

Worklist Details

How to View Details in your Worklist for GAX or PRC documents

The Worklist Details page will display the following fields pertaining to items in your approval queue: Vendor Customer (Vendor ID #), Legal Name (Vendor Name), Vendor Invoice Number, Vendor Invoice Date and Actual Amount (Invoice Amount).

Approvals can be performed in the Worklist Details view just as they can in the Worklist View. The only significant difference in the views is while the Worklist View will display all the document types, the Worklist Details view requires the user to specify a Document Code to view (i.e. PRC or GAX).

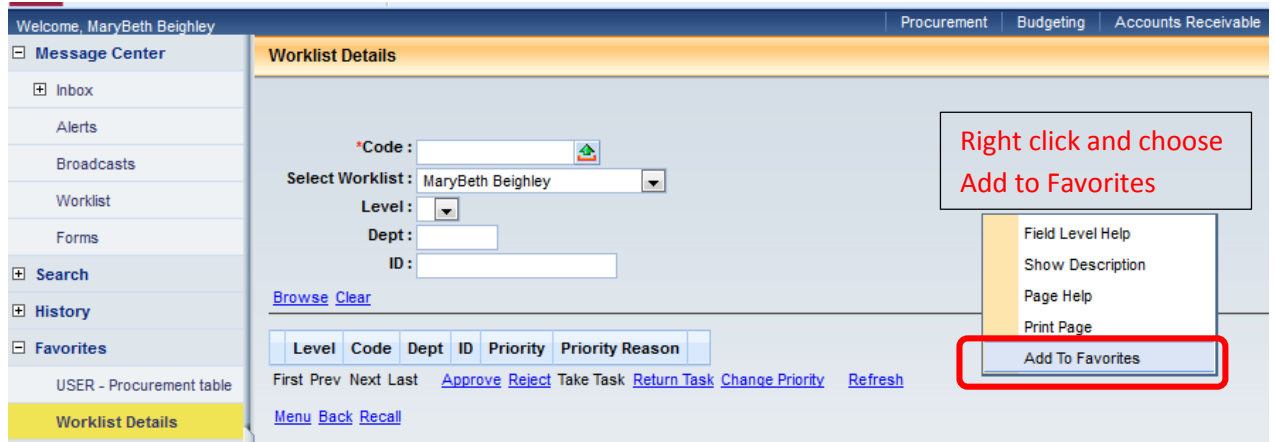
Approvals are a two-step process in A360. When invoices are submitted for approval, they will go first to the departmental approval worklist (i.e. Dept 445 – Approval Queue). To approve the documents, the end user will select the documents from the departmental approval queue and “take” the document to their own named approval queue.

1. Go to **Message Center > Worklist**
2. Click [Worklist Details](#)

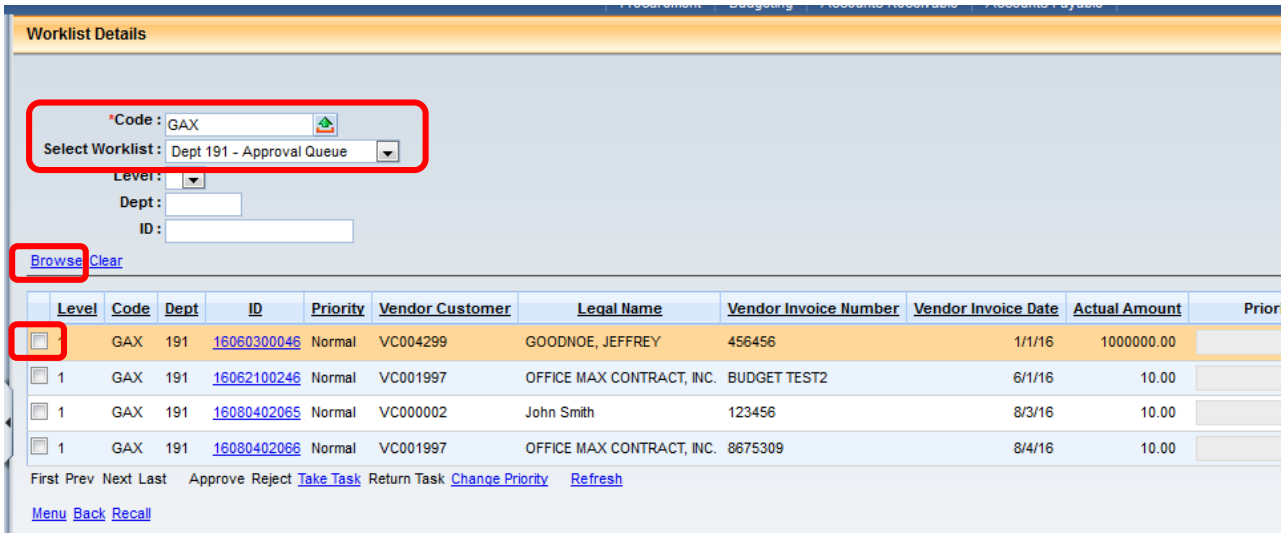
The screenshot shows the CGI Advantage interface. The left sidebar has a 'Message Center' section with 'Worklist' highlighted. The main area is titled 'Worklist' and contains a form with the following fields: 'Select Worklist' (dropdown menu), 'Level' (dropdown), 'Code' (text input), 'Dept' (text input), 'ID' (text input), 'Submitter ID' (text input), and 'Escalated Item' (dropdown). Below the form are 'Browse' and 'Clear' links. At the bottom, there is a table with columns: Level, Code, Dept, ID, Priority, Escalated Item, Comments, Creator ID, Submitter ID, Date, Reason, Message, Priority Reason. Below the table are navigation links: 'First', 'Prev', 'Next', 'Last', 'Approve', 'Reject', 'Take Task', 'Return Task', 'Change Priority', 'Refresh'. The 'Worklist Details' link is highlighted with a red box.

3. The **Worklist Details** page displays.

Note: you may want to right-click and select Add to Favorites so that you can go directly to this page in the future.



4. Select **Worklist** first, then enter **GAX** or **PRC** in the **Code** field. Click **Browse**.
The specified documents in your selected approval queue will display.



5. In this view you may **Select** the documents that you would like to approve by clicking the checkbox on the left.

Click **Take Task**. This will remove the items from the Departmental Approval Queue and put them in your named approval queue.

6. Select your **Document Code** and **Name** from the Worklist.
7. Select the documents for approval. Click Approve

Worklist Details

*Code: GAX
Select Worklist: MaryBeth Beighley
Level: [v]
Dept: []
ID: []

[Browse](#) [Clear](#)

<input type="checkbox"/>	Level	Code	Dept	ID	Priority	Vendor Customer	Legal Name	Vendor Invoice Number	Vendor Invoice Date	Actual Amount	<input type="checkbox"/>
<input checked="" type="checkbox"/>		GAX	191	16061300229	Normal	VC000002	John Smith	CONFIDENTIAL ADDRESS	6/1/16	10.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>		GAX	191	16061300230	Normal	VC000002	John Smith	CONFIDENTIAL MAILING ADDRESS 2	6/1/16	100.00	<input type="checkbox"/>
<input type="checkbox"/>	1	GAX	191	16061600238	Normal	VC004204	PYATT & ASSOCIATES, LLC	4568740	1/1/16	600.00	<input type="checkbox"/>

First Prev Next Last [Approve](#) [Reject](#) [Take Task](#) [Return Task](#) [Change Priority](#) [Refresh](#)

[Menu](#) [Back](#) [Recall](#)

8. You should receive an **“Approve action completed”** message.

1 of 1 | [View All](#) Approve action completed.

Worklist

9. You're done!