FIN How-to: Worklists [1]

Watch the video

Read the procedures

In the Finance System (FIN), the Worklist is a prioritized list of work items awaiting action by you.

1. Log into the Finance System.
2. From the **Finance Inquiry or Finance & Accounting** homepage, click the **Worklist** tile.
3. The **From/Date From** columns indicate who sent you something and when.
4. The **Work Item** column will indicate what type of action is needed by you.
5. **Worked By Activity** indicates how the transaction was routed to you.
6. The **Priority** column lets you rank each item as high, medium or low priority, and then you can sort your worklist according to this.
7. The **Link** column will take you to full details of the item where you can view attachments, review or approve the transaction.
8. In the final column, you can use the buttons to mark an item as worked, or reassign the item to another user.

Have a question or feedback?

Questions & Feedback [2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

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