Going with the Multiview WorkFLOW

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Understanding the concept
What is Workflow?

Multiview's Workflow is an essential tool that empowers end users to establish a sequence of tasks and approvals triggered by system events like sending a PO, receiving a pre-voucher, or posting a voucher, among others.

This automated function streamlines data routing for review, data entry, and approval of transactions, whether within Multiview or with data from other production systems. Workflow efficiently directs information through internal policies, ensuring a smooth approval process until completion or rejection is achieved.

Functionality

One of the standout features of Workflow within Multiview is its complete paperless approach to approvals. This not only benefits the environment but also aligns with the growing prevalence of technology, making the approval process significantly faster and hassle-free. Additionally, Workflow's flexibility allows it to be tailored and utilized in accordance with internal policies for approval processes, providing a seamless fit for our organization's unique needs.

Multiview Workflow Types

In Multiview, the concept of a workflow remains consistent, but it offers various types of workflows, each serving distinct end goals. This session will focus on the Pre-Voucher workflow type, while also mentioning other available options:
- Business Event Workflow
- Check Run Workflow
- Expense Report Workflow
- Post-Journal Entry Workflow
- Purchase order Workflow
- Requisition Workflow
- Voucher Workflows
- and more!

Business Event Workflow:

A business event is simply another type of event that can initiate workflow however, a user must initiate the event instead of the system doing so. This can also be thought of as a user-defined workflow.

Typically, the "diagram" for a business event is a simple checklist of tasks to complete. Since there is no data (such as PO data or voucher data) associated with the event, there is no real opportunity to have different conditional paths taken based on that data, or conditional assignments based on the data.

Check Run Workflow:

The Check Run Workflow controls what happens once a Check Run (Payment Selection) is ready. Before entering workflow, the Check Run is in Ready to Generate status. While the Check Run is in workflow, it shows as In Workflow status. When the Check Run completes its workflow, it will be in the Checks Generated status. If the Check Run is rejected, it is (re-)set to Ready to Generate status, with the WF Reject Flag set ON.

Expense Report Workflow:

The Expense Report workflow event provides workflow when submitting an employee expense report.

Journal Entry Workflows:

The Post Journal Entry Approval uses Workflow to manage what happens before a Journal Entry is posted.

Purchase Order Workflow:

The PO Approval uses Workflow to manage what happens once a PO is sent for approval.

Before entering workflow, the PO is in the **Open** state.

While the PO is in the workflow it is in the **Workflow in Progress** state.

When the PO completes its workflow, it will be in the **Ready to Send** state.

If the PO is rejected, it will return to the **Open** State and the person who sent the PO will be informed that it has been rejected. At that point, they can send the PO again to send it back into the workflow system for final approval.

Requisition Workflow:

The REQ Approval uses Workflow to manage what happens once a REQ is sent for approval.

Before entering workflow, the REQ is in the **Open** state.

While the REQ is in the workflow it is in the **Workflow in Progress** state.

When the REQ completes its workflow, it will be in the **Ready to Send** state.

If the REQ is rejected, it will return to the **Open** State and the person who sent the REQ will be informed that it has been rejected. At that point, they can send the REQ again to send it back into the workflow system for final approval.

Voucher Workflows:
Pre-Voucher Workflow:
Pre-Voucher Workflow is used to Approve and Collect Data Entry for an AP Invoice before being entered into AP as a Voucher.

Pre-Voucher Workflow starts when the Pre-Voucher batch is Submitted.

Each Workflow Activity can use Advanced Properties to define what type, if any, data entry can be performed at various stages.

If the Pre-Voucher document is rejected, the Pre-Voucher Data Entry screen is used to correct and re-submit the document.

Post-Voucher Workflow:
The Post Voucher Approval uses Workflow to manage what happens before a Voucher is posted.

Before entering the workflow, the Posting Status of the Voucher is in **Open** status.

While the Voucher is in workflow Posting Status is **Unapproved** status.

When the Voucher completes its workflow, it will be in the **Closed or Posted** status depending upon the Workflow Setup option.

If a Voucher does not need any approval, then it will be moved to Closed/Posted status.

Depending upon the System Option, a batch will be split for approved vouchers. If a batch has voucher(s) and that need(s) approval, then the batch will be moved to **In Workflow** status. If a Voucher is rejected, then the Posting Status of the voucher is sent back to **Open.**

Hold Voucher Workflow:
The Hold Voucher Approval uses Workflow to manage what happens once a Voucher is posted and before releasing to be paid.

Before entering the workflow, the Voucher is in the **Open** status.

While the Voucher is in workflow Voucher Status is on **Hold** status.

When the Voucher completes its workflow, it will be in the **Open** status. If the Voucher is rejected, then the voucher is sent to TobeReversed status.

Workflow Position

Before delving into the creation of a Workflow Diagram, the initial step involves setting up workflow positions. These positions enable the assignment of activities, such as approvals and tasks, to the respective individuals within our company.

Understanding workflow positions

The Workflow Positions screen serves the purpose of adding and editing positions that can be held by Multiview users. These positions play a crucial role in determining the recipients for various Workflow activities. Instead of assigning activities directly to individuals, activities are sent to job titles (positions). The person's user ID, associated with that position, is then assigned to the activity in the Workflow Diagram. It's important to note that each position can be filled by only one application user, while an application user can be assigned to zero, one, or multiple positions.

The advantages of utilizing positions rather than user IDs to identify recipients are as follows:

- *Intuitive Selection*: When choosing a recipient, selecting a title rather than a name makes the process more intuitive and reduces the likelihood of errors.
- *Flexibility*: As people change positions or join/leave the company, the Workflow Positions table requires updating instead of the entire diagram. This approach enhances the system's flexibility and saves time as there is no need for extensive re-testing every time such events occur.

Creating Workflow Positions

To assign or alter positions navigate to the Workflow Positions screen found in *Multiview > Workflow > Workflow Setups > Workflow Positions.*
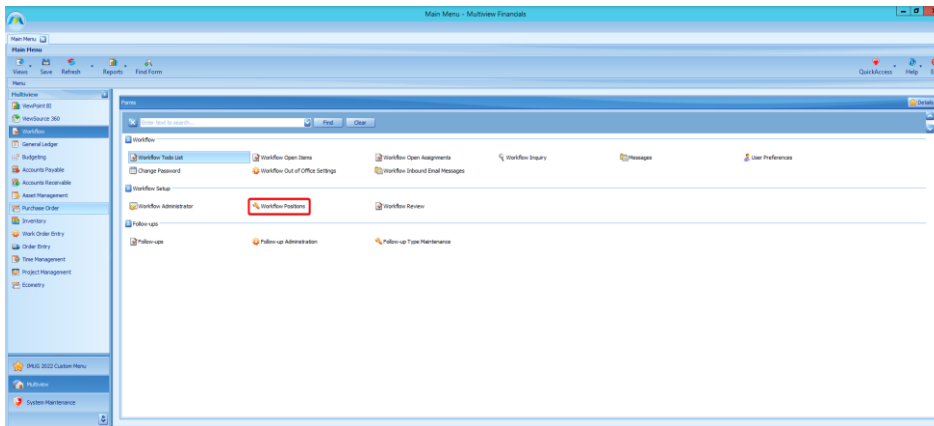
To add a new position on the Workflow Position screen, follow these steps:

1. Click on the "Add" button.
2. In the "Title" field, enter the name of the position.
3. From the LOV (List of Values) in the "Assigned to User" field, select the User ID of the person who occupies that position.
4. Note: The "Position ID" will auto-populate automatically.
5. For all active positions, ensure that the "Active" box is checked.
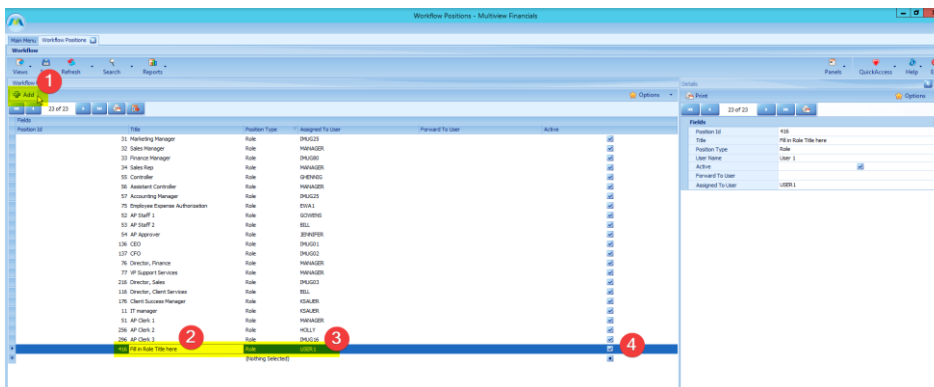
The number of positions in this table is unlimited, providing the flexibility to accommodate various roles within the organization. As users move positions, whether joining, leaving the company, or changing roles internally, we can easily manage the changes by either updating the "Assigned To User" for that specific position or marking the position as inactive. This adaptability ensures a seamless and up-to-date representation of the workforce in the Workflow system.

Note: When making a position as inactive, it's crucial to consider its impact on the Workflow Diagram. To ensure a smooth transition, first remove the position within the diagram, including any assignments or associated conditions. Once the position is properly removed from the diagram, proceed to mark it as inactive in the table. This will mitigate the risk of errors occurring in the workflow.

Forward to users

"Forward To User" is a valuable option that facilitates the sharing of assignments among users. This feature is especially useful when a user is temporarily unavailable or out of the office, and another user needs to cover their Workflow assignments. As this functionality is accessible through each user's Workflow To-Do List, there is no need for additional security for editing this screen. It enables users to seamlessly collaborate and ensure uninterrupted workflow operations, enhancing productivity and efficiency within the system.
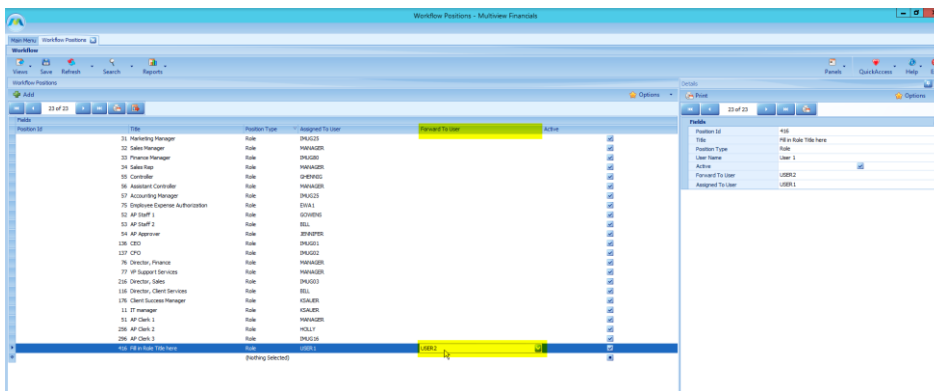
Understanding the Workflow Diagram
Workflow Activity Types (Nodes):

The Workflow Activity Types, also known as "nodes," are present in each diagram and define the actions performed by the Workflow in the flow process. Each Workflow module, such as Purchase Order, Requisition, Pre-Voucher, etc., has its distinct set of activities, with some activities overlapping across the Workflow Types.

Each activity type has its own predefined properties that can be easily adjusted based on requirements. To access and modify these properties, click on the "Advanced Properties" button, available on the Activity tab in the detail panel for each activity in the diagram.

Below are the definitions for activity notes that span across modules:

Workflow Submitted:
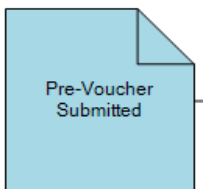
This Node represents the start or entry of an item in the workflow. This Node is frequently utilized to establish defaults that would apply to the rest of the workflow unless otherwise specified.

Advanced Properties options:

- Number of days between reminders
- Default approval email setups
- Rad's enabled for data entry (AP-type workflows)

Task:

This node is designed for data entry users to "complete" items without approving or rejecting them. For example, in AP Data Entry, users input voucher details, and upon completion, the item advances to the department manager for approval. This streamlines data entry and ensures a smooth approval process.

Advanced Properties:

- Number of days between reminders to assigned recipients
- Task Email Options
- Data Entry Options (Fields available for entry)
- GL Distribution Options
- Number of days for item to auto-exit if not completed

Approval:

This node assigns to-do items to a position for review and the option to approve or reject the item. It can involve multiple people, but only a specified number of approvals are needed to complete the activity. For example, we can send the task to 3 Managers, but only one or all is required to approve for the completion. This streamlines the review process efficiently.

Advanced Properties:

- Number of days between reminders to assigned recipients
- Approval email options
- Data Entry options (Fields available for entry)
- GL Distribution Options
- Number of days for item to auto-exit if not completed

Rejection:
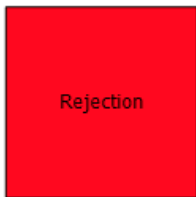
Unlike the "Reject" option in the approval Node, which requires manual rejection by users, the Rejection Node automates the rejection process based on conditions you can configure, aligning with your internal policies.

Advanced Properties: Rejection Message type.

Validation Failure:

Conditions can be set on the exit path to the Validation Failure, stopping the item if validation conditions are met. It is commonly used with the Task/Data Entry Node to check for valid data, such as non-blank accounting date, proper distribution, and no duplicate invoice numbers. Unlike the rejection node, it won't reject the item, but it will prevent the user from completing the to-do item until the Validation Failure is resolved.

Audit Check:
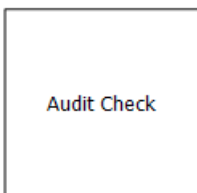
The Audit Check Node identifies items that pass through this activity and marks them for an audit. Subsequently, these flagged items can be directed to another approval or task activity for review, deviating from the regular approval process.
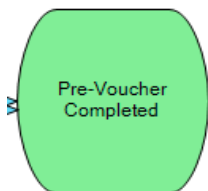
Advanced Properties:

- Audit check numbers
- Random Check Option
- Limit Check to this activity

Connector:

Connectors combine the exit paths of multiple activities into one spot with multiple conditional paths. They're used when the same complex conditions are needed for more than one activity, streamlining the workflow design.

Workflow Completed:

This Node signifies the end of the workflow.

Advanced properties: Completion Message type which allows you to send a message when the item is completed.

Arrow/Flowline:

The arrow indicates the next node to which the completion path is pointing.

Note: Nodes can be renamed by double-clicking on them and modifying the title. The default node title is based on the node type. Clients often customize node titles to better label and visualize the flow of their diagrams. For instance, they may change "Task" to "AP Data Entry" or "Approval" to "Manager Approval" for better clarity and understanding.

Workflow Editor

The Workflow Editor, part of the Workflow Administrator, graphically organizes the activities and paths of a Workflow process. It allows users to configure rules, add assigned positions and conditions, and create the process flow based on business needs.

Rules the Editor follows:

- The main diagram must have a Start and End activity, which cannot be deleted. Additional Start or End activities cannot be added. The Start activity initiates the Workflow, and the End activity marks its completion.
- Activities are linked using paths (flowlines), leaving the exit point of one activity to enter another, except for the Start and End activities. The Start has no entry point, and the End has no exit point.
- All activities, except the End, must have one Normal exit point, and each normal exit point must have at least one path.
- The user selects the next activity, and the system adds it with default values and draws a path from the Start Exit Point to the new activity's Entry point.
- Properties are used to configure activity options.
- The user can create additional conditional exit paths by connecting to another activity.

Workflow Activity Panels

Each Workflow has this Activity panels containing the following:
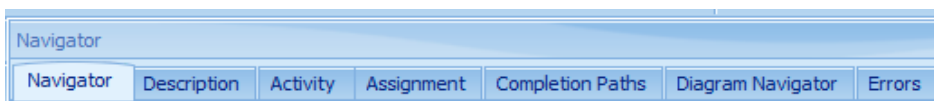
- **Description**: This tab provides a comprehensive overview of the selected activity node, including the Activity Number, Type of Activity, and other relevant information. It also outlines the exit path details for the activity.
- **Activity**: This tab allows customization of the activity name visible to recipients in the web app, to-do list inquiry, and open item inquiry. Advanced Properties, found within this panel, enable customization of the activity to define the actions recipients are allowed to perform.
- **Assignment**: This tab is utilized for Message, Task, and Approval activity types. For Message types, it allows users to enter the message content and identify message recipients. For Task

and Approval types, it specifies the positions (from the Positions Table) assigned to complete the activity, along with their respective conditions. This tab also includes settings for multiple approvers, if needed.
- **Completion Paths**: For activity types other than Task or Approval, this tab presents a single exit option, as the system automatically progresses without user input. For Tasks, it starts with one normal exit, with designers having the ability to add additional choices for task completion. For Approvals, it begins with one normal exit and one reject exit, and designers can include multiple Normal and Reject exits. Each exit point displays connected paths (only Normal Exits have paths), and the condition editor allows for conditional paths. The sequence becomes crucial when multiple exit paths with conditions are involved.
- **Diagram Navigator**: This tab displays the entire Workflow diagram, facilitating easy navigation, especially in cases of extensive and complex diagrams.

Adding Activities

When creating the initial version of the Workflow diagram, two mandatory activities are present: the start activity (submitted) and the end activity (completed). These activities cannot be deleted and must have associated paths. The Start activity must have an exit path but no entry path, while the End activity must have an entry path but no exit path.

To add a new activity, simply right-click with your mouse and select the desired activity type to be added to the diagram. Repeat this process for all the necessary tasks, approvals, etc., within the diagram editor. An example of a complete Pre-Voucher Workflow diagram, featuring one task and one approval activity, would appear as follows: [Include the visual representation of the diagram if available].
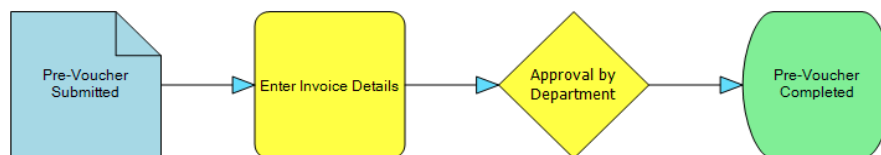

It's important to emphasize that the flow or routing of items is determined by the settings of each activity. When an item is submitted into Workflow, it will automatically route to the Start activity and further progress based on the defined Completion Paths within that Start activity.
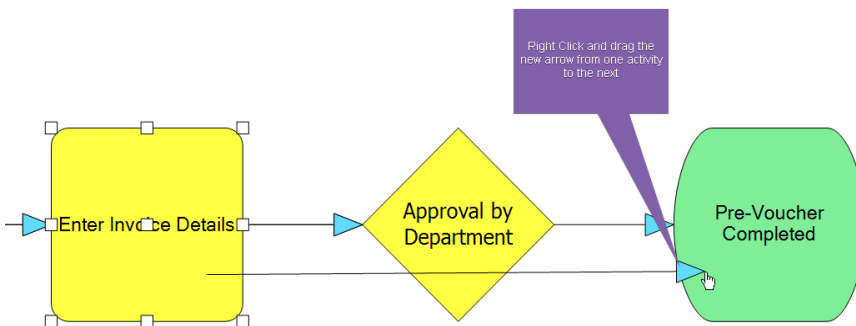
Completion Paths

Completion Paths determine the next activity and route for an item once it is completed by the recipient in the Assignment tab.

An activity can have one or multiple Completion Paths. If there are multiple paths, conditions are required on all paths except one; otherwise, the item will follow the first Completion Path in the sequence.
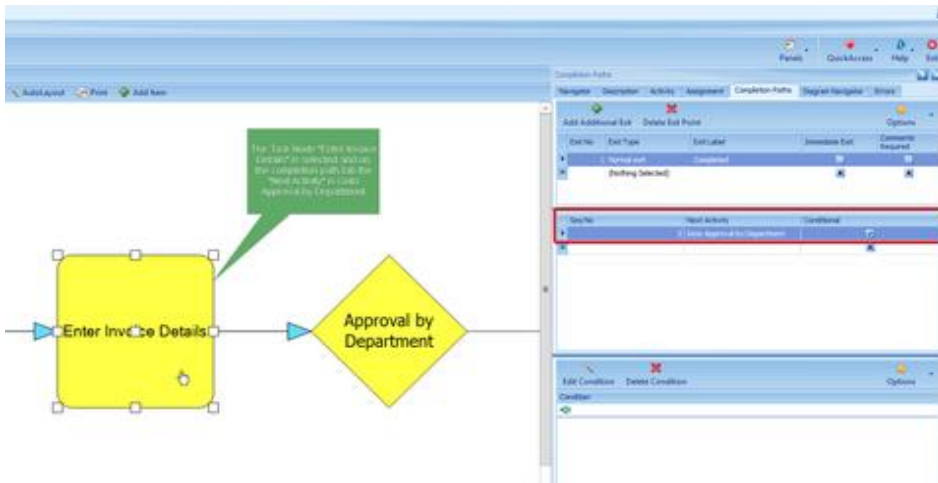
Paths are drawn using the mouse by clicking within the "from" activity and then dragging the arrow into the "to" activity to establish the connection between the two activities.

In the example provided, the "Enter Invoice Details" activity now features two Completion Paths for an item.
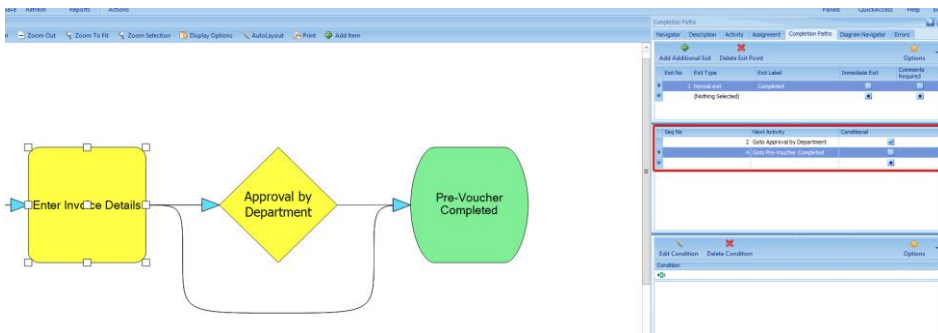
Note: It's important to have at least one of those paths with a condition; otherwise, all items will route to the first Completion Path in the sequence.

Sequence numbers are automatically populated based on the order of each Completion Path created. Designers have the flexibility to modify this field to set the desired routing order for items to look for a match once conditions are established.

Exits Points

Another noteworthy feature of Completion Paths is the Exit Point, which is predefined based on the type of activity.

For all types other than Task or Approval, the tab displays only one possible way to exit because the system automatically progresses without "stopping" to get user input.

However, for Tasks and Approval nodes, the tab begins with one normal exit, and designers can add additional "choices" or ways to enable the assignee to complete the task.
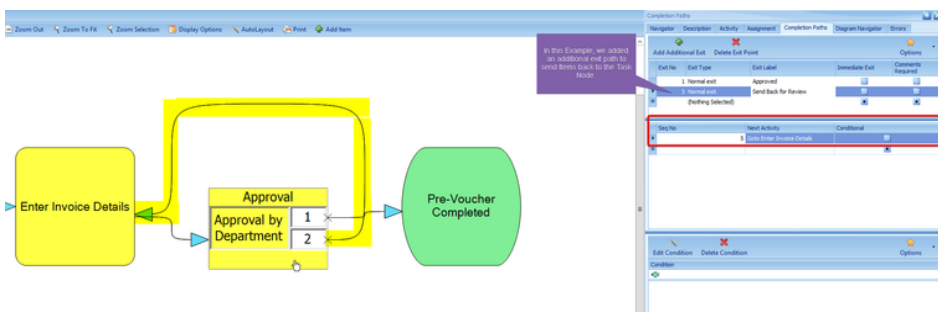
Each Exit Point can have one or multiple Completion Paths, and there is no limit to the number of either Exit Points or Completion Paths.

Designers have the flexibility to modify the Exit Label, which is the text the recipient selects when completing the Workflow item. This allows for customized and user-friendly labels that suit the specific requirements of the Workflow.

Note: Approval nodes come with two predefined exit points - Approve and Reject. However, the Reject exit does not appear on the diagram, as it functions as an automatic path.

An organization may find it useful to add an additional exit path, such as "Returns to AP Data Clerk," allowing approvers to send the item back to the AP data entry team in case of errors or necessary fixes. This option adds flexibility and enables a smooth workflow process in handling exceptions and adjustments.

Workflow Conditions
Workflow Assignments

The Workflow assigns recipients to a workflow item using three methods: By Condition, By Unit Distribution, or by Workflow Owner.
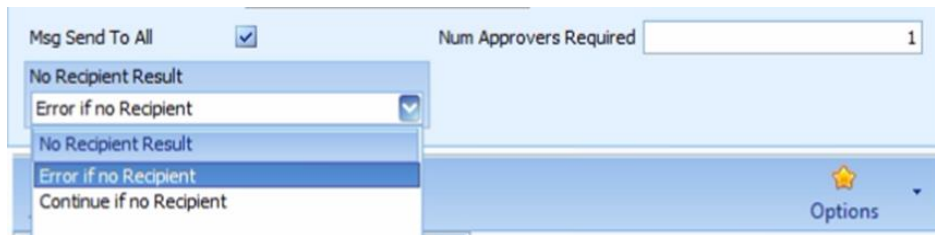
The "By Condition" assignment method is the most commonly used, allowing administrators to set up personalized conditions for recipients. This enables organizations to tailor the recipient assignment based on specific criteria, ensuring efficient and targeted approval processes that align with their unique business requirements.
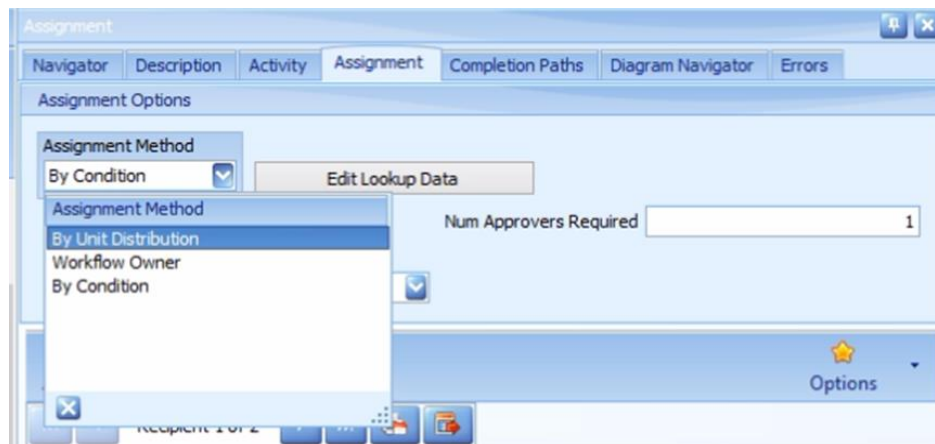
The "Send MSG to All" checkbox is designed to target users who meet specific item conditions. To illustrate, if your workflow's approver has set a business unit condition, and there is only one approver with that business unit, the message will exclusively reach that approver. Enabling this checkbox ensures that the message reaches users who fulfill the specified Workflow To-Do-Lists conditions. Once one of these users approves it, the message will automatically be removed from the other users' to-do lists.

The default setting for "No Recipient Results" will trigger an error for the item if it cannot locate an approver meeting the specified conditions. However, there is an option available to allow the item to proceed without requiring approval from that node if the conditions are not met.

The "Number of Approvers Required" field determines when an item will be removed from other users' lists once it has received approval. When the "Send to All" option is checked, and this field is set to 1, the item will vanish from everyone else's list as soon as one user approves it. However, if, for example, the field is set to 3, it will only be removed from other users' lists after three users have given their approval. Setting this field to 99 serves as the default, ensuring that every approver assigned to the item must individually approve it before its proceeds in the Workflow.

Workflow Condition Editor

The Workflow Editor features the Condition Editor, a tool used to establish conditions that must be fulfilled for specific actions to take place. These actions include:

1. Conditional Completion Paths: The Workflow assesses each Completion Path in sequential order until it finds a true condition. If Completion Path #1's condition is not met, it evaluates Completion Path #2, and so on, until a matching condition is found. If no condition is met your workflow user will receive an error when trying to process the workflow Item. It is important to create a sequence of conditions that encompasses all possible scenarios.
2. Conditional Recipients in the Assignment tab: After an item enters an activity, the assigned positions can be conditioned to receive the relevant items based on predefined criteria. This ensures the appropriate routing of tasks to the right recipients.

To launch the Condition Editor select from either the Assignment tab or the Completion Path tab.
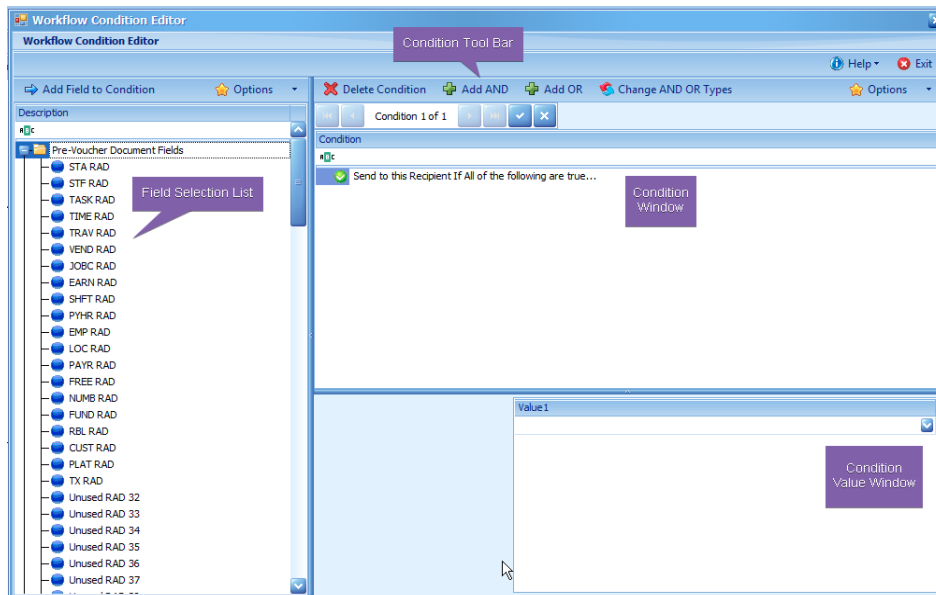
Field Selection List:

The Condition Editor window displays all available fields that can be included in the condition, depending on the specific Workflow module being set up. For example, a Purchase Order workflow setup will have fields like the buyer, company ID, and Purchase For ID, while a Voucher Workflow will have fields like Company ID, Invoice Date, Vendor ID, etc. The purpose of this window is to enable the selection of fields to be added to the condition.

Condition Window:

This section lists the conditions that have been defined, and it can include none, one, or multiple conditions.

Condition Value Window:

In this window, the designer defines the values of the fields selected in the Condition Window.

Condition Toolbar:

The Condition Toolbar provides tools for the designer to change condition types and delete conditions as necessary.

Setting Conditions

In the Condition Editor, conditions can be set by clicking and dragging fields from the Field Selection List into the Condition Window. After adding a field to the Condition Window, a value must be defined

for it in the Condition Value Window. This process allows designers to establish specific conditions based on the selected fields and their corresponding values.
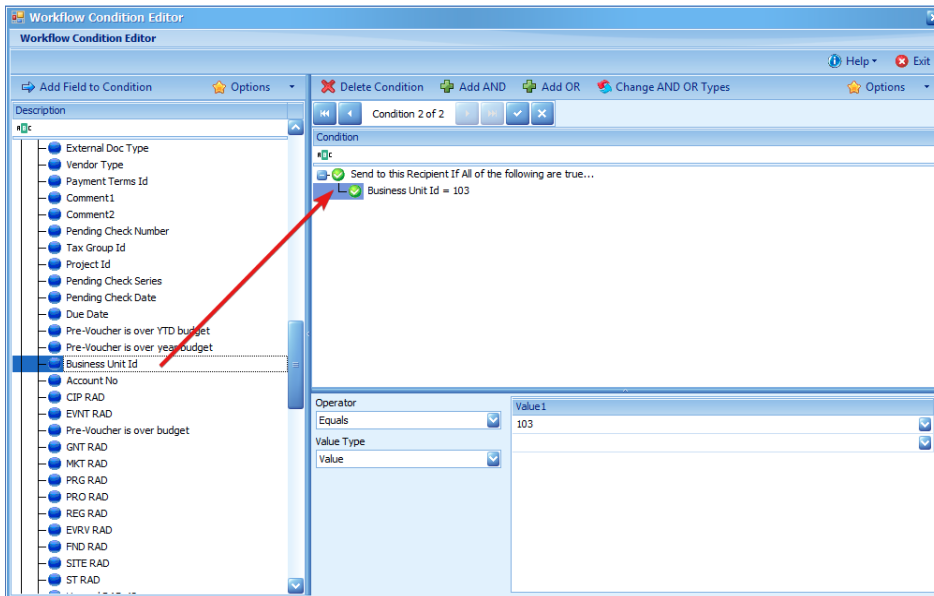
In the example above, the Business Unit Id field was brought into the Condition Window. Then Value1 was defined as Business Unit Id = 103. The Value1 can be typed in or the LOV may be accessed for selection from the Business Unit table.

In the Condition Editor, you can modify the Operator field to specify conditions like "Does Not Equal" for certain values. Simply use the List of Values (LOV) to change "Equals" to "Does Not Equal."

Additionally, the Value Type field is customizable, offering options such as Value, Relative Date, or Another Field. This flexibility allows you to choose the appropriate value type when defining conditions.

To include additional conditions in the Editor repeat the click and drag from the Field Selection List into the Condition Window.
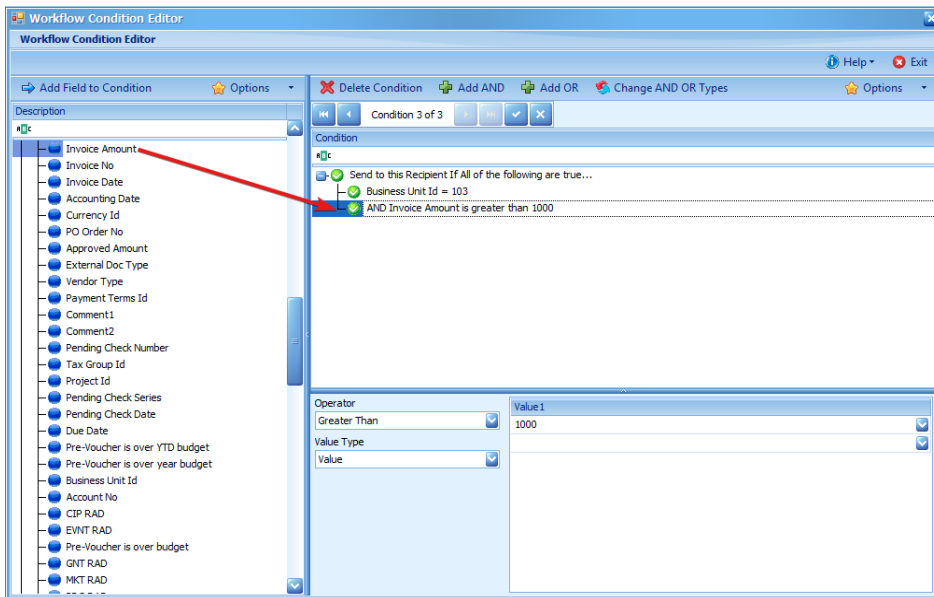
Condition types:

AND: When using the AND condition type, it implies that ALL conditions following must be met for the item to match this conditional activity.

OR: On the other hand, when using the OR condition type, only one of the conditions needs to be met for the item to match this conditional activity.

For example, in the scenario above, with the second condition starting with **AND**, the assigned recipient would only receive the pre-voucher if the item has been coded to Business Unit 103 AND the invoice amount is greater than $1,000.

To change the Condition Window so that the item only needs to match one of the conditions set, select the top level of the condition, and then choose "OR" from the Condition Toolbar. This will modify the conditions to require only one of the fields and their respective values to be met.
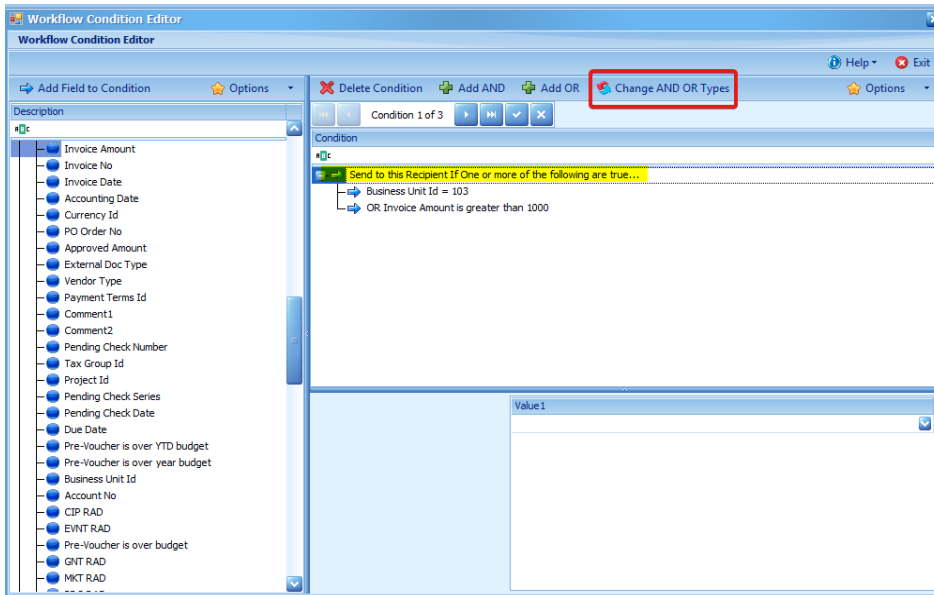
Users can also build conditions using both **AND** and **OR** types to create grouped conditions.
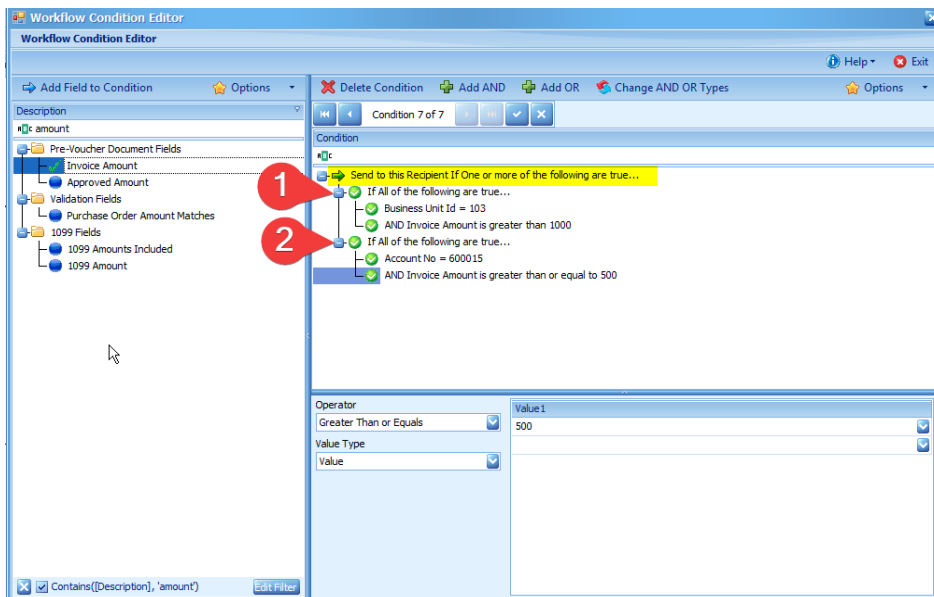
In the example above, the Condition is set to an OR condition, meaning it will consider only one of the following conditions to be met for the item to match the conditionality.

However, the two subsequent conditions are set to AND condition types, which means BOTH conditions must be met for the item to match the conditionality. Based on this example, we can determine that the item will be routed to the user if:
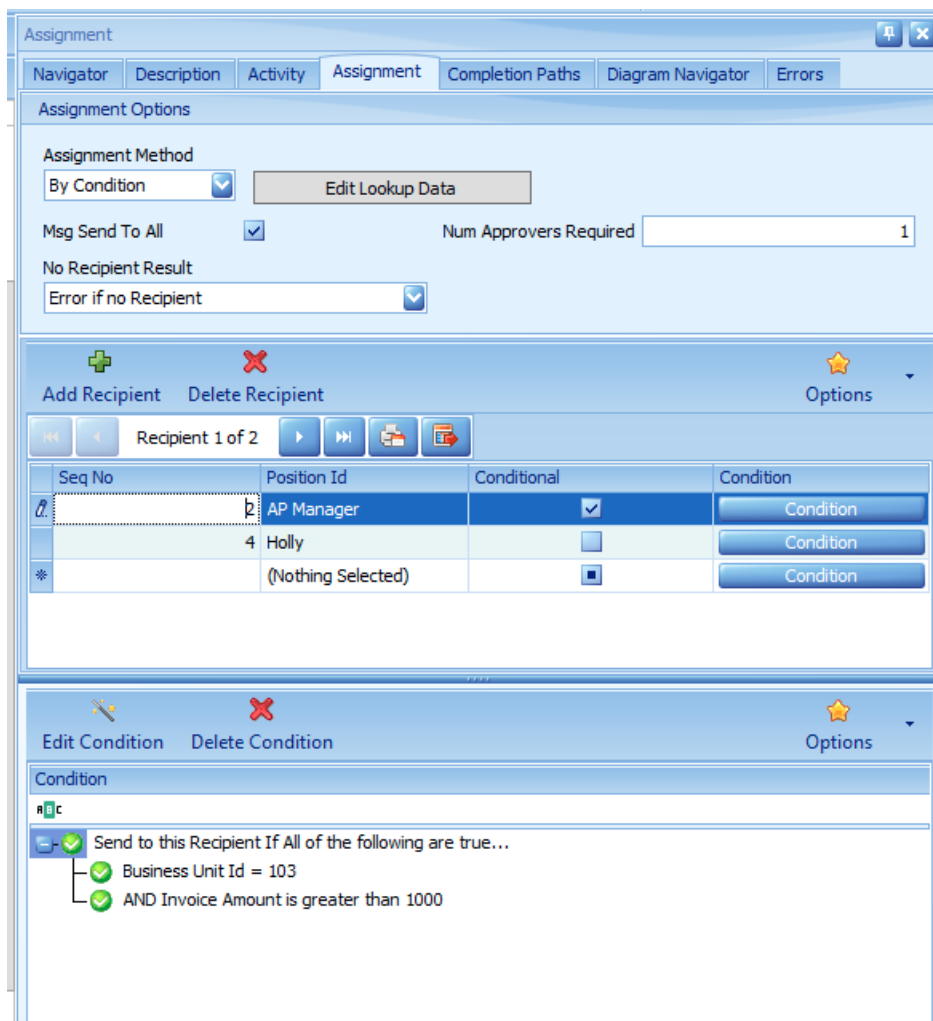
1. The item is for Business Unit ID = 103 **AND** the invoice amount is greater than 1000

OR

2. The item is for Account No = 600015 **AND** the invoice amount is greater than or equal to 500

To delete a condition from the Condition Window, select the respective condition line and click on "Delete Condition."

Once all conditions are set, the Condition Editor can be exited. The conditions set for each assignment can be observed in the window below the recipient listing.

This process can also be applied for Completion Path routing that relies on conditions. The Condition Editor functions similarly for both the Assignment tab and the Completion Path tab.

For each activity, the Description tab serves as a helpful overview to review the conditional Assignments and conditional Completion Paths, conveniently summarizing all the settings in one place.

## Other Features & Benefits of the Workflow
Workflow Email Features

Send Detail Emails: Multiview offers the option to send Detail Emails that provide a comprehensive description of the item in Workflow or a summarized view, reducing the number of emails per message. This enhances the efficiency of processing Workflow items.

Approve/Reject by Email: With the Detail Email function, recipients can conveniently approve or reject Workflow items directly through a reply link in the email.

Email External Documents: The Detail Email includes an attached copy of the external document, if applicable, ensuring all necessary information is readily accessible.

Sample Summary Email Message of Workflow Assignment Items
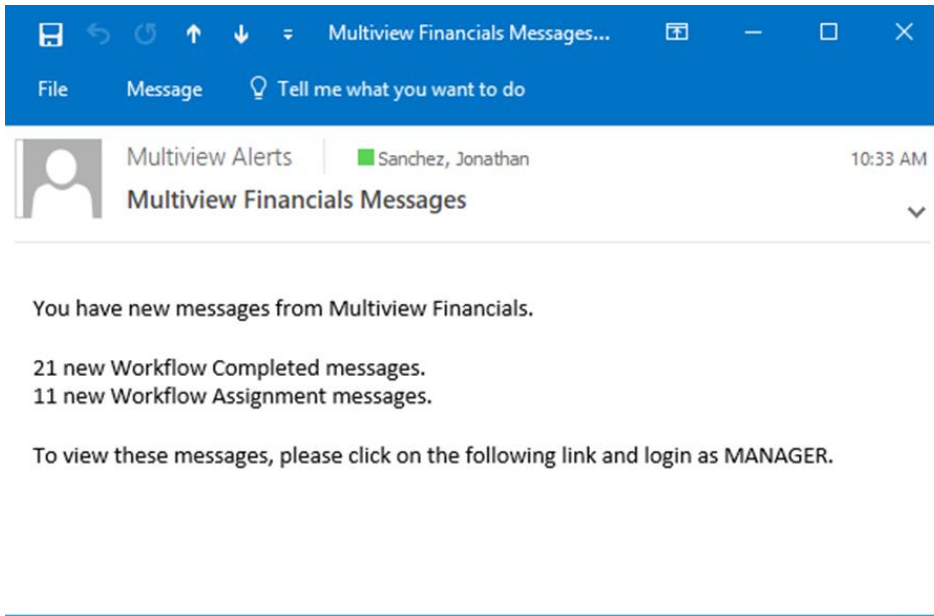
Sample Detail Email Message of Workflow Item
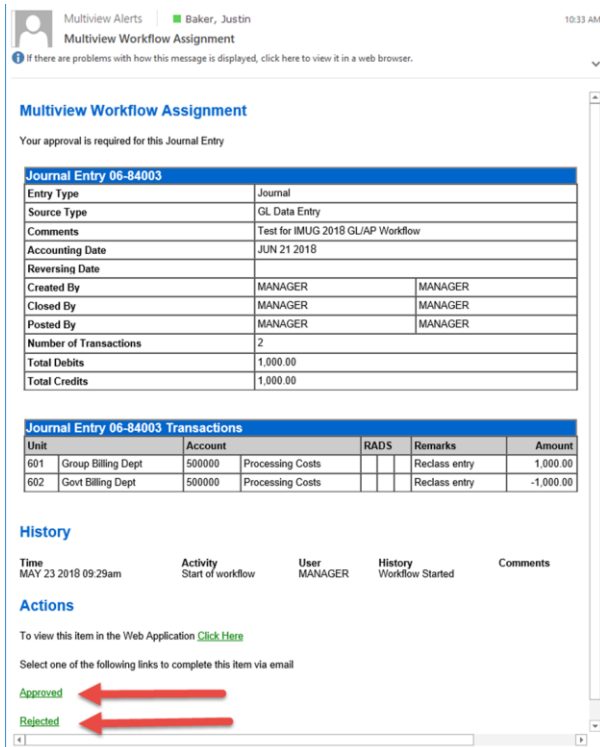
GL Workflow

The ***Post Journal Entry*** Workflow streamlines the approval process prior to posting any entry.

Seamless Processing: Whether you enter Journal Entries via Data, Template, or Interface Entry, Workflow efficiently manages the posting of entries in the GL Module by defining the approval process.

Routing Based on Business Conditions:

In the Journal Entry Workflow, the approval process can be customized using specific Conditions available for this Workflow:

Examples:

1. Accounting Manager Approval: In many cases, the Accounting Manager is designated as the approver for all Journal Entries, ensuring their oversight.
2. Segregation of Duties: An approach commonly used is to assign a different approver from the Journal Entry Field User who created the entry. This segregation helps maintain accountability and control over the approval process.
3. Review for Specific Entries: Conditions can be set based on Journal Entry Functions or Journal Entry Fields. For instance, entries posted by the same person who created the JE can be reviewed by another user before posting. Similarly, entries categorized as "Prior Period Adjustment" or "Reversals" can be restricted to the Accounting Manager's approval or at least require their review before finalization.

These examples demonstrate how the Journal Entry Workflow can be tailored to ensure appropriate approval procedures are followed based on various conditions and entry characteristics.

AP Voucher Workflow

The AP Module in Multiview combined with the Workflow module determines how approvals for Vouchers should be managed. **Note: Only a voucher that is in a Posted status is available for payment regardless of the AP Workflow used.**

Derive Default Settings: Select Multiple Default Fields to be derived from Company or Vendor Settings to ease the data entry process.
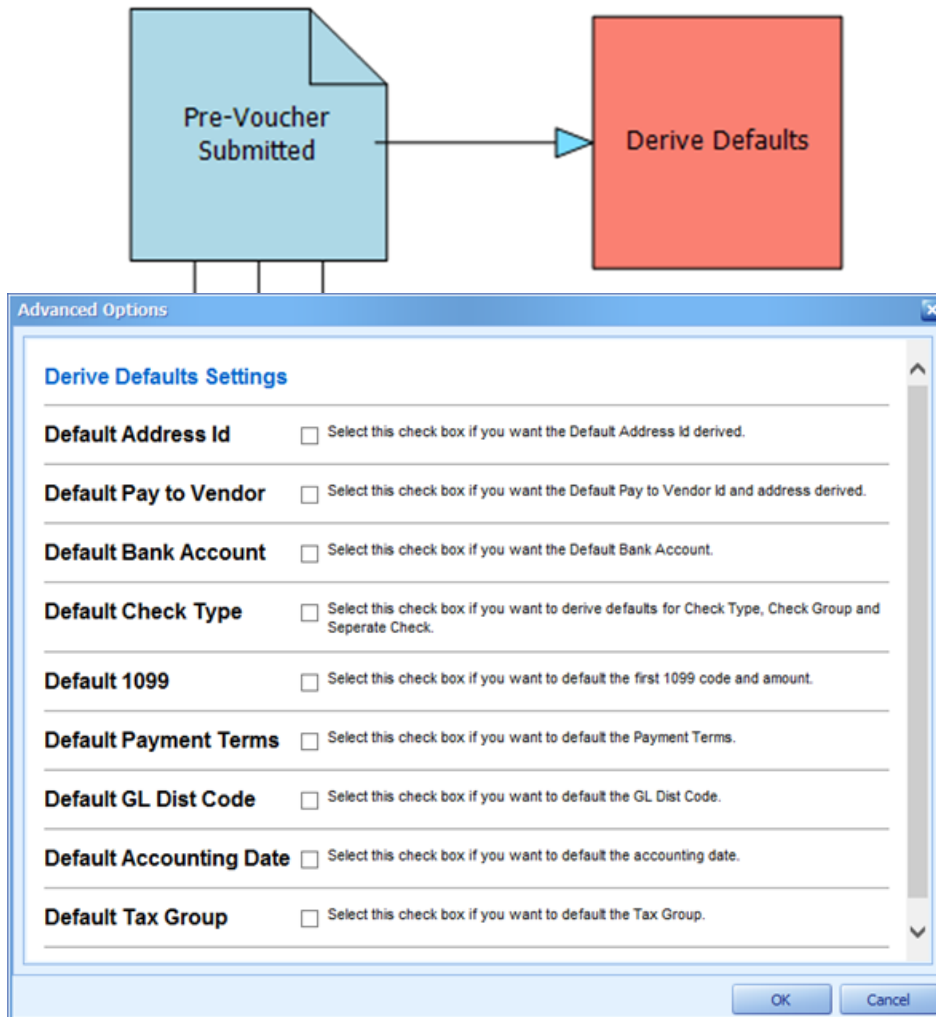
Final Voucher Creation Method: Determine if/how a Final Voucher is created

Final Voucher Owner: Determine which User Id will be used as the "Owner" of the final Voucher Created

Set Check Type: Determine the Check Type to use for vouchers being processed in this Workflow

Set Payment Terms: Determine the Payment Terms for the voucher being processed in this Workflow

Set AP Control Account: Determine the Control Account used for items processed in this Workflow
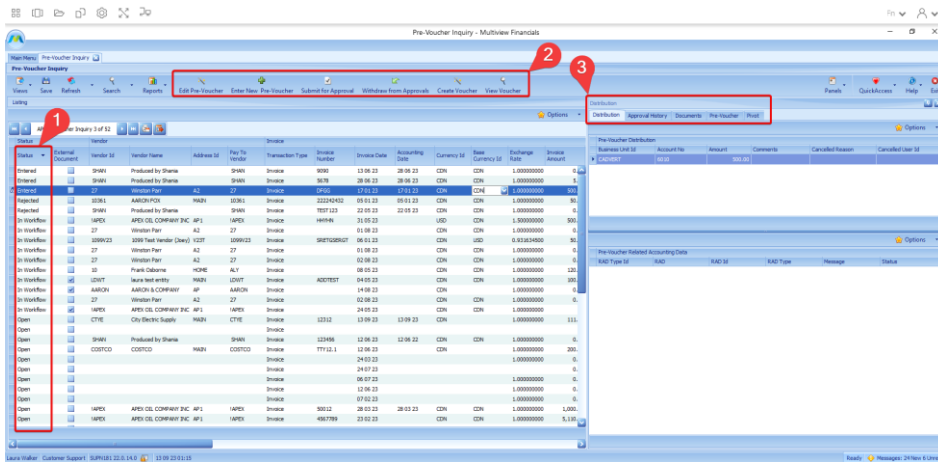
Pre-Voucher Workflow

The Pre-Voucher Workflow is employed to approve and gather data entry for an Accounts Payable (AP) Invoice before it is entered into the AP system as a Voucher. This process initiates when a scanned invoice is uploaded and includes an AP Data Entry node followed by one or more approval nodes. Once it receives approval, it transforms into a Posted Voucher within the AP system. However, it will not appear in aging reports, or the Voucher Inquiry screens until it successfully completes the pre-voucher workflow approval process. To review these items, there are separate Pre-Voucher Inquiry screens available.

On the other hand, a Voucher is recorded directly into the Voucher Entry screen and does not commence with a scan. For clients who utilize the Pre-Voucher Workflow, the Voucher Entry screen is typically used for approved items or recurring invoices. There is also a workflow available for the Voucher Entry screen if you decide to set it up. You can still attach a document to a Voucher; however, this attachment process is different—it is done through "My Files" and "Temporary Files" rather than through the Portal File Upload.

Pre-Voucher Inquiry

The pre-voucher Inquiry screen serves as your comprehensive hub for managing pre-voucher entries.

1. Pre-voucher Statuses:

Within the pre-voucher inquiry screen, you will see the different statuses of your pre-voucher Items.

Within the Pre-Voucher Inquiry, various statuses are observed:

In Workflow: Signifies that the item is currently within the workflow process, which encompasses both data entry and approval stages. To track its progress within this process, consult the Approval History panel.

Open: Indicates that the item has been removed from the workflow, typically accomplished by using the "Withdraw From Approvals" button. To proceed, it must either be resubmitted for approval through the "Submit For Approval" option or deleted. You can delete it by accessing the "Edit Pre-Voucher" feature and utilizing the "Delete Pre-Voucher" button located in the Pre-Voucher Data Entry screen that opens.

Entered: Denotes that the item has successfully completed the workflow process and is now registered as a voucher in the AP sub-ledger. After this stage, you can access voucher details by using the "View Voucher" button within the Voucher Inquiry to check its payment status.

Rejected: Represents items that have been canceled by the Workflow process, typically due to disapproval by an approver during the workflow. To move this item to AP, a review of the rejection reason is required. After reviewing, you may need to edit the pre-voucher and then resubmit it to the workflow for further processing.

2. Pre-voucher Tool Bar:

Within the pre-voucher toolbar, several actions are available for managing your pre-vouchers. These actions include:

Edit Pre-Voucher: This option allows you to make edits to a pre-voucher. It's important to note that the pre-voucher must be in either an "Open" or "Rejected" status to perform edits. If the pre-voucher is in an "Entered" status, edits should be made from the Voucher Inquiry. If it's in "Workflow," you'll need to withdraw it from approvals first.

Enter New Pre-Voucher: This action initiates the Pre-Voucher Entry Screen, enabling you to create a pre-voucher without starting with a scanned document.

Submit for Approval: When you have a pre-voucher in an "Open" or "Rejected" status and you wish to send it for approval in preparation for moving it to AP, you can use this action to facilitate its progression through the workflow.

Withdraw from Approvals: If there's a need to remove an item from the workflow for various reasons, you can utilize this action. This action changes the pre-voucher status from "In Workflow" to "Open."

View Voucher: When the pre-voucher status is "Entered," you can promptly access the corresponding AP voucher by selecting the "View Voucher" action button. This action directs you to the voucher within the Voucher Inquiry for further examination.

3. Pre-voucher Inquiry Docking Panel

The pre-voucher docking panel provides a deeper insight into various details of the pre-voucher, including distribution, approval history, and attached documentation.

Exporting/Importing your workflow diagram

Multiview's Workflow Diagram Export and Import features enable the seamless transfer of workflow diagrams between databases, offering convenience and backup options.

Here's how to export/import your workflow diagrams:

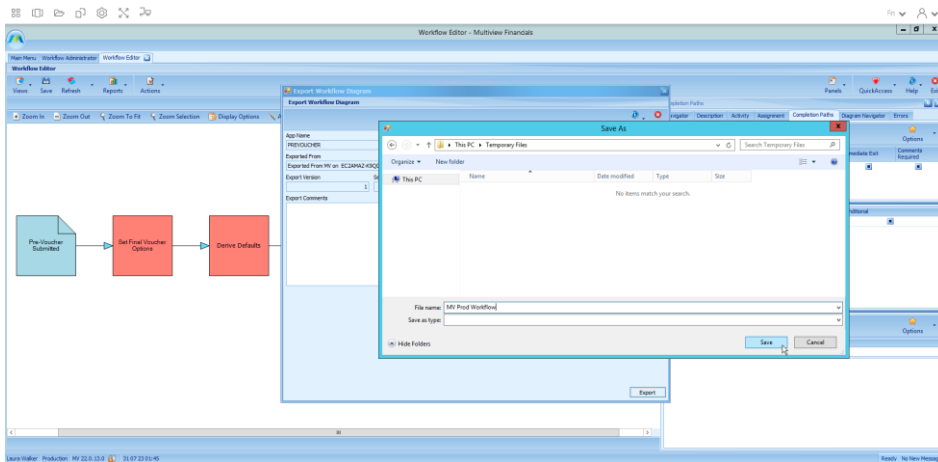**Exporting the Workflow Diagram**:

1. In Workflow Administrator, open the desired workflow diagram on the source database.
2. Right-click on the diagram version and select "Edit Diagram."
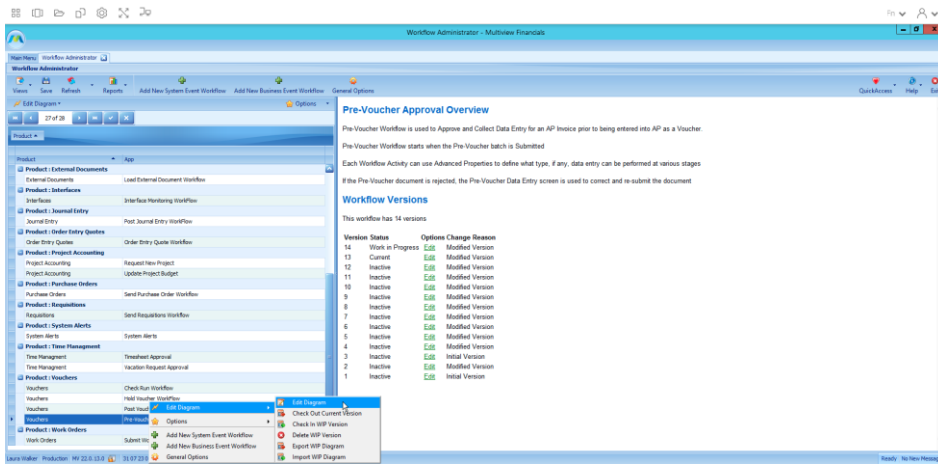
3. On the Workflow Editor screen, click the Action Button at the top and choose "Export This Diagram."

4. Click the "Export" button on the bottom right of the Export Workflow Diagram screen.
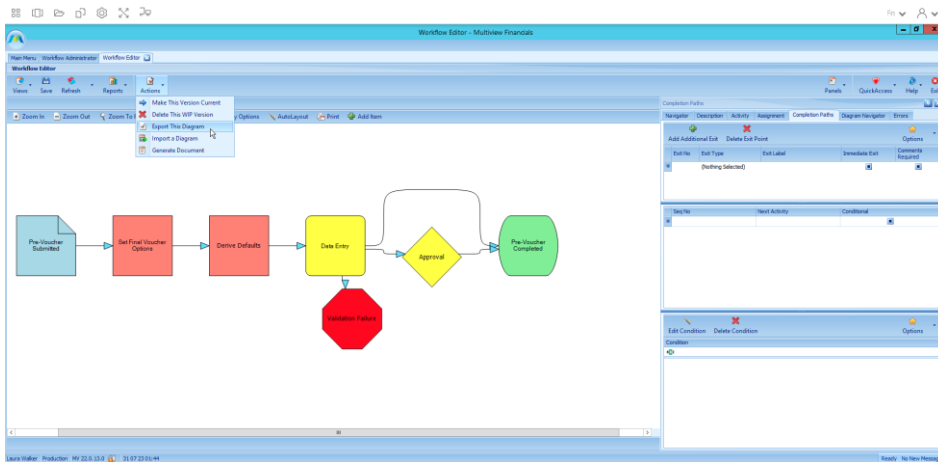

5. Specify a file name and location to save the exported file.

Importing the Workflow Diagram:

6. Log in to the target database and access Workflow Administrator.
7. Select the workflow you want to replace with the imported diagram. It is advisable to create a backup of the existing workflow by following steps 1 to 5 of the Export process.
8. Edit the Workflow Diagram and Check Out the Current Version.
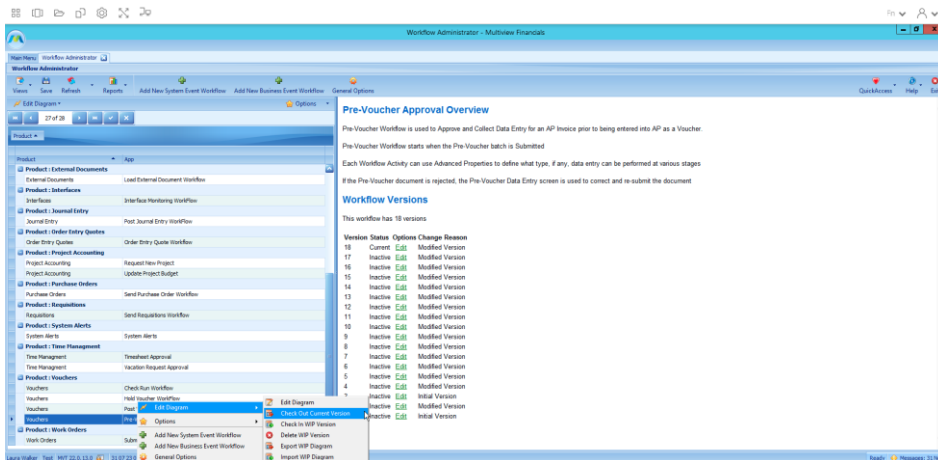
9. Click the Action Button at the top and select "Import a Diagram."
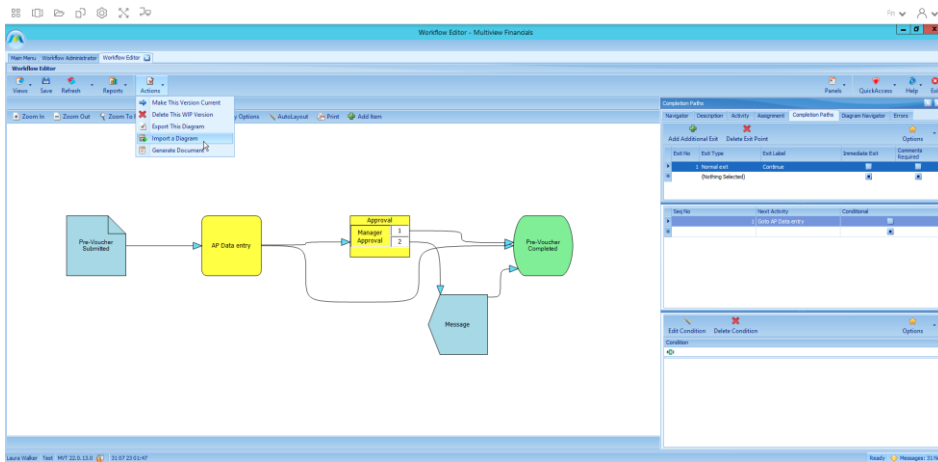
10. On the Import Workflow Diagram > Load File screen, provide the name of the file you wish to import. Use the drop-down box to navigate to the saved exported diagram and click "Next."
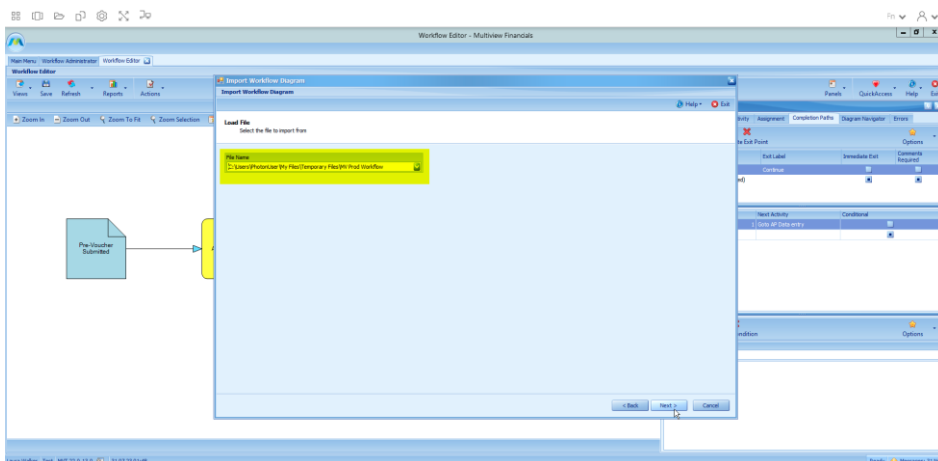
11. Review the description of the export diagram on the Import Workflow Diagram > Review Setup screen to ensure it is the correct one for import. h. If there are differences in positions between the databases, modify the position mapping on the Import Workflow Diagram > Map Positions screen.
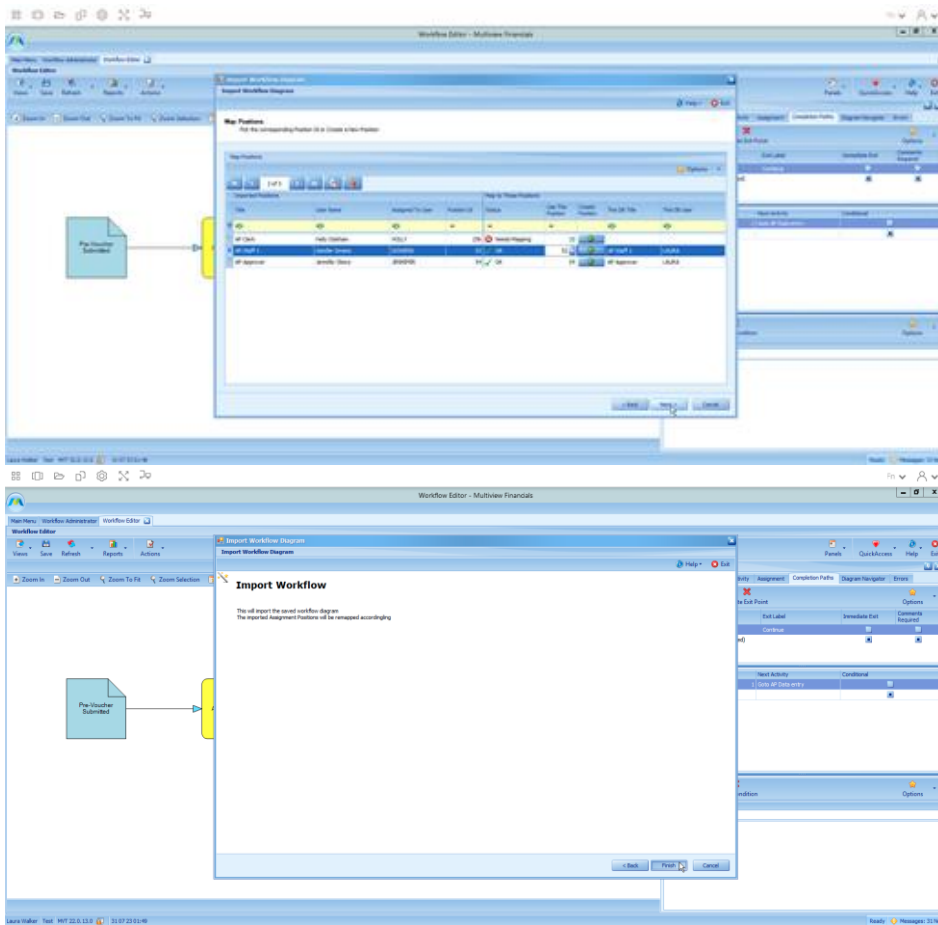
12. After editing the imported workflow diagram, make this version the current one by selecting Actions and clicking "Make this Version Current."
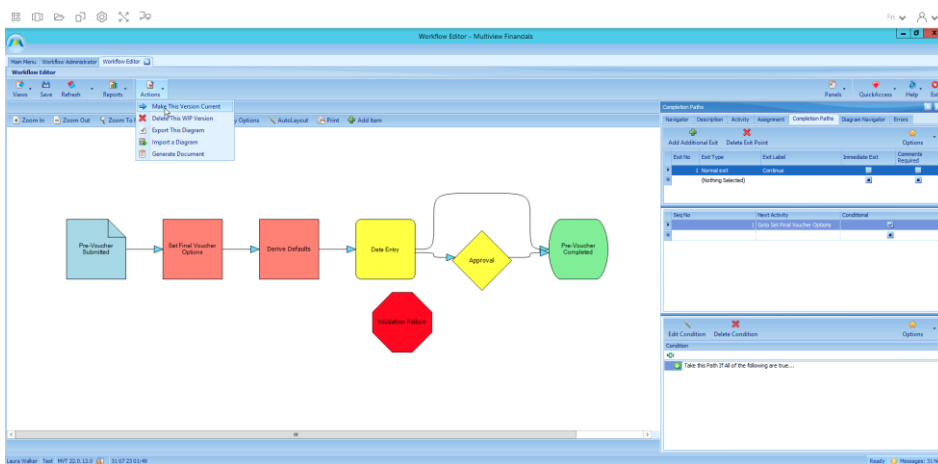
Note: If you are exporting from a test to a live database (or vice versa), consider using the export feature to create a backup of the workflow you are overwriting for added safety and data integrity.

Key Steps for Success

1. **Draw it out!**

Always design the workflow outside of Multiview. Having it all laid out before building will decrease the chances of unexpected errors and work stoppage. See below for a sample handout you can use to help you draw out your Workflow!

2. Create WIP versions.

When making changes to an existing workflow, always create a Work In Progress version.

3. Export your current workflow diagram.

Keeping a copy of your diagram somewhere safe ensures that any issues can be quickly corrected by simply loading in the original version.

4. Review Errors Tab before making a workflow active.

Click on Check for Errors to be notified of any workflow breaking issues before going live.

5. Use the Generate Document Feature.

This feature provides a clean and detailed layout of workflow activity step by step.
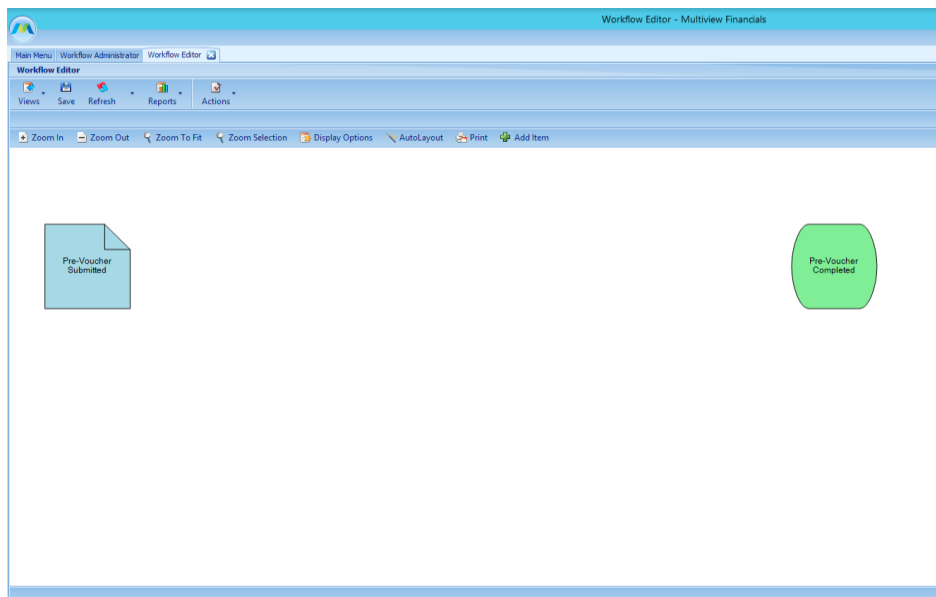
Explore our client portal and access our comprehensive How-to Guides for Workflow! Discover a variety of step-by-step guides on diagnosing errors, making edits to the Workflow diagram, and much more. These guides are designed to help you navigate the Workflow process smoothly and efficiently. Don't hesitate to leverage our resources to enhance your understanding and proficiency with our Workflow system.

Multiview Customer Support / How To Guides / Workflow How-To

Workflow How-To

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- How to set up a warning for users in Workflow if the item is a duplicate invoice/accounting date is incorrect... etc
- How to add a new User to the workflow
- How to correct an item not going to the correct location (node)
- How to correct an Item not going to the correct user/position
- How to Temporarily replace an approver who is away on Vacation from the workflow
- How can I require multiple approvers to approve the same workflow item?
- How to verify if your Workflow items are in an active Workflow
- How to resolve "No Recipients Found" error messages
- How to add an approver to Workflow while using User Defined Fields
- How to add Check Run Workflow
- How to send a user a Completion Message in Workflow.
- How to Export/Import a Workflow
- How to setup Multiview Workflow Emails
- How to enter comments when processing a workflow item

Session Handout:

Business Case:

Let's consider a large healthcare network as an example. Such an organization typically has multiple departments, each with its own budget and financial responsibilities. The organization uses your workflow to manage expenses effectively:

- Managers in various departments approve routine expenses like medical supplies, staff training, and minor equipment purchases, ensuring they stay within their allocated budgets.
- Directors oversee larger expenditures such as medical equipment upgrades, facility maintenance contracts, and IT infrastructure investments, making certain these expenses align with departmental strategies.
- The CEO gets involved when substantial financial decisions are on the table, like building expansions, major equipment purchases, or strategic acquisitions, ensuring they fit into the organization's overall financial plan.
- Data entry clerks play a vital role in ensuring all invoices are processed efficiently, which is particularly important in a healthcare network with a high volume of financial transactions.

In this healthcare organization, your workflow helps manage costs, ensure compliance, and maintain transparency in financial operations, ultimately contributing to the organization's sustainability and growth.

Draw it out! (Sample)

Here is an example of how you can visually represent or map out a workflow. The workflow I've developed comes with specific requirements. It involves three tiers of approval: Managers, Directors, and the CEO. Additionally, it relies on our dedicated data entry clerks. In this process, Managers are the initial level of approval, responsible for reviewing and approving coded invoices. Any invoice exceeding $10,000 is then escalated to the respective Directors for approval, ensuring alignment with departmental budgets. Furthermore, invoices surpassing $25,000 require the CEO's approval due to their impact on our budget."

Entry	Data Entry	Level 1 Approval	Manager Approvers	Units	Level 2 Approvals	Director Approval	Units	Level 3 Approval	CEO approval
Clerks:	Ap Staff 1	Approvers	Management Operations	ex: 133	If invoice > 10,000	Director, Operations	ex: 133	If invoice > 25,000	CEO
	AP Staff 2		Human Resources			Director, Patient & Care			
			Regulatory Manager			Director, HR			
			Compliance Manager			Director, Marketing			
			Finance Manager			CFO			
			IS Manager						
			Marketing Manager						
			Radiology Manager						
			Surgical Manager						