Modifying Standard Approval Workflow in Requisitions

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<th>Step</th>
<th>Action</th>
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| 1.   | Access the transactions pending approval using the Email Notification, Worklist, Notification Bell, Workspace, or Expense module.  

*Note:* For more information, access the Reviewing and Approving/Rejecting a Requisition training materials. |

| 2.   | To modify the Approval Workflow click the Actions drop down in the upper right hand corner and select the appropriate action. |

![Actions Dropdown](image)

| 3.   | **Request Information** allows the approver to request additional information from another OFC user through Attachments and Comments.  

Select Other users and click magnifying glass to search users and select appropriate user by clicking the radio button.  

Ensure that Comments are entered, select the Return Option, and click OK. |

**Request More Information**

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<tr>
<th>From</th>
<th>Participant</th>
<th>Other users</th>
<th>Comments:</th>
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<tbody>
<tr>
<td></td>
<td>charitystrong</td>
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**Return Options**  
- Route directly back to me  
- Require subsequent participants to retake action |
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| 4.   | The user will receive an email with the request and may respond with the information in one of three ways: 1. **Email**: Click **Submit Info**, attach documentation or enter comments in the email, and click **Send**. 2. **Notification Bell**: Select Expense Report from list, add comments and/or attachments, and click **Submit Information** from the **Actions** menu. 3. **Worklist**: Select Expense Report from list, add comments and/or attachments, and click **Submit Information** from the **Actions** menu.  

![Actions and Attachments](image)

**Note**: The person adding documentation cannot change the information submitted on the original transaction, they may opt to withdraw the transaction to edit. |
| 5.   | **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**.  

![Reassign Task](image)  

- Reassign tasks to one or more users. This will transfer ownership of the task and remove it from your worklist.  
  - Reassign (transfer task to another user or group)  
  - Delegate (allow specified user to act on my behalf)  

**Note**: Review the transaction prior to designating an Adhoc  |
| 6.   | **Adhoc Route** allows the approver to add more approvers to the workflow and Approves the transaction by the assigner.  

Select **Single Approver** or **Chain of Single Approvers**, enter **Comments**, search for user(s) and select appropriate user(s) below, and click **OK**.  

![Route Task](image)  

**Note**: Review the transaction prior to designating an Adhoc  |
| 7.   | **End of Procedure**. |