8.9 HRMS Step by Step Guide
Approve with Worklist

Overview: Use this Step-by-Step guide to Approve multiple transaction items more efficiently.

REFERENCES: Please refer to your campus business processes for the required off-line transaction approvals. The procedures, policies, and or Rules that are required by your campus and the State of Colorado are not addressed in this Step-by-Step. Please consult with the appropriate Human Resource department on your campus for those processes.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Worklist

- Worklist

2. Filter Worklist Items

- Click to display the filter types: Funding Distribution Approval, Job Approval, Position Approval, Position Incumbent Approval, Time Entry Worklist, PET Approval, PET SP Approval

If there are no worklist items, the filter will not be displayed in the dropdown list.

- Select a filter type
3. Filtered Items display

4. Work your Worklist
   - Click on the Link for each item
   - Ex. 189266.0.2007-02-26.0.HIR.G3A4XX.10261.EDUC.R
   - You will automatically be transferred to the appropriate Approval page for that worklist item selected
   - Once you select an item, you become the “owner” of that Worklist item. The item will disappear from any other approver(s) Worklist(s)
   - Approve or Reject the Worklist item, OR leave item in Proposed status
   - Review your work
   - Click Save
5. Return to Worklist

☐ Click Worklist on the top blue menu bar
☐ Click on the "Mark Worked" button to remove this completed and approved work item from your Worklist

**Or** Leave item on the Worklist and the nightly "sweep" will remove approved or rejected items from your Worklist

Note: Once the "Mark Worked" button is selected, items will be removed from the Worklist whether or not they are in approved, proposed or rejected status.

6. Reassign Worklist

☐ Click on the Reassign button

7. Select New Approver

☐ Select appropriate approver from the Operator ID list.
☐ Enter a comment, if necessary
☐ Click 

NOTE: It is recommended that users run the Position Status, Funding Status, and Job Status reports to ensure that all transactions are in approved status prior to payroll deadlines. In other words, do not rely solely on Worklist for verifying that all of your transactions have been approved.

Approve Worklist Complete