

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
 Job Approval
 Position Approval
 Position Incumbent
 Job 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

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Worklist for PRACT10: PRACT10

Summary View Work List Filters: Job Approval Worklist

From	Date From	Work Item	Link	Selected Dttm	Mark Worked	Reassign
PRACT12	02/26/2007 2:26:29PM	Job Approval Worklist	189266_0_2007-02-26_0_.. HIR_G3A4XX_10261_1EDUC_R		Mark Worked	Reassign
PRACT19	02/26/2007 2:40:39PM	Job Approval Worklist	189273_0_2007-02-26_0_.. HIR_H6G3XN_20412_2SOD_R		Mark Worked	Reassign

4. Work your Worklist

- Click on the Link for each item

Ex. [189266_0_2007-02-26_0_HIR_G3A4XX_10261_1EDUC_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**

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PRACT19	02/26/2007 2:40:39PM	Job Approval Worklist	189273_0_2007-02-26_0_.. HIR_H6G3XN_20412_2SOD_R		Mark Worked	Reassign

Work Location Job Information Payroll Compensation Employment Information Job Approval Cu

Save Return to Search Next in List Previous in List Refresh

Mary, Weather ID: 189266

Approval Find First 1 of 1 Last

Effective Date: 02/26/2007 Sequence: 0 Job Notes Payroll Status: Active

Action: HIR Hire Reason: HIR New Hire

Department: 10261 School of Education Action Date: 02/26/2007

Job Code: G3A4XX Admin Assistant III %TIME: 100.00

Position Number: 00106564 Admin Assistant III Std Hrs/Wk: 40.00

Pay Rate Data

Annual Rate:	46800.000	Comp Freq:	M
Monthly Rate:	3900.000		
Hourly Rate:	22.500000		

'Approval Status: Proposed Status Date: 02/26/2007 Appr Reject:

Save View Worklist Previous in Worklist Next in Worklist Notify Previous tab Next tab Refresh

'Approval Status: Approved Status Date: 02/27/2007 Appr Reject:

Save View Worklist Previous in Worklist Next in Worklist Notify Previous tab Next tab Refresh

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.

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HR89PRAC PRACT10 Home | **Worklist** | Add to Favorites | Sign

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Worklist for PRACT10: PRACT10

Summary View Work List Filters: Job Approval Worklist

From	Date From	Work Item	Link	Selected Dttm	Mark Worked	Reassign	Previous User	Comment
PRACT12	02/26/2007 2:26:29PM	Job Approval Worklist	189266_0_2007-02-26_0_HIR_G3A4XX_10261_1EDUC_R	02/27/2007 7:57:00AM	Mark Worked	Reassign		

6. Reassign Worklist

- Click on the Reassign button

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Worklist for PRACT10: PRACT10

Summary View Work List Filters: Job Approval Worklist

From	Date From	Work Item	Link	Selected Dttm	Mark Worked	Reassign	Previous User	Comment
PRACT12	02/26/2007 2:26:29PM	Job Approval Worklist	189266_0_2007-02-26_0_HIR_G3A4XX_10261_1EDUC_R		Mark Worked	Reassign		
PRACT19	02/26/2007 2:40:39PM	Job Approval Worklist	189273_0_2007-02-26_0_HIR_H6G3XN_20412_2SOD_R		Mark Worked	Reassign		

7. Select New Approver

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

User ID:

Comment:

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