Getting Your

WiTS

(Workflow information Tracking System)

On

Work

A Step-by-Step Guide

Table of Contents

About WiTS.. 3
What is WiTS?..3
What Does WiTS Do For Me?…………………………………………… 3
Working with WITS 3
Accessing WiTS for the First Time………………………………………..3
Working on Actions……………………………………………………………4
Your Work Area Page…………………………………………………….. 4
Initiating Actions in WiTS………………………………………………….6
Saving a Partially Completed Action……………………………………..7
Opening a Partially Completed Action…………………………………...7
Adding a Comment……………………………………………………………8
Adding an Attachment…………………………………………………… 9
Exiting Without Saving………………………………………………………9
Moving an Action to the Next Step……………………………………….. 9
Accessing Actions Sent to You…………………………………………… 10
Monitoring Actions in WiTS…………………………………………………10
Activity Status Icon Descriptions 11
Completing an Action Assigned to Someone Else. ……...………………………..12
Forwarding an Action to another WiTS User………………………………..13
Using the Quick Search Feature in WiTS……………………………………14
Reports & Metrics Information…………………………………………………14
Using the Reports Feature in WiTS……………………………………………14
Generating a WiTS Report……………………………………………………14
Options to Navigate, View, Export and Print Reports…………………………16
Exporting Report Data…………………………………………………………17
Printing WiTS Reports…………………………………………………………17
System Preferences……………………………………………………………18
Setting User Absence (Out of Office)………………………………………..18
Signature……………………………………………………………………..20
Notification……………………………………………………………………20
Getting Help……………………………………………………………………... 20

About WiTS

What is WiTS?

WiTS is a workflow management system that provides corporate consistency through business process management and automated workflows. This automated workflow system enables OHR to monitor and track the status of a vast array of actions, correspondence and approvals. It enables OHR to track the location, responsible person/body, action status, action effective/due date, etc., of personnel actions (i.e., awards, promotions, recruitments, benefits actions, etc.). WiTS can communicate the status of these actions to administrative staff and management officials through its monitoring views and auto-generated emails. The system also allows for the measurement of the performance of HR staff (trend analysis) and identification of staff skill, competency and improvement areas, provides a variety of reports (i.e. workload, metric), and facilitates customer service through improved communication and timeliness in completing actions.

WiTS is secure and web-enabled, and with appropriate remote privileges, can be accessed over the Internet from anywhere.

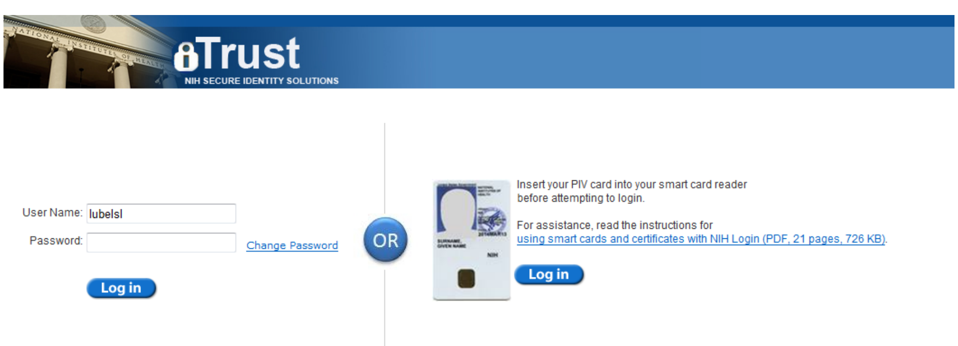
What Does WiTS Do For Me?

- Provides action tracking which can reduce the number of inquiries from customers regarding the status of actions
- Facilitates and expedites the transmission of approvals and provide communication regarding the status of actions
- Provides real-time monitoring of actions
- Sends notifications when a workitem has been received or completed
- Allows you to send and receive comments and/or attachments with the action
- Sends reminders
- Provides workload analysis
- Provides reporting tools
- Allows Single Sign On through the NIH OHR Website
- Prioritizes actions
- Automatically routes actions to designated back-up when primary is out of the office

Working with WITS

Accessing WiTS for the First Time

Go to the WiTS website at: http://wits.od.nih.gov. You will see the following screen:



1) Using the first option, ***Type*** in your **Network User ID** (usually the first few of the last name followed by first initial) Example: smithj for Joe Smith.

2) ***Type*** in your network password. ***Click*** on the 

icon. **OR**

1) Using the second option, ***Insert*** your **PIV Card**.

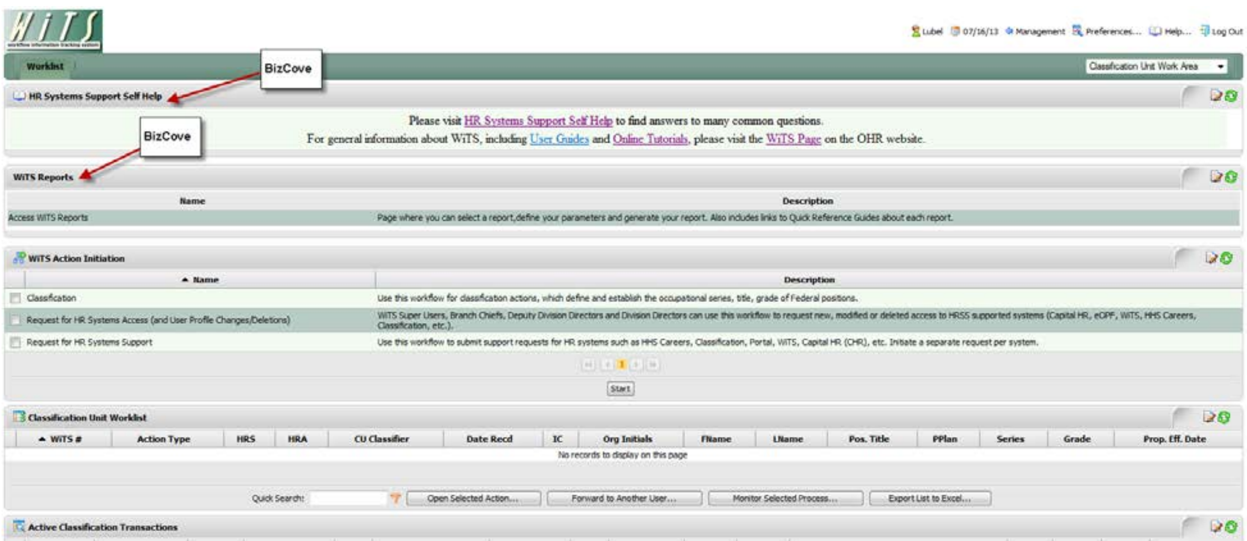
2) ***Click*** on the "**Log in**" 

icon.

Working on Actions

Your Work Area Page

Upon successful login, you will see your Work Area Page. Your work area page will be specific to your role and will display the Bizcoves that you will need.



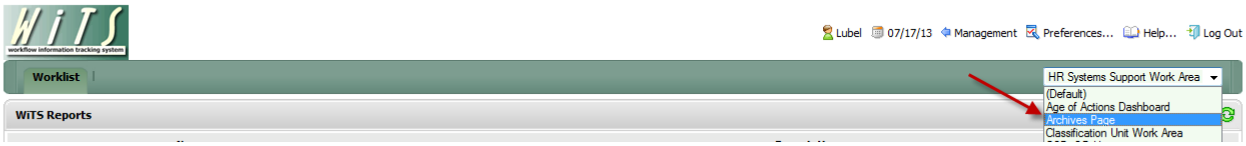
WiTS BizCoves are blocks of information, work activities, and functionality delegated to participants according to their responsibilities within the organization. The blocks of information are presented to provide at-a-glance access to pending work and reports. Depending on your role, the BizCoves are displayed in your Work Area will change.

Some of the most commonly used BizCoves are divided into the following areas:

- HR Systems Support Self Help – access to WiTS user guides and tutorials
- WiTS Reports – access to individual reports.
- WiTS Action Initiation — work processes that you can initiate
- Worklist — immediate access to your workitems
- Active WiTS Transactions*— access to all active workitems in your team / organization
- HR Systems Support (Help Desk) Worklist* – lists HR Systems Support work items requiring your attention
- My Active HR Systems Support (Help Desk) Transactions* – lists all of your open HR Systems Support tickets

* **Note**: *These BizCoves are not shown in the screenshot above.*

To view Archived (completed) WiTS actions, ***select*** "**Archives Page**" from the drop down menu at the top right of the page:



In addition to organizing work, BizCoves provide a series of buttons at the bottom of each block to help you perform necessary actions:

Start - initiates the selected process/action

Open Selected Action... - opens the selected action

Forward to Another User... - enables you to manually re-route the action to another WiTS user

Monitor Selected Process... - enables you to determine where an active action is within a process or view the completed steps of an archived action

Export List to Excel... - exports the data into an Excel spreadsheet

View Action Detail... - allows you to see narrative details about the action; also gives the user access to functions such as View, Complete, Monitor, Forward, Excel, Print, Refresh

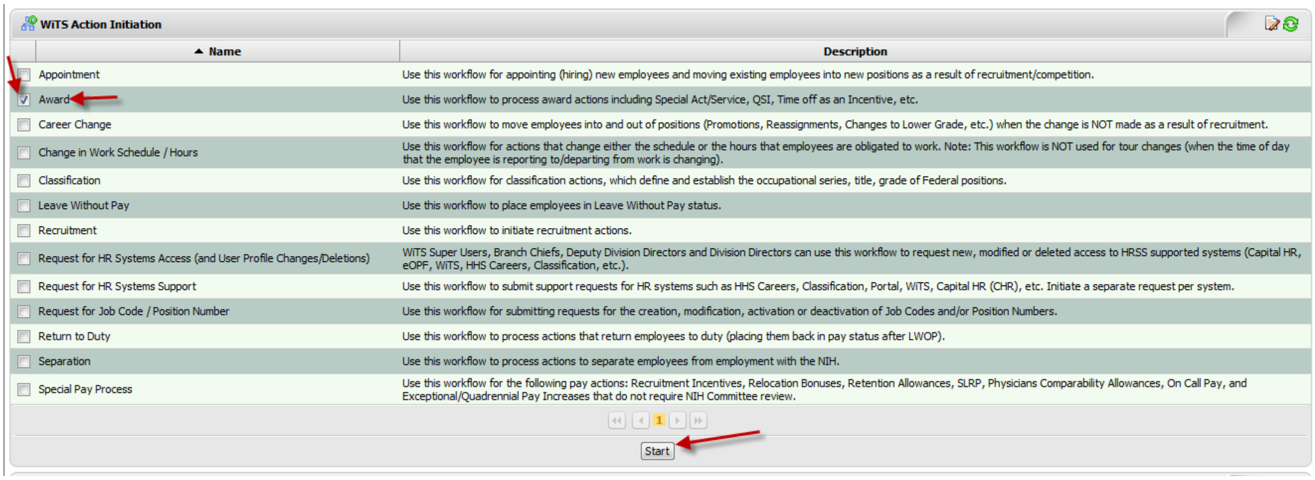
Advanced Search... - allows you to search the BizCove for actions based on certain criteria

Initiating Actions in WiTS

From the **WiTS Action Initiation** BizCove on your work area page, you can initiate a variety of actions. There are two ways to initiate an action within the **WiTS Action Initiation** BizCove - you can either:

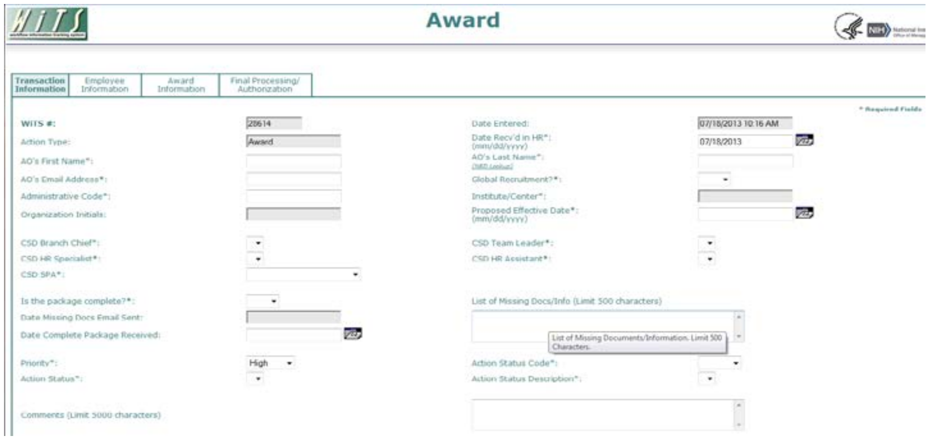
1) ***Click*** on the **name of the process** to be started **OR *Click*** on the **checkbox** next to the process name and then ***click* "Start"** 

button.



After you have initiated a process, a blank form will open. The look of the form will vary depending upon the process initiated. For example, if you choose HR Systems Support (help desk), an HR Systems Support ticket will open:

Which has a different look than the HR action form:



Complete the data fields on the form as appropriate for the type of action/help request that has been initiated. All mandatory fields are indicated by asterisks.

After you have completed the appropriate fields on the form, you have several options. You can:

- Save the action as partially completed,
- Close the action without saving,
- Add a comment,
- Add an attachment, or
- Move the action to the next activity/participant in the process.

Note: If you miss a mandatory field, the system will prompt you to complete it before the action can be moved forward.

Saving a Partially Completed Action

If you save a partially completed an action WiTS keeps the information you have already entered, but does not send it to the next activity. The work item appears again in your Work Area as partially completed.

1) ***Enter*** the data on the form.

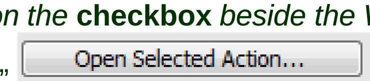
2) ***Click*** the "**Save**"  icon on the menu bar at the top of the screen. When you click the save icon, the workitem will be saved back into your active worklist to allow you to work on it at a later time.

Opening a Partially Completed Action

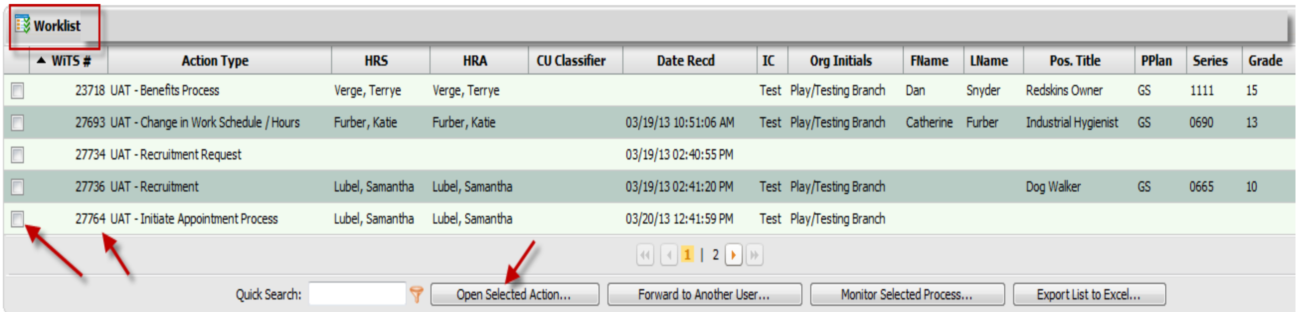
If you have saved a partially completed action, and at a later time you need to complete the action, go to your **Worklist** BizCove.

1) ***Click*** *on the* **WiTS Transaction Number**

OR

2) ***Click*** *on the* **checkbox** *beside the WiTS Transaction, and then* ***Click*** *on the* "**Open Selected Action**" 

button.



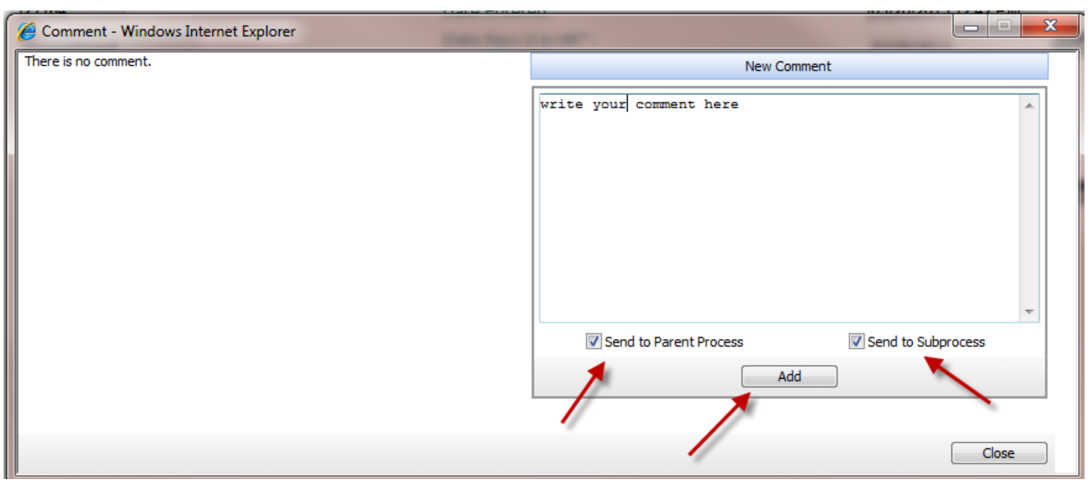
After you have opened the partially completed action, you will see the saved form for that action. Complete the data fields on the form as appropriate. You can then send the action to the next activity (step in the process and/or activity participant).

Adding a Comment

If you want to add a comment to an action, from the form toolbar:

1) ***Click*** the "**Comment**"  icon.

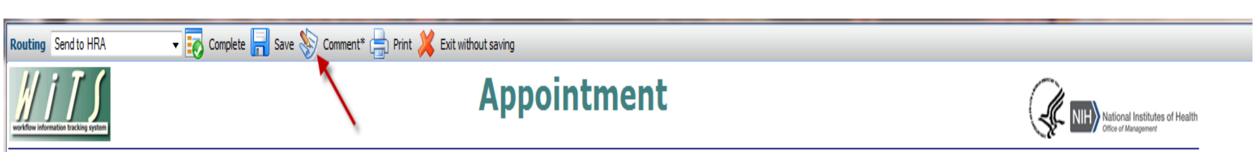
2) Type your comment in the pop-up box that appears.
3) ***Click*** "***Add***" when finished. Your comments will appear along with any other comments that have been previously entered.



Note: Be sure to check "**Send to Parent Process**" and "**Send to Subprocess**" if you want the comment seen throughout the entire action.

4) Your comment will appear to the left of the screen.

5) When an action contains a comment, the icon will change



To edit a comment:

Select the comment and ***click*** the "**Modify**" icon:

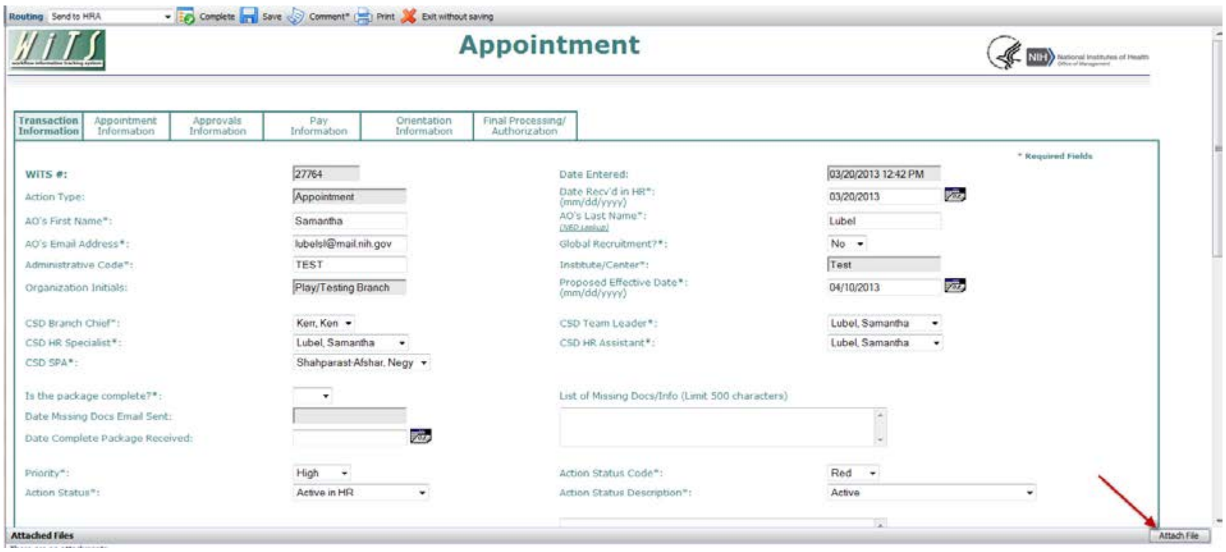
To delete the comment:

Select the comment and ***click*** the "**Delete**" icon:

Adding an Attachment

To add an attachment to an action:

1) ***Click*** the "**Attach File**" button. An Attach file dialog box will open.
2) ***Click*** the "**Browse**" button and locate the file you wish to attach. You can attach any type of file.
3) ***Click*** "**Open.*"*** Your file will appear in a panel at the bottom of the screen.



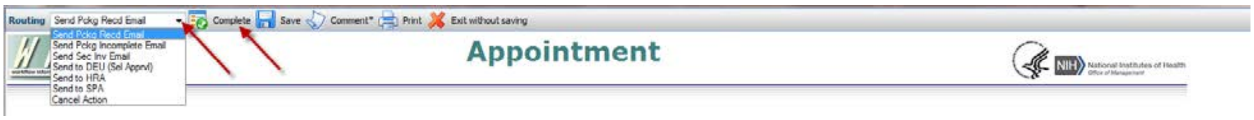
Exiting Without Saving

If you do not want to save the information you have entered in the form, ***click*** the "**Exit without Saving***"* icon. The work item will remain in your Work Area, but any information you entered will not be saved.

Moving an Action to the Next Step

To send the action to the next activity in the process,

1) ***Select*** the appropriate response from the routing drop down menu at the top left of the screen. The response menu contains a list of choices that will either direct the action to the next step in the process or complete a specific task (e.g., send an automated email).
2) After you have chosen the appropriate response, ***click*** the "**Complete"** icon to the right of the response drop-down menu. This will send the work item will be sent to the next step (activity/participant) within the workflow.



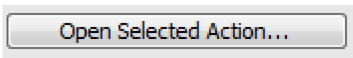
Note*:* If the next step in the process involves another participant, the workitem will no longer appear in your worklist. However, you can monitor the status of the action from the **Active WiTS Transactions** BizCove.

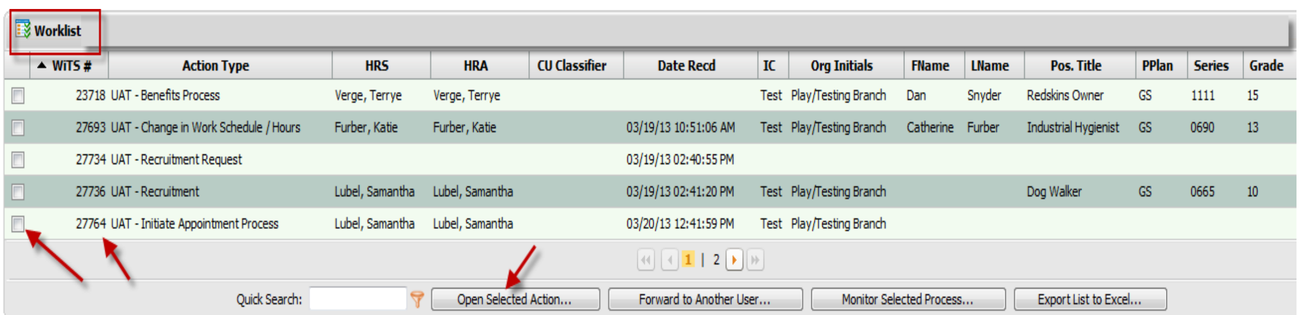
Accessing Actions Sent to You

All work that is sent to you will appear in your **Worklist** BizCove.

1) Access your **Worklist** BizCove Work Area page and ***Click** on the **WiTS Transaction Number***

OR

2) ***Click** on the* **"check box** *beside the WiTS Transaction, and then **Click** on the* "**Open Selected Action**"  *button.*



The form for the selected action will open. After completing the required information on the form, you may have several options to move/save the action. See "Initiating Actions in WiTS" above for options for moving or saving an action.

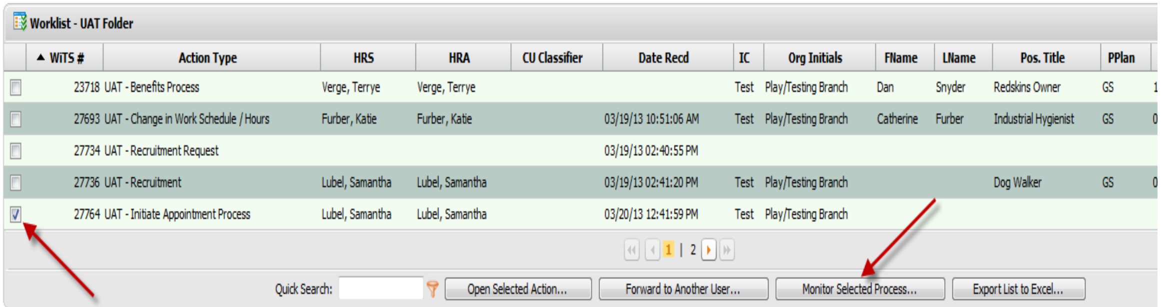
Monitoring Actions in WiTS

WiTS allows you to monitor an action and view detailed information about it. Perhaps you have initiated an action and need to see who currently has it or what step the action is currently at within the process. You may also want to view the details of an action that someone else has initiated, or to see whether or not there are attachments or comments associated with it, or when an action will arrive at in your worklist.

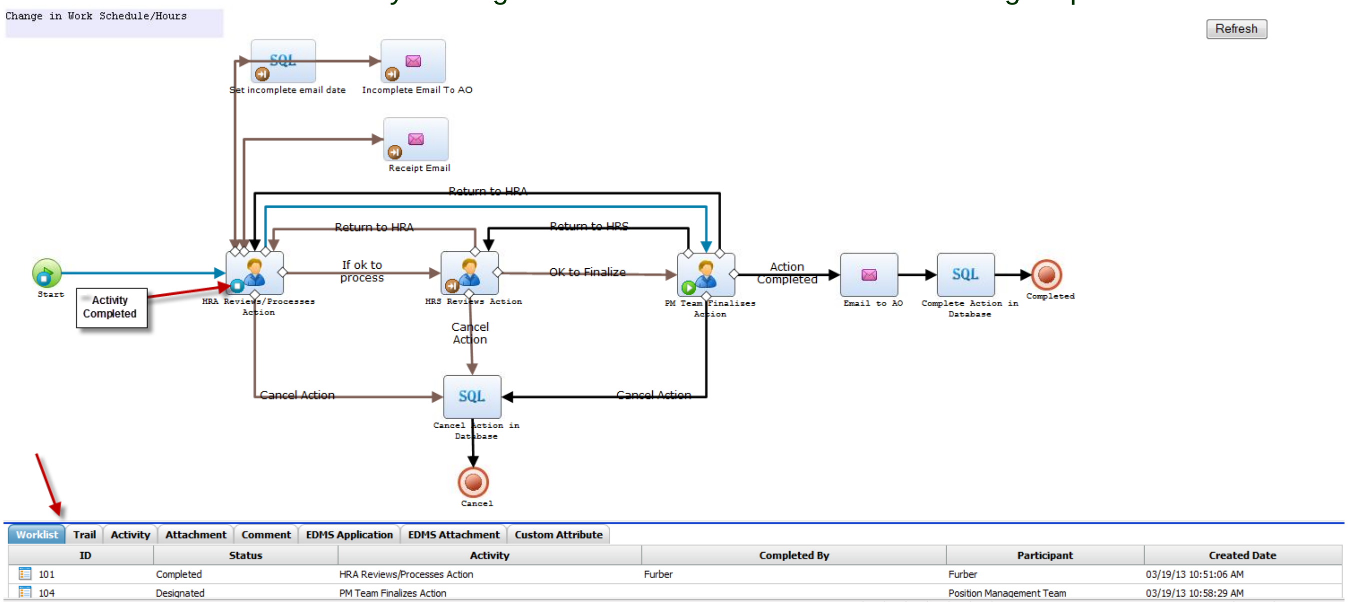
To monitor an action:

1) ***Select*** a workitem from a **Worklist** BizCove by checking the check box next to it.

2) ***Click*** "**Monitor Selected Process**"



The Monitor window will open. You can then view the routing map of the process and obtain information about the action by clicking on the tabs at the bottom of the routing map.



The thick blue lines indicate the route the action has taken. In addition, you will see icons in the lower left hand corner of the activity box which also provide an explanation of where the action has been and where it is (if the process has not been completed).

Activity Status Icon Descriptions

 Activity Completed

 Activity Skipped (Unnecessary)

 Current Activity

To view specific information about the action (e.g., trail, attachments, comments, etc.), you can click on the tabs below the routing map.

The tabs in the Monitor window include the following:

Tab	Description
Worklist	Lists the workitems for the process instance. The process instance may have more than one workitem per activity if there is more than one participant for that activity.
Trail	Shows the event log for items associated with the process instance, such as the instance itself, activities

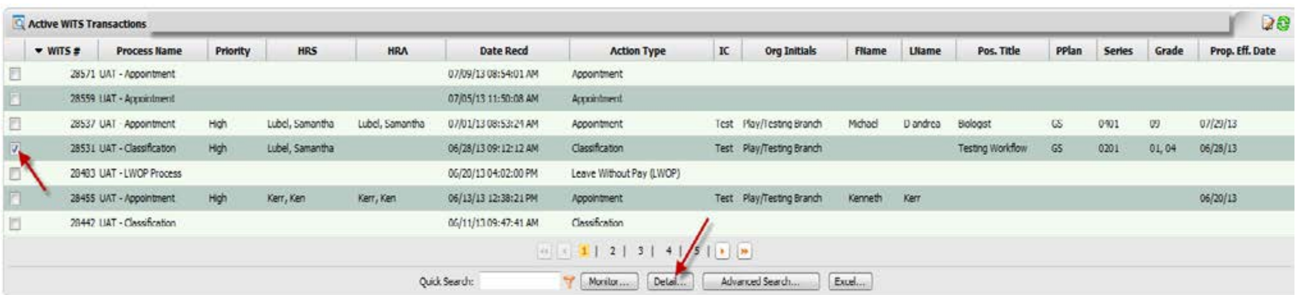
	and workitems.
Activity	Lists the activities and gives details such as their status.
Attachment	Shows any files that have been attached to the instance by a user in his/her workitem.
Comment	Lists any comments that have been added to the instance by a user in his/her workitem.
Custom Attribute	Not used at this time

Completing an Action Assigned to Someone Else

Occasionally, it may be necessary for you to access another user's action and complete it.

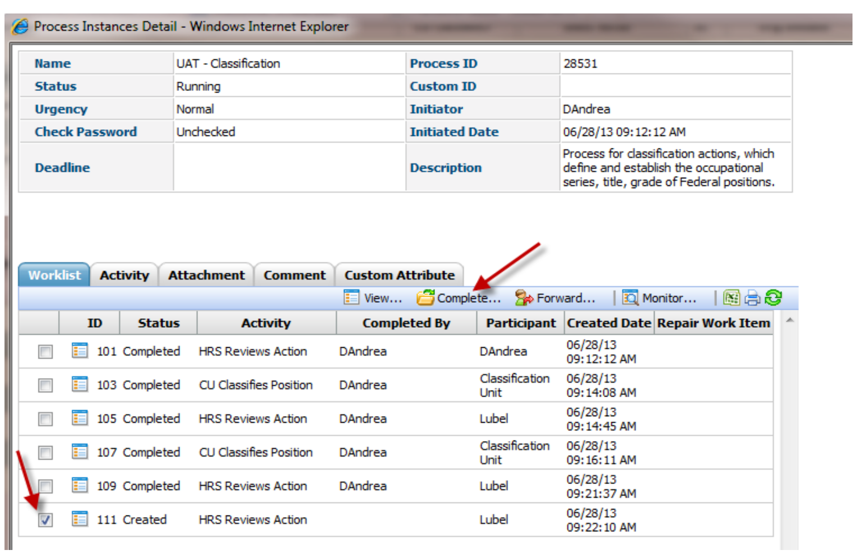
To complete an action assigned to someone else, go to the **Active WiTS Transactions** BizCove,

1) ***Check*** the box next to the action you wish to complete.
2) ***Click*** on the "**Detail**" Detail... button.



The Process Instances Details Window will open.

3) ***Check*** the box next to the activity you wish to complete. (**Note**: You may only complete an action that has not already been completed. If multiple activities are listed, select the last activity listed that is noted as "created".)
4) ***Click*** on the "**Complete**" Complete... icon.
5) This will open the form for the action you have selected. Complete and move the action forward as necessary.



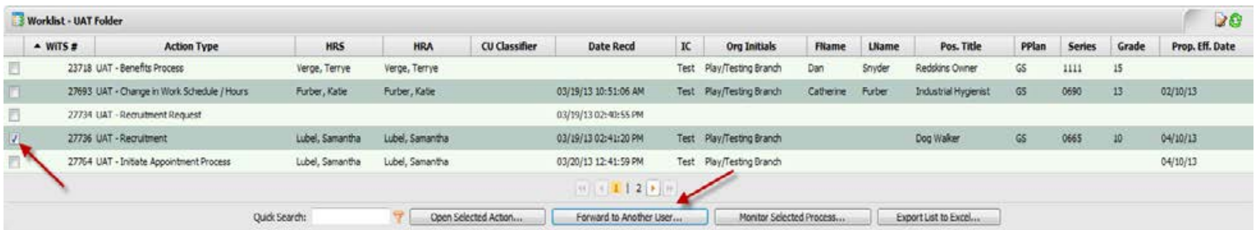
Forwarding an Action to another WiTS User

Transactions within WiTS may be forwarded as needed to other WiTS users. **Note:** It is generally not recommended to forward your actions to another user unless you believe the action was erroneously sent to you and you need to forward the action to the appropriate user.

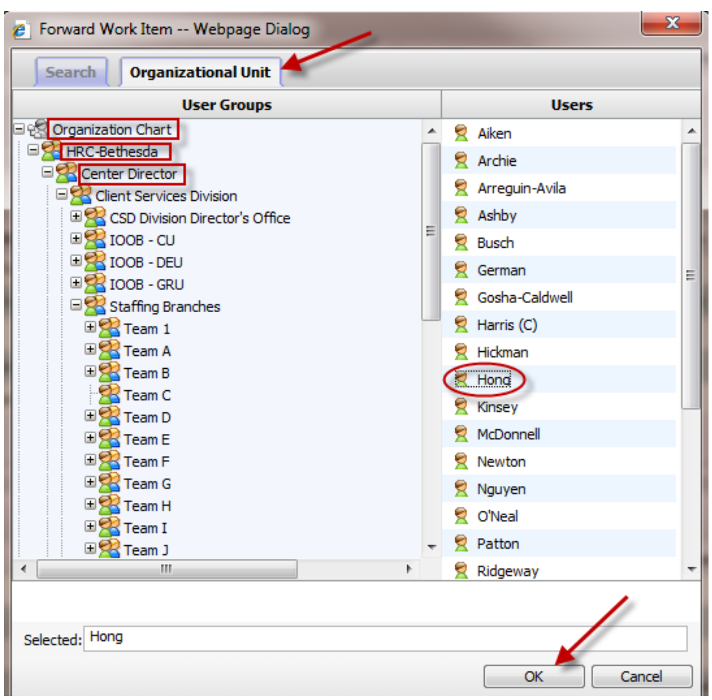
To forward an action:

1) Go to either the **Active WiTS Transactions** BizCove **OR** the **Worklist** BizCove, ***check*** the box of the action you wish to forward.
Note: This feature is only available for actions that have not yet closed.
2) ***Click*** on the "**Forward to Another User...**" 

button. This will open a pop-up window with an organizational structure.



3) ***Select*** the "**Organizational Unit**" tab at the top of the screen.
4) ***Click*** on the "**+**" to expand the folders and locate the part of the organization you wish to direct the action.
5) ***Click*** on the name of the Division/Team which contains the individual you are forwarding to. A list of WiTS users will appear along the right side of the pop-up window.
6) ***Click*** on the name of the individual who should receive the action.
Note: You can only forward to one person.



Once the individual's name appears in the text box at the bottom of the pop-up window, click OK. The user will receive a notification that a new work item is in their Worklist.

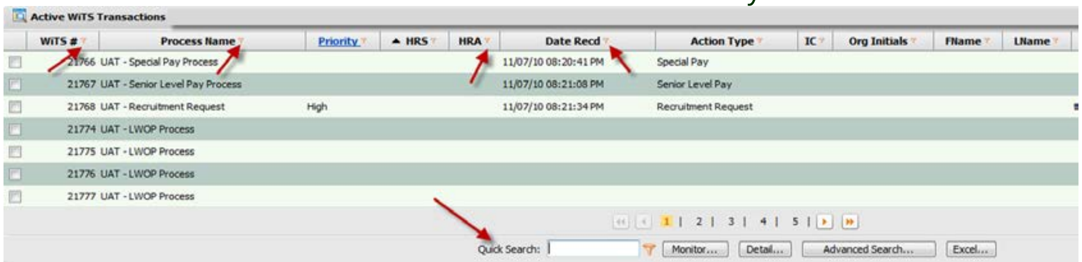
Using the Quick Search Feature in WiTS

The WiTS Quick Search feature is available to users who wish to find work items in the BizCoves.

1) Locate the *Quick Search* button in the BizCove you wish to conduct your search:

   Note: To locate **Active Actions,** conduct your search in the **Worklist** or **Active Transactions** BizCoves. If the action you wish to search for has been completed, you will find it in **Archives**.

2) After you ***click*** within the **Quick Search box**, question marks will appear next to each column header. These are the columns that WiTS will search in for your desired text.



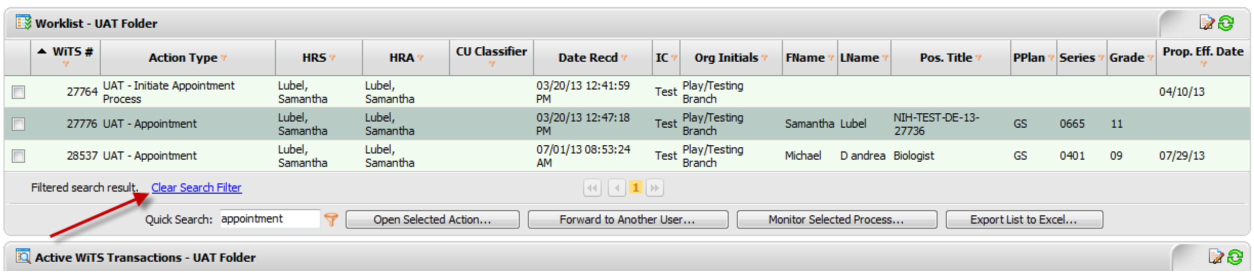
3) ***Type*** in your search value (name, number, date, etc.) WiTS will search the BizCove for all actions that contain your search criteria.

4) ***Click*** on the "**Tornado**"  icon to begin the search.

5) The BizCove will refresh and display only actions with text that matches your search in any of the columns.

   Note: If it is empty, no matches were found for your criteria.

   Note: You will need to ***click*** on **Clear Search Filter** to clear your search. This will refresh the BizCove to display all actions and you may begin a new search if needed.



Reports & Metrics Information

WiTS provides several types of reports that can be exported to Excel, PDF, or Word.

Using the Reports Feature in WiTS

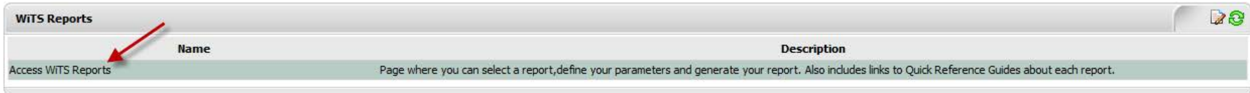
WiTS data may be extracted using the reporting feature. All WiTS reports are found in the **WiTS Reports** BizCove.

Metric data is available in some reports; for example, you may find the average processing times on recruitment and awards reports.

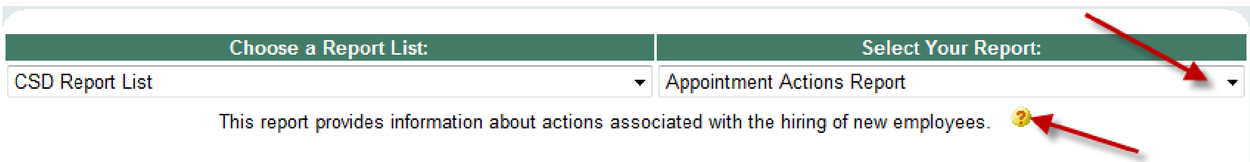
Generating a WiTS Report

1) ***Locate*** the **WiTS Reports** BizCove at the top of your Work Area Page. This list contains the pre-defined reports that are currently available to you in WiTS.

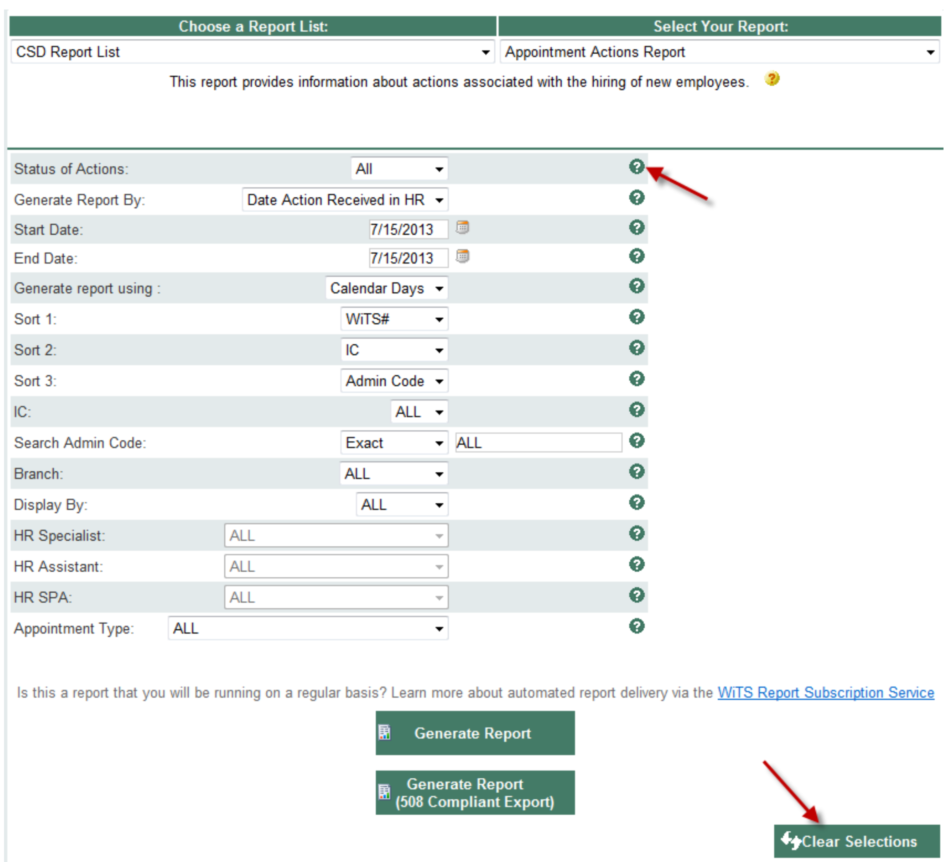
2) *Click* Access WiTS Reports.



2) ***Select*** the report you wish to run from the drop down menu. Once selected, refer to the report discription for more information about the report – the "**Help**" icon contains a Quick Reference Guide explaining the report.



3) Parameters specific to the report you selected will need to be chosen so that you may customize your report results. Access to reports and data are based on your permissions, i.e., CSD Branch staff can view reports for IC's assigned to his/her Branch, etc. Change the default settings to define the specific parameters for your report. Information about each parameter is provided in the "**Help**" icon next to each field.

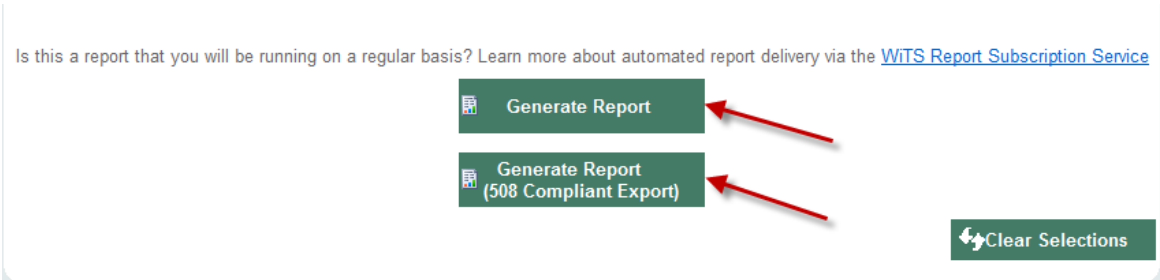


Note: To reset the parameter fields to their original default settings, ***click*** the "**Clear Selections**" Clear Selections button at the bottom of the page.

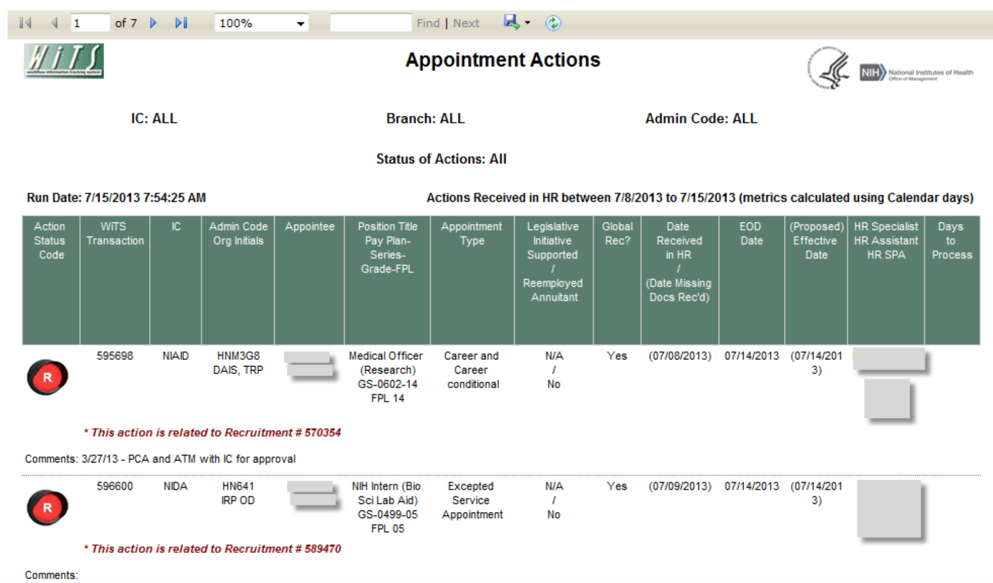
4) ***Click*** the "**Generate Report**"  button to run the report.

Note: You have the option of running a 508 Compliant Report. This export option presents the data in a format that is accessible for users using screen readers and other assistive technology. ***Select*** the "**Generate Report (508 Compliant Export)**"  button to run this report.

Note: A message box may appear indicating that the database search is in progress and your report data is loading.



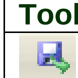
5) The requested report is generated and displayed in a new window as shown below. Each report will look slightly different.

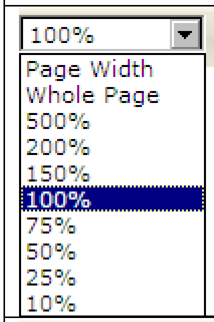


Options to Navigate, View, Export and Print Reports

WiTS offers several additional options to view and present WiTS data.

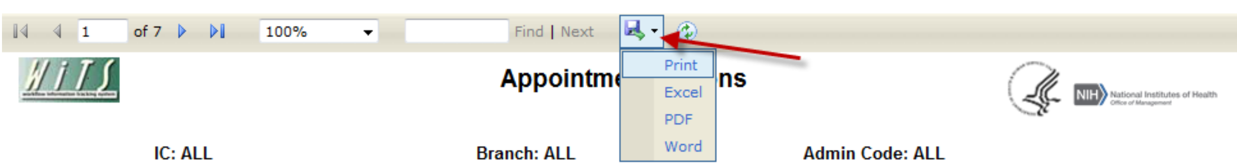
The Report **toolbar** options are described as follows:

Toolbar	**Option**	**Description**
	Export / Print	Export the report data to another software application for viewing/editing/printing. Export options include:

		❖ Print ❖ Adobe Acrobat (PDF); ❖ MS Word (DOC); ❖ Excel (XLS)
	Refresh	Refreshes report data
	Go to page…	= Go to first page = Go to previous page 1 / 1 = Current View page # **/** # of total report pages = Go to next page = Go to last page
	Zoom	Default is 100%. Allows users to select from drop-down menu to resize and refresh report screen view.
	Search for Text	Allows users to enter a keyword or number and locate it in the Report.

Exporting Report Data

1) From the report toolbar, ***click*** on "**Export**" icon. A drop down menu appears opens that allows you to choose which software application to export (save) the report data to:



PDF (Adobe Acrobat) - Keeps report formatting
Microsoft Word - Allows user to make modifications to the report
Microsoft Excel - Allows for manipulation and editing of data, including addition of calculations and filtering

Tip: Select the file type appropriate to the need. For example, if you wish to edit and manipulate report data, Excel would probably be the best option. If you wish to share an un-editable report, then PDF would be the best option.

Printing WiTS Reports

1) From the Report toolbar Export Icon, **select** "**Print**". A pop-up window opens that allows you either open or save the report in the default PDF (Adobe Acrobat) format. The report opens in Adobe Acrobat. You are then able to print the report from Adobe Acrobat by entering **Ctrl + P**.

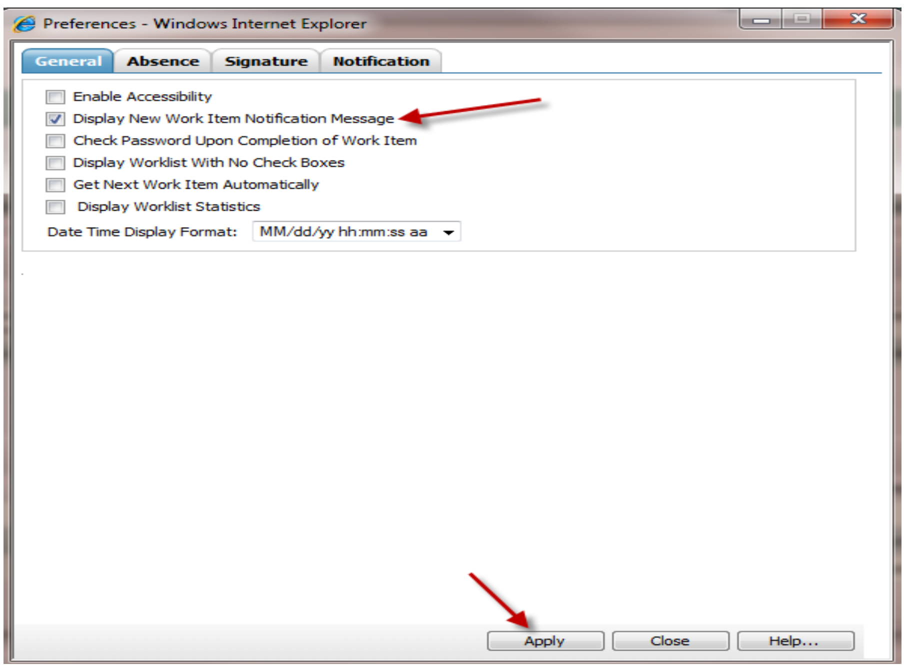
System Preferences

WiTS has several preferences that users have the option of editing and using.
Click the "**Preference**" link along the very top right corner of the WiTS main screen to open the Preferences window.

The *General* tab will appear giving you access to optional user settings. Most users will not have to make any changes on the general tab. Occasionally, some users will not get their pop-up notifications. If this occurs, users should:

1) ***Click*** the **Display New Work Item Notification Message** (to remove the check in the box)\
2) ***Re-click*** the **Display New Work Item Notification Message** to re-add the check in the box
3) ***Click*** on **Apply**
4) ***Close*** out of the Preferences window
5) ***Log Out*** of the System
6) ***Log back in***

These steps will re-enable this feature for users.



Note: It is recommended that you not alter "Enable Accessibility" or the "Date Time Display Format."

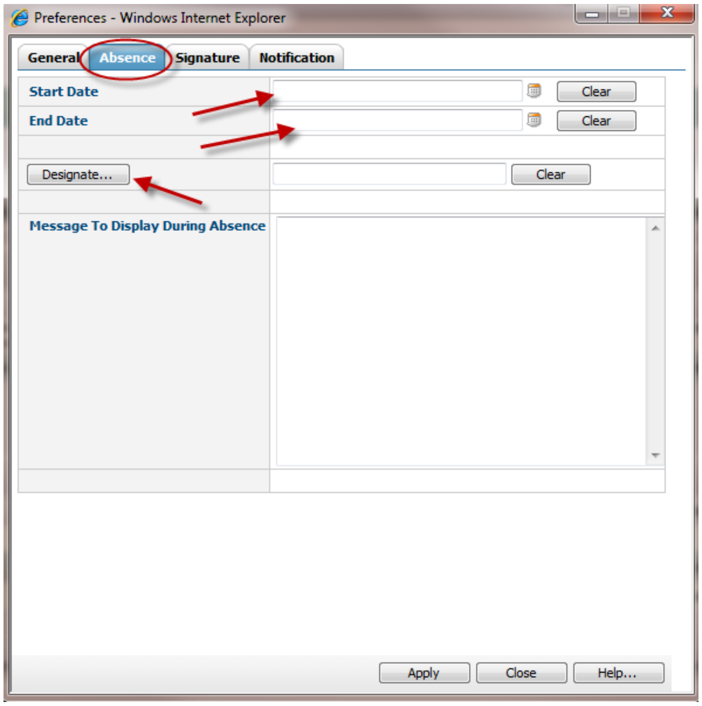
Setting User Absence (Out of Office)

WiTS allows you to designate someone else to complete your workitems in your absence. When the designated user clicks Designated Work in *their* Work Area, the work that has been designated to them is displayed.

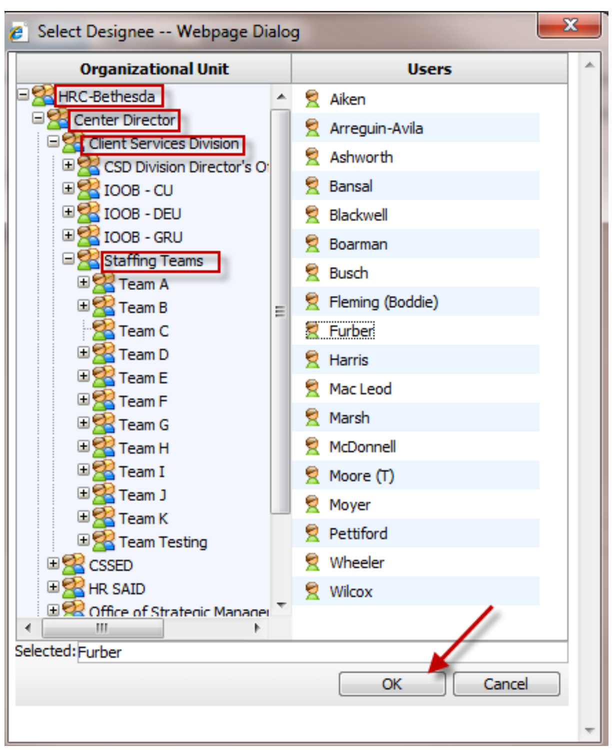
Using the *Absence* tab, you can set the absence start and end dates, designate another user to handle your actions, and create a message to be displayed during your absence.

To set an absence:

1) ***Click*** the "**Absence**" tab.
2) ***Enter*** the **start** and **end dates** and **times** for your absence in the respective boxes.
3) ***Click*** the "**Designate**" button to select the person who will receive your work items during your absence from the organization tree.

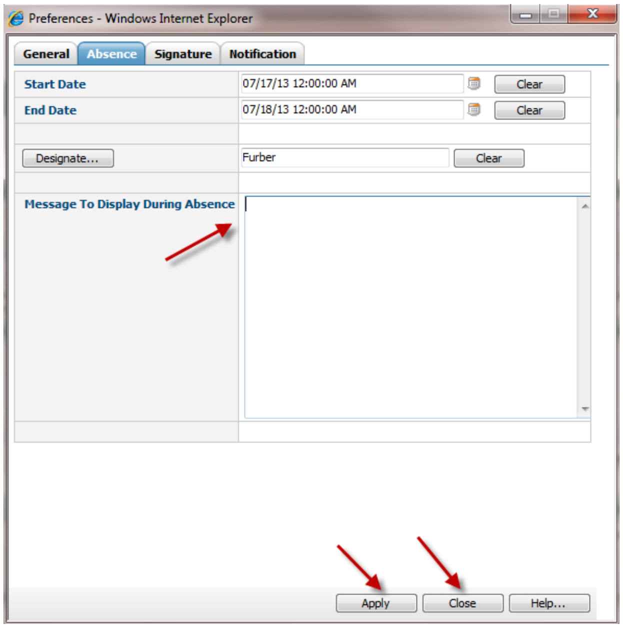


4) Locate the person who will be receive your work during your absense.



5) ***Type*** a **message** that will appear to the designated person.

6) ***Click*** "**Apply**".
7) ***Click*** "**Close**" to exit the Preference dialog box and return to the WiTS main screen.

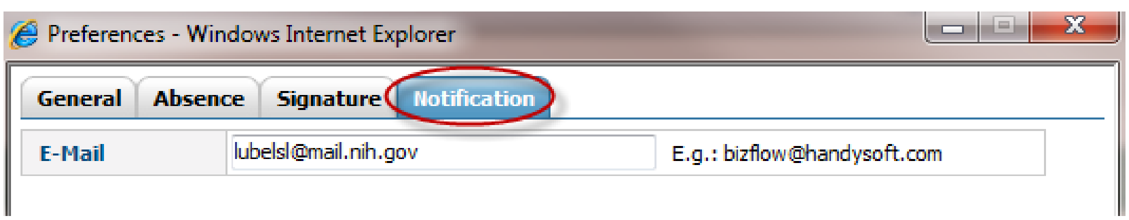


Signature

The *Signature* tab is not being used at this time.

Notification

The *Notification* tab displays the email address which is currently on file for you in the WiTS system. This is the email address that the auto-generated workitem emails will be sent to notify of your new actions.



Getting Help

Should you need help using WiTS, you have several options available to you to get assistance. A three-tiered system is in place to assist with all levels of questions.

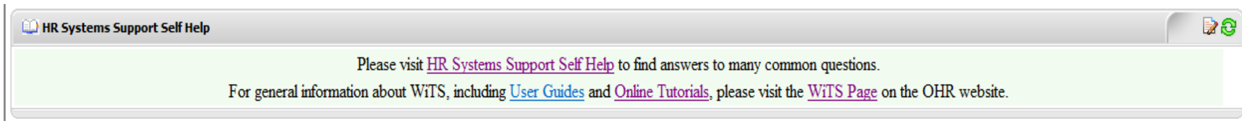
Tier I support consists of WiTS Super Users. These are members of your organization with an advanced level of knowledge and troubleshooting skills related to WiTS who are available to assist staff in resolving some of the more common problems / issues.

Tier II support consists of SAID's HR Systems Support team. Support at the Tier II level and beyond is only accessible via HR Systems Support.

Tier III consists of the WiTS technical support team.

If you need help with WiTS, you should:

First: Read the guidance (User Guides, Quick Reference Guides, FAQ, etc.) located on the **HR Systems Support Self Help** BizCove to see if your issue is addressed in any of these documents.



Next: Consult your **WiTS Super User** to see if the issue can be resolved internally.

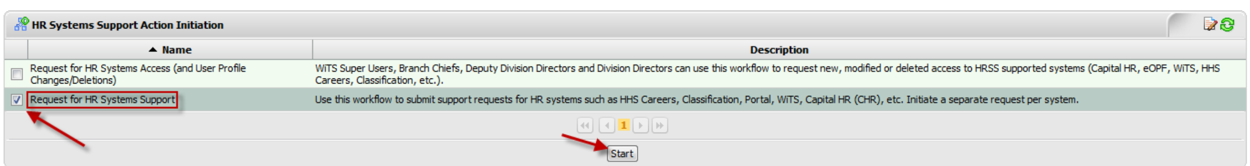
If your WiTS Super User cannot rectify the problem, then;

Contact HR Systems Support. HR Systems Support will then make the determination as to where the ticket needs to be directed.

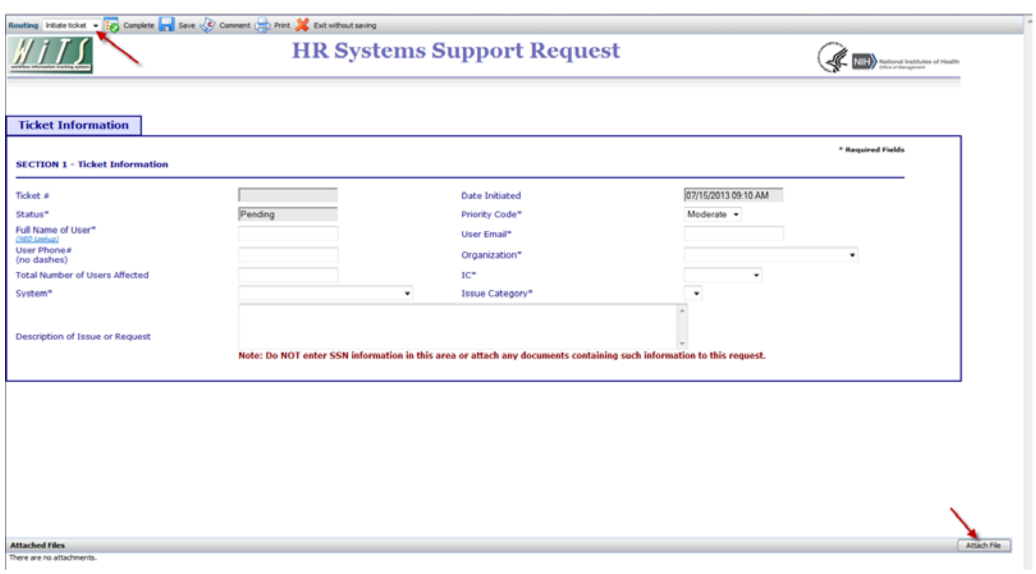
- **Initiate a HRSS request** within WiTS at http://wits.od.nih.gov (preferred) or
- E-mail HRSystemsSupport@od.nih.gov

To initiate a Help Desk ticket in WiTS:

1) ***Locate*** the **HR Systems Support Action Initiation** BizCove.
2) ***Click*** on the **name** of the process to be started (HR Systems Support), **OR *Click*** on the **checkbox** next to the process name.
3) ***Click*** the "**Start**" Start button.



4) ***Complete*** "**Section 1**" of the HRSS form. Describe your issue as clearly as possible and attach a screenshot of any error message you may be receiving. Be sure to complete the fields for your contact information (email and telephone) so that HRSS will be able to contact you for more information if needed.
5) ***Select*** "**Initiate Ticket**" from the drop down menu.



3) ***Click*** the "**Complete**" 

icon to the right of the response drop-down list. This will send the ticket to the HR Systems Support (help desk) for further action.

Note: You may monitor the status of your ticket in the **My Active HR Systems Support (Help Desk) Transactions** BizCove on your Work Area Page. Once the ticket has been resolved, an e-mail summarizing the problem and resolution will be sent to you.