Approvals Process for Financial Transactions

This guide will cover:

- How to take Approval Process action on a transaction, including
  - Where to view transactions requiring approval
  - Reviewing the transaction
  - Approve
  - Reject
  - Reassign
  - Request Information
  - Adhoc Route
  - Delegate

- Tips on reading approvals notifications for financial transactions including expense reports, requisitions and non-P.O. invoices.

Note: As an approver, you will receive an email notifying you when you have an item ready for approval. However, you will need to log into WyoCloud to review the full details and complete approval.

Step One

Navigate to the BPM (Business Process Monitor) Worklist. There are multiple ways to access the Worklist.

Bell icon worklist access:

- Click on the Bell icon along the top of the page.

  - This will display the most recent items added to your worklist. It is recommended to click Show All to view all items needing your attention.
Things to Finish worklist access:

- Towards the bottom of the main WyoCloud homepage you will see a section called **Things to Finish**. This area allows for quick access into individual items needing your attention.
- Individual items needing your attention will appear as cards in this area. You can click on the hyperlinked item **title** to expand full details of the transaction.
- Alternatively you can click on the number below **Assigned to Me** to view items in a list.

Notifications list

- Upon clicking **Show More** from the bell icon or the **Assigned To Me** number from **Things to Finish**, you will see the full Notifications list. Here you can see all items needing your attention. To review and take action on one, click on the item **Title**.
• An Approval pop-up window for the transaction will display.

Step Two
Review the transaction.
  • Before taking action on a transaction, you should review all pertinent information regarding the transaction including, but not limited to:
    o Vendor/Payee
    o Description/purpose (i.e. allowable expense using specified funds and under University policies and procedures)
    o Amounts
    o Attachments (make sure receipts/invoices match amounts)
    o Chart of account string/distribution line charged (make sure expense fund class 999 is updated)
    o Justification if applicable
    o Contracts attached
  • Location of the above information may vary depending on the type of transaction (i.e. Expense Report, Requisition, Non-PO Invoice, etc.) Below are a few examples:
Non-PO Invoice

Approval of Invoice Test 2 from City of Laramie (50.00 USD)

Details
- Assignee: Laura Sheing
- From: Jon Kelly - A
- Assigned Date: 11/12/2019 10:45 AM
- Task Number: 1291903
- Supplier or Party: City of Laramie
- Supplier Site: Fire Dept
- Business Unit: UNYCY
- Invoice Number: Test 2
- Invoice Date: 11/10/2019
- Description: Test expenses for XYZ
- Payment Currency: USD
- Invoice Total: 50.00 USD

Amount Summary

<table>
<thead>
<tr>
<th>Line Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>50.00</td>
</tr>
</tbody>
</table>

Cost Center Summary

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems &amp; institutional effectiveness</td>
<td>50.00</td>
</tr>
</tbody>
</table>

Invoice Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Line Type</th>
<th>Amount</th>
<th>Item Description</th>
<th>Supplier Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item</td>
<td>50.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click to view Account string charged

Attachments
- No data to display

Comments
- No data to display
Step to Approve

Expense Report or Non-PO Invoice
Approve the transaction.

- To approve the transaction for an expense report or a non-po invoice, click the Approve button in top right-hand corner of the Approval window.

Requisition
Approve the transaction.

- To approve the transaction for a requisition, click the Approve button in the top right-hand corner of the Approval window.
A pop-up window will appear and you have the option to include a comment or add an attachment to be routed to the next individual in the approval chain. Click **Submit** and the transaction will route to the next step in the workflow.
**Step to Reject**

**Expense Report or Non-PO Invoice**

Reject the transaction.

- Comments on the reason for rejecting the transaction are required before rejecting. Click the plus symbol (+) in the **Comments** section.

- In the **Add Comment** pop-up window:
  - Provide the reason(s) for rejecting the transaction in the **Comment** field.
  - Click **OK**.

- The **Add Comment** window will close and you will be returned to the **Approval** window.
- Click **Reject**.
The Approval window will close and the creator of the transaction will be notified of the action.

Requisitions
Reject the transaction.
- From the Approval window click Reject.

Comments on the reason for rejecting the transaction are required before rejecting. On the pop-up window that display, you can enter your comments here and click submit.
• The **Approval** window will close and the creator of the transaction will be notified of the action.

**Step to Request Information**

**Expense Report or Non-PO Invoice**

Request Information for the transaction from the creator.

- To request more information for the transaction before you take action, click on the **Actions** dropdown in the top right-hand corner of the **Approval** window.

- In the **Actions** menu, click **Request Information**.
- The **Request More Information** pop-up window will display.

- To request information from the creator, leave the **Participant** radio button selected for the **From** option.
- Indicate the information requested in the **Comments** field.
- Leave the **Return Options** set to **Route directly back to me**. With this setting the transaction will reappear in your Notifications when the user has submitted the information.
- Click **OK**.
- The **Request Information** and **Approval** windows will close and the creator of the transaction will be notified of the action.

**Requisition**

Request Information for the transaction from the creator.

- To request more information for the transaction before you take action, click on the **Actions** dropdown in the top right-hand corner of the **Approval** window.
In the **Actions** menu, click **Request Information**

- To request information from the creator, leave the name that appears beside the **Name** field. This will auto populate the creator’s name. You can only request information from the creator of the requisition.
- Indicate the information requested in the **Comments** field.
• Leave the **Return Options** set to *Back to me*. With this setting the transaction will reappear in your Notifications when the user has submitted the information.
• Click **Submit**.
• The **Request Information** and **Approval** windows will close and the creator of the transaction will be notified of the action.

**Step to Reassign**

**Expense Report or Non-PO Invoice**
Reassign the transaction.

• To reassign the task to another appropriate user, open the **Actions** dropdown menu in the top right-hand corner of the **Approval** window.
• In the **Actions** menu, click **Reassign**.

![Expense Report Approval](image-url)
- The **Reassign Task** window will display

![Image of Reassign Task window]

1. Leave the **Reassign** default radio button selected.
2. Search for the user to reassign the task to.
   - The field next to **Users** is used to search by username.
   - To search by name or email, enter the information in the Advanced search fields.
3. Click **Search**.

- In the search results, click the box next to the user that you wish to reassign the task to.
- Click **OK**.

- The **Reassign Task** and **Approval** windows will close and the new assignee of the transaction will be notified of the required action. You are removed from the approval process for this transaction.
Requisition

Reassign the transaction.

- To reassign the task to another appropriate user, open the Actions dropdown menu in the top right-hand corner of the Approval window.

In the Actions menu, click Reassign

The Reassign window will pop-up. Click on the Name drop down and click Search to search for the appropriate user to reassign the task to.
• Search for the user to reassign the task to.
  o The field next to Users is used to search by username.
  o To search by name or email, enter the information in the Advanced search fields
• Click Search.
• Select the user in the search results then click OK.

• You will be returned to the Reassign window with the name of the person displayed you are reassigning to. You have the option to enter a comment. Then click Submit.
• The Reassign Task and Approval windows will close and the new assignee of the transaction will be notified of the required action. You are removed from the approval process for this transaction.
Step to Adhoc Route

**Expense Reports and Non-PO Invoices**

Adhoc Route the transaction.

- To Adhoc route the task, which will include an additional approver on the transaction, open the Actions dropdown menu in the top right-hand corner of the Approval window.
- In the Actions menu, click **Adhoc Route**...

In the Route Task window:

1. Leave the default approver option radio button set to **Single Approver**.
2. In the **Comments** field, include information for the new approver.
o Search by username, name, or email for the user you wish to Adhoc (route) the task to
  o Click **Search**.

- In the search results, click the box next to the user that you wish to route the task to.

- Click **OK**.
- The Route Task and Approval windows will close, your approval is complete, and the additional approver of the transaction will be notified of the required action.

**Requisition**
Adhoc Route function is not an option in a Requisition. See Route Task feature.

**Step to Route Task**

**Requisition**
Route task replaced the Adhoc function in requisitions and is **only an option with requisitions**. This option is not a function in expense reports or non-po invoices, see Adhoc feature above. To route the task, the system acknowledges the initial approver’s approval of the expenditure and he/she can route the task to an additional user for secondary approval.

- Open the **Actions** dropdown menu in the top right-hand corner of the Approval window.
- In the **Actions** menu, click **Route Task**.
The Route Task window will appear.

From the Name dropdown, click Search.
Use the search fields to locate the name of the person you want to route the task to. Click on the user’s name in the search results and click OK.

You will be returned to the Route Task window and it is required to enter a comment prior to routing the task. After entering a comment, select Approve. This feature recognizes this submission as an approval.

Step to Delegate Task

Delegate is an additional option in requisitions and is only an option with requisitions. This option is not a function in expense reports or non-po invoices. This feature is meant to delegate the approval request to another individual, which is very similar to Route Task above. This feature is not recommended and users should use Reassign or Route Task instead.

You have now completed the steps of Approval Process.