## Modifying Standard Approval Workflow

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| 1.   | Access the transactions pending approval using the Email Notification, Worklist, Notification Bell, or Workspace.  

*Note:* For more information, access the **Reviewing, Approving, and Rejecting Expense Reports, Invoice Payments, and Requisitions** training materials. |
| 2.   | To modify the **Approval Workflow** click the **Actions** drop down in the upper right hand corner and select the appropriate action. |

### Expense Report & Invoice Payment Options

- Request Information...
- Reassign...
- Adhoc Route...
- Save

### Requisition Options

- Actions
- Approve
- Reject
  - Request Information
  - Delegate
  - Reassign
  - Route Task
  - Add Comments
  - Add Attachment
Step | Action
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3. | **Request Information** allows the approver to request additional information from another OFC user through **Attachments** and/or **Comments**.

It will default to the Requester. You may select a different user by selecting the chevron next to the **Name** and clicking Search.

Ensure that **Comments** are entered, select the **Return Option**, and click **Submit**.

The requester will receive an email with the request and may respond with the information in one of three ways:

1. **Email**: Click **Submit Information** and attach documentation or enter comments in the email and click **Send**.

2. **Notification Bell**: Select Expense Report, Invoice Payment, or Requisition from list, add comments and/or attachments, and click **Submit Information** from the **Actions** menu.

3. **Worklist**: Select Expense Report, Invoice Payment, or Requisition from list, add comments and/or attachments, and click **Submit Information** from the **Actions** menu.

**Note**: The person adding documentation cannot change the information submitted on the original transaction, they may opt to withdraw the transaction to edit.
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| 4.   | Delegate allows the approver to reassign the task to **Approve or Reject** the transaction.  
Reassign allows the approver to reassign both the task and the responsibility to **Approve or Reject** the transaction.  
Select **Reassign or Delegate**, search for user, select appropriate user, and click **OK**.  
Click **Submit** once completed. |
| 5.   | **Adhoc Route** (Invoice Payments and Expense Reports) or **Route Task** (Requisitions) allows the approver to add an approver to the workflow and **Approve** the transaction by the assigner.  
Enter **Comments**, search for user and select appropriate user, and click **OK**.  
Attach files, if applicable, and click **Approve**. |
| 6.   | **End of Procedure.** |

*Note*: Review the transaction prior to designating an Adhoc Approver.