

Defining a Budgeting Workflow

Article Number

000089707

Information

In Budgeting, you can establish a multi-step review process that includes a different set of reviewers for each process. Determine the actions each reviewer is able to take, from their ability to approve or deny a request to simply being able to move the request to a different step in the process. You can also give each reviewer the ability to edit the amount requested within each submission.

Start adding your workflow process by clicking the *Workflow* tab in your budgeting process.

When creating a new review step, you will be able to customize the following:

- Name the Reviewer step. This can be a single person, an office, or a step in the review process. Use the terminology that follows your internal process for consistency!
- Add any number of users from Engage can be added in each step. You can add a user by their name or by their position template in the requesting organization.
 - If you choose to add a user by their position template rather than as an individual, you will first need to identify the branch housing the position template. You can add multiple position templates across multiple branches as position templates for this step as needed.
 - Additionally, when configuring the step to be based on position template, you will need to identify a *Backup Individual Reviewer*. This ensures that if the organization does not have anyone holding that position template in their organization, someone can still be assigned to this reviewing step. The backup individual reviewer will only be added if there is not a reviewer by position template, and other individual reviewers cannot be added once a position template reviewer is defined.
- When you select the Actions available, they will refer to all reviewers listed in this step.
 - Approve Request – User can approve the request without additional review and make the final approval decision
 - Deny Request – User can deny the request without additional review and make the final approval decision
 - Return for Revision – User can return the request to the submitter for more information
 - Move Back to Previous Step – User can return the request to the previous step in the process
 - Move Forward to Next Step – User can move the request forward to the next step in the process (without approving)
 - Request Amount Adjustments – Indicates whether or not reviewers can adjust requested amounts while reviewing

Click *Save* to save the step, and add as many review steps as are needed for your process.

KB Product

Engage

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