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1. Introduction to Workflow

Workflow in the Spectrum System allows us to automate business processes and deliver information to the right people at the right time. For example, workflow allows us to automate the purchase requisition approval process. Once a requisition is entered, workflow will route the requisition to the appropriate Approver, and when the Final Approver approves the requisition, workflow will route the requisition to the right buyer in Purchasing. This is just an example of the workflow capabilities.

1.1. Chapter Objectives

After completing reading and practicing this chapter the user will be able to operate and approve transactions using the Worklist.
2. Selecting the Worklist
To select Worklist and look for pending transactions that need to be approved select View, Navigator Display, Worklist.
3. Adding the Worklist Icon to the Tool Bar

To add the Worklist Icon to your toolbar, follow these steps:

1. At the Menu Bar select Edit, Preferences, Toolbar

   ![Diagram of the Menu Bar](image)

   1. Select the Worklist Icon and drag it from the Available Buttons (right) to the Current Toolbar (left).
   2. Locate the icon at desire location on your toolbar. You can also the arrows to select. Using the arrow will locate the icon to the right side of the toolbar.

   ![Diagram of Toolbar Customization](image)

   2. When finish click ok to proceed. The Worklist icon should be in your toolbar.

   ![Toolbar with Worklist Icon](image)
4. Viewing the Worklist

This is what your Worklist should look like. It is similar to the Windows Explorer. The left side of the panel will show the word Worklist and the right side will show the type of transactions that are pending to be approved.

To view all pending transaction double click in the right side of the panel under category presented under Worklist name. This will show a list of transaction waiting for approval.

Select transaction you wish to approve. This will take into the transaction approval panel. The approval panels will be different and related to transaction being approved (Reqs, PO, JE & Voucher).
5. Approving Requisitions

To approve requisitions follow these steps:
1. To select requisition approval click on the Requisition Approval Folder and view all pending transactions.
2. Select transaction to be approved.
After selecting the transaction your panel should look like the one below. Review selected transaction. Using the drop down box select Approve, Deny or Recycle.

If you select:

**Approve:** transaction will follow its workflow.

**Deny:** Transaction will not continue its workflow and will go back to the originator.

**Recycle:** Transaction will be returned to previous approver.
6. Approving Journal Entries

Follow step 1 and 2 of section 5. Select transaction to be approved.

Review Journal Header and Lines panel. Select approval status using the radio buttons. If you select:

- **Approve**: transaction will follow its workflow.
- **Deny**: Transaction will not continue its workflow and will go back to the originator. If transaction is to be denied enter comments to explain to originator.
- **Recycle**: Transaction will be returned to previous approver.

Click on diskette to save changes.
7. Approving Vouchers

Follow step 1 and 2 of section 5. Select transaction to be approved. Review information in all three panels.

The **Approval Panel** tab will allow the user to review basic information from the vouchers invoice header panel such as vendor, invoice information and gross amounts. Do not change status in this until all voucher panels have been reviewed.

The **Line Information** panel tab allows the user to view line information; line number, description, quantity, and amount.
The **Charge Information Panel** tab lets the approver review chartfields being used in this voucher. After reviewing this panel go back to the **Approval Panel** tab.

Select appropriate transaction status by selecting with the radio buttons. Save transaction to continue its workflow. This can be done by clicking the diskette in the toolbar or by selecting File and then Save from the menu bar.

If you select:
- **Approve**; transaction will follow its workflow.
- **Deny**; Transaction will not continue its workflow and will go back to the originator. If transaction is to be denied enter comments to explain to originator.
- **Recycle**; Transaction will be returned to previous approver.

Click on diskette to save changes.
8. Approving Purchase Orders

Follow step 1 and 2 of section 5. Select transaction to be approved.

When approving Purchase Orders two panels will be shown, Approval and Detail Panel Tabs.

To view purchase order header and schedule information select the Approval panel.

To view information line details select the Details panel. To extract detailed information, press the fetch button. Full line details will display in your screen.
To set transaction to its appropriate status (approved, deny or recycle), return to the Approval panel using the drop down box. After selecting status click the diskette on the toolbar or select File, Save from the menu bar to save changes.

If you select:

**Approve:** transaction will follow its workflow.

**Deny:** Transaction will not continue its workflow and will go back to the originator. If transaction is to be denied enter comments to explain to originator.

**Recycle:** Transaction will be returned to previous approver.
9. Returning to the Main Menu

To return to regular business panels from the Worklist the user needs to go into the Menu Bar and select View, Navigator Display, Menus Only.