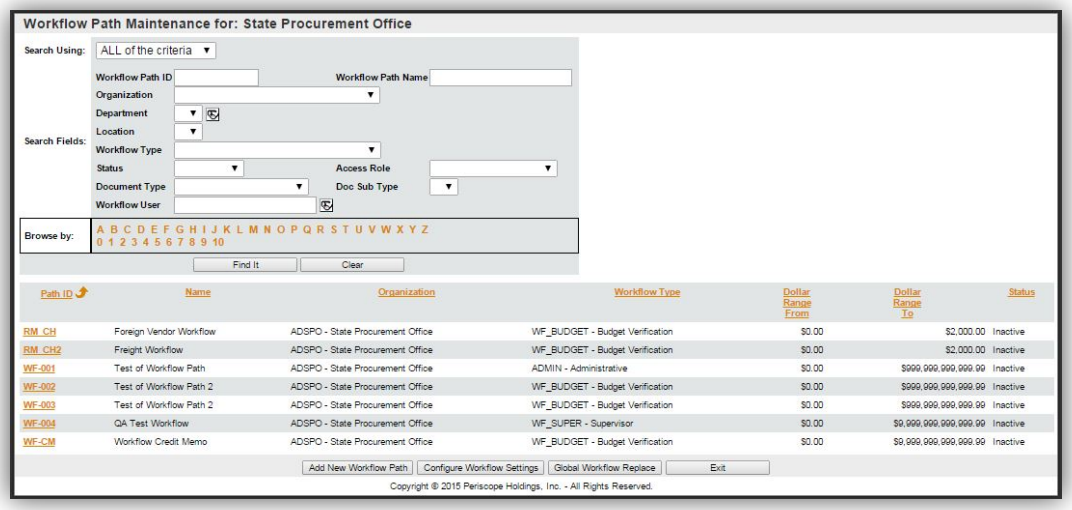
Workflows: Administration

Workflows use user-input routing logic to determine the path an Invoice should take toward validation. This functionality automatically triggers actions such as notification emails and status changes, and passes a document to the appropriate user, all in order to streamline workflow. Workflow routing logic automatically triggers whenever a document is checked back into the Workflow, updating next-step routing according to any changes the User may have made.

Managing Saved Workflows

Workflows are managed on the **Organization Administrator**'s home page, under **Maintain Workflow Paths and Settings**. From this page, the Administrator can view all paths, search for a specific path or path type, create a new path, edit an existing path, or configure Workflow settings.



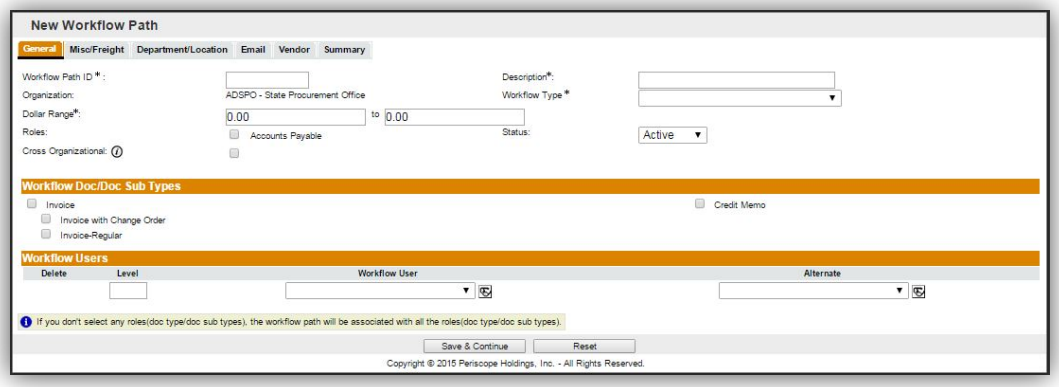
To locate a specific Workflow, search through all saved Workflows using the fields provided, browse through the list of saved Workflows through the alphabetical listing, or select it from the full list of Workflows at the bottom of the page.

When you have located it, click that Workflow's *Path ID* to view or edit its settings.

Creating a Workflow

To create a new Workflow, click on the *Add New Workflow Path* button found at the bottom of the page. This will bring you to the **New Workflow Path** page. Fill out the form, entering as much information as is necessary to define your new Workflow. As with all of BuySpeed, fields with an asterisk by their name are required fields. Consider using the Workflow Planning Worksheet (found at the end of this document) to guide you.

Workflows: Administration



Note: Workflows operate by inclusive logic, meaning that the Workflow you create will only apply to documents that match all of the criteria you enter. Take care when defining a Workflow's criteria. If a Workflow is intended to apply in an either/or situation, create two separate Workflows, one for each situation.

Be sure to take care when adding Workflow Users to your Workflow. These Users must have the required permissions to interact with the Invoice. Select the appropriate User, then assign them a Level (User Levels determine the order in which User's actions are performed). Each Workflow may only have one primary User at each level, but may have many Alternate users. When a User's task has been completed, all of the Users at the following level in that Workflow will receive Notification Emails letting them know that there is an Invoice awaiting their input.

Complete the **General** new Workflow form, and click *Save & Continue*. After saving a Workflow, add more information or assign actions to this Workflow by navigating to the other tabs on the Workflow Path. At any time, click *Save & Continue* and visit the **Summary** page to view all current saved settings for the open Workflow.

Workflow Overrides

If you have more than one Workflow that could apply to one Invoice, the first determinant is their comparative Workflow Type priority levels. Outside of that, Workflow Overrides determine which Workflow takes priority. If, for instance, you have a Workflow defined for foreign vendors and a Workflow defined for electronic purchases, when a user creates an Invoice for speakers from a vendor in Canada, your Workflow Type level and your override settings will determine which path that Invoice will follow.

A Workflow's Overrides can be set under that Workflow's **Overrides** tab. You may search for Workflows which that Workflow should have priority over, browse via the alphabetical listing, or view all saved Workflows at the bottom of the page.

Click the check box to the left of each Workflow your Workflow should have priority over, then click *Save & Exit* or *Save & Continue*.

Note: A Workflow may not override any Workflows of the same priority level. Keep this in mind when setting up your Workflow Types.

Workflows: Administration

Workflow Path Settings

Misc/Freight

Enter values here if a change in one of these fields should trigger your Workflow.

Dollar Increase	The value entered should be a dollar ($) amount. This value will identify the dollar amount change from the Misc/Freight that triggers this workflow path.
Percentage Increase	The value entered should be a percentage (%). This value will identify the percent change from the Misc/Freight that triggers this workflow path.

Department/Location

Click *Add Depts/Locs* to open the **Search Departments/Locations** window. Search for the Department or Location you want to add by using the fields provided, or browse through the list of available Departments and Locations through the alphabetical listing.

When you have located the Department or Location you want to add, click the check box next to it, then click *Save & Exit.*

Email

Change or add to the default Email Notification settings here.

Send Email	Toggle email notifications on or off.
Resend Email after [0] Days …	Have the Workflow send a second email notification after the set number of days to each recipient if no one from their level has Approved or Returned the Invoice.
Customize Email Content	Create and save additional content for Workflow-generated emails. This can be completely replacing or accompanied by the preset information an email notification contains by default.
Set additional email notification recipients	In addition to whichever Workflow Users are “next” in the Workflow path, you may choose to have the Workflow send an email notification to other users when a Workflow User completes their task in the Workflow.

NIGP Code

Enter one or more NIGP code here if this Workflow should be triggered by the presence of a specific NIGP code in an Invoice.

Click *Add NIGP Code* to open the **Search NIGP Codes** window. Search for the NIGP class or class item you want to select by using the fields provided, or browse through the list of code classes through the alphabetical listing.

When you have located the NIGP code class or class item you want to trigger your current Workflow, click the check box next to it, then click *Save & Exit.*

Vendor

Click *Lookup & Add Vendor* to open the **Lookup & Add Vendor** window. Search for the Vendor you want to select by using the fields provided, or browse through the list of saved Workflows through the alphabetical listing.

When you have located the Vendor you want your current Workflow to be associated with, click the check box next to it, then click *Save & Exit.*

Overrides

Click *Add Overrides* to open the **Search Workflows** window. Search for the Workflow you want to select by using the fields provided, or browse through the list of saved Workflows through the alphabetical listing.

When you have located the Workflow you want your current Workflow to override, click the check box next to it, then click *Save & Exit.*

Custom Columns

Select your document type from the dropdown menu, then add any Custom Columns whose criteria should be determining the Workflow you are creating.

Workflows: Administration

Workflow Planning Worksheet

Before you create new Workflows, it's important to think through the logistics that will determine the routing logic of those Workflows. Use this worksheet to help you plan Workflows before you create them.

What qualities should define this Workflow?

For example, does this Workflow apply to all Invoices within a specific dollar range, or with a particular User, Department, or Vendor, a Vendor type, or to specific NIGP classes or class items?

- ☐ Defining criteria: _____

Note: Pay particular attention to which qualities trigger the Workflow you are creating. While you can go back and edit your Workflow settings at any time, remember that Workflows operate on inclusive logic, meaning that only Invoices matching all of the qualities you select will trigger this Workflow. If you want to create a Workflow that applies in an either/or situation, create a separate Workflow for each option individually.

Take care when naming your new Workflow.

Name your Workflow something that will be clear to you and to other people that may participate in Workflow Administration. Keep in mind that the Workflow ID may be no more than 10 characters long.

- ☐ Workflow Path ID: _____
- ☐ Description: _____

You must assign this Workflow to one of the pre-saved Workflow Types.

- ☐ Workflow Type: _____

Note: If the Workflow you are creating is unlikely to need to take priority over many others, assign it to a Type with a low priority. Save your Priority 1, 2, and 3 Types for emergency Workflows.

Similarly, determine a Dollar Range for this Workflow. Remember not to be needlessly restrictive.

- ☐ Dollar Range: _____

Who will interact with this Invoice?

Collect the names of any users who should be completing tasks involved in processing this Invoice. Workflows will accept both Primary and Alternate Users, so be sure to consider this when setting Users for the Workflow you are creating.

Also consider which users should be notified when a task is completed but are not the User(s) with the following task along this Workflow path. You can configure your Workflow so that they receive an email under your Workflow's **Email** tab.