

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

The screenshot displays the 'Worklist' interface. At the top, there's a 'Worklist Filters' dropdown menu, which is currently open, showing a list of filter options: 'Approval Routing', 'Event Notification', 'Review Budget Early Warning', 'Transaction Approved', and 'Transaction Terminated'. A red arrow points to this dropdown. Below the filters, there's a table of worklist items. The table has columns: 'From', 'Date From', 'Work Item', 'Worked By Activity', and 'Priority'. The first row shows 'Cassidy Reynolds' in the 'From' column, '06/07/2023' in the 'Date From' column, 'Approval Routing' in the 'Work Item' column, 'Approval Workflow' in the 'Worked By Activity' column, and '2-Medium' in the 'Priority' column. To the right of the table, there are buttons for 'Mark Worked' and 'Reassign'. At the bottom left, there is a 'Refresh' button.

💡 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.

Employee Self Service

Worklist

New Window | Help | Personal

Worklist

Worklist for 101006330: Edgar DeGas

Detail View

Publish as Feed

Worklist Filters

Feed

Worklist Items

1-8 of 8

From	Date From	Work Item	Worked By Activity	Priority	Link		
Wasily Kandinsky	04/08/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 15 Credit Invoice Approval 19001-01 N 0 BUSINESS UNIT WATSON INVOICE MSC-0000002158 ROC-A-TA	Mark Worked	Reassign
Wasily Kandinsky	04/08/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 16 Credit Invoice Approval 19001-01 N 0 BUSINESS UNIT WATSON INVOICE MSC-0000002158 ROC-A-TA	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5301 WACTC 1901-01-01 N 0 ADVANCE ID 0000000057 ROC-RATA	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5305 WACTC 1901-01-01 N 0 ADVANCE ID 0000000057 ROC-RATA	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	TAApproval 47026 WACTC 1901-01-02 N 0 TRAVEL AND 0200000004 ROC-BATA	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5311 WACTC 1901-01-01 N 0 ADVANCE ID 0000000057 ROC-RATA	Mark Worked	Reassign
Paul Klee	04/02/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5303 WACTC 1901-01-01 N 0 ADVANCE ID 0000000057 ROC-RATA	Mark Worked	Reassign
Paul Klee	04/08/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5315 WACTC 1901-01-01 N 0 ADVANCE ID 0000000057 ROC-RATA	Mark Worked	Reassign

Refresh

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

Worklist		Cash Advance		Home Search Help More						
Xoan Hayes		275.00 USD		Approve Deny More						
1 line(s) are pending your approval										
Summary										
Name: Xoan Hayes		Advance ID: 0000000853		Approvals In Process						
Total Amount: 275.00 USD		Reference:								
Advance Description: Need It		Submission Date: 02/06/19								
Business Purpose: Conference		Updated on: 03/27/19 - 6:06 AM								
Lines										
Pending All										
1 row										
<input type="checkbox"/>	Select	Source	Amount							
<input type="checkbox"/>		System Check	275.00 USD							
Approver Comments										
Approval Chain										

Travel Authorization Approvals

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

Employee Self Service

Worklist

New Window

Help

Personal

Worklist

Worklist for 101006330: Edgar DeGas

Detail View

Publish as Feed

Worklist Filters

Feed

Worklist Items

1-8 of 8

From	Date From	Work Item	Worked By Activity	Priority	Link		
Wasily Kandinsky	04/08/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 15 Credit Invoice Approval 1900-01-01 N 0 BUSINESS UNIT WAT40 INVOICE MSC-0000004157 RDC-A.T.A.	Mark Worked	Reassign
Wasily Kandinsky	04/08/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 15 Credit Invoice Approval 1900-01-01 N 0 BUSINESS UNIT WAT40 INVOICE MSC-0000002158 RDC-A.T.A.	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5301 WACTC 1901-01-01 N 0 ADVANCE ID 0000000853 RDC-R.A.T.A.	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5305 WACTC 1901-01-01 N 0 ADVANCE ID 0000000855 RDC-R.A.T.A.	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	TAApproval 47028 WACTC 1901-01-02 N 0 TRAVEL AUTH ID 0000000854 RDC-R.A.T.A.	Mark Worked	Reassign
Paul Klee	03/27/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5311 WACTC 1901-01-01 N 0 ADVANCE ID 0000000859 RDC-R.A.T.A.	Mark Worked	Reassign
Paul Klee	04/02/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5303 WACTC 1901-01-01 N 0 ADVANCE ID 0000000854 RDC-R.A.T.A.	Mark Worked	Reassign
Paul Klee	04/08/2019	Approval Routing	Approval Workflow	2-Medium	CAApproval 5315 WACTC 1901-01-01 N 0 ADVANCE ID 0000000860 RDC-R.A.T.A.	Mark Worked	Reassign

Refresh

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

Worklist			Travel Authorization								
Xoan Hayes			18.00 USD			Approve Deny More					
1 line(s) are pending your approval											
Summary											
Name Xoan Hayes			Authorization ID 0000004064 Approvals in Process								
Total Amount 18.00 USD			Date From 04/01/19								
Travel Auth Description PeopleSoft HEUG Conference			Date To 04/05/19								
Business Purpose User Conference			Submission Date 03/26/19								
			Updated on 03/27/19 - 7:32 AM								
Lines											
Pending All											
			1 row								
Select	Date/Expense Type	Amount									
<input type="checkbox"/>	04/01/19 Meal outside of WA Lunch	18.00 USD	>								
Approver Comments											
Approval Chain			>								

Billing Credit Invoice Approval

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

Voucher Approvals

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

Worklist
Worklist for 101058473: Phoenix Reed

Detail View Worklist Filters Approval Routing Feed

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link	
Perry Hall	06/08/2023	Approval Routing	Approval Workflow	1-High	GL Journal Approval_54304_WA280_1901-01-03_N_0_BUSINESS_UNIT-WA280_JOURNAL_ID:0000326180_JOURNAL_DATE:2023-06-07_BUSINESS_UNIT-LN-WA280_RDC:RA.0.A	Mark Worked
Kendall Simmons	06/08/2023	Approval Routing	Approval Workflow	3-Low	VoucherApproval_337067_WA280_1901-01-01_N_0_BUSINESS_UNIT-WA280_VOUCHER_ID:00006086_RDC:RA.0.A	Mark Worked
Kendall Simmons	06/08/2023	Approval Routing	Approval Workflow	3-Low	VoucherApproval_336582_WA280_1901-01-01_N_0_BUSINESS_UNIT-WA280_VOUCHER_ID:00006074_RDC:RA.0.A	Mark Worked

Refresh

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.

Voucher

45.86 USD In Process

Summary

Business Unit: WA280
Invoice Number: 5120250756
Supplier Name: Aramark Uniform Services Inc
Due Date: 05/29/23
Voucher Source: Online

Voucher ID: 00006074
Created By: Perry Hall
Modified By: Perry Hall
Invoice Date: 05/29/23
Voucher Style: Regular Voucher

Line Details

Voucher Line	Item	Description	Quantity
1			0

More Information

View Attachments (1)

Approver Comments

Approval Chain

Approve

You are about to approve this request.

Approver Comments

Reviewed and approved.

Submit

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.