation bar with the university logo, the name 'University of the Philippines', and several menu items: Home, Navigator, Favorites, Settings, Logged In As CRPASCO, Help, and Logout. Below the navigation bar, there is a yellow 'Information' banner stating 'The current responsibility context has been switched to: Alert Manager'. The main content area is divided into three sections: 'Add People', 'Add Proxy', and 'Grant Responsibility Access'. The 'Add Proxy' section is highlighted with a red box and contains the following fields: 'User Name' (with the value 'JRDELACRUZ'), 'Active From' (with the value '11-Sep-2021'), and 'Active To'. There is also a 'Notes to Proxy' text area. Below the 'Add Proxy' section, there are two sections: 'Grant Responsibility Access' and 'Grant Worklist Access'. Both sections have radio button options for 'None', 'Selected', and 'All', with 'None' selected in both.

Step 5. On the **Add Proxy Region**, enter the required information.

Fill out the **User Name** and **Active From** fields.

Then click **Submit**.



Step 6. On the **Grant Responsibility Access Region**, click **All** or **Selected**.

If you chose **Selected**, move items from the list of **Available Responsibilities** to the **Selected Responsibilities**.

Grant Worklist Access

Workflow Item Types None Selected All

Available Item Types

- AP Invoice Approval
- Concurrent Manager Message
- Expenses
- HR
- HR Save For Later
- Requisition
- UMX Proxy Notification

Selected Item Types

- UP Research Information Module Workflow

Move
Move All
Remove
Remove All

Submit Cancel

Step 7. On the **Grant Worklist Access Region**, click **All** or **Selected**.

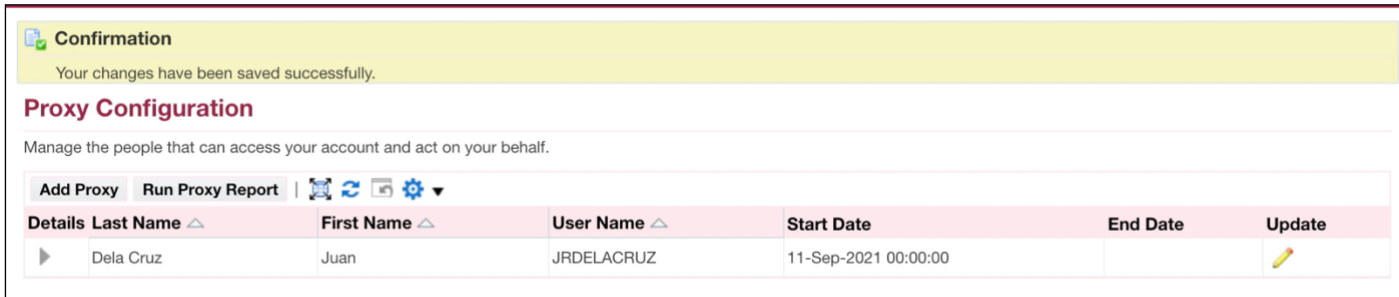
If you chose **Selected**, move items from the list of **Available Item Types** to the **Selected Item Types**.

Then, click **Submit**.

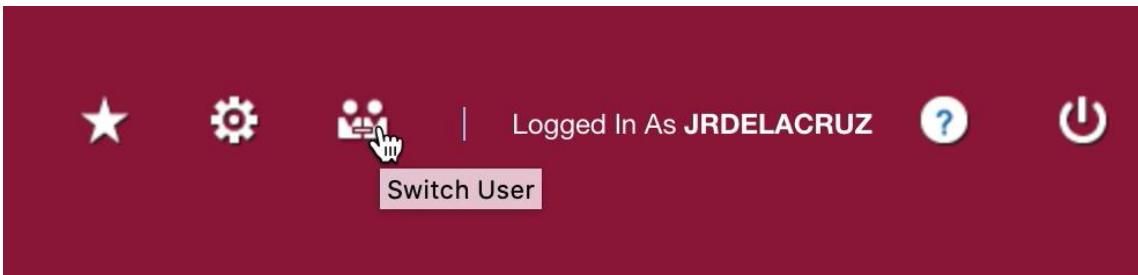
Expected Result:

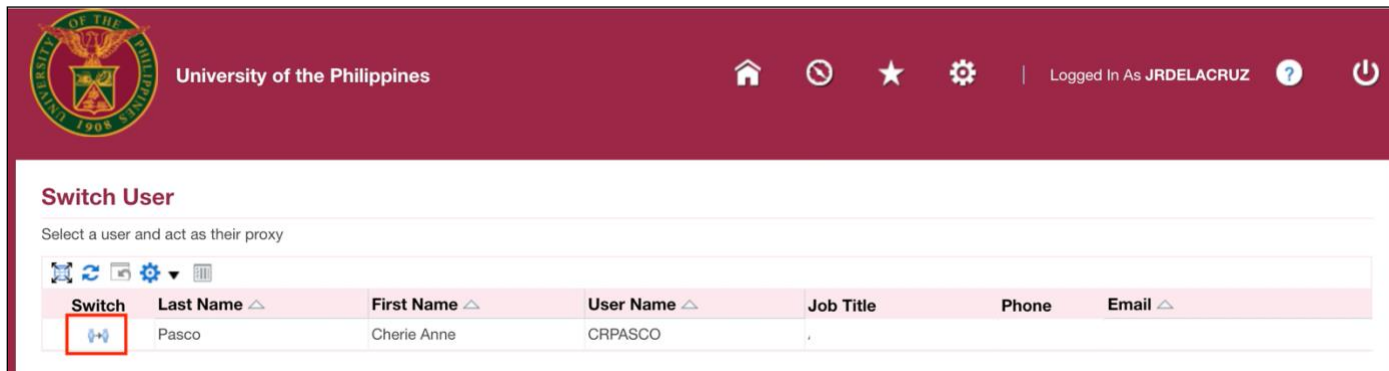
A confirmation message will appear that changes have been saved successfully.

DISCLAIMER: The screenshots in this document are for illustration purposes only and may not be the same as the final user interface.



On the **UIS Home Page header** of the authorized staff, the **Switch User icon** will appear.

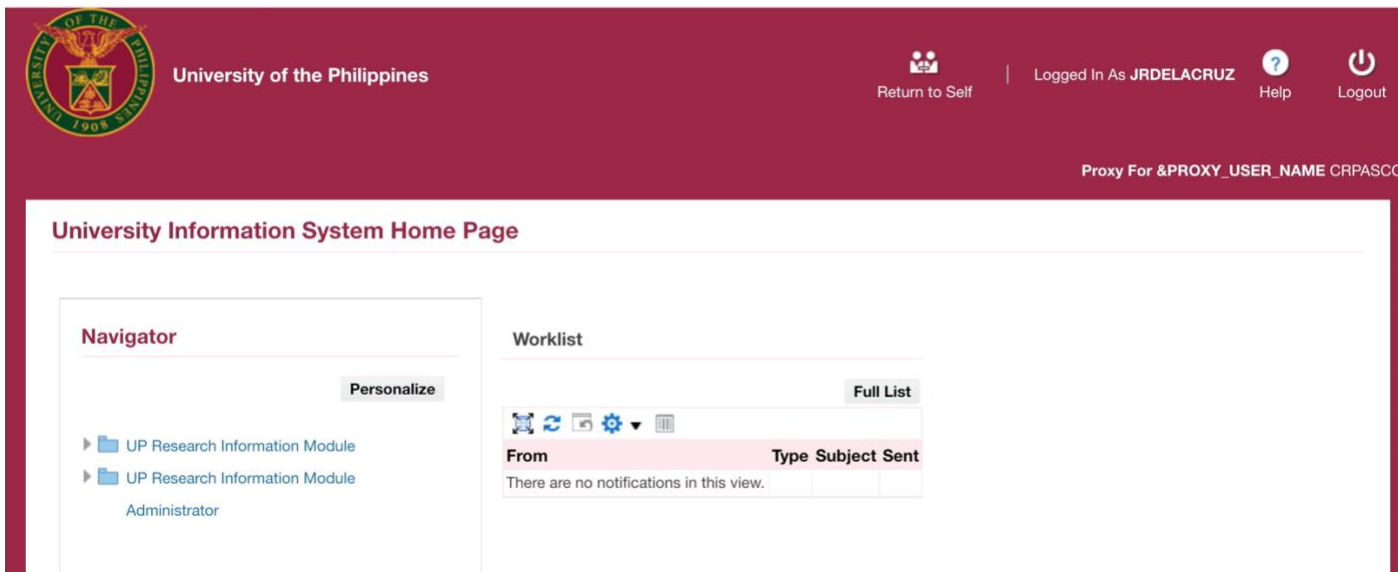




To access the account of the approver, the authorized staff should click on **Switch User**.

Then, click the **Switch icon** beside the name of the project leader.

This will redirect the staff to the **Navigator** and **Worklist** of the project leader with selected items shown to be accessible.



[Back to Top](#)