Approve Workday Transactions Overview

This Quick Reference Guide (QRG) is designed to walk **approvers** through the approval process in Workday. By the end of this QRG, you will know how to approve transactions and add approvers in Workday.

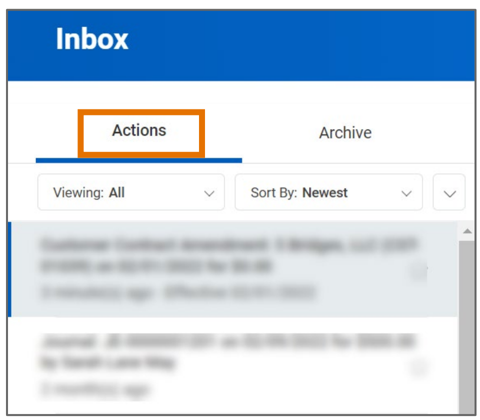
Approve Workday Transactions

As an Approver, you will receive a notification in your **Workday Inbox** for the tasks you need to review and approve in Workday.

On the **Workday Home** screen:

1. Click the **Inbox** icon.

2. Click on the applicable inbox task available under the **Actions** tab.



3. Scroll down to view all the details related to the task.

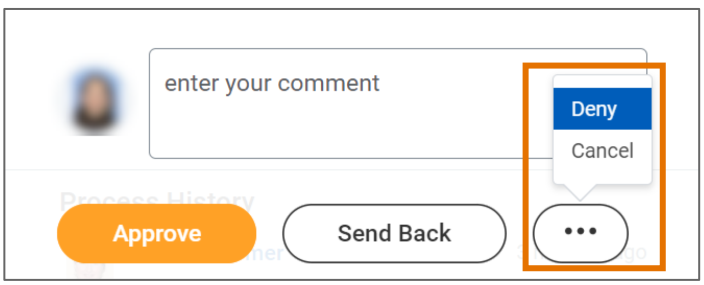
NOTE	Be sure to pay attention to the following details if included in the task: employees listed, the dates, the worktags provided on each line, the total amount, and any attachments.

4. If required, enter comments in the comment box. It is recommended that you write a brief description indicating you have reviewed the task and provide the date as confirmation.
5. Take appropriate action for the inbox task. Depending on your role, you may see the following options displayed differently:
   - Click **Approve** or **Submit** if the details provided are accurate. This option sends the task to the next approver or if no approvers exist, completes the process.

- Click **Send Back** if the details provided are incorrect and the initiator of the task is required to make changes. Enter a reason in the pop-up box. This option sends the task back to the initiator of task.
- Click **Add Approvers** if you need to forward the transaction to anyone outside of the approval chain. See the Add Approvers section for further details. Not all tasks will have this option.
- Click **Deny** to reject the task and enter a reason in the pop-up box. Then click **Submit**. The initiator will receive a notification in their Inbox that their request was denied.

NOTE	Be sure to review the task carefully before selecting **Deny** as this completely cancels the task and it will no longer be able to be edited or viewed.

- Click **Save for Later** to save any edits you have applied to the transaction and keep the task in your inbox to review later.
- Click **Cancel** to close out the task without saving any edits you have applied to the transaction and keep the task in your inbox to review later.
- Click the **More** icon (...) to view additional actions that are not displayed. Not all tasks will have this option.



Add Approvers in Workday

On the Workday Home screen:

1. Click the **Inbox** icon.
2. Locate and select the applicable inbox task under the Actions tab.
3. Scroll down to review all the details related to the task.
4. Below the task, click the **Additional Approvers** button.

On the **Add Approvers** pop-up box:

5. Select the **Additional Approvers** field and search the name of the individual to whom you would like to forward the transaction for approval.
6. If needed, enter comments in the comment box. It is recommended that you provide a brief description of the reason you are adding additional approvers to the task.
7. Click **Submit** button.