Approval Process
1. To view any carts assigned to you or requisitions pending approval, click on the Action Items button in the task bar.
2. Click on the Unassigned Requisitions Needing Approval option in the pop up box.
3. Depending on how many requisitions need to be approved, you may see multiple folders. They are organized by Index Code.
4. Click on the requisition number to open the document.
5. Here you can view the vendor, items being purchased, accounting information, approval workflow, comments, attachments, and history associated with this requisition by clicking on the appropriate tab.
6. Click the Available Actions drop down menu to view the options that are available. To make any changes to the requisition or to return it to the requisitioner for modification, you must assign the requisition to yourself. This can be accomplished by selecting Assign to myself from the drop down menu and click Go.
7. After you have assigned the requisition to yourself, click on the Available Actions drop down menu to view the new action items. The Approver may now place the requisition on hold, return it to the Requisitioner for corrections/modifications, add comments, and reject the requisition in addition to the basic Approve/Complete actions previously available.
8. The Approver may also make changes to selected product lines by clicking on the For selected line items drop down menu.
9. Unless the requisition is returned, the Approver must select the Approve/Complete Step after reviewing the requisition and attachments. Click on the Available Actions drop down menu, select Approve/Complete and click Go.