Approvals Process

This guide will cover:

- How to take Approval Process action on a transaction, including Approve, Reject, Reassign, Request Information, Delegate or Adhoc Route.

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:
  - Financial Transactions:
    - Vendor/Payee
    - Description/purpose (i.e. allowable expense using specified funds and under University policies and procedures)
    - Amounts
    - Attachments (make sure receipts/invoices match amounts)
    - Chart of account string/distribution line charged (make sure expense fund class 999 is updated)
    - Justification if applicable
    - Contracts attached
  - HCM (HR/Payroll) Transactions:
    - Hours Worked (time card approvals)
    - Manager Change
    - Compensation or Salary Change

- Location of the above information may vary depending on the type of transaction (i.e. Expense Report, Requisition, Time Card, Compensation, etc.) Below are a few examples:

Expenses Report

Note: For additional details specific to financial transactions, see Approval Process for Financial Transactions Quick Reference Guide.
### Time Card

**Approval of Payroll Time Entries for Robin...**

**Details**
- **Assignee:** Manager...
- **Assigned Date:** 6/3/2019
- **Task Number:** 1706442

**Recommended Actions**

**Payroll Time Entries for Approval**

#### Person Information
- **Name:** Robin...
- **Assignment Number:** E28220
- **Position:** Accounting Associate, Senior
- **Location:** Information Technology

#### Time Card Details
- **Time Card Period:** 6/16/2019 - 6/29/2019
- **Overtime Period:** 6/19/2019 - 6/29/2019

#### Reported Time

- **Reported Hours:** 8.00
- **Absence Hours:** 0.00

#### Calculated Time

- **Reported Hours:** 9.00
- **Scheduled Hours:** 8.00

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**Summary of total**

- **Hours worked, exactly as reported on time card:**
  - **Sunday, June 16:** Hours:10.00
  - **Monday, June 17:** Hours:8.00
  - **Tuesday, June 18:** Hours:8.00
  - **Wednesday, June 19:** Hours:10.00
  - **Thursday, June 20:** Hours:8.00
  - **Friday, June 21:** Hours:8.00
  - **Saturday, June 22:** Hours:8.00
  - **Sunday, June 23:** Hours:8.00
  - **Monday, June 24:** Hours:8.00
  - **Tuesday, June 25:** Hours:8.00
  - **Wednesday, June 26:** Hours:8.00
  - **Thursday, June 27:** Hours:8.00

**Reported time plus any payroll calculations. For example, compensatory time, if earned.**
**Step To Approve**
Approve the transaction. There are two potential views of the approval, depending on the transaction type.

**Classic View:**
- To approve the transaction, click the **Approve** button in top right-hand corner of the **Approval** window.

  ![Approval Window](image)

- The **Approval** pop-up window will close and the transaction will route to the next step in the workflow.

**Alternate View:**
- To approve the transaction, click the **Approve** button in the top right-hand corner of the **Approval** window.

![Approval History](image)
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**

**Classic View**

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**.

  ![Add Comment](image)

- The **Add Comment** window will close and you will be returned to the **Approval** window.
- Click **Reject**.

  ![Approval Window](image)

- The **Approval** window will close and the creator of the transaction will be notified of the action.

**Alternate View**
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**

**Classic View**

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.

**Alternate View**

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**

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 Task window will display

- Leave the Reassign default radio button selected.
- 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
- 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.

You have now completed the steps of Approval Process.