People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email or call hrhelpline@ed.ac.uk

Employee Guide- How to Access and Action Checklist Items

Employee

Estimated time to complete: Insert time

In Brief…

This is a simple overview of the process.

1. From the Home page, click the Navigator menu on the top left icon.
2. Open the Me section, and then click Checklist Tasks
3. Select Current Tasks and then either To Do for Myself or To Do for Others based on what’s relevant; In-Progress Checklists to view your progress; or Completed Checklists to see what’s been completed.

For detailed guidance, see the next section.
1. From the Home page, click the **Navigator** menu on the top left icon.

2. Open the **Me** section, and then click **Checklist Tasks**
3. Select **Current Tasks**.

4. Then go to **To Do for Myself**

5. Then to **To Do for Others** based on what’s relevant.
6. Go to In-Progress Checklists to view your progress.

7. Then View.
8. Go to **Completed Checklists** to see what’s been completed.

9. Then view.

---

**Glossary**

Please refer to Glossary