

Assigning Work Items

AP Sorter page work items must be assigned to specific employee numbers before working them. Listed below are the steps on how to assign work items on the AP Sorter page for AP and ECM.

AP Assigned Items and ECM

OAKS FIN > Main Menu > Accounts Payable > Batch Processes > Extracts and Loads > UDS Image Matching

The screenshot displays the 'AP Sorter' interface within the OAKS Financials application. The breadcrumb trail at the top reads: 'Favorites > Main Menu > Accounts Payable > Batch Processes > Extracts and Loads > UDS Image Matching'. The page title is 'AP Sorter'. The search form includes the following fields and controls:

- *Status: New (dropdown)
- Assigned To: (text input)
- From Date: (calendar icon) To Date: (calendar icon)
- Exception Category: (dropdown)
- Work Group: (dropdown)
- Vndr Name: (text input)
- Invoice: (text input)
- Batch ID: (text input) Image ID: (text input)
- Business Unit: (text input)
- Voucher ID: (text input)
- Origin: (text input)
- Search: (button)

Below the form is a table with the following columns: Received Date, Batch ID, Image ID, Image, Create Voucher, Assigned To, *Sort Status, Work Group, and Exce. The table contains one row with a checkbox, the number 1, and various fields. At the bottom, there are buttons for Select All, Clear All, Save, and Unlock Images.

Always refresh the AP Sorter page prior to assigning work items.

1. Click the [Select this row](#) checkbox to select a desired line.

Do not manually change [Sort Status](#) - once [Work Group](#) is selected, status of "Assigned" is automatically populated.

2. Select [Work Group](#) for appropriate work group.

3. Enter [Assigned To](#) for the employee number of desired associate.

4. Click [Save](#).