Approvals Process

This guide will cover:

- How to take Approval Process action on a transaction, including Approve, Reject, Reassign, Request Information, and 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 Notifications and select a transaction:

- Open Notifications (from the Bell icon).

- Although items needing action may display on the drop down, the best practice is to click on More Details to open a full list.

- The BPM Worklist pop-up will appear. 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 (e.g. Expense Report Approval, Approval of Invoice, or Approve Requisition).

**Step Two**
Review the transaction.

- Before taking action on a transaction, review the Details, Comments, Items, and Attachments.
**Step To Approve**

Approve the transaction.

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

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

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:
  1. Provide the reason(s) for rejecting the transaction in the **Comment** field.
  2. 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.
**Step To Request Information**

Request Information for the transaction.

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

In the **Actions** menu, click **Request Information**...

- In the **Request More Information** pop-up window:
  
  1. To request information from the creator, leave the **Participant** radio button selected for the **From** option.
  2. Indicate the information requested in the **Comments** field.
3. 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.

4. Click **OK**.
   - 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**.
In the Reassign Task window:

1. Leave the Reassign default radio button selected.
2. Search for the user to reassign the task to.
   i. The field next to Users is used to search by username.
   ii. To search by name or email, enter the information in the Advanced search fields
3. Click Search.
4. 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.
Step To Adhoc Route

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.
3. Search by username, name, or email for the user you wish to route the task
4. 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.

**You have now completed the steps of Approval Process.**