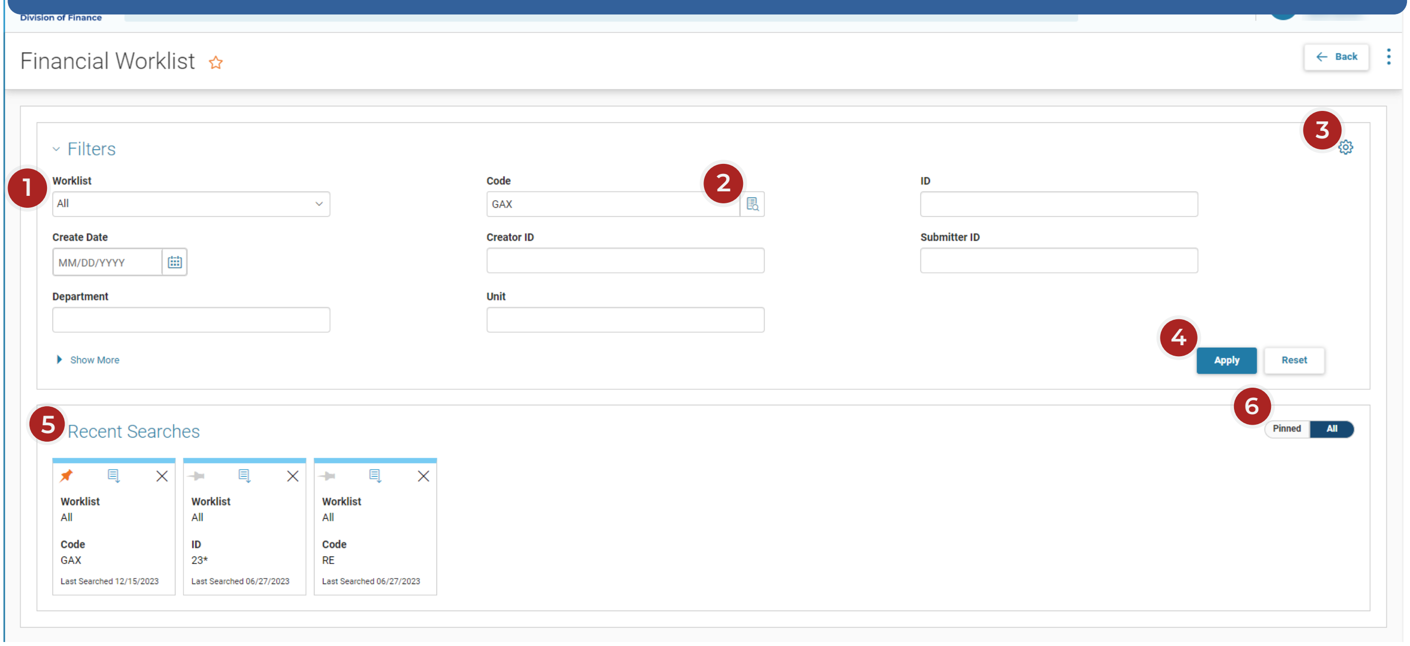
division of
Finance

Worklists and approvals
FINET quick reference guide

Introduction

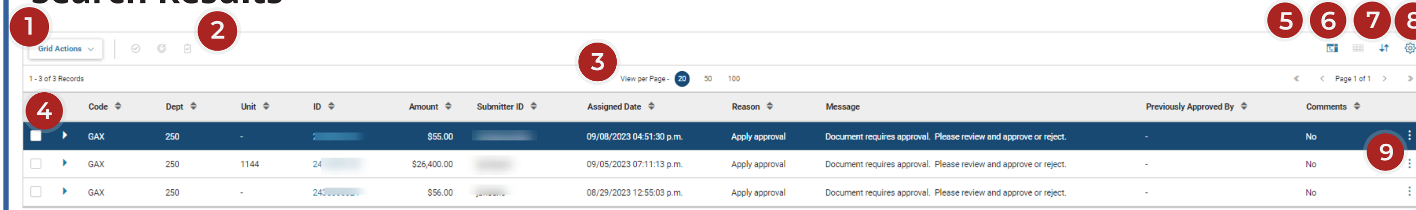
All FINET users have a Worklist **(WRKLSTC)** page, which can be accessed from the home page quick link. The worklist page is the interaction point between users or approvers and worklist items. FINET users can access all transactions that are in their personal worklist while approvers can access their personal worklist or an assigned worklist. If an approver rejects a transaction, it appears on the submitters personal worklist in a draft phase with a reason and message indicating the transaction was rejected. The approver may also enter a comment on the transaction with additional details indicating why the transaction was rejected.

Worklist search



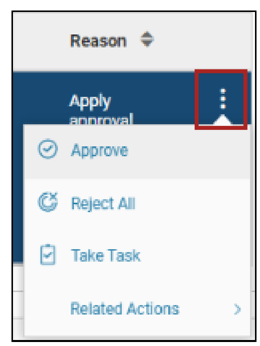
1. **Assigned Worklists** – Includes the personal worklist and list for each approval group to which the approver belongs.
2. **Search fields** – Enter search criteria.
3. **Configure Search Criteria** – Determine search fields by clicking the gear icon and selecting the fields.
4. **Apply** button – Click to return search results.
5. **Recent Searches** – Previous searches are displayed as cards, which represent the recent searches.
   - **Pin** ( ) – Click to always display the card in your recent searches.
   - **More Information** ( ) – Click to see all of the search criteria entered.
   - **Close** ( ) – Click to remove the search card from the recent searches area.
6. **Recent Searches** View Options – Click to view only **Pinned** or **All** recent searches cards.

Search Results



The worklist search results are sorted by default to show highest dollar transactions first but the sort order can be changed by clicking selected column headers or clicking the sort results icon to complete a multi-column sort. If the worklist is sorted by another criteria and you want to go back to viewing high dollar transactions first, close and re-open the worklist.

1. **Grid Actions** – Select results records and click the button to take an action on the selected results.
2. **Action Icons** ( ) – Select results and click **Approve**, **Reject All**, or **Take Task** to apply the action to the selected results.
3. **Results Display Count** – Click to view 20, 50, or 100 search results per page.
4. **Expand Results** ( ) – Click to view more details on the search result record.
5. **Advanced Grid** ( ) – Click to view the results in Pivot Mode.
6. **Freeze Columns** ( ) – Click a column and then click the icon to freeze all columns before the selected column.
7. **Sort Results** ( ) – Click to sort the records in ascending or descending order.
8. **Personalize your columns** ( ) – Click gear and choose the columns to display in the grid.
9. **3-dot Menu** ( ) – Click to edit, copy, or take action on the selected result.

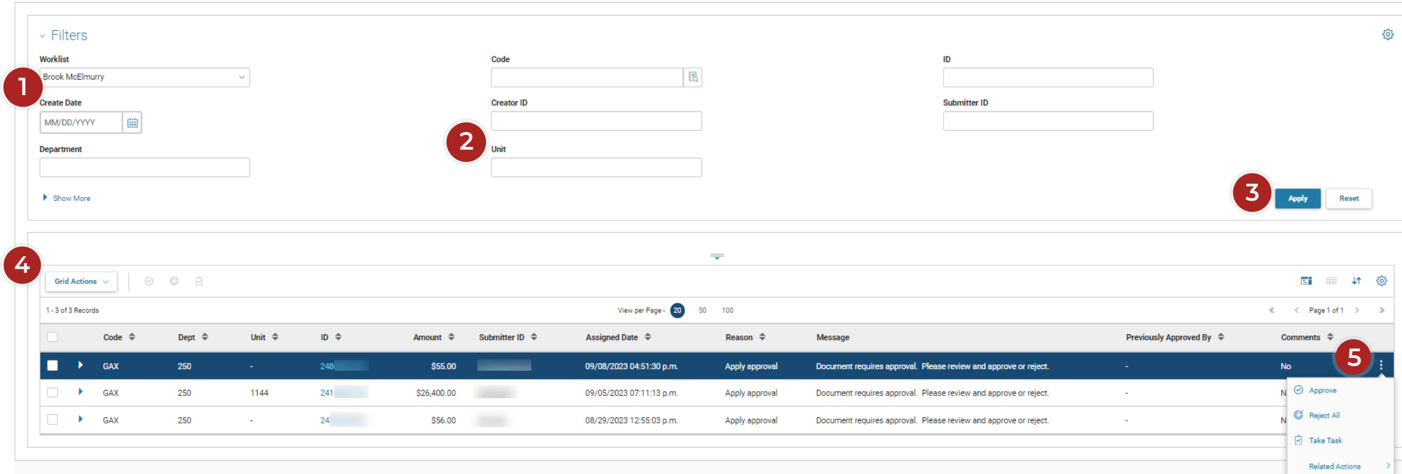


Worklist Enhancements

There are several worklist enhancements:

1. The **Creator ID**, **Unit**, and **Create Date** fields have been added as search fields on the Worklist page.
2. The **Unit** and **Previously Approved By** fields have been added as column options in the grid on the Worklist page.
3. The worklist pages default sorts to show the highest dollar item first. Additional columns can be used to sort the records within the results grid.
4. Approvers can select multiple transactions in a worklist and then use the **Grid Actions** button or the **Take Task** icon to move all of the selected records to their personal worklist.

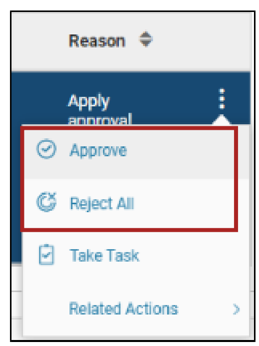
5. Approvers can take actions on transactions without taking the task.
- Approve or Reject buttons on the transaction
- 3-dot menu at the right of the transaction on the worklist results grid
- Grid Actions button on the worklist results grid
- Action icons on the worklist results grid



Approve or Reject Transactions – Take Task

Approvers can continue to Take Task on a specific transaction to move it to their personal worklist before applying approval. Approvers should click the 3-dot menu on a worklist transaction and click Take Task to move a single transaction to their personal worklist or select multiple transactions using the check boxes and then click the Take Task icon to move multiple transactions to their personal worklist.

Approve or Reject Transactions – Worklist or Transaction



Approvers can now approve or reject individual transactions from the worklist by clicking the 3-dot menu and then clicking **Approve** or **Reject All**. Individual transactions can also be approved or rejected using the **Approve** Approve and **Reject** Reject buttons that display at the top of Pending transactions.

Note: The Worklist Details **(WRKLSTDL)** page displays additional fields from transactions for each worklist result allowing approvers to sort on those fields so they can prioritize worklist items.