WFS Wesleyan Financial System

Workflow

Approval From E-Mail

Approving a Transaction From an E-mail

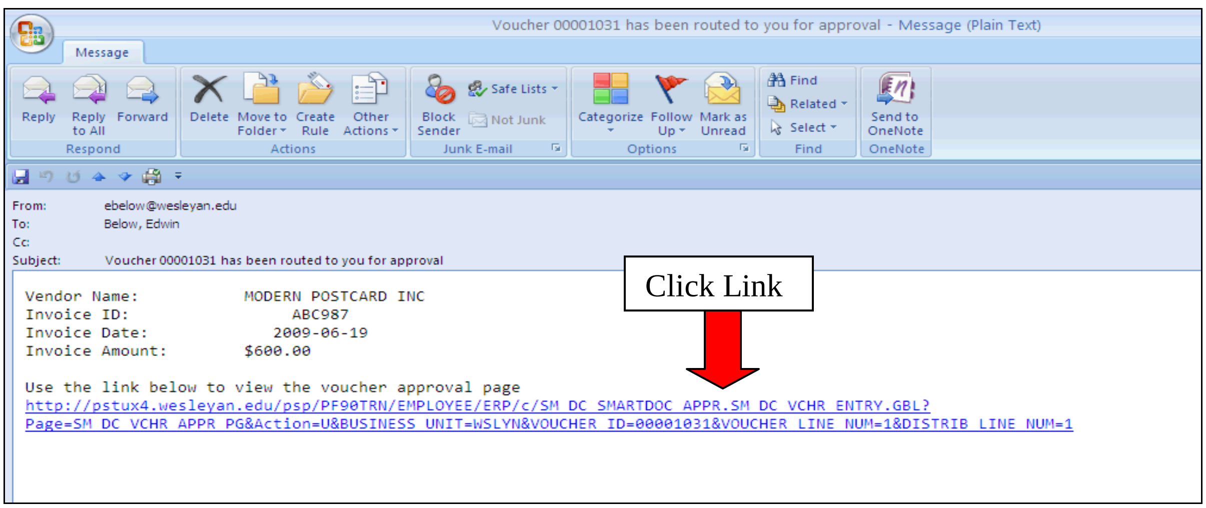
Financial transactions can be approved directly from the link in an e-mail sent to the approver. Clicking the link takes the approver to the document in the system so that it can be reviewed.

Summary of steps:

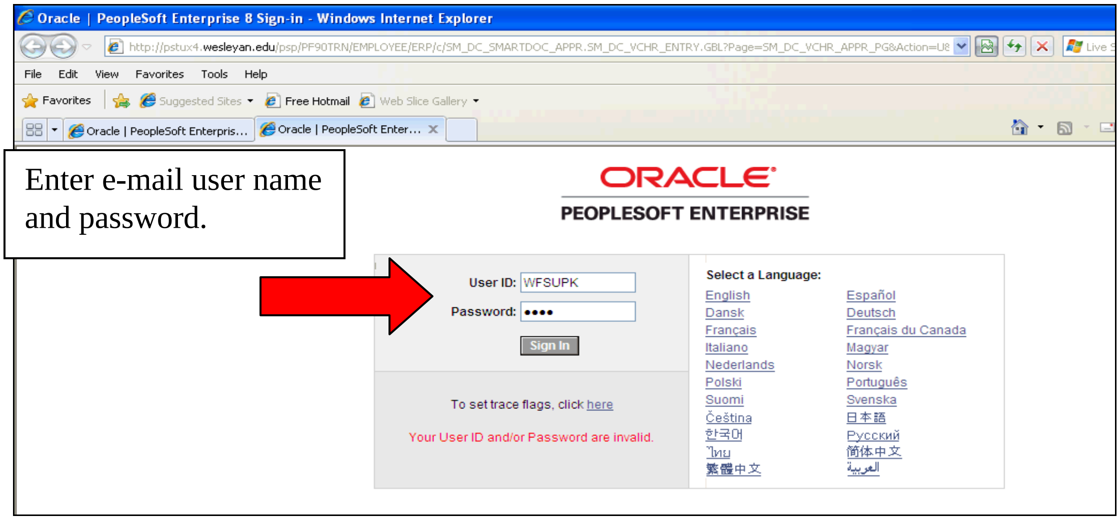
1. Click the link and login to WFS with your e-mail user name and password (if you are already logged in, this step will be skipped).
2. Review the information on the document.
3. Review attachments (a pop-up blocker might prevent you from opening an attachment).
4. Make a workflow comment, if appropriate. If the transaction will be denied, a comment should always be entered.
5. Take the appropriate action:
   a. Approve - sends the transaction to the next approver
   b. Deny - returns transaction to the initiator (be sure to make a comment)
   c. Hold - hold making an action to review at a later time.

Procedure

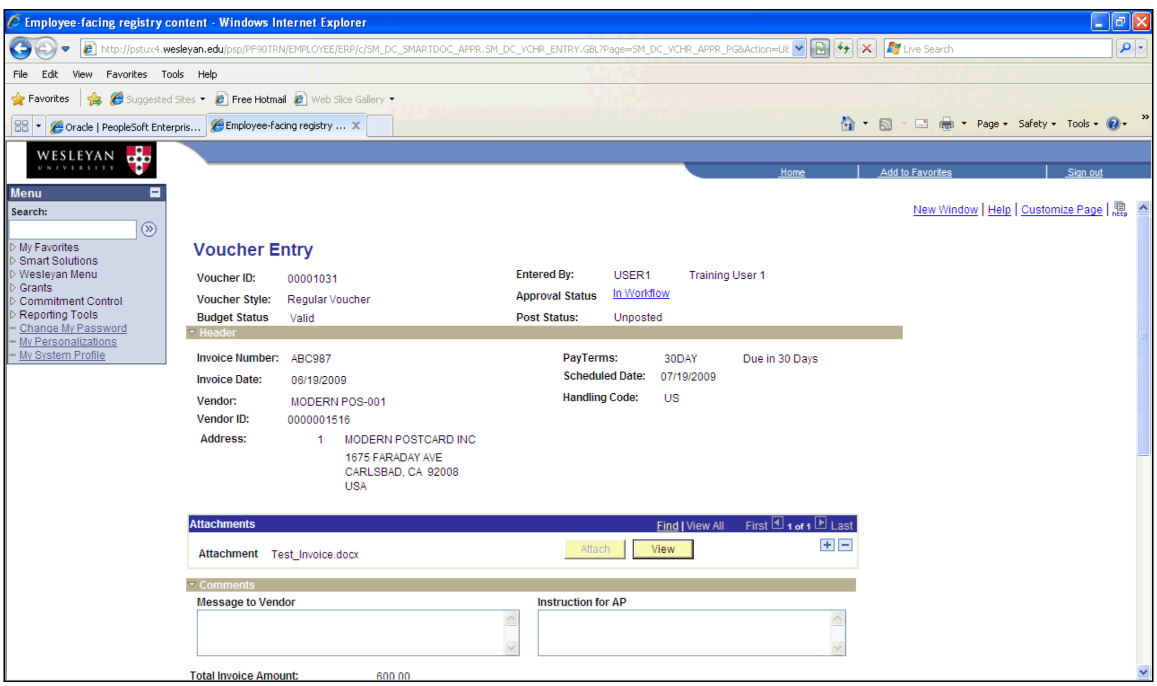
Sample Workflow Approval E-Mail



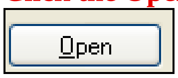
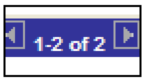
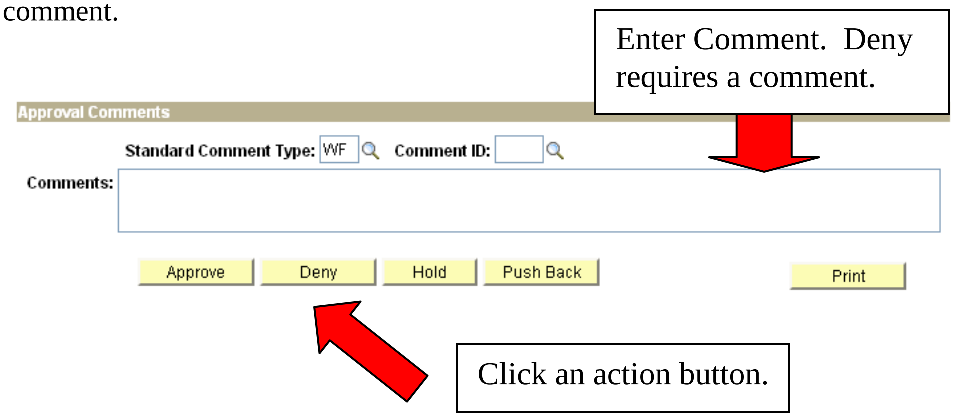
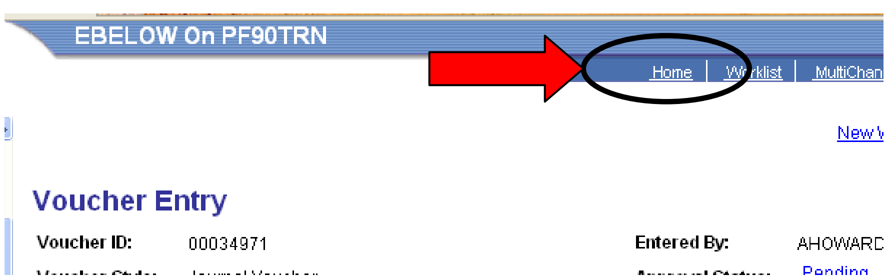
Step	Action
1.	**Click the link** in the e-mail to enter WFS to approve the transaction. If you are not already in your portfolio, you will need to log on with your e-mail user name and password. See sample Login Page below.



Step	Action
2.	Click the **Sign In** button. Sign In



Step	Action
3.	The document will open. This might take a few seconds. **Review the information on the voucher**

Step	Action
4.	To view any attachments, **click the View button in the Attachment area**.  Be sure any pop-up blockers are turned off.
5.	**Click the Open button** to download and view the attachments. 
6.	Check to see if there is more than one line. 
7.	**Click the View All** link to open all the lines 
8.	**A comment can be entered in the comment field** at the bottom. A Deny action requires a comment. 
9.	Once the Approve or Deny button has been clicked the buttons will gray out. If you want to go to your Approval Inbox to review additional workflow requests, click "Home" at the top of the page. 
10.	**End of Procedure.**