Approving Worklist Items

Purpose: Use this document as a reference for using the ctcLink Worklist to approve workflow items.

Audience: Managers who approve requests for resources.

You must have at least one of these local college managed security roles:

- ZZ Former Employee
- ZZ PeopleSoft User

You must also set these User Preference Definitions:

- User Preferences: Purchase Order Processing

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

Your Worklist is part of the ctcLink Approval Framework.

What is a Worklist? A Worklist is an organized list of to-do items that has been routed to you through a workflow process. The list is an automated communication to you that a transaction requires your approval or that something has occurred and you are being notified.

Many daily tasks are part of a larger process that involves several steps and people working together. The term *workflow* refers to this process, which could encompass, for example, the approval of a purchase requisition or a job change request form. To facilitate this type of multiuser process, ctcLink can automatically trigger workflow notifications to inform the next approver in the process of work awaiting them.

You can select a item to work on, and the item provides access to the ctcLink pages that you need. This enables you to bypass other navigation and work directly from the worklist. The target page that appears when you select an item is based on the type of activity that you perform. For example, if you are a resource manager and you receive notification that an assignment date changed for one of your resources, you access the Assign Resource (approval) page from the worklist if assignment approval workflow is enabled.

Again, many types of items might appear in your Worklist, depending on your college's choices. In this example, we'll look at a Worklist that contains a credit billing invoice, a cash advance request, and a travel authorization request.

The bottom line? Your Worklist is a time-saver, designed to bundle your approvals in one place, then to speed your navigation to the pages you use to manage your approvals.

Use your Worklist as a convenient portal from where you review and manage item requests that require your approval. Please work with your college and with SBCTC to decide which items to include in your Worklist.

Approving Worklist Items by My Worklist - Summary View

Navigation: Worklist > My Worklist - Summary View

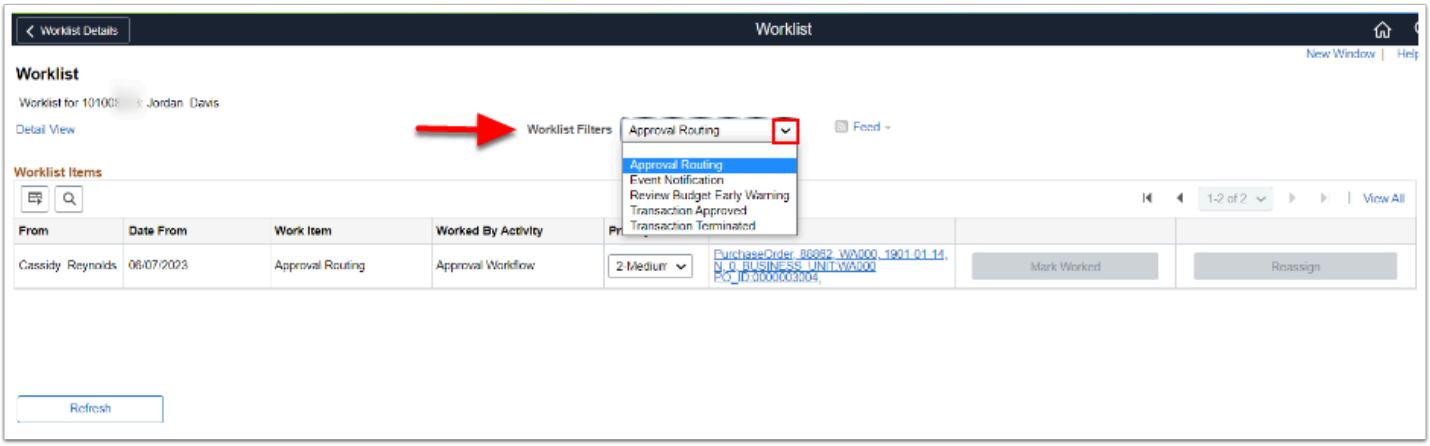
The **Worklist** - **Summary View** page displays. Here are descriptions of its contents:

Worklist Items Label	Description
From	Displays the individual who triggered the work item.
Date From	Displays the date when the work item was triggered.
Work Item	Displays the type of Approval Framework item.
Worked By Activity	Displays the action that generated the workflow item You can have multiple entries with the same action, but each entry represents a different item that requires attention.
Priority	1 = High 2 = Medium 3 = Low
Link	Select a link in this column to access the target page—the page where you work on the item. The target page is specific to the type of activity that you perform. For example, if the action is "Recommendation Made", the link accesses the Job Detail page, where you can view

Worklist Items Label	Description
	information about the resource request.
Mark Worked	Select an icon in this column to mark an item as "Worked" if you have performed the necessary actions. This removes items that ctcLink Resource Management workflow processes generate.
Reassign	Allows you to transfer the Worklist item to another approver.

Utilize the **Worklist Filters** drop down menu to refine results by Work Item status:

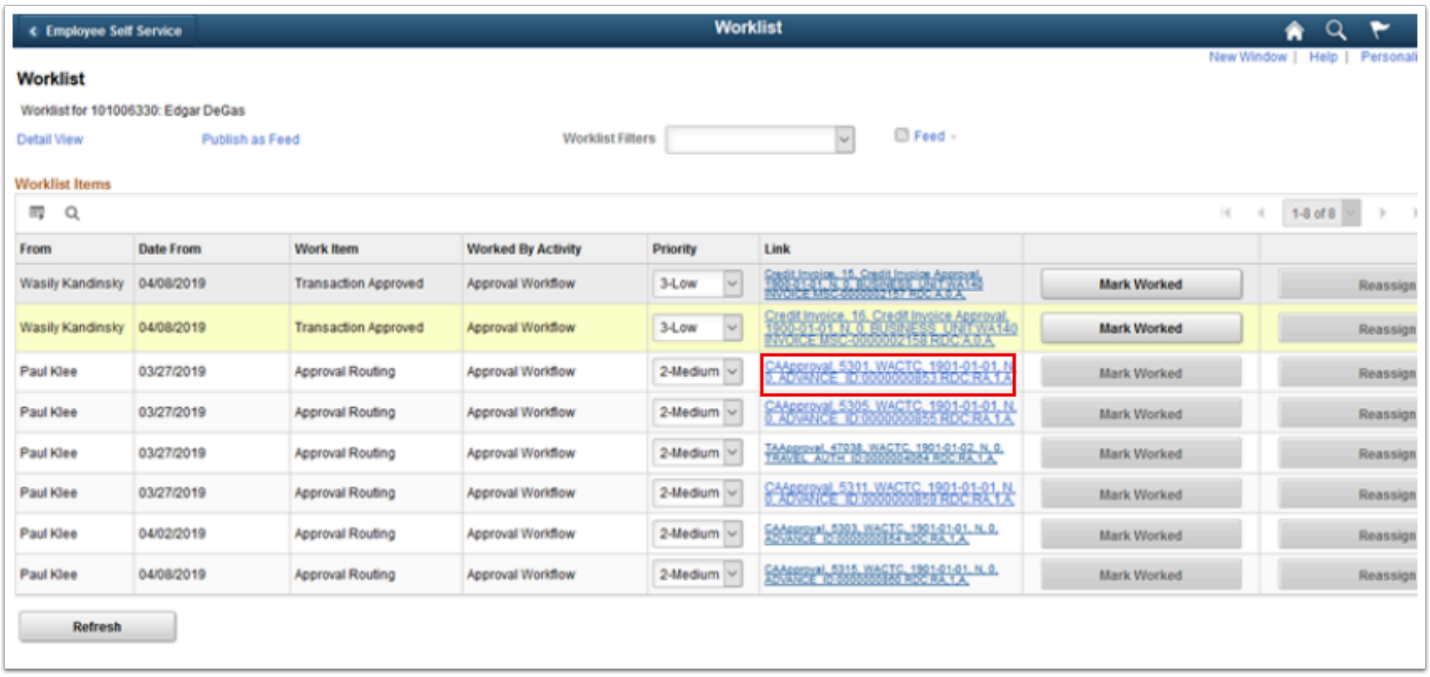
- Approval Routing
- Event Notification
- Review Budget Early Warning
- Transaction Approved
- Transaction Terminated



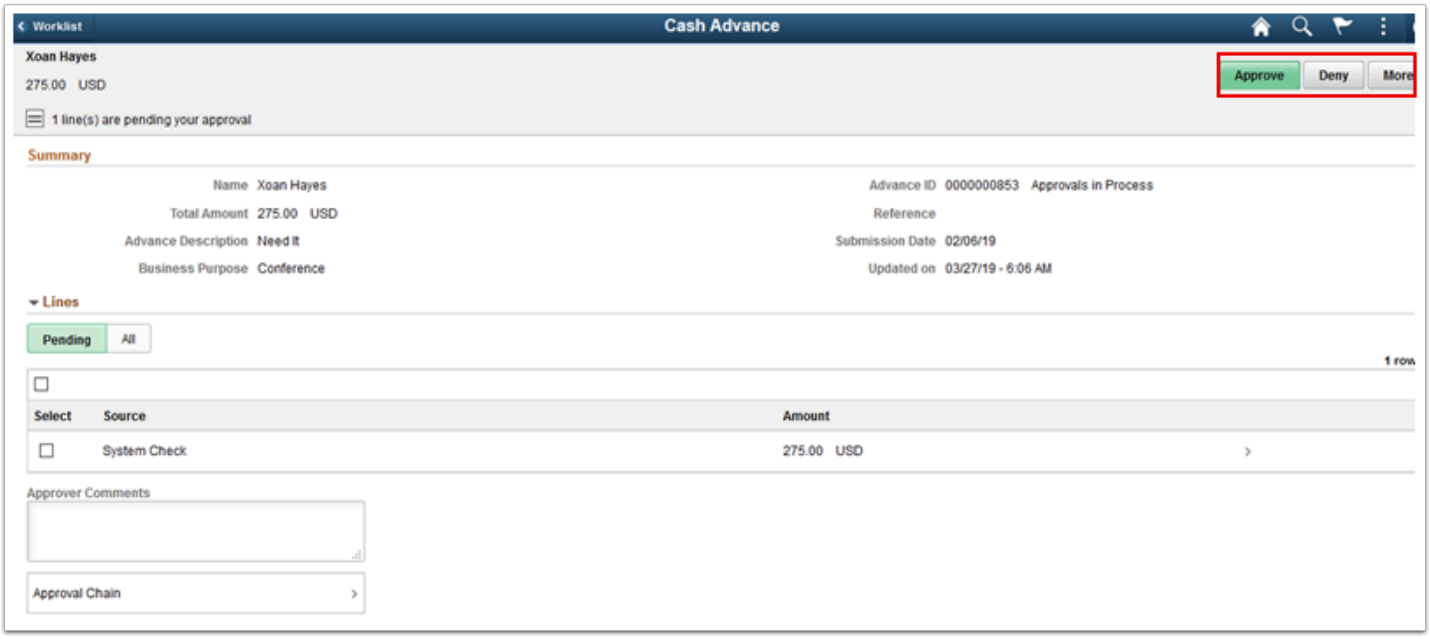
Utilize the column sort functionality to refine your results. Select the **Column Title** such as 'From' to view the EMPL name or the 'Date From' for most recent items. The following are a few examples of common Worklist Approval Items.

Cash Advance Approvals

1. From the Worklist Items section, select a **Cash Advance Approval** (CAA prefix) link.

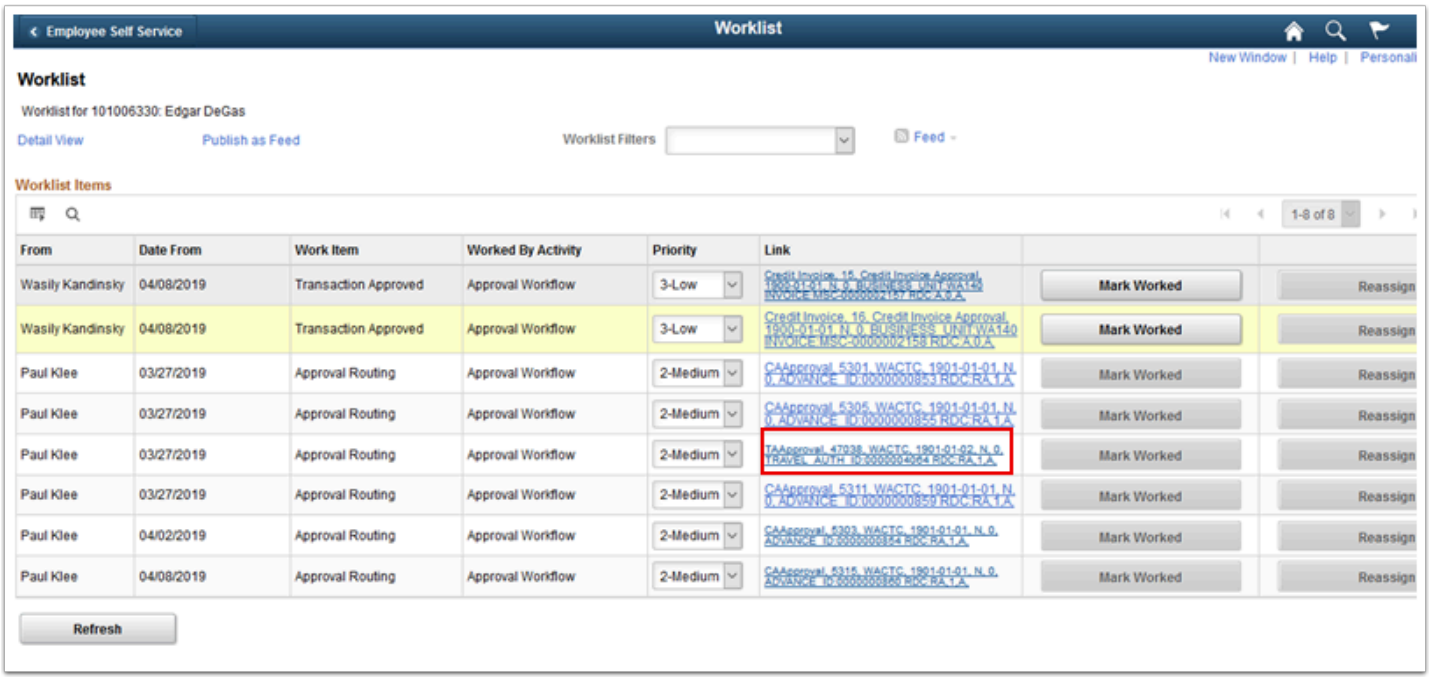


2. The Cash Advance approval page displays. Use it to **Approve** or **Deny** the request.

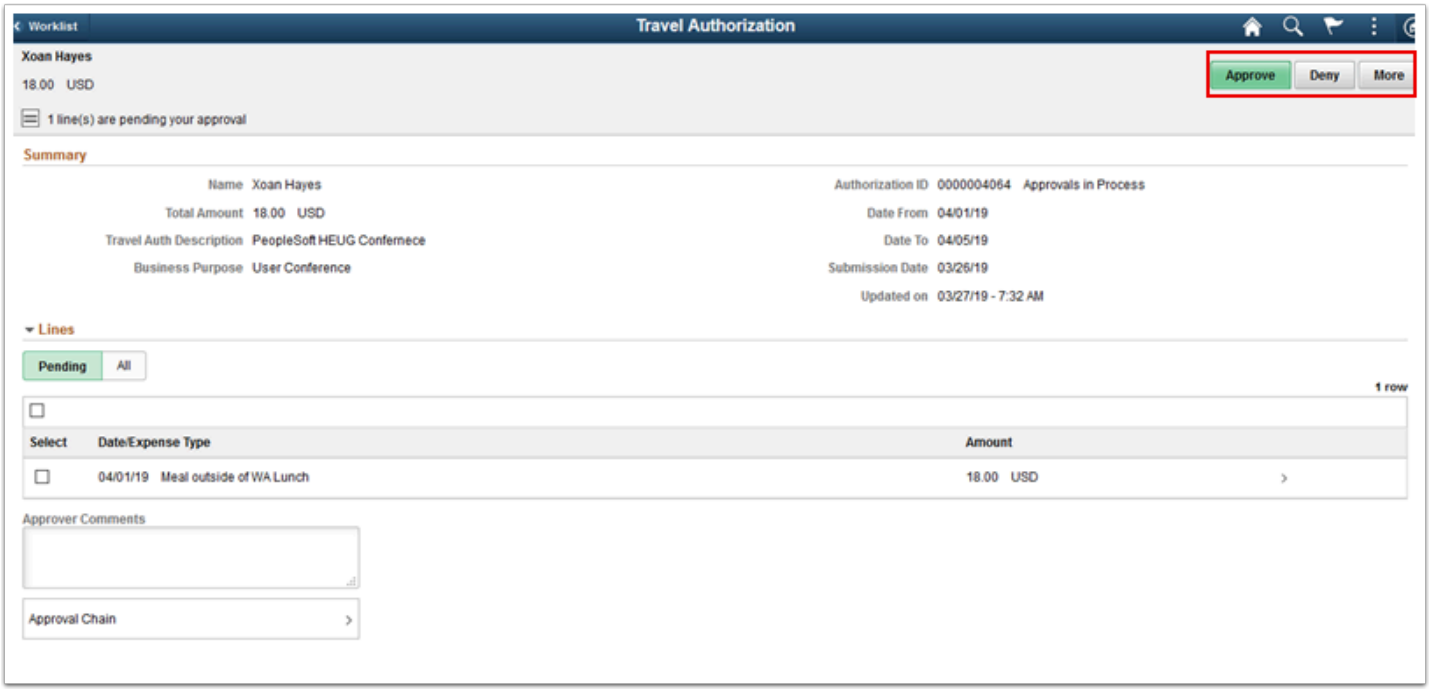


Travel Authorization Approvals

1. From the Worklist Items section, select a **Travel Authorization Approval** (TAA prefix) link.

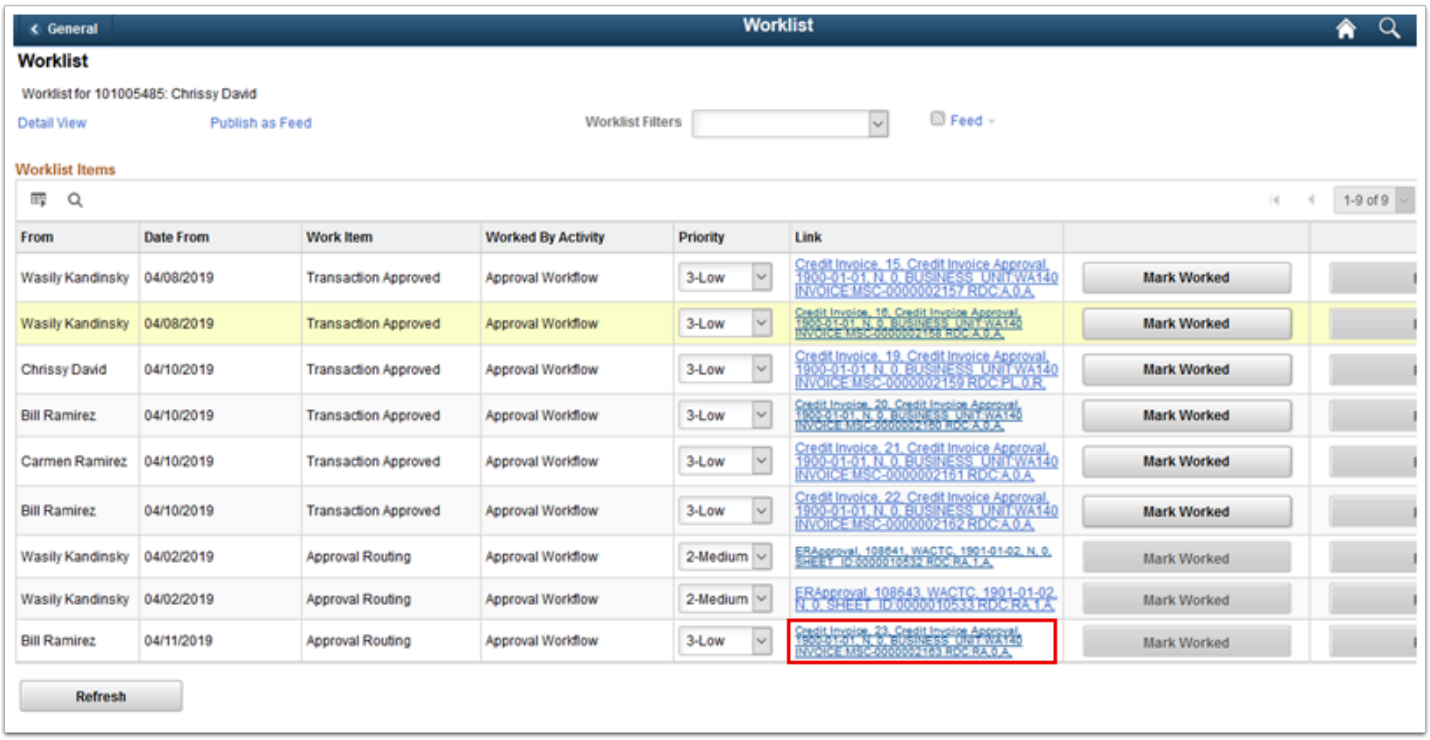


2. The **Travel Authorization** approval page displays. Use it to **Approve** or **Deny** the request.

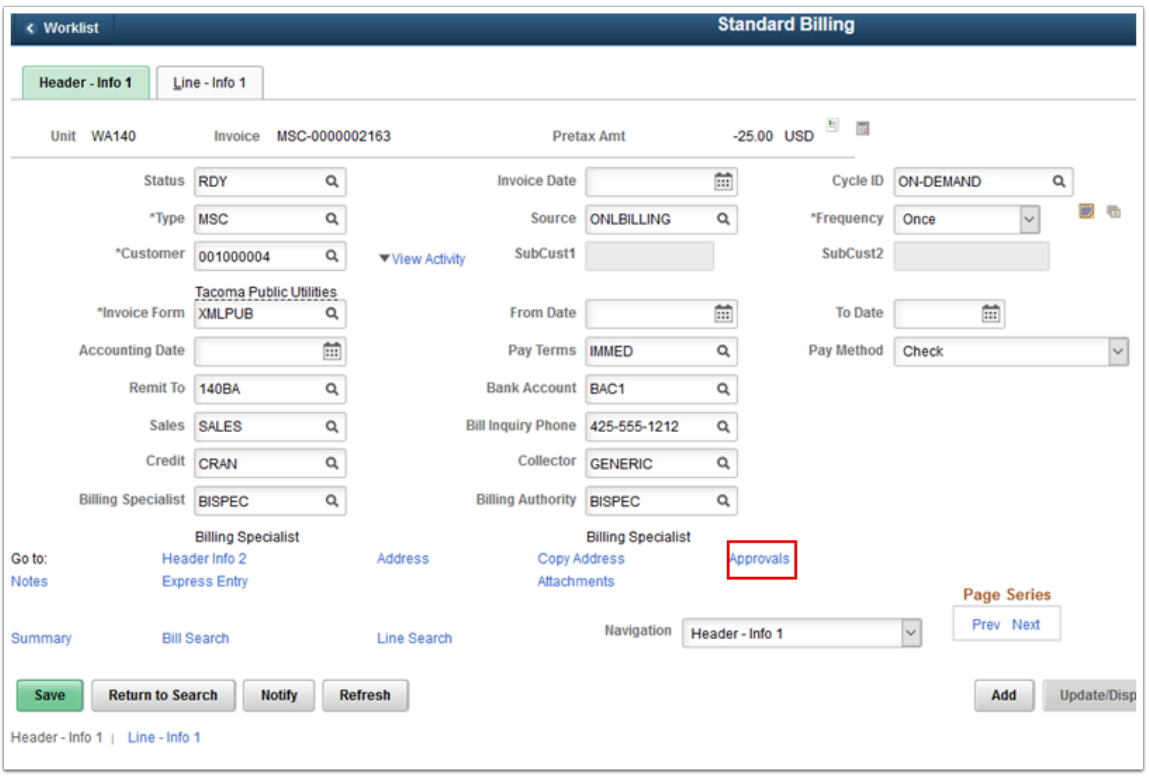


Billing Credit Invoice Approval

1. From the Worklist Items section, select a **Credit Invoice** link.



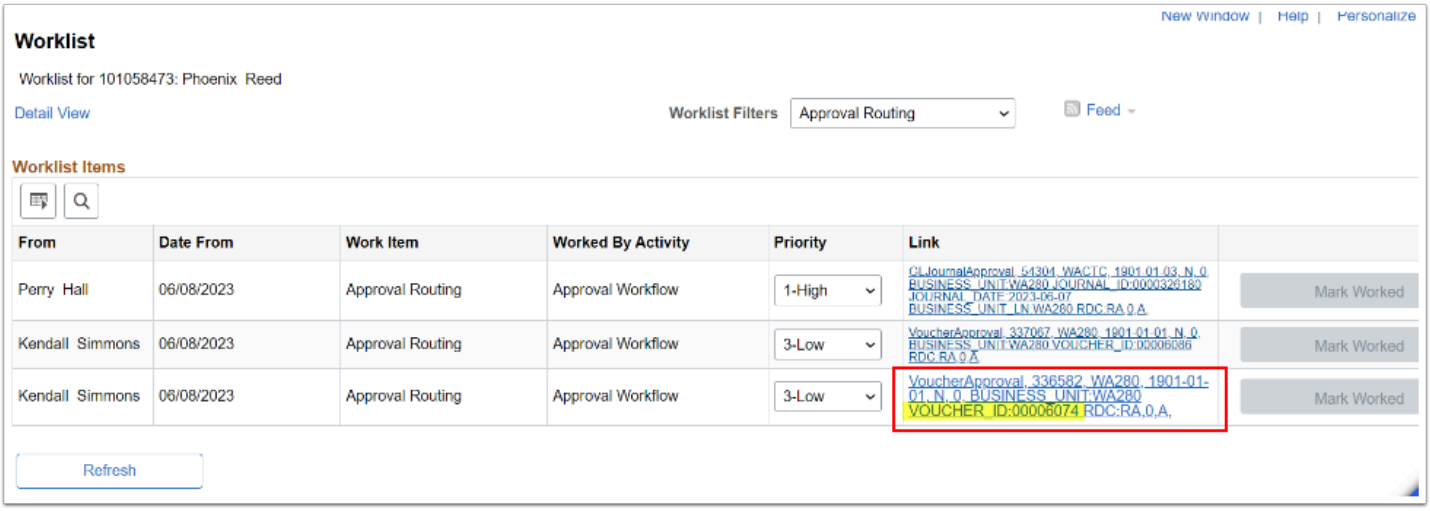
2. The Standard Billing, Header-Info 1 tab displays. Select the **Approvals** link to approve or deny the request.



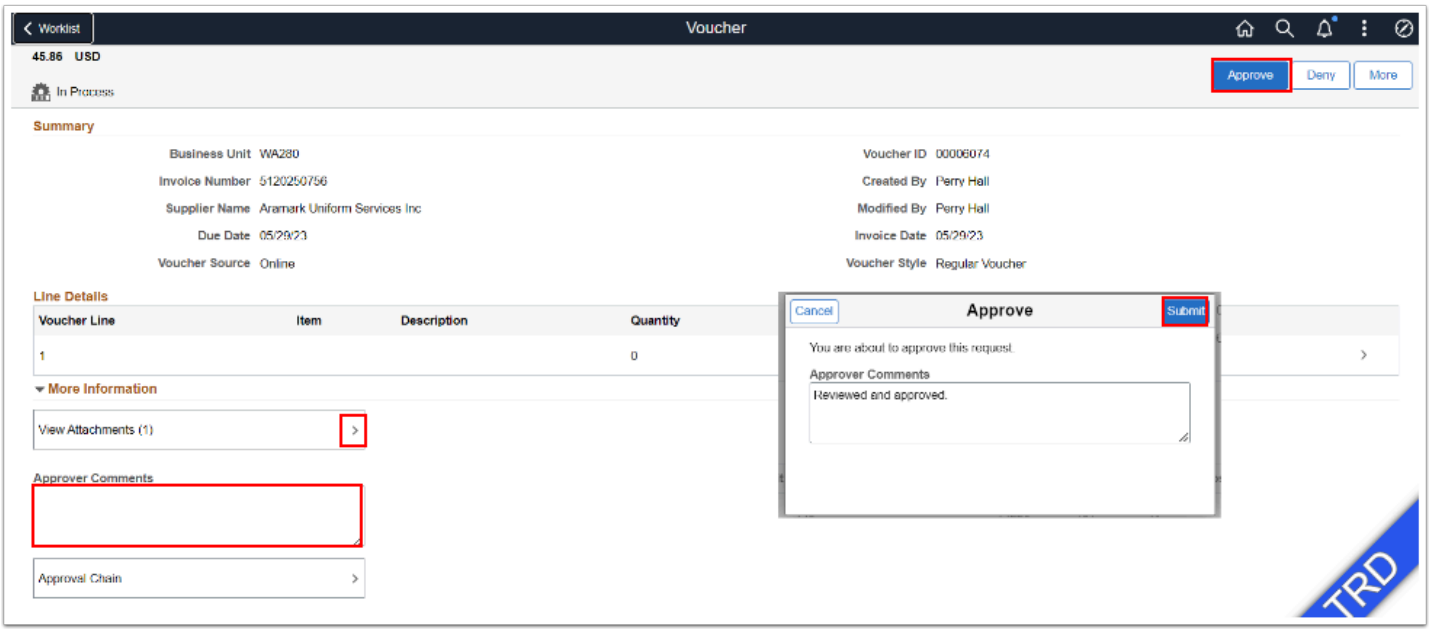
8. Process complete.

Voucher Approvals

1. From the Worklist Items section, select the Voucher approval link.



2. The Voucher page opens to display the summary data of the voucher.
3. Optional to view attachments, add Approver comments or view Approval Chain.
4. Select the **Approve button.** Optional to select **Deny,** or **More** (to Pushback or Hold) buttons.
5. The Approve box opens.
6. Optional to add comments and select **Submit** to submit the approval.
7. The approved Worklist item disappears from your Worklist.



8. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to Approving Worklist Items. This link will open in a new tab/window.