

Approvals in Workday

All approvals in workday have similar steps to approve: travel spend authorizations, expense reports, supplier invoice requests, timesheets, absence requests, delegation requests, etc. They all follow similar steps. Approvals for specific types of requests will be included in the manager's job aids.

On this job aid:

[Approve inbox items](#)

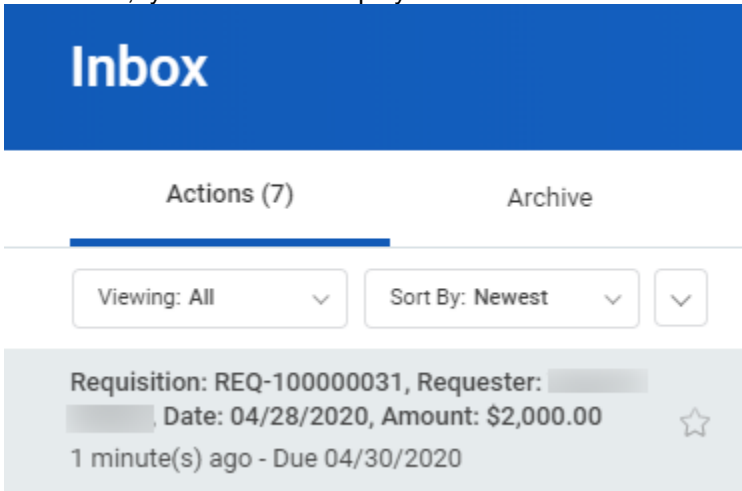
[View Overall Process](#)

To approve an Inbox Item.

1. **Log in** to Workday.
2. Click the **inbox** icon in the upper right (next to your picture) to access your inbox. The number in the orange circle indicates the number of items that require your attention.



3. On the left, your inbox will display under **Actions** a list of items requiring your attention.



4. Click to view one of the items requiring approval.
5. Scroll to the right inside the services window to see the details of the item to approve (below).

ReviewRequisition: REQ-100000031, Requester: [REDACTED], Date: 04/28/2020, Amount: \$2,000.00 [Actions](#)

1 minute(s) ago - Due 04/30/2020

For REQ-100000031

Overall Process Requisition: REQ-100000031, Requester: [REDACTED] Date: 04/28/2020, Amount: \$2,000.00

Overall Status In Progress

Due Date 05/05/2020

Details to Review

> Shipping Address


> Information

> Goods

1 Item

Line	Image	Item	Quantity	Unit of Measure	Unit Cost	Extended Amount	Deliver-To	Ship-To Address	Sh
Q		Item Item Description Dell Computer	Requested 2	Each	1,000.00	2,000.00	de Hoernle Residence Hall	de Hoernle Residence Hall 3601 N. Military Trail Boca Raton, FL 33431 United States of America	TI

[Approve](#)
[Send Back](#)
[Deny](#)
[Cancel](#)

6. The item will display a list of details to review. Click on the arrow  to expand the details.

Details to Review

> Shipping Address

> Information

> Goods

7. You can Approve, Send Back and Deny the requests.



8. If not, click on Send Back" and explain what needs to be corrected.

View Overall Process

Workday has audit processes that register every step on a business process. Many automated tasks happen behind the scenes, and tasks move between departments without our knowledge. To view all steps on a process that you approved and it is still in process:

1. Click the **inbox** icon in the upper right (next to your picture) to access your inbox.



2. On the left, your inbox will display under **Archive** a list of items already processed by you. The item will display the overall request status (Successfully Completed, In Progress)

Inbox

Actions (6)
Archive

Sort By: Newest
▼

▼

From Last 30 Days

Requisition: REQ-100000031, Requester: [REDACTED]

Date: 04/28/2020, Amount: \$2,000.00

5 minute(s) ago - In Progress: Multiple Parties

3. Click to view one of the items.
4. Click on the Process tab.

Details Process						
Process History 17 items						
Process	Step	Status	Completed On	Due Date	Person	Comment
Requisition Event	Requisition Event	Step Completed	04/28/2020 10:11:25 AM	05/05/2020	[REDACTED]	
Check Budget (Financial)	Check Budget (Financial)	Automatic Complete	04/28/2020 10:11:25 AM	04/30/2020		
Check Budget (Financial)	Batch/Job: Run Budget Check	Step Completed	04/28/2020 10:11:26 AM			
Check Budget (Financial)	Review Budget Check	Not Required		04/30/2020		
Check Budget (Financial)	Override Budget Check	Not Required		04/30/2020		
Check Budget (Financial)	Service: Run Spend Commitment Accounting and Budget Check	Step Completed	04/28/2020 10:11:26 AM	04/30/2020	Workday Service	
Check Budget (Financial)	Service: Reserve Budget in Budget Check	Step Completed	04/28/2020 10:11:26 AM	04/30/2020	Workday Service	
Requisition Event	Approval by Cost Center Manager (All)	Approved	04/28/2020 10:23:54 AM	04/30/2020	(Cost Center Manager)	
Requisition Event	Approval by Gift Manager (All)	Not Required		05/05/2020		
Requisition Event	Approval by Program Manager (All)	Not Required		05/05/2020		
Requisition Event	Approval by Cost Center Hierarchy Manager (Level I) (All)	Not Required		05/05/2020		
Requisition Event	Approval by Cost Center Hierarchy Manager (Level II) (All)	Not Required		05/05/2020		

5. All steps in the process will be listed with details if the process is automated or any approvals.
6. If the task is still in process and waiting for someone's action, look for the Status Awaiting Action on your list. You can click on the blue name for the staff's contact information.

Awaiting Action

