


Approvals

Quick Reference Guide



11/21/2019

Grouping Approvals

- 1) Click the **Orders**  icon → Go to **Approvals** → Click **Requisitions to Approve**.
- 2) Use the **Group Results By** menu **Group Results By:** to select **List** or **Folders** view.
- 3) Use the **Sort by** menu **Sort by:** to sort results.
- 4) Results can be refined using **Filters** (located in the left pane).

Assigning Requisitions


*Note: if you assign a requisition to yourself before approving, you will have additional action items available such as **Return to Requisitioner**, and **Reject Requisition**.*

- 1) From your **My Approvals** list of requisitions:
 - Assign a single requisition → Click the **Assign**  button next to the requisition.
 - Assign multiple requisitions → Click the checkbox (far-right side) of each requisition → Select **Assign** from the drop-down  → Click **Go**.

Approving a Requisition

- 1) Click on the **Requisition No.** to open it → Review all components.
- 2) Click the **Requisition** [Requisition](#) ▾ drop-down menu → Click **Approve/Complete Step and Show Next**.

Approving a Requisition (in the Preview window)

- 1) Click the **Preview icon**  next to the requisition number.
- 2) Review the requisition.
- 3) Click the **Approve** button to approve, or the **Assign** button to assign to yourself for further review before approving.

Returning or Rejecting a Requisition

Returning – sends it back to the Requisitioner to make edits and resubmit for approval.

Rejecting – cancels the requisition in its entirety and cannot be reopened.

- 1) **Assign** the requisition to yourself.
- 2) Open the requisition.
- 3) Click the **Requisition** [Requisition](#) ▾ drop-down menu → Click either **Return to Requisitioner** or **Reject Requisition**.