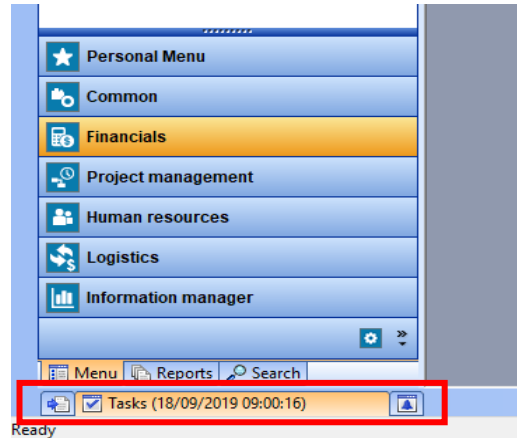


Checking your Agresso Tasks List

Task List in Desktop

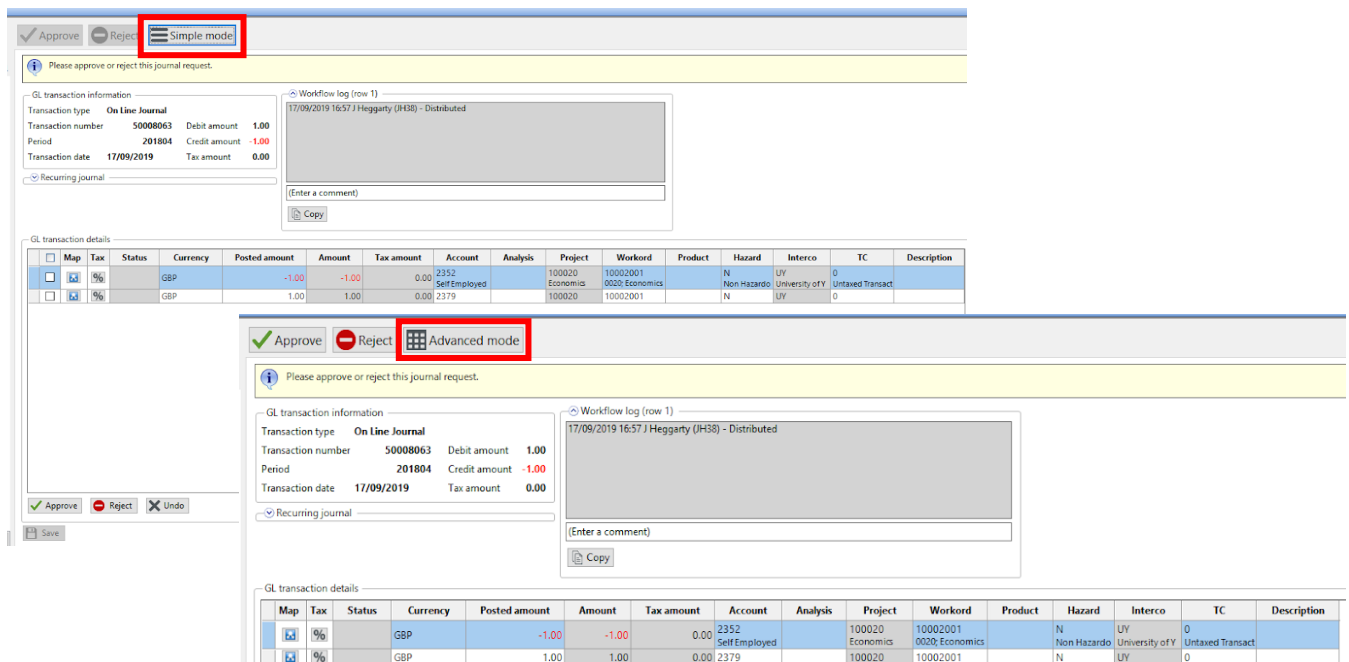
Within Agresso (Unit4) Business World, aka Smart Client or Back Office, your Task List contains items which has been workflowed to you and are awaiting action. Please **check this regularly** and deal with your Tasks in a timely manner.

1. Your Tasks List can be seen at any time within Agresso from the main menu: **View** → **Tasks**. Alternatively, you can click on the Task List Pane, usually located at the foot of the main Agresso screen, as shown below.



You are able to pin the Task List open too, by clicking the 'pin' icon on the top right .

2. Double click on one of your Tasks to open the approval screen.
 - In **Advanced Mode** you can Approve/Reject each line (top left picture below)
 - In **Simple Mode** you can Approve/Reject all lines within the same Tasks (right picture)



The screenshots show the approval interface for a journal request. The top screenshot is in 'Simple mode' and the bottom is in 'Advanced mode'. Both show the following transaction information:

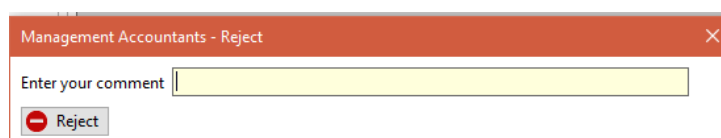
GL transaction information
 Transaction type: On Line Journal
 Transaction number: 50008063 Debit amount: 1.00
 Period: 201804 Credit amount: -1.00
 Transaction date: 17/09/2019 Tax amount: 0.00

Workflow log (row 1)
 17/09/2019 16:57 J Heggarty (JH38) - Distributed

GL transaction details table:

Map	Tax	Status	Currency	Posted amount	Amount	Tax amount	Account	Analysis	Project	Workord	Product	Hazard	Interco	TC	Description
	%		GBP	-1.00	-1.00	0.00	2352 Self Employed		100020 Economics	10002001 0000 Economics		N Non Hazardo	UY University of Y	0	Unfaxed Transact
	%		GBP	1.00	1.00	0.00	2379		100020	10002001		N	UY	0	

3. Tick the relevant lines in the box in the Tasks menu (or Select all visible items) and click the Reject or Approve button as appropriate. If you click Reject, you will be prompted to enter a comment to explain your reason for rejection.



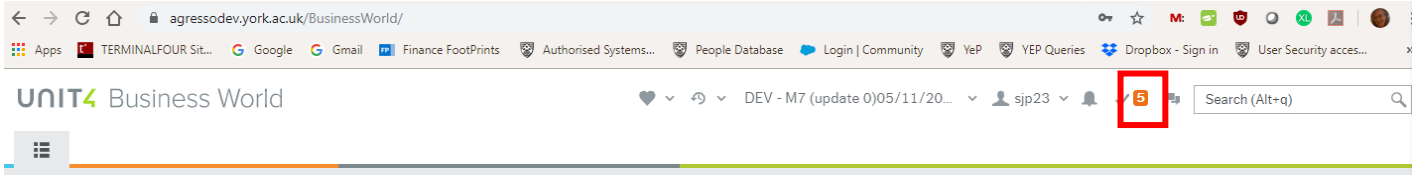
Management Accountants - Reject

Enter your comment

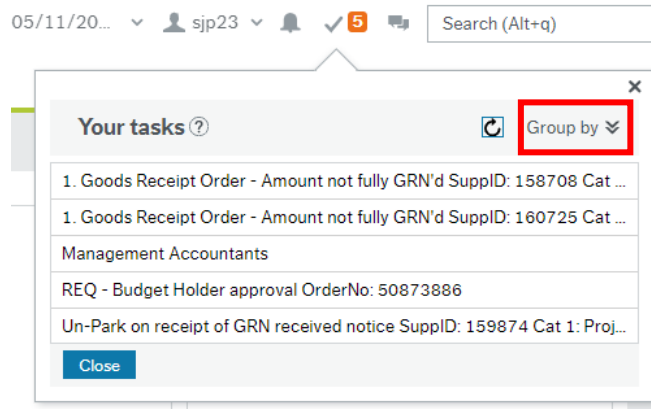
Checking your Agresso Tasks List

Task List in Web

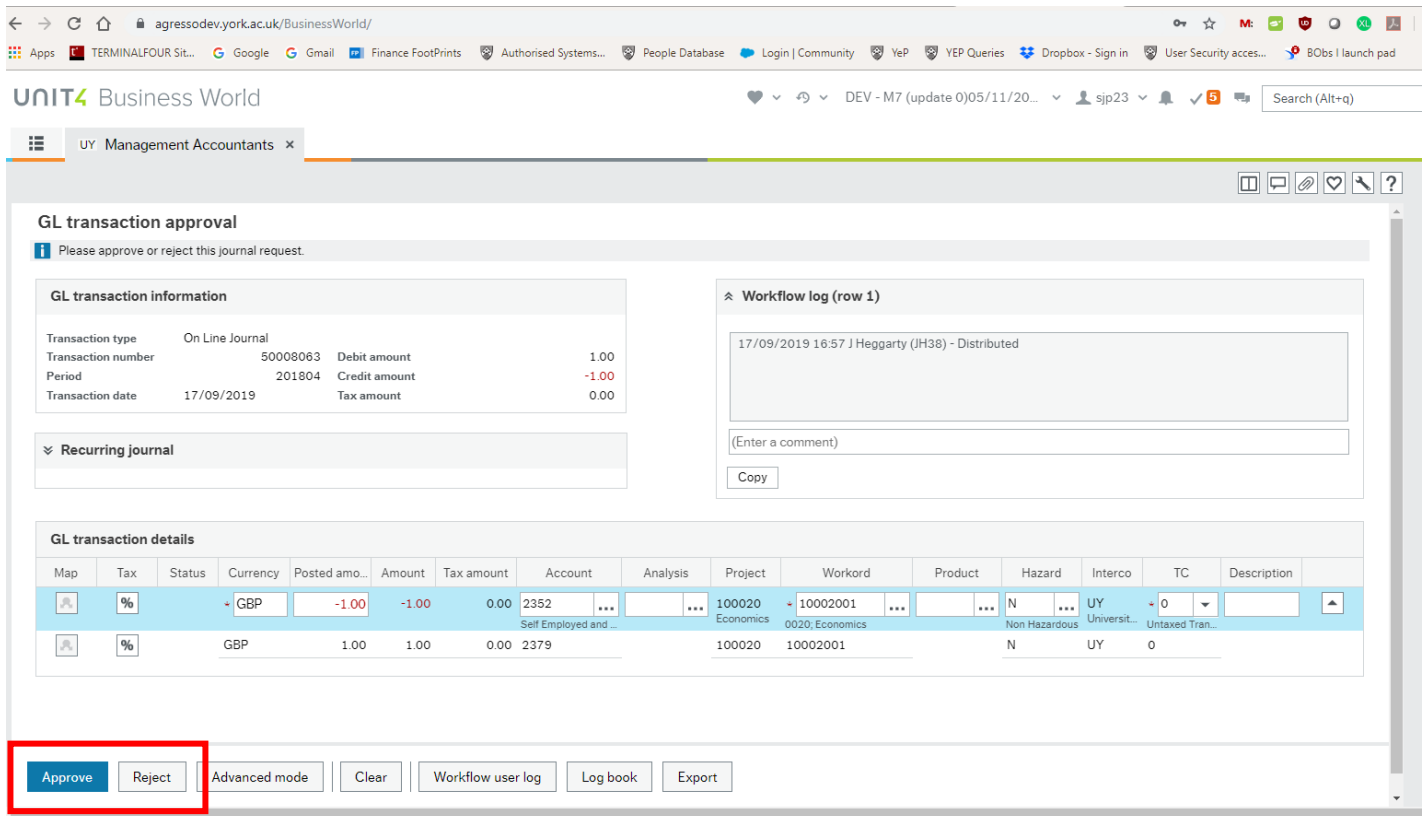
- Once you've logged into the Agresso web via your browser, an orange square in the top right will indicate the number of Tasks to action, as shown below.



Tasks may be grouped using the 'Group by' filter, as shown below.



- Click on a Task to open the approval screen and action accordingly using the Approve/Reject buttons.



GL transaction approval

Please approve or reject this journal request.

GL transaction information

Transaction type	On Line Journal		
Transaction number	50008063	Debit amount	1.00
Period	201804	Credit amount	-1.00
Transaction date	17/09/2019	Tax amount	0.00

Recurring journal

Workflow log (row 1)

17/09/2019 16:57 J Heggarty (JH38) - Distributed

(Enter a comment)

Copy

GL transaction details

Map	Tax	Status	Currency	Posted amo...	Amount	Tax amount	Account	Analysis	Project	Workord	Product	Hazard	Interco	TC	Description
	%		GBP	-1.00	-1.00	0.00	2352	...	100020	10002001	...	N	UY	0	Self Employed and ...
	%		GBP	1.00	1.00	0.00	2379	...	100020	10002001	...	N	UY	0	Economics

Approve **Reject** **Advanced mode** **Clear** **Workflow user log** **Log book** **Export**