Step-by-Step Guide
Navigating Requisition Approval Folders

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- ✓ Reviewing My PR Approvals
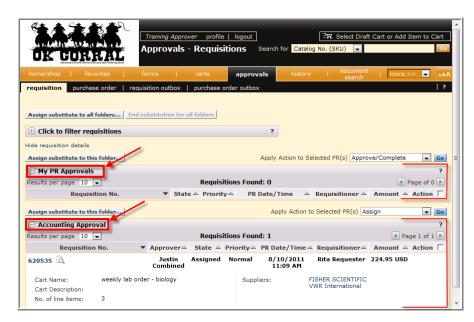- ✓ Assigning requisitions for approval
- ✓ Reviewing shared approval folders

This guide demonstrates how to navigate your requisition approval workflow folders.

Procedure

1. As an Approver, if you are assigned to:
   - only **one** workflow rule - you will have one approval folder.

   - **multiple** workflow rules - you will have more than one approval folder.
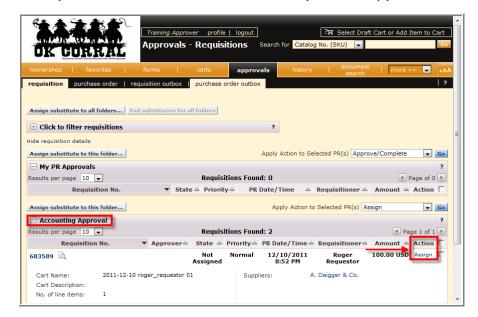
Each approval folder is visually ⇨ separated by boxes.

2. Shared approval requisitions can be easily identified due to the fact that they do <u>not</u> appear in your **My PR Approvals** folder, but in a separate folder indicating the workflow rule.

Also, the requisitions in the shared approval folder will display the **Assign** link under the **Action** column.
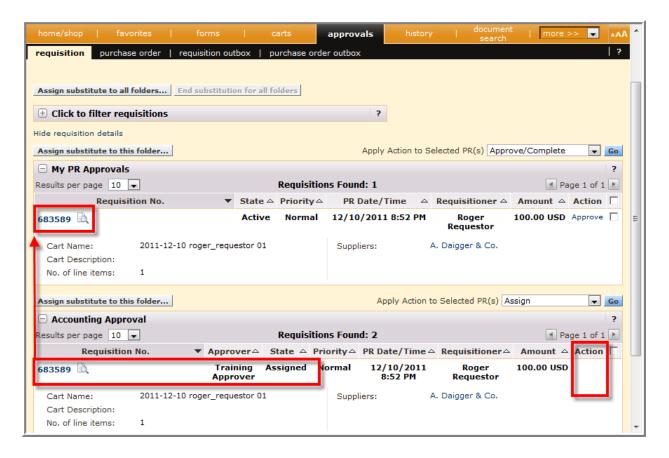
3. A requisition in the shared approval folder that does not contain the **Assign** link under the **Action** column indicates that you or another approver has already assigned it to him/herself (as shown in the example below).

4. For shared approvals, it is recommended that you **Assign** a requisition to yourself if you plan to approve the requisition so that another approver does not begin to simultaneously work on it.

▲ After you have assigned a requisition to yourself it will appear in your **My PR Approvals** folder.

5. You can view the requisition details by clicking on the requisition number.

A requisition may have multiple line items awaiting approval. In some cases, only one line item may require your approval but you will see <u>all</u> the line items on the requisition. There is no direct indicator showing which line items you must approve.

⚠ It is r**ecommended** that you review all line items and focus on the line items that fall into your workflow rules (i.e. fiscal, administrative, accounting). When your review is complete, approve the requisition.

The entire requisition will stay in workflow until all the appropriate approvals are completed.

When a Requisition Number exists in Multiple Approver Folders

⚠ A requisition *may* display more than once if you are assigned to *multiple* workflow rules.

⚠ When you assign a requisition which exists in multiple folders to yourself, the following message displays:

The following requisition(s) is currently in an additional approval folder. Would you like to perform this action against additional folders as well?

- Click **Yes** to assign the requisition to yourself across all approval folders. It is recommended to select Yes, otherwise you may need to approve the same requisition more than once.

- Click **No** to assign the requisition to yourself for only this approval folder.

You have successfully navigated your requisition approval folders.