

Worklist Approvals

How to Approve a GAX or PRC document

Workflow approvals are handled via the Worklist that is located in the Message Center menu. As with OnBase, each department will have its own departmental Approval Worklist in A360. In addition, each authorized approver within the department will have their own “named” worklist. This “named” worklist is very similar in concept to the Approval Note in OnBase that contained the User ID and time/date stamp of when the vendor invoice was approved.

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**

The screenshot displays the CGI Advantage interface. The left sidebar shows the 'Message Center' menu with 'Worklist' highlighted. The main area is titled 'Worklist' and contains a form for selecting a worklist. The form includes a dropdown for 'Select Worklist' (set to 'MaryBeth Beighley'), a 'Level' dropdown, a 'Code' field with an upload icon, a 'Dept' field, an 'ID' field, a 'Submitter ID' field, and an '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', and 'Refresh'. A 'Menu Recall Worklist Details' link is also present.

2. Select Worklist – Department Approvers will see **Dept ### - Approval Queue**

The screenshot shows the 'Worklist' interface. At the top, there is a header 'Worklist'. Below it, there are several filter fields: 'Select Worklist' (set to 'learner 01'), 'Level' (set to 'Dept 445 - Approval Queue'), 'Code', 'Dept', 'ID', 'Submitter ID', and 'Escalated Item'. A red box highlights the 'Select Worklist' and 'Level' fields. To the right of these fields is a link 'Change Worklist Role Order'. Below the filters are 'Browse' and 'Clear' links. At the bottom, there is a table header with columns: Level, Code, Dept, ID, Priority, Escalated Item, Comments, Creator ID, Submitter ID, Date, Reason, Message, Priority Reason. Below the header are navigation links: 'First Prev Next Last', 'Approve Reject Take Task Return Task Change Priority Refresh', and 'Menu Recall Worklist Details'.

3. **Select** the documents that you would like to approve.
Click **Take Task**. This will remove the items from the Departmental Approval Queue and put them in your approval queue.

The screenshot shows the 'Worklist' interface with the same filters as the previous screenshot. The 'Select Worklist' is now set to 'Dept 445 - Approval Queue'. Below the filters 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. The table contains two rows of data. The first row has 'GAX', '445', '18032200154', 'Normal', 'No', 'No', 'learner01', 'learner01', '3/22/2016 9:14:37 PM', 'Apply approval', 'Please Review and Approve or Reject'. The second row has 'GAX', '445', '18032200153', 'Normal', 'No', 'No', 'learner01', 'learner01', '3/22/2016 9:12:18 PM', 'Apply approval', 'Please Review and Approve or Reject'. Red boxes highlight the checkboxes in the first two columns of both rows and the 'Take Task' button in the navigation links below the table. Below the table are navigation links: 'First Prev Next Last', 'Approve Reject Take Task Return Task Change Priority Refresh', and 'Menu Recall Worklist Details'.

4. Select your name from the Worklist.
5. Select the documents for approval. Click Approve

The screenshot shows a 'Worklist' interface. At the top, there is a navigation bar with links for 'Problematic', 'Budgeting', 'Accounts Receivable', and 'Accounts Payable'. Below this, the 'Worklist' title is displayed. A dropdown menu labeled 'Select Worklist' is set to 'MaryBeth Beighley' and is highlighted with a red box. To its right is a link 'Change Worklist Role Order'. Below the dropdown are several input fields: 'Level', 'Code', 'Dept', 'ID', 'Submitter ID', and 'Escalated Item'. There are also 'Browse' and 'Clear' links. A table of tasks is shown below, with columns: 'Level', 'Code', 'Dept', 'ID', 'Priority', 'Escalated Item', 'Comments', 'Creator ID', 'Submitter ID', 'Date', 'Reason', 'Message', and 'Priority'. Two rows are visible, both with checkboxes checked. The 'Approve' button in the first row is highlighted with a red box. Below the table are navigation links: 'First', 'Prev', 'Next', 'Last', 'Approve', 'Reject', 'Take Task', 'Return Task', 'Change Priority', and 'Refresh'. At the bottom, there are links for 'Menu', 'Recall Worklist Details', and 'Worklist Details'.

6. You should receive an “Approve action completed” message.

The screenshot shows a message bar at the top of the interface. The message text is '1 of 1 | View All Approve action completed.' and is highlighted with a red box. Below the message bar, the 'Worklist' title is visible.

7. You're done!