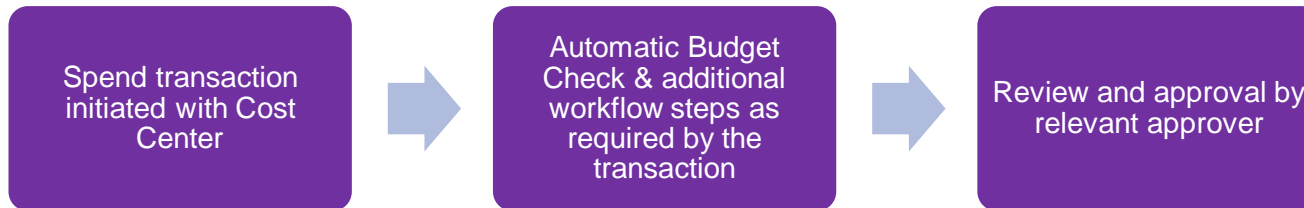


Overview

Use this job aid as a resource to complete financial approvals in Workday.

Process Flow



Getting Started

All approvals will occur in Workday and the approver must sign into Workday to approve transactions via their Workday inbox. With Workday, approval roles are defined by the value of the spend transactions, levels of the cost center hierarchy, and the managers of different driver worktags. Approval responsibility is driven by the cost center approver role assignment, thereby empowering those responsible for the cost and improving data integrity.

Some of the most common transactions requiring approval are Expense Reports, Requisitions, Change Orders, Supplier Invoices, and Procurement Card Verification. From the inbox, the approver has the following options:

Approve: Approves and moves the business process forward.

Deny: Denies and stops the entire business process (use with caution).

Send Back: Returns the task to the initiator and pauses the event after entering a comment explaining why the task has been sent back.

Cancel: Exits the task but leaves it in your inbox.

There are also key differences between a Review and Approve task:

Review: A request to provide input on a transaction. May edit prior to approving. You can also Send Back.

Approve: A request to approve a transaction. You can view only and cannot edit data. However, you may Approve or Send Back.

Financial Approvals

1. From your Workday inbox, select the **task** requiring approval.
2. Review the information and confirm that it is accurate.
3. If accurate, click **Approve** to approve the transaction.
4. If inaccurate, click **Send Back** and enter a **Comment** to return the task to the initiator for edits.