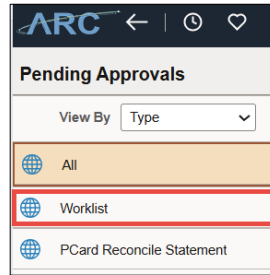
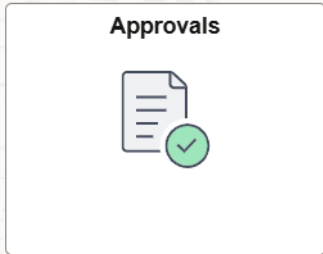


The Worklist is where you will manage the items that have been routed to you and pending your action. It is recommended that you manage your Worklist daily since there will be no e-mail notification sent when a new item is routed to you. You can access the Worklist from the **Approvals** tile and then the **Worklist** menu.



The Worklist has the following features:

- Prioritize items from 1 –High to 3 – Low
- Access the item pending action from a direct link
- Mark items that have been worked on (this will remove the item from your Worklist)

The diagram below highlights each of these features on the Worklist:

From	Date From	Work Item	Worked By Activity	Priority	Link		
Michael Kerstan	04/13/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval. 11. COLUM. 1901-01-01. N. 0. BUSINESS_UNIT:AGENC JOURNAL_ID:CNV0000248 JOURNAL_DATE:2011-06-29 BUSINESS_UNIT LN:AGENC RDC:A.0.R</a>	Mark Worked	Reassign
Integrating System Approval	05/02/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval. 881. COLUM. 1901-01-01. N. 0. BUSINESS_UNIT:COLUM JOURNAL_ID:FP00075388 JOURNAL_DATE:2012-04-01 BUSINESS_UNIT LN:COLUM RDC:A.0.R</a>	Mark Worked	Reassign
Binoy Saha	05/03/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval. 981. COLUM. 1901-01-01. N. 0. BUSINESS_UNIT:COLUM JOURNAL_ID:0000075405 JOURNAL_DATE:2012-05-02 BUSINESS_UNIT LN:COLUM RDC:A.0.R</a>	Mark Worked	Reassign

Annotations:

- Work Item:** This column displays the status of the Work Item ('Transaction Approved' means you have already approved the transaction; 'Approval Routing' means the transaction needs to be reviewed and approved)
- Priority:** This column allows you to organize your Worklist by prioritizing items from '3 –Low' to '1-High'.
- Link:** The links on this column will take you directly to the worklist item that is pending approval.
- Mark Worked:** Once action has been taken on an item you can remove it from your Worklist by marking it as complete.

1. Click on the link of the item to be worked on.

Worklist for GL\_TEST\_11: Controller FR&O

Detail View Work List Filters: [Dropdown] Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
Michael Kerstan	04/13/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval_11.COLUM, 1901-01-01.N.0, BUSINESS_UNIT:AGENC, JOURNAL_ID:CNV0000248, JOURNAL_DATE:2011-06-29, BUSINESS_UNIT_LN:AGENC, RDC:A.O.R</a>	Mark Worked	Reassign
Integrating System Approval	05/02/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval_881.COLUM, 1901-01-01.N.0, BUSINESS_UNIT:COLUM, JOURNAL_ID:FP00075388, JOURNAL_DATE:2012-04-01, BUSINESS_UNIT_LN:COLUM, RDC:A.O.R</a>	Mark Worked	Reassign
Binoy Saha	05/03/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval_981.COLUM, 1901-01-01.N.0, BUSINESS_UNIT:COLUM, JOURNAL_ID:0000075405, JOURNAL_DATE:2012-05-02, BUSINESS_UNIT_LN:COLUM, RDC:A.O.R</a>	Mark Worked	Reassign

2. The link will take you directly to the entry that requires your action. In this case, the Journal approval page:

Header | Lines | Totals | Errors | **Approval**

Unit: COLUM Journal ID: 0000075450 Date: 05/03/2012 **Submit**

Approval Status: Pending Approval  
Approval Action: **Approve**

**Departmental Approval**  
BUSINESS\_UNIT=COLUM, JOURNAL\_ID=0000075450, JOURNAL\_DATE=2012-05-03, BUSINESS\_UNIT\_LN=COLUM:Approved  
Internal Xfer Dept Approval  
Dept: 7001101  
Self Approved  
Stacey Tsai (Any)  
Department Level Approval  
05/04/12 - 11:40 AM

**Campus Approval**  
BUSINESS\_UNIT=COLUM, JOURNAL\_ID=0000075450, JOURNAL\_DATE=2012-05-03, BUSINESS\_UNIT\_LN=COLUM:Pending  
CUMC Controller's Approval  
Pending  
Multiple Approvers  
CUMC Fund Transfer

Approval History

Save Return to Search Notify Refresh Add Update/Display

3. Once you have reviewed the entry and are ready to take action, select your approval action from the drop-down menu ('Approve' or 'Deny') and click the 'Submit' button.

Header | Lines | Totals | Errors | **Approval**

Unit: COLUM Journal ID: 0000075450 Date: 05/03/2012 **Submit**

Approval Status: Pending Approval  
Approval Action: **Approve**

Deny Comments:

4. To remove an item that you have already worked on from the Worklist, click on the 'Mark Worked' button:

Worklist for GL\_TEST\_11: Controller FR&O

Detail View Work List Filters: [ ] Feed -

From	Date From	Work Item	Worked By Activity	Priority	Link		
Michael Kerstan	04/13/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval.11.COLUM.1901-01-01.N.0.BUSINESS_UNIT.AGENC.JOURNAL_ID.CNV0000248.JOURNAL_DATE.2011-06-29.BUSINESS_UNIT.LN.AGENC.RDCA.0.R</a>	Mark Worked	Reassign
Integrating System Approval	05/02/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval.881.COLUM.1901-01-01.N.0.BUSINESS_UNIT.COLUM.JOURNAL_ID.FF00075388.JOURNAL_DATE.2012-04-01.BUSINESS_UNIT.LN.COLUM.RDCA.0.R</a>	Mark Worked	Reassign
Binoy Saha	05/03/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval.981.COLUM.1901-01-01.N.0.BUSINESS_UNIT.COLUM.JOURNAL_ID.0000075405.JOURNAL_DATE.2012-05-02.BUSINESS_UNIT.LN.COLUM.RDCA.0.R</a>	Mark Worked	Reassign

5. The item will no longer appear on your Worklist:

Worklist for GL\_TEST\_11: Controller FR&O

Detail View Work List Filters: [ ] Feed -

From	Date From	Work Item	Worked By Activity	Priority	Link		
Integrating System Approval	05/02/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval.881.COLUM.1901-01-01.N.0.BUSINESS_UNIT.COLUM.JOURNAL_ID.FF00075388.JOURNAL_DATE.2012-04-01.BUSINESS_UNIT.LN.COLUM.RDCA.0.R</a>	Mark Worked	Reassign
Binoy Saha	05/03/2012	Transaction Approved	Approval Workflow	2-Medium	<a href="#">GL JournalApproval.981.COLUM.1901-01-01.N.0.BUSINESS_UNIT.COLUM.JOURNAL_ID.0000075405.JOURNAL_DATE.2012-05-02.BUSINESS_UNIT.LN.COLUM.RDCA.0.R</a>	Mark Worked	Reassign

### Getting Help

Please contact the Finance Service Center  
<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now  
<https://columbia.service-now.com>