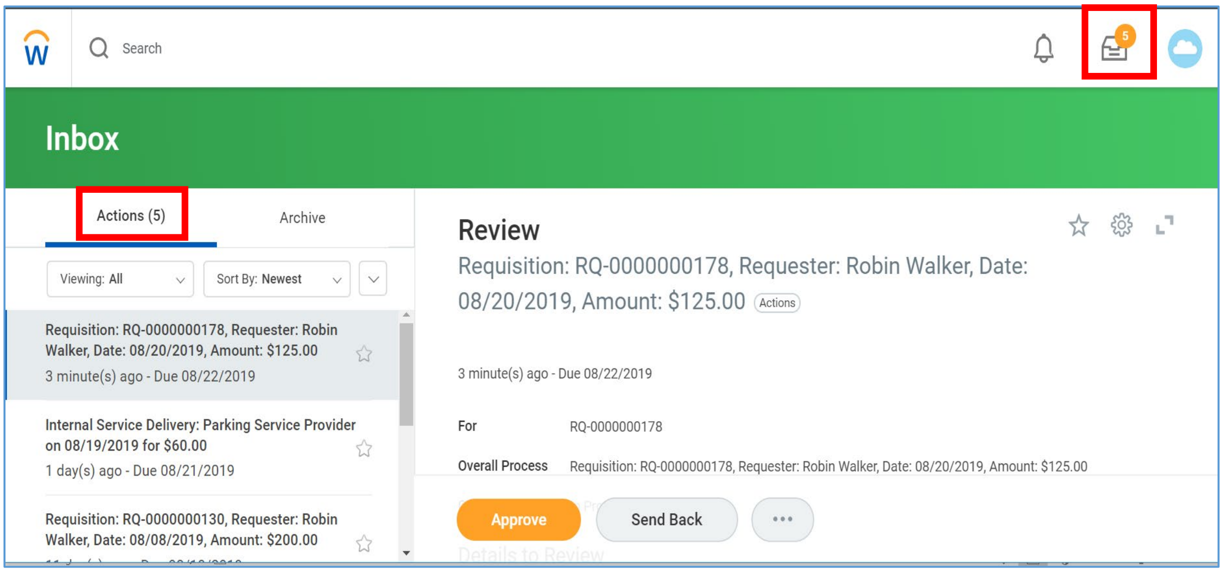
Approving Workday Transactions

Contents

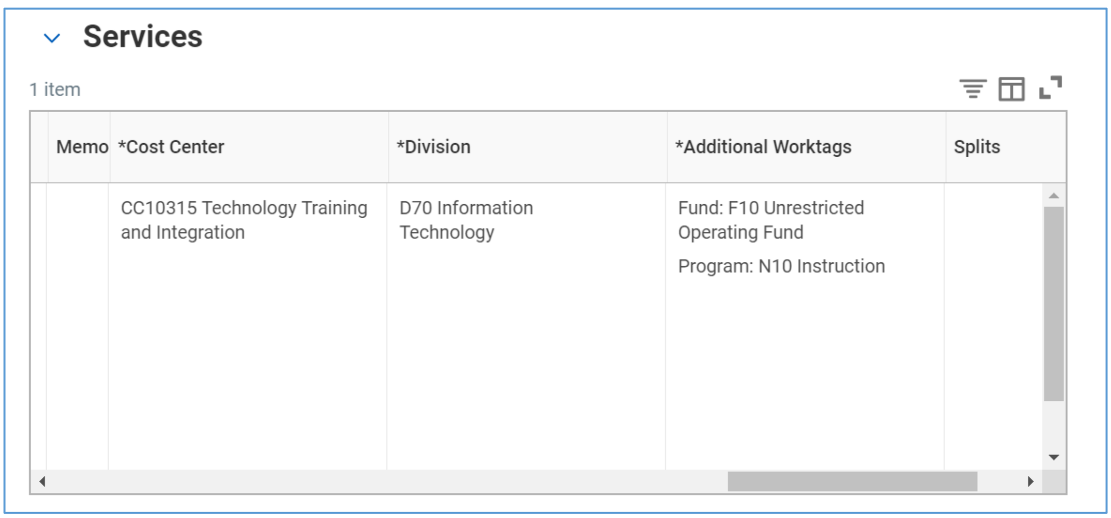
Access Items to Process

Approvers who have items to review and approve will receive a notification in their Workday Inbox. To access the items that need to be reviewed and processed:

1) Click the **Inbox** icon.
2) Click the **Actions** tab.
3) Click on the item to be reviewed.



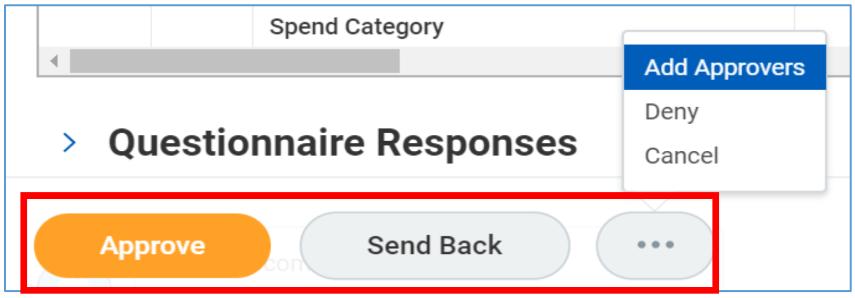
4) Review the requisition details and pay special attention to the Worktags on each line – Cost Center, Division and Additional Worktags, as these codes indicate where the line will be expensed within the budget.



5) After review of the information proceed with one of the following options:

- **Approve** – Sends the requisition to the next approver, or if no other approvers exist, completes the process.
- **Send Back** – Sends the requisition back to the initiator/previous approver. Approver must include comments as to what needs to be changed on the request.
- **Add Approvers** – Forwards to anyone outside of the approval chain. IMPORTANT: once an additional approver is added, the additional approver ***must*** process the request in order to complete the business process. See the *Add Approvers* section below.
- **Deny** – Terminates the requisition (this will completely cancel the order and it will no longer be able to be edited or viewed). Be careful about selecting this option.

- **Cancel** – Closes the current Inbox item view. It remains in the Inbox until it is processed.

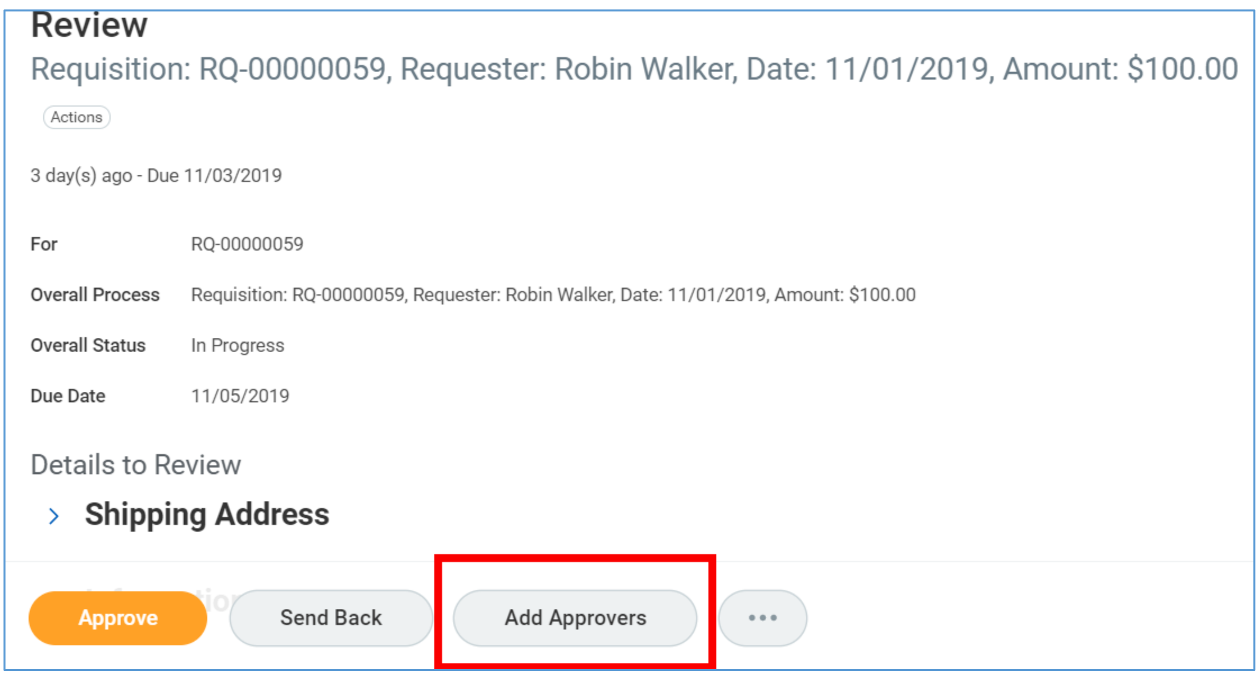


Add Approvers

You can add an individual outside of the standard approval chain to a request, such as your direct supervisor/manager.

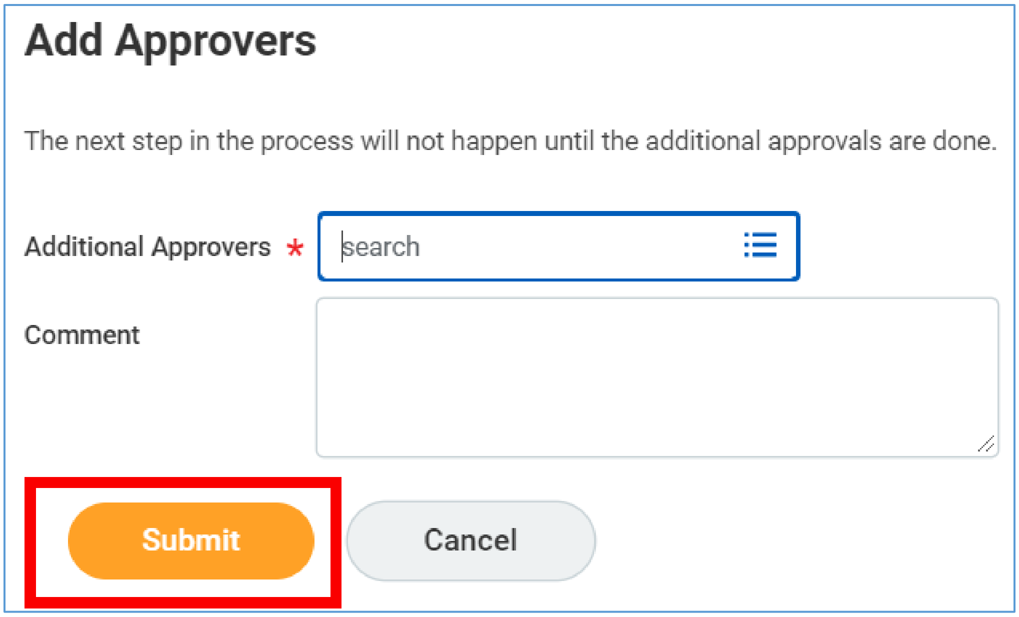
1) From the **Inbox** and **Actions** tab, locate the requisition to review and follow steps 3 and 4 above.

2) Below the requisition, select the **Add Approvers** option.



3) Select the **prompt** icon in the **Additional Approvers** field to search for and select the name of the individual to add to the approval flow.

4) Click the **Submit** button.

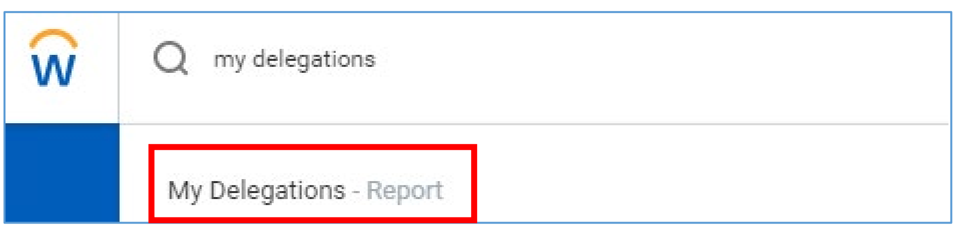


Delegate Approval Authority

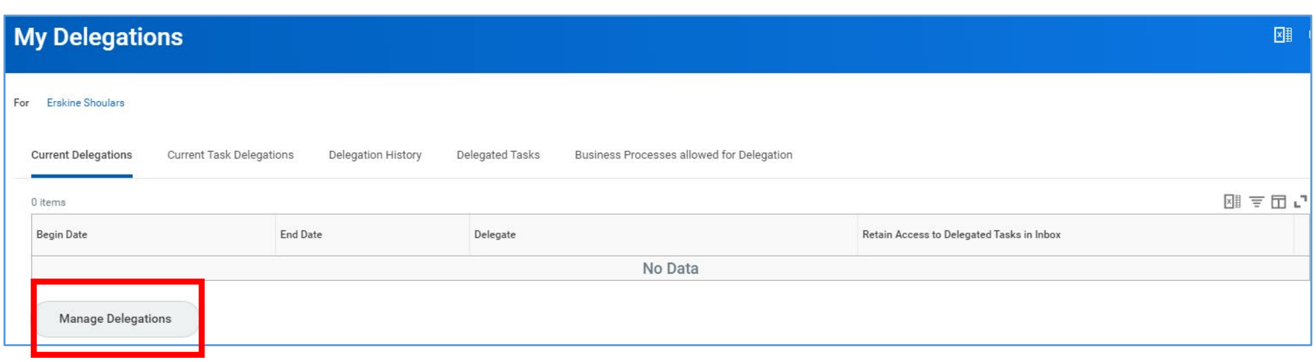
When there is a need for an approver to delegate approval authority, they can set delegation options in Workday for all business processes or for a specific set of them. **Note** – Pcard transactions cannot be delegated.

BEFORE beginning the delegation process, please review the **Signing Authority Policy** located on the *Finance and Treasury* website in the *Policies and Procedures* section, under the *Treasury* section.

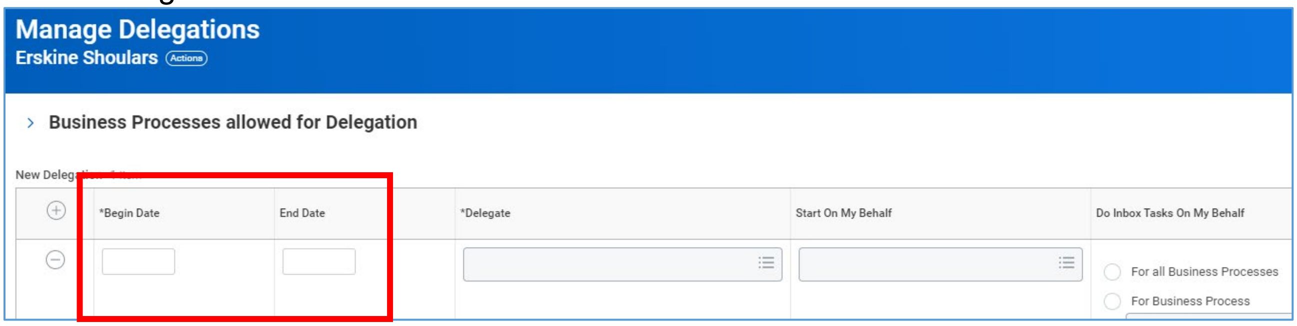
1) In the *Search* field, enter **My Delegations** and select the same task from the search results list.



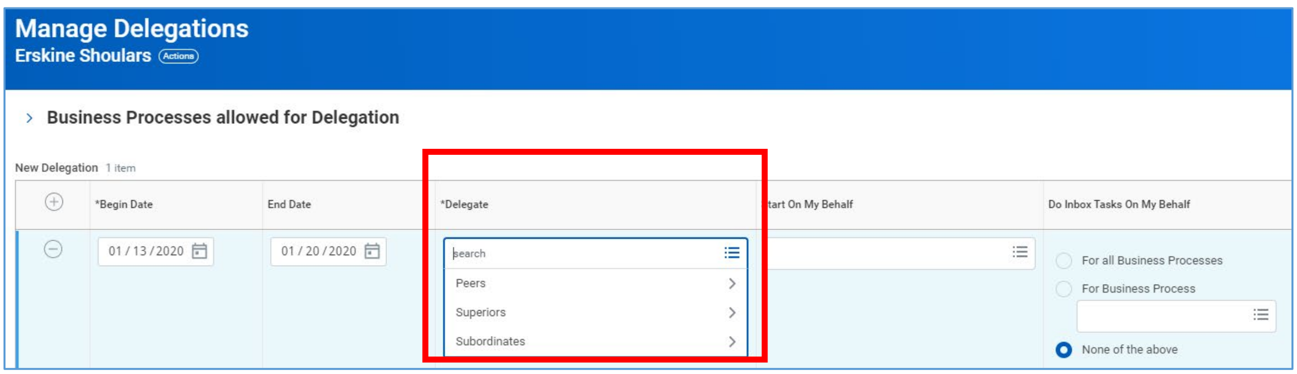
2) When the screen displays, click the **Manage Delegations** button.



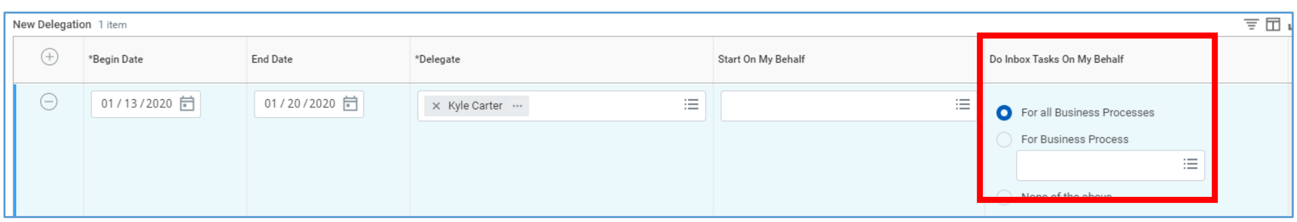
3) Complete the **Begin Date** and **End Date** fields with the date range for the delegations.



4) In the *Delegate* field, select the person you wish to assign your requests by choosing their role in the organization and then selecting their name from the generated list.



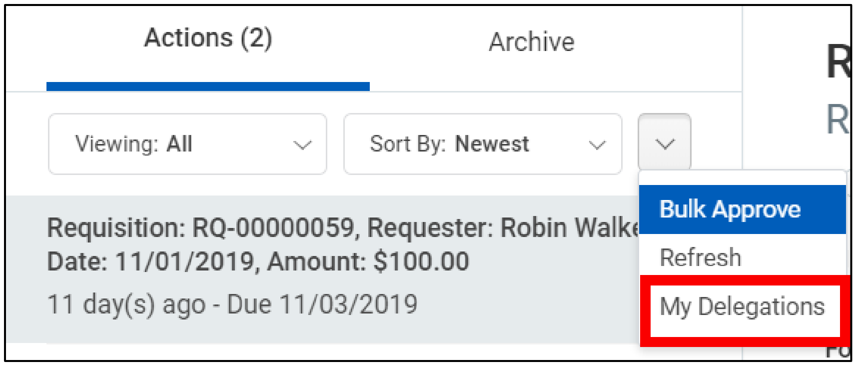
5) In the *Do Inbox Tasks On My Behalf* column, confirm the **For all Business Processes** item is selected.



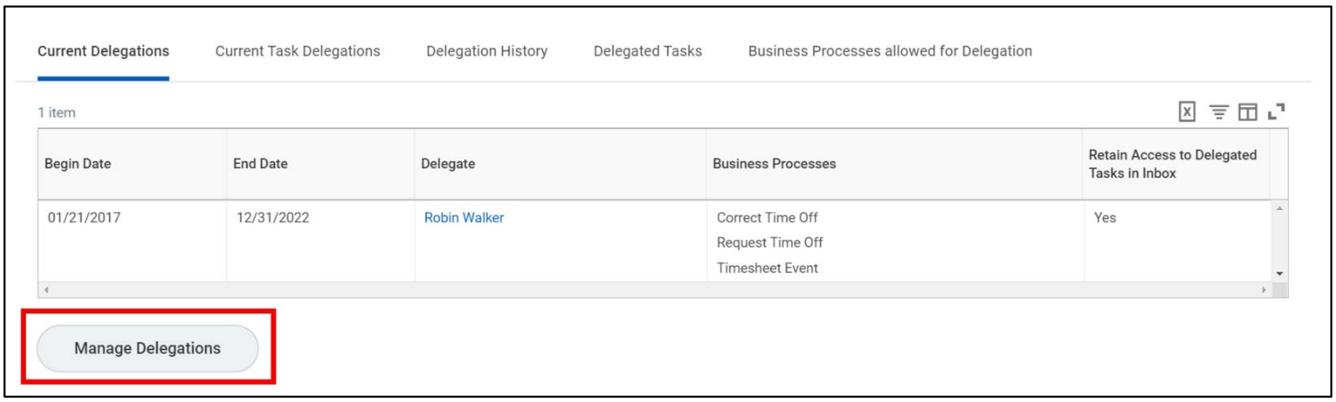
6) Click the **Submit** button at the bottom of the screen.

Access/Manage Delegations

1) From your Workday Inbox, click the **More** button and select **My Delegations.**



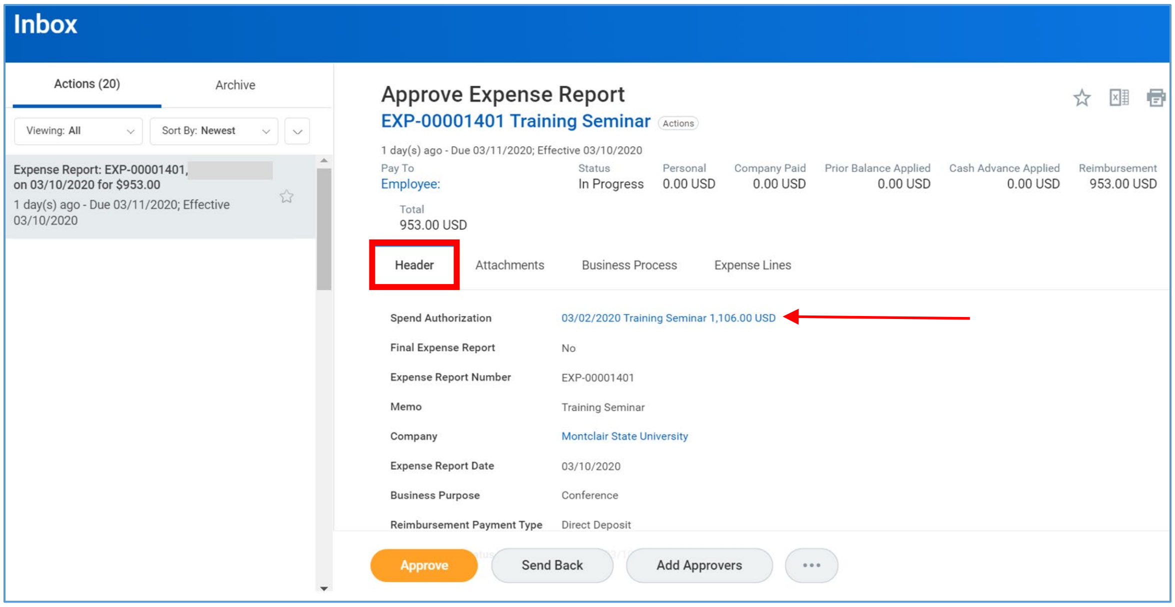
2) From the *My Delegations* screen, select **Manage Delegations.**



Approving Expense Reports

Expense reports that involve overnight travel or a cash advanced meal per diem are required to have a spend authorization associated to them.

1) To confirm if a spend authorization has been associated to the expense report, from within the approval request, click the **Header** tab.
2) A hyperlink will be in the **Spend Authorization field** if a spend authorization was associated to the expense report.
3) Click the **hyperlink** in the Spend Authorization field to open the request in view mode.



Approval Process Scenarios

The approval flows are set by the business processes and depends on which area(s) - Cost Center, Grant, Gift, Project - within the University will be paying for the request.

Additionally, some spend categories for requisitions are assigned to a Spend Category Approver, such as IT, printing, or chemicals. If the requisition uses one of the spend categories pre-assigned to a Spend Category Approver, that approver is added onto the approval chain.

Depending on the content of the request, the approval chain will differ.

Please note the following standard approval flows for the process indicated below:

Account Adjustment

If the ACCOUNT ADJUSMENT is for…	Goes to for Approval
Grant	Award Contract Manager
Does NOT contain a Grant	Accounting Manager

Accounting Journal

If the ACCOUNTING JOURNAL is for…	Goes to for Approval
Grant	Award Contract Manager
Does NOT contain a Grant	Accounting Manager

Budget Amendment

If the BUDGET AMENDMENT is submitted by…	Goes to for Approval
Anyone outside of the budget office	Cost Center Manager
Someone within the budget office	Budget Manager

Spend Authorization and Expense Reports

If the EXPENSE is for a …	Goes to for Approval
Project	Manager→Project Manager→Cost Center Manager
Grant	Manager→Grant Manager→Award Contract Specialist for the related Grant
Gift	Manager→Gift Manager
$20,000 or above	Any above applicable approvers + Cost Center Level 2 Approver & Level 2 Accounts Payable Signatory
$100,000 - $1,000,000	Any above applicable approvers + Cost Center Level 2 Approver & Level 3 Accounts Payable Signatory
Over $1,000,000	Any above applicable approvers + Cost Center Level 2 Approver & Level 4 Accounts Payable Signatory

Internal Service Delivery

If the INTERNAL SERVICE DELIVERY is for…	Goes to for Approval
Not a Gift or Grant	Cost Center Manager
Project	Cost Center→Project Manager
Grant	Grant Manager→Award Contract Specialist for related Grant
Gift	Gift Manager

Procurement Card Transaction Verification

If the SUPPLIER INVOICE is for…	Goes to for Approval
Project	Project Manager→PCard Approver
Gift	Gift Manager
Grant	Grant Manager→Award Contract Specialist

Requisitions

If the REQUISITION is for…	Goes to for Approval
Project	Project Manager→Cost Center Manager→Procurement Manager - Construction
Grant	Grant Manager→Award Contract Specialist assigned to the specific Grant
Gift	Gift Manager *If the Gift Manager initiated the request it goes to the Cost Center Manager
Not a Gift or Grant	Any above applicable approvers + Cost Center Manager
Non-Catalog & Not Catering	Spend Category buyer for approval and a review step. In the Review Step, the Spend Category Buyer must define someone within the buyer field as the sourcing buyer that will appear in the PO.
Over $34,400	Any above applicable approvers + will also be routed to the Procurement Manager – Non Construction for Cost Center and Gift purchases, or to the Procurement Manager – Construction for Project requisitions.
Over $500,000	Any above applicable approvers + Contract Authority
Over $1,000,000	Any above applicable approvers + University President

Supplier Invoice

If the SUPPLIER INVOICE is for…	Goes to for Approval
Project	Project Manager→Cost Center Manager→Facilities Approver→Procurement Manager - Construction
Gift	Gift Manager
Grant	Grant Manager→Award Contract Specialist
Supplier Invoice Adjustment	Any above applicable approvers + Accounts Payable Manager
$20,000 or above	Any above applicable approvers + Level 2 Accounts Payable Signatory

If the SUPPLIER INVOICE is for…	Goes to for Approval
$100,000 - $1,000,000	Any above applicable approvers + Level 2 Accounts Payable Signatory
Over $1,000,000	Any above applicable approvers Level 3 & 4 Accounts Payable Signatory