

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', 'Pr', and a link to the item details. The first row shows 'Cassidy Reynolds' as the 'From' user, '06/07/2023' as the 'Date From', 'Approval Routing' as the 'Work Item', 'Approval Workflow' as the 'Worked By Activity', and '2-Medium' as the 'Pr'. The link to the item details is 'PurchaseOrder 86852 WA000 1901 01 14'. 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 190001-01 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 190001-01 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 Personal						
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, UNIV, WAT40, INVOICE MSC-0000004157 RDC-A, A, 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, UNIV, WAT40, INVOICE MSC-0000002158 RDC-A, A, 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			Home Search Help																		
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			Date To: 04/05/19																		
Travel Auth Description: PeopleSoft HEUG Conference			Submission Date: 03/26/19			Updated on: 03/27/19 - 7:32 AM																		
Business Purpose: User Conference																								
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																								
<input type="text"/>																								
Approval Chain >																								

Billing Credit Invoice Approval

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

Worklist						
Worklist for 101005485: Chrissy David						
Detail View Publish as Feed Worklist Filters <input type="text"/> Feed						
Worklist Items						
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.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-A.O.A.	Mark Worked
Wasily Kandinsky	04/08/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 16 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-A.O.A.	Mark Worked
Chrissy David	04/10/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 19 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-PL O.R.	Mark Worked
Bill Ramirez	04/10/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 20 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-A.O.A.	Mark Worked
Carmen Ramirez	04/10/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 21 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-A.O.A.	Mark Worked
Bill Ramirez	04/10/2019	Transaction Approved	Approval Workflow	3-Low	Credit Invoice 22 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-A.O.A.	Mark Worked
Wasily Kandinsky	04/02/2019	Approval Routing	Approval Workflow	2-Medium	ERApproval 108841 WACTC 1901-01-02 N.O. SHEET ID 0000010533 RDC-RA.T.A.	Mark Worked
Wasily Kandinsky	04/02/2019	Approval Routing	Approval Workflow	2-Medium	ERApproval 108543 WACTC 1901-01-02 N.O. SHEET ID 0000010533 RDC-RA.T.A.	Mark Worked
Bill Ramirez	04/11/2019	Approval Routing	Approval Workflow	3-Low	Credit Invoice 23 Credit Invoice Approval 1900-01-01 N.O. BUSINESS UNIT WA140 INVOICE MSC-0000002163 RDC-RA.O.A.	Mark Worked
Refresh						

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

Worklist		Standard Billing	
Header - Info 1		Line - Info 1	
Unit	WA140	Invoice	MSC-0000002163
Pretax Amt	-25.00	USD	
Status	RDY	Invoice Date	
*Type	MSC	Source	ONLBILLING
*Customer	001000004	SubCust1	
*Invoice Form	Tacoma Public Utilities XMLPUB	SubCust2	
Accounting Date		From Date	
Remit To	140BA	Pay Terms	IMMED
Sales	SALES	Bank Account	BAC1
Credit	CRAN	Bill Inquiry Phone	425-555-1212
Billing Specialist	BISPEC	Collector	GENERIC
Billing Specialist	BISPEC	Billing Authority	BISPEC
Go to:	Header Info 2	Billing Specialist	Approvals
Notes	Express Entry	Copy Address	
Summary	Bill Search	Attachments	
Navigation	Header - Info 1	Page Series	Prev Next
Save	Return to Search	Notify	Refresh
Add	Update/Disp		

- Process complete.

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	Voucher Approval 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	Voucher Approval 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.

Worklist

Voucher

45.86 USD

In Process

Approve

Deny

More

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

TRD

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.