

Step-by-Step Guide

Navigating Requisition Approval Folders



In This Guide

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

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.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
620535	Justin Combined	Assigned	Normal	8/10/2011 11:09 AM	Rita Requester	224.95 USD	

2. Shared approval requisitions can be easily identified due to the fact that they do not 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.

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
683589	Not Assigned	Assigned	Normal	12/10/2011 8:52 PM	Roger Requester	100.00 USD	Assign

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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.

home/shop | favorites | forms | carts | **approvals** | history | document search | more >> | AA

requisition | purchase order | requisition outbox | purchase order outbox

Assign substitute to all folders... End substitution for all folders

+ Click to filter requisitions ?

Hide requisition details

Assign substitute to this folder... Apply Action to Selected PR(s) Approve/Complete Go

My PR Approvals ?

Results per page 10 Requisitions Found: 1 Page 1 of 1

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action
683589	Active	Normal	12/10/2011 8:52 PM	Roger Requestor	100.00 USD	Approve

Cart Name: 2011-12-10 roger_requestor 01 Suppliers: A. Daigger & Co.
Cart Description:
No. of line items: 1

Assign substitute to this folder... Apply Action to Selected PR(s) Assign Go

Accounting Approval ?

Results per page 10 Requisitions Found: 2 Page 1 of 1

Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action
683589	Training Approver	Assigned	Normal	12/10/2011 8:52 PM	Roger Requestor	100.00 USD	

Cart Name: 2011-12-10 roger_requestor 01 Suppliers: A. Daigger & Co.
Cart Description:
No. of line items: 1

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

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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 all the line items on the requisition. There is no direct indicator showing which line items you must approve.

- ▲ It is **recommended** 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.