



## Escape Workflow – Required for Online 6

Workflows are used for routing documents such as requisitions, payments, payroll changes, etc. through the software. Workflow definitions allow numerous levels of approvals and notifications for document routing requirements. We are moving to Workflow because of this flexibility, also because **Escape is phasing out of the Standard 1234 module that we are currently using.**

### What's the Difference: Standard 1234 vs Workflow

**Standard 1234** gives four levels of approvals (location, account, fiscal, department).

**Workflows** are open-ended with much more flexibility – including the ability to define groups of approvers, or individual users; put approvals in any order based on a wide variety of fields; add Notifications.

#### **Workflows allows you to:**

- **Define Approvers**
- **Assign Buyers**
- **Define Notifications**
- **Setup Approval Routing**

Using the workflow setup, we will define approvers, assign buyers, define notifications and setup approval routing. Workflow is based on when an event occurs; the setup will determine what happens next and who is notified in order to process the document through the system. It also **allows editing while in submitted status** based on permissions.

### Document Types

- Requisitions: Vendor, Stores, Department
- Journal Entries, Budget Transfers, Budget Revisions
- Payments: AP, Direct, Employee

## Escape Finance Workflow in Action

<b>Maximize approvals using workflow!</b>	<b>1234</b>	<b>Workflow</b>
<b>REQUISITIONS - Vendor, Stores, Department</b>		
Approval Notifications	X	X
Status Notifications		X
Other Notifications: Change Notice, Issues, Unissues, Returns		X
Ability to edit in submitted status		X
Approvers can have different account component approvals based on department and type of requisition		X
Approvals are re-evaluated if requisition is edited in submitted status		X
Approvals can be done automatically if requisition is edited in submitted status		X
Approval levels can be customized		X
Approvals done automatically when submitted by approver	X	X
Buyers can approve based on goods and services or account components		X
<b>JOURNAL ENTRIES, BUDGET TRANSFERS, BUDGET REVISIONS</b>		
Approval Notifications		X
Status Notifications		X
Other Notifications: On Hold, Off Hold, Reversed, Error		X
Approvers can have different account component approvals based on JE type		X
Ability to edit in submitted status		X
Approval levels can be customized		X
Approvals can be routed based on location, department, academic department, and campus.		X
Approvals done automatically when submitted by approver	X	X
Notifications for system-generated journal entries		X
<b>COUNTY JOURNAL ENTRIES</b>		
Approvals		X
Approval Notifications		X
Status Notifications		X
Other Notifications: On Hold, Off Hold, Reversed, Error		X
Ability to edit in submitted status		X
<b>PAYMENTS: AP, DIRECT, EMPLOYEE</b>		
Approval Notifications		X
Status Notifications		X
Other Notifications: Check Cancelled, Check Reissued, Check Stale Dated, Check Voided, On Hold, Off Hold, Error		X
Ability to edit in submitted status		X
Approvers can have different approvals based on payment type		X
Approval levels can be customized		X