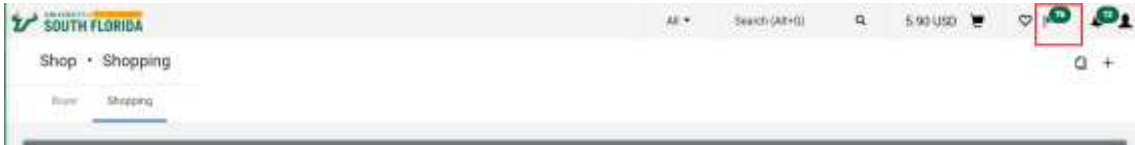
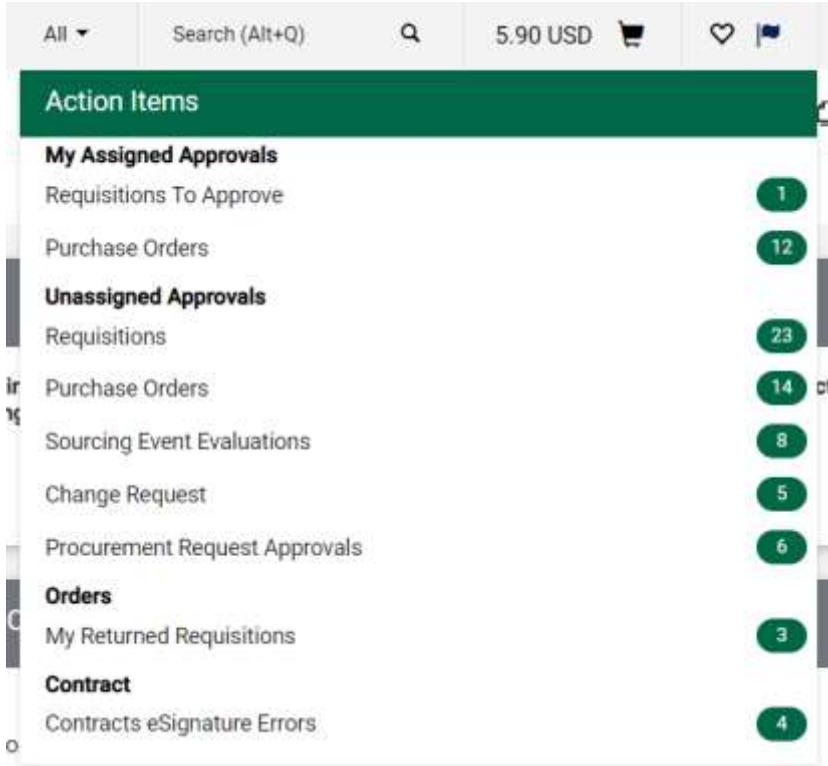


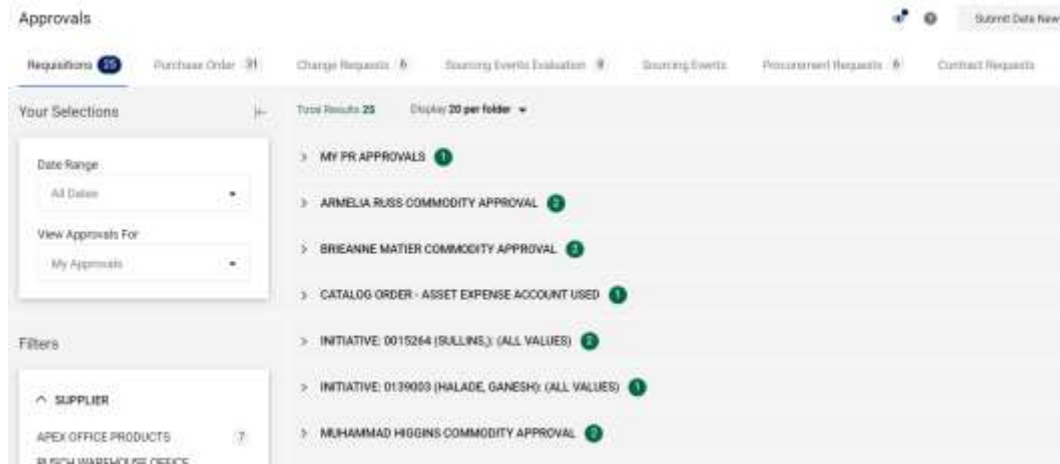
Purpose:	This section outlines the process for Approving Requisitions, Purchase Orders, and Forms
Navigation:	Documents > Approvals
Notes:	<ul style="list-style-type: none"> • There are multiple ways to handle approving, rejecting, or returning forms, requisitions, and change request. • Only users with the Approver or Buyer roles are able to approve workflow items. • The Approver role is almost always assigned to a user by the chartfield approval requested in the FAST Purchasing Workflow Request form (not through the FAST Security Access Request form, where Requestor and Receiver roles are requested)

Steps	Section Header
1	<p>How to find items pending your approval: the Action Items flag</p> <p>1.1 In the Top Right corner of the Bull Marketplace is the Action Items flag Icon. It will alert you of items pending review which you, personally, can approve.</p>  <p>1.2 After clicking on the Action Items flag, you will see what types of items are in need of review. These can include requisitions, purchase orders (Buyers only), change requests, sourcing events, contracts, and procurement requests. There are other ways to get to your approval items, but this is the easiest.</p> 

The Approvals Page

2

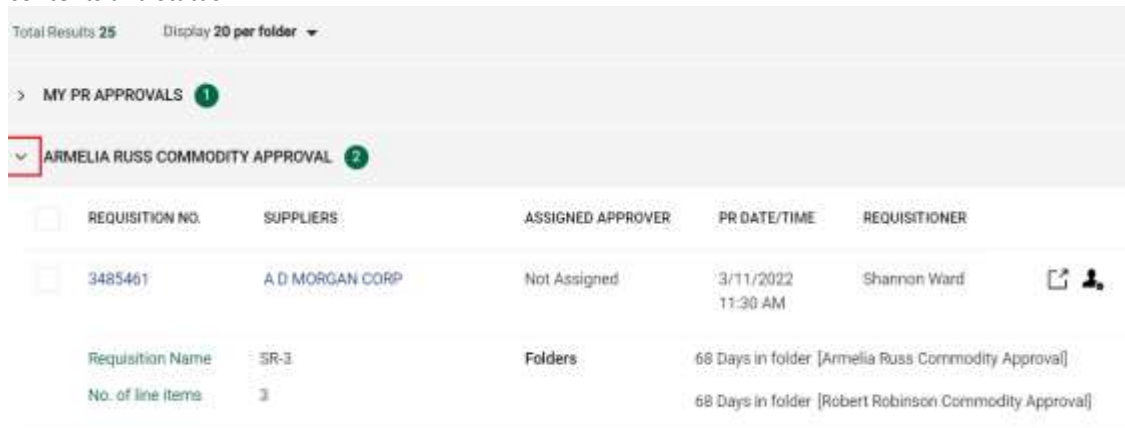
2.1 Once you have selected the type of item you wish to review, you will be taken to the “Approvals” page, where you can see a list of what items are pending your approval, and what workflow folders they belong to.



2.2 In the example above, the user is reviewing all pending requisitions for which they are a potential approver. The workflow folders for each give a description of what the folder is sorting based on. For example:

- **MY PR APPROVALS:** these are pending requisitions which the user has assigned to themselves.
- **(NAME) COMMODITY APPROVAL:** these are pending requisitions assigned to a Buyer (the user in this example is also a Buyer). While the workflow folder lists a specific name, anyone listed as an approver for that folder can review and approve the workflow step.
- **INITIATIVE: OXXXXXX:** these are requisitions pending approval from a chartfield Approver; in this case, the Approver for the Initiative field. Only the Approvers who are responsible for the particular chartfield can approve the workflow step. If workflow is not yet set up, this will be assigned to a Procurement Services administrator for review.

2.3 Clicking the arrow next to each folder name will show or hide a brief summary of the folder contents and status.

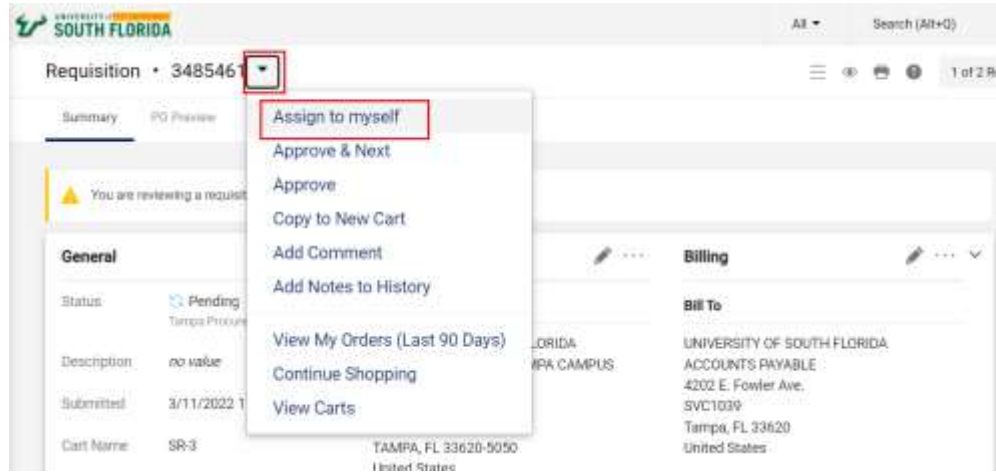


3

Assigning to yourself

3.1 If an Approver wishes to make changes, or take an action other than APPROVE, they should Assign the pending item to themselves.

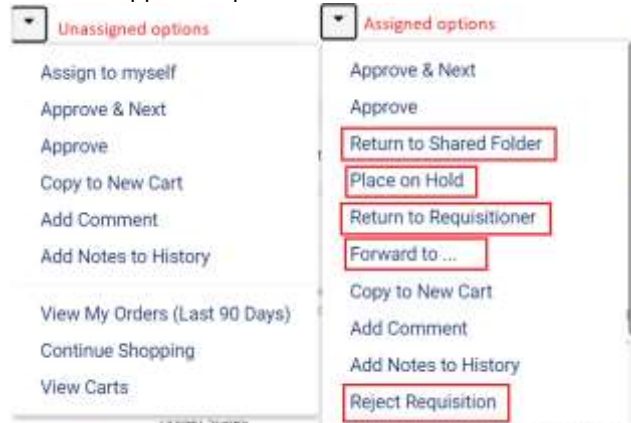
3.2 Click on the document number to open the document page. Next to the document number (in this case a requisition number) is a drop-down menu arrow. Select “Assign to myself” from the options. There are other ways to assign a document to yourself, this is the easiest.



3.3 Once assigned **no other approvers** may approve the pending item until you unassign it. The pending item will also show up in your personal “My PR Approvals” folder, and you will be listed as the “Assigned Approver”.



3.4 Besides stopping another user from approving the pending item, assigning also adds several other workflow approval options:

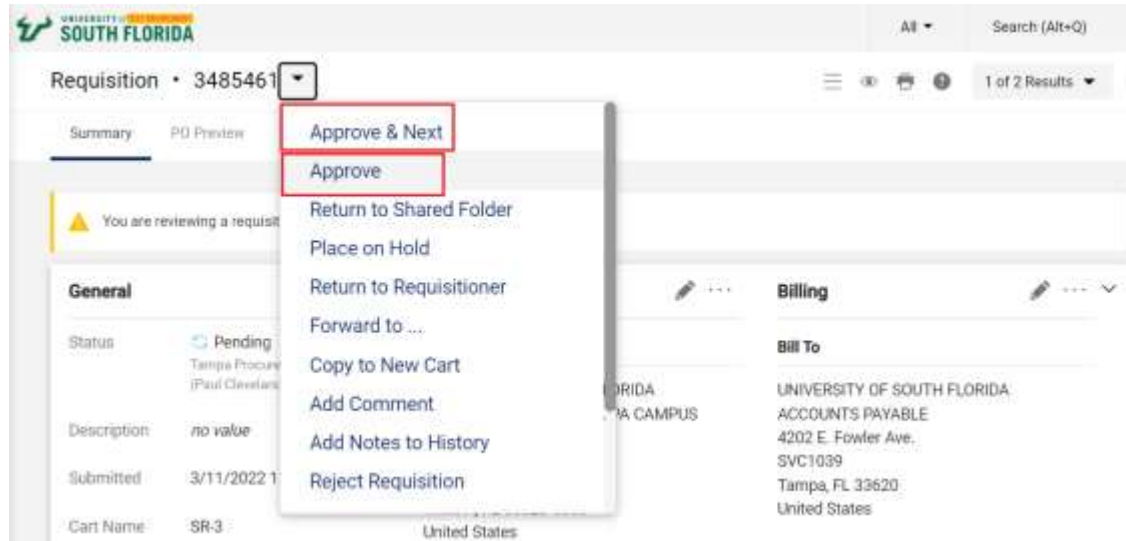


4

Approving a Requisition, Purchase Order, Change Request or Procurement Request Document

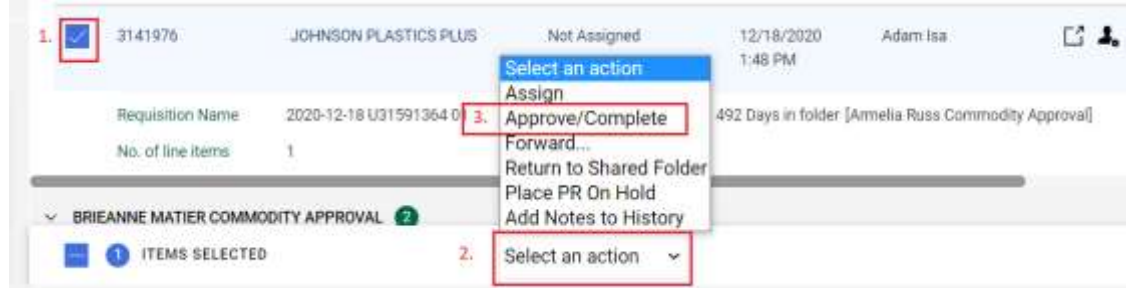
4.1 As best practices standards, items should only be approved *after* a thorough review by the Approver, therefore approval should be *from within the document itself*. When approving a requisition/PO, you are approving the entire document. Not individual lines or items

4.2 Navigate to the document and clicking the drop-down menu next to the document number. Here the Approver can select either “Approve”(which will return the user to their home page) or “Approve & Next” (will move the Approver to the next document of the same type in their worklist).



4.3 ONLY IF YOU ARE ALREADY FAMILIAR WITH THE DOCUMENT

You may approve the document from the Approvals folder is by checking the box next to the pending item, going down to “Select an action” at the bottom of the screen, and choosing “Approve/Complete”



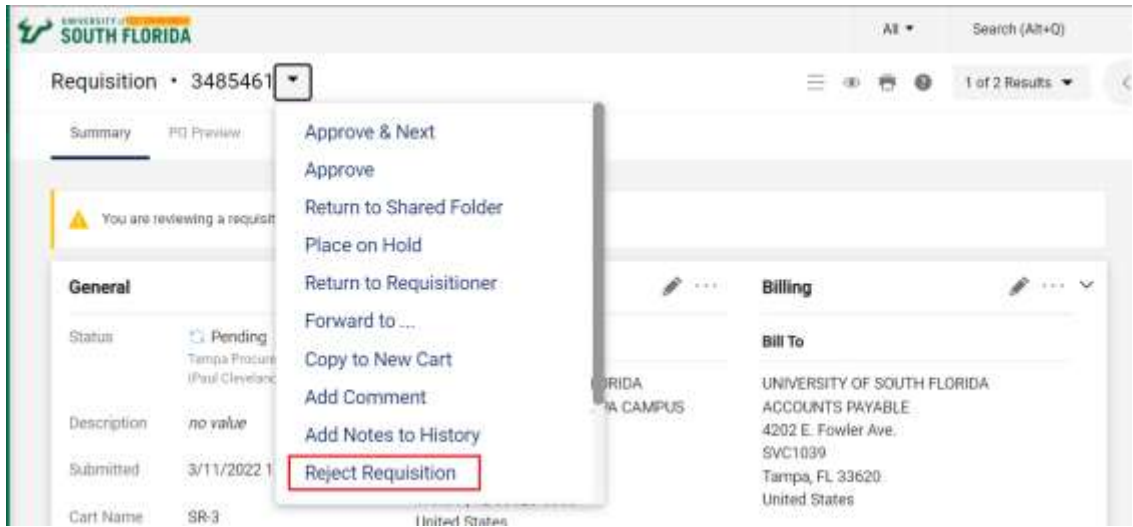
4.4 Bull Marketplace has some LIMITED ad hoc approve capabilities for certain roles. **Generally these should not be used.** If adding an ad-hoc approver, you will need to approve it first before the ad-hoc approver is able to review and approve the same document (requisition). If you have an ad hoc approver option, so NOT select it unless you have already reviewed the pending item and would approve it yourself. It is not a “substitute” option; it is an “I approve this and want someone else to approve it as well” option.

5

Reject a Requisition/PO/Change Request/Invoice

5.1 **REJECTING is a FINAL action; after rejecting that document number will not be used or updated again. Users cannot resubmit a rejected document, or update it.**

6.2 To reject: Assign the document to yourself. Navigate to the drop-down menu next to the document number. A dropdown will populate and you will click Reject (Requisition, in this case).



5.3 When rejecting a document, a comment/reason is required.

Reject Requisition

WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.

PR Reject Reason

This order is no longer required, and the requisition is being rejected.

927 characters remaining expand | clear

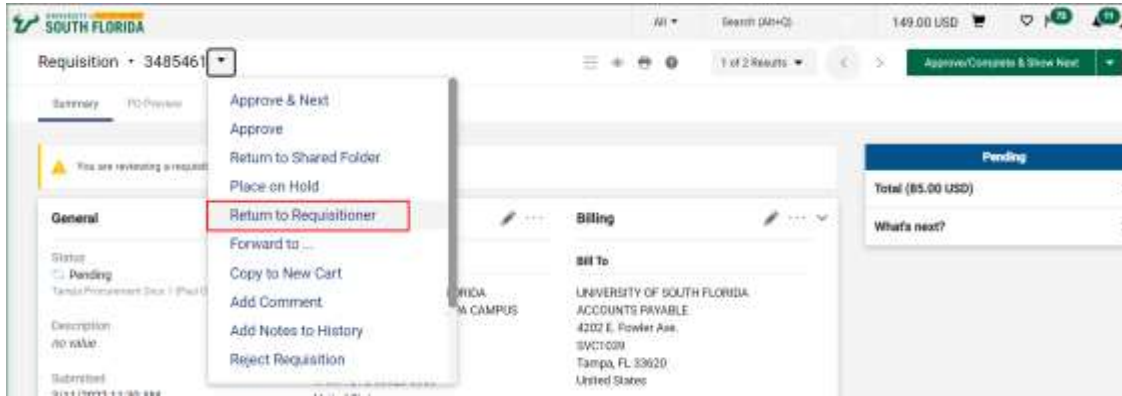
Reject Requisition Close

6

Returning a Requisition/PO/Change Request/Invoice

6.1 **RETURNING** a document is done so that the submitter can create changes to it and resubmit it into workflow, without needing to create a brand new document).

6.2 To return: assign the document to yourself. Navigate to the drop-down menu next to the document number. A dropdown will populate, and you will click “Return to [the submitter]” (in this case, as it is a Requisition, it is to return it to the Requisitioner).



6.3 When Returning to the original requestor/creator a comment reason is required. Please make it clear to the submitter what changes are needed before the document is resubmitted into workflow.

Return To Requisitioner

Returning requisition so that the chartfield string can be updated. Please resubmit once the changes are made.

expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Save Changes Cancel

6.4 Once “Returned” the document will become UNASSIGNED so that the document can be modified and resubmitted.