Enable a Workflow

AP Online and AP Payment File

1. Navigate to the **Super Admin Utilities > Manage AP** page.
2. Search for your organization using the search criteria box and click "Search."
3. Select the organization and click "Enable AP" . This will open the **AP Configuration** page.
4. Under "General AP Settings," check the checkbox beside "AP Online Enabled" or "AP Payment File Workflow Enabled."

Transaction and Transaction Envelope

1. From the Super Admin login page, search for the desired organization using the text boxes.
2. Select the organization and click "Edit" . This will lead to the organization's specific organization settings.
3. Click "Transaction Settings" to expand the option.
4. Check the checkbox beside "Transaction Workflow."
5. Click "Save Client Profile." A success modal will appear at the top of the page.

Create or Modify a Workflow

1. Navigate to the **Security Manager > Workflow** page. It will default to the **Modify a Workflow Hierarchy** page.
2. From the drop-down menu beside "Modify Hierarchy," select which workflow type to create or modify. The options below will vary depending on the organization's setup.
   - AP Payment File
   - AP Online
   - Transaction
   - Transaction Envelope
3. Enter the names for each hierarchy level and add or delete levels using the "Add Child" and "Disable Hierarchy" selections on the right of each textbox.
4. Click "Save." A success modal will appear at the top of the page.

Assign Users to Workflow

1. Navigate to the **Security Manager > Workflow** page. It will default to the **Modify a Workflow Hierarchy** page.
2. Click "Assign Users to Workflow Hierarchy."
3. From the drop-down menu beside "Select a workflow hierarchy," choose the desired workflow. The options below will vary depending on the organization's setup.
   - AP Payment File
   - AP Online
   - Transaction
   - Transaction Envelope

4. Under “Select a Hierarchy,” decide which tier to assign a user and click the “Select” button to its right.
5. From the drop-down menu beside “Select type of user to assign,” choose the type of user to assign. This will produce a corresponding grid listing specific users of that type.
6. Use the “User Search” criteria to locate a specific user and click “Search.”
7. Select the desired users from the grid by clicking the checkbox under “Use” beside each name.
8. Enter an amount for the threshold of money that this user can approve or submit.
9. If available, select an email frequency under the drop-down “Email frequency.”
10. Click “Save.”

View Workflow History

1. Navigate to the **Security Manager > Workflow** page. It will default to the **Modify a Workflow Hierarchy** page.
2. Click “Workflow History.”
3. From the drop-down menu beside “Select a Workflow,” choose the desired workflow. The options below will vary depending on the organization’s setup.
    - AP Payment File
    - AP Online
    - Transaction
    - Transaction Envelope
4. If there have been workflow hierarchy or user changes, the information will display in the respective grids and may be exported by selecting an export format in the drop-down menu at the top of each grid.
5. Click “Export” to download a copy of the workflow history to your local computer.