## 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. *To learn more details about My Tasks (Workday Inbox), refer to the [Workday Navigation QRG](#).*

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| **NOTE** | **Remember to approve transactions** in a timely fashion. To view all tasks that you need to review or approve, you can run the report "Processes Awaiting My Action." The report shows what tasks you need to act on and how many days it has been since initiation. |

## Approve Workday Transactions

As an Approver, you will receive a notification in your **My Tasks** (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 **All Items** tab.
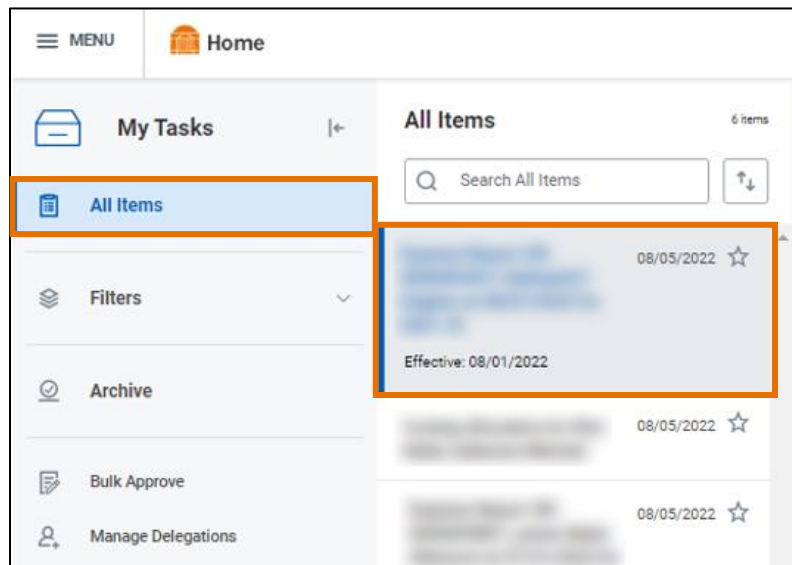
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| HINT | **Did you know?** If you are looking for a specific inbox task, you can type the task or the name of the employee in the inbox search and press enter. For example, search '**Expense**' to view expense reports you need to review or approve. You can apply this in your All Items and Archive tabs. |

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

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| 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.

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| NOTE | Employees will receive an Inbox notification if their task has been sent back and can review the reason by following the steps below: <br><br> 1. Navigate to your Workday Inbox on your homepage. <br> 2. Select the **Archive** tab and locate your submitted task that was sent back. <br> 3. On the View Event screen, select the **Process** tab. <br> 4. You can find the send back reason under the **Comment** column in the **Process History** table. |

| Status | Completed On | Due Date | Person (Up to 5) | All Persons | Comment |
|---|---|---|---|---|---|
| Step Completed | 06/30/2022 01:50:08 PM | | | 1 | |
| Sent Back | 07/06/2022 02:52:06 PM | 07/02/2022 | (Investment Pool Manager) | 1 | Send Back Reason from Test |

   - 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.

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| **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.
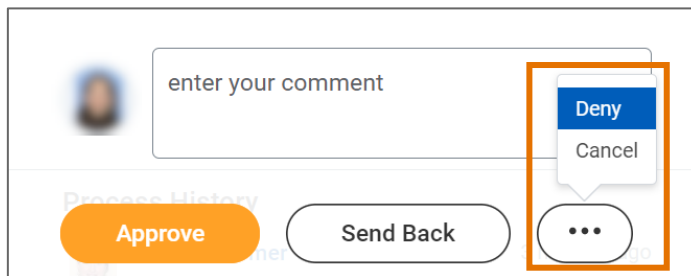


## Add Approvers in Workday

On the Workday Home screen:

1. Click the **Inbox** icon.
2. Locate and select the applicable inbox task under the **All Items** 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.

**Add Approvers**

The next step in the process will not happen until the additional approvals are done.

Additional Approvers * [search      ☰]

Comment [                    ]

[ Submit ]   ( Cancel )