Introduction

- Workflow is the automated routing and handling of pending documents that require approval. It describes the path a document takes between its draft and final approval stages.
- Once a document is ready to be approved, it is workflowed to the appropriate Worklists where it waits for action from the appropriate user.
- In addition to your personal Worklist, you will also be able to view Worklists for each workflow/approval role granted to you.

Approving a Document

1. Login to AdvantageME.
2. Click **Message Center** in the Secondary Navigation Panel
3. In the list that extends below, click Worklist
4. The Worklist page displays. If the listing of documents is too long to be displayed in its entirety, use the navigational links (First, Prev, Next, Last) to move through the listing.

   NOTE: The Worklist page, by default, will open displaying the documents specifically assigned to you. Your full name will be displayed in the **Select Worklist** selection box. If you are a member of any workflow/approval roles, they will be displayed in the selection box too. All the documents that have been assigned to the role will appear.

Worklist Page

5. If the task appears under your full name role (your personal Worklist), then skip to step 10.
6. If the task is not in your personal Worklist, and you would like to check one of the other approver roles you have, select the appropriate role from the **Select Worklist** selection box. All documents under this role will display.
7. To take the task, click the check box to the left of the task/document pending approval.
8. Click Take Task.
9. To open your Worklist, select your full name from the **Select Worklist** selection box. The document will now appear.
10. Click the Document ID of the document you wish to approve. This will open the document for viewing, at which point you will be able to approve the task.

Document Page

11. In the Document task bar at the bottom of the page, click the appropriate action:
    a. Approve—Applies your approval to the selected document at the currently assigned approval level. Once you have approved the document, it is removed from your Worklist and routed to the next level for approval, if any
    b. Reject – Indicates you do not approve the selected document at the current approval level. The document is routed back to the approver who previously approved the document
    c. An action from the Action Menu—see the reverse side in the Policies section for more information
12. The Comments page will open.

Comment Page

13. Click Insert.
14. Enter text in the **Subject** and **Comments** fields.
15. Click Save.
16. Click Back to return to the Document page.
17. You will notice that the document is in Final phase.
18. Click **Close** to exit the document.

If applicable, once the document is moved to the next approval level, the document can be either approved, by clicking *Approve*, or unapproved by clicking *Unapprove* in the Action Menu. Approved documents will move through the approval routing while unapproved documents will be returned to the previous approval role's Worklist, as if it was rejected.

State of Maine Policies

Due to Service Center structure, some departments will have the ability to view other department's worklists, but will not have the ability to perform actions on tasks for which they do not have security access. Filtering a search will minimize the amount of documents on the filtered Worklist.

From the Worklist page you have the ability to:

- Return Task
- Refresh
- Recall
- Take Task

From the Action Menu, you can do the following:

- Reject All
- Unapprove
- Track Work in Progress (TWIP)
- Reassign
- Manual Route

State of Maine Resources

Visit the AdvantageME Training Web Site (address below) for:

- Training Materials—specifically 101 and 801
- Video Demonstrations
- Help Desk Form
- AdvantageME Newsletter

For immediate assistance, contact the Help Desk at (207) 624-7700.

http://inet.state.me.us/osc/accounting/mfasis%20upgrade/training.htm

AdvantageME

Financial Management System

Workflow—Approving a Document

Quick Reference Card