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.

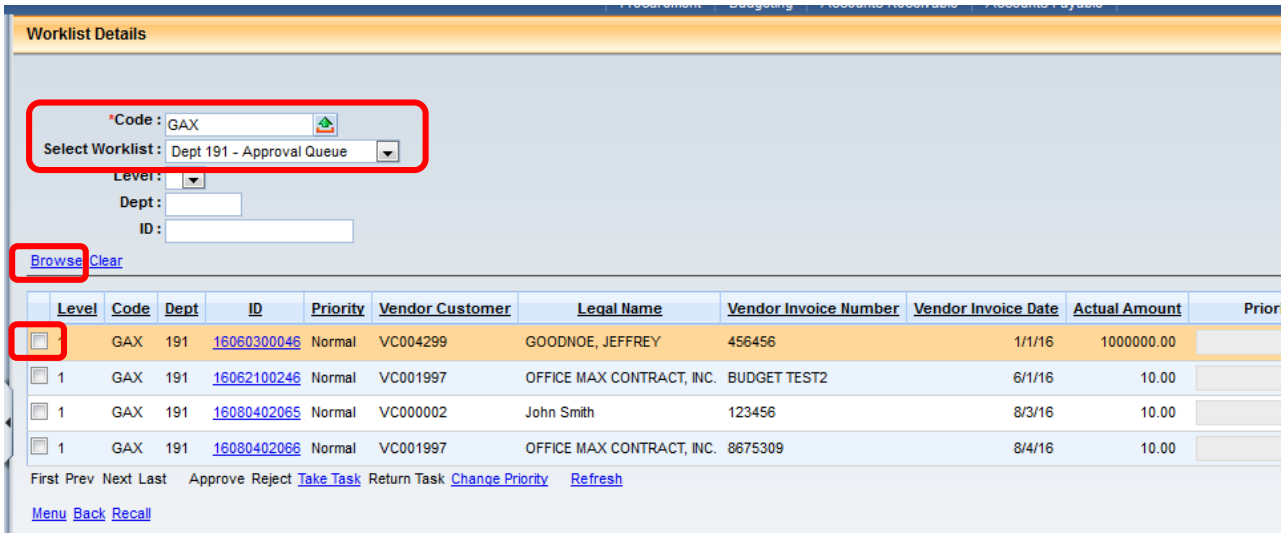1. Go to **Message Center > Worklist**
2. Click Worklist Details

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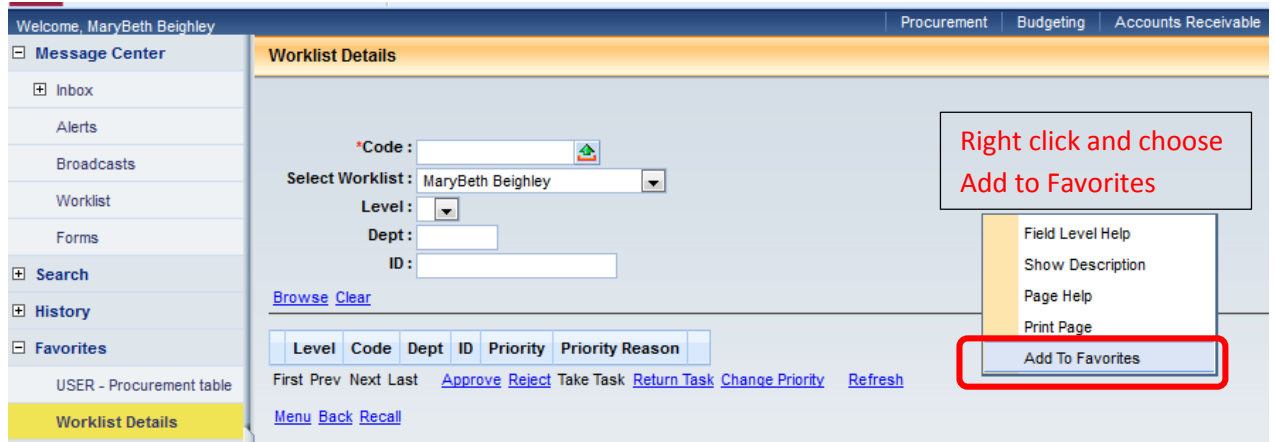
4. Select **Worklist** first, then enter **GAX** or **PRC** in the **Code** field. Click **Browse**.
   The specified documents in your selected approval queue will display.

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

8. You should receive an "**Approve action completed**" message.

9. You're done!