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
    - Edit a requisition as an approver
  - 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:
  - 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

- 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:
Expense Report

Expense Report Approval EXP0031115529 for Kaylyn Greenawalt (2,575.31 USD)

- Details
  - Assigned: Laura Shewing
  - From: Kaylyn Greenawalt
  - Assigned Date: 1/15/2019 11:34 AM
  - Task Number: 1291061

- Report Period: 12/25/2018 - 12/31/2018
- Report Total: 2,575.31 USD
- Submission Date: 1/16/2019

- Context Segment
  - Purpose: TEST Travel expenses for conference in Nashville, TN 12/19-12/31/18

- Expense Items
  - View/Format/Expense Items/Require your approval/View Columns

- Recurring Violations

- To view COA string, click on the hyperlinked expense items

- Click to view attachment(s)

Requisition

Approve Requisition R147376

- Requisition Approval
  - Amount of Requisition & Person who submitted the Requisition with description
  - Kasper, Paul
    - Money for test after maintenance

- Lines
  - Chart of Account string charged
  - Money for test after maintenance
    - Charge Account: 10-03001-165-03001-21003-550-0000-0900-0

- Approval History
  - Shows the approval chain
  - PDF view of entire Requisition

- Requisition R147376
  - Hyper-linked requisition number to go into the requisition to view details

10/16/2019 4
Non-PO Invoice

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

Details
- Assignee: Laura Sheving
- From: Jon Kelly - A
- Assigned Date: 11/10/2019 10:46 AM
- Task Number: 1290553

Supplier or Party: City of Laramie
Supplier Site: Fire Dept.
Business Unit: UNYOD

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>
<th>Cost Center</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>50.00</td>
<td>Systems &amp; Institutional Effectiveness</td>
<td>50.00</td>
</tr>
</tbody>
</table>

Cost Center Summary

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</tr>
</tbody>
</table>

Total 50.00 USD

Click to view Account string charged

Edit Distributions

Comments
No data to display

Attachments
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.

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

**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.
Edit a Requisition as an Approver before Approving

Cost center approvers have the ability/option to edit a requisition themselves when it shows up in their worklist to approve rather than send the requisition back to the original creator/requester.

Any comments to add to the requisition must be added PRIOR to editing the requisition. To add comments, click the actions drop down menu on the approval screen and select Add Comments.

Once the Edit Requisition hyperlink is clicked, the requisition must be submitted to continue through workflow; otherwise, the requisition will be suspended and only the cost center approver can resubmit the requisition.

- After reviewing the approval screen information and details within the requisition (as noted in the above steps), if a field on the requisition needs to be updated, click on the Edit Requisition hyperlink at the bottom of the approval notification.
- A warning will display. Click Yes to continue to the requisition to edit.

- The Edit Requisition screen will display
  - Note the statement at the top “You are editing this requisition as an approver. You will be approving the requisition when you submit the changes.”
If you are editing a **catalog** requisition, you will also receive the error below. Click “OK”. You will **not** be able to edit the requisition line description, category, unit price or order total, but will be able to edit the chart string and other items below:

![Error Message]

Any changes can be made on this screen. Some common changes could be:
- Header description
- Editing a line item (description, category, quantity, price, supplier, supplier site)
- Asset Information (owner, building, location)
- Billing Information (project or general ledger account string)
  - Update expense class from 999
- Notes and Attachments

After all changes/edits have been made. Click **Submit**.

Clicking submit means the requisition is approved and will continue in workflow to the next level of approval.

![Edit Requisition: R153567]

**Note**: If you click Save, the requisition will be suspended and will show as an item in your own requisition cart. The requisition will stay in your cart until you take action on it.
- To take action, click on the cart icon, click review to view and edit the requisition, then click submit. Submitting the requisition acknowledges this action as your approval of the requisition.
**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.

![Expense Report Approval](image)

- 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.
- 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**.
- The **Reassign Task** window will display

![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.
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
Ad hoc 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**

**Requisition**
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.