### Purpose:
To define procedures for Approving Requisitions, Purchase Orders, and Forms

### Navigation:
Documents > Approvals

### Notes:
There are multiple ways to handle approving, rejecting, or returning forms

<table>
<thead>
<tr>
<th>Steps</th>
<th>Section Header</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Notification Flag/Icon</td>
</tr>
<tr>
<td>1.1</td>
<td>In the Top Right is the Notification Flag Icon. It will notify you, if anything needs to be approved.</td>
</tr>
<tr>
<td>1.2</td>
<td>After Clicking on it, you will see what types of items are in need of review.</td>
</tr>
<tr>
<td>2</td>
<td>Approval Section and Approval Page</td>
</tr>
<tr>
<td>2.1</td>
<td>Clicking or Hovering over the Documents hyperlink will cause the documents flyout to appear.</td>
</tr>
</tbody>
</table>
2.2 Click or Hover on the Approvals hyperlink will show the contents of Approval options

2.3 Click on the My Approvals hyperlink to take you to the Approval Folder page

3.1 The following is a view of the Approval page. These are your SHARED FOLDERS.

3.2 It is important to go through all the Approval Types. You may responsible for approving Change Request, Purchase Orders, Requisitions, Invoices, and Form Types. As shown below, circled in yellow.
3.3 Clicking *expand all* or *collapse all*, will show/hide a brief summary of the folder contents and status.

4 Assigning to yourself

4.1 There are multiple ways to assign to yourself. The quickest way is to click the green Assign button on the far right. This will assign it directly to yourself.

4.2 The second way to assign to yourself is click the checkbox next to assign and then click the dropdown in the top right corner and select assign. And then clicking Go. This will assign it directly to yourself. Using this method you can assign multiple items to yourself in one step.

4.3 The last way is to click directly into the document (requisition). Then click the Document Action in the top right corner. This will populate a dropdown table, that allows you to click the *Assign to myself* option.
4.4 This is what it looks like something is assigned to your personal folder

4.5 Once you assign the item to yourself, this will allow to Approve, Reject, Return to requestor, or Return to Shared Folder

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

5.1 There are multiple ways to approve a document. They can be approved from your personal assigned folder, from the shared folder, or by clicking into the document(requisition).

5.2 The quickest and easiest way is to approve from your assigned folder. When it is in the your personal assigned folder the green Approve button on the far right can be clicked to approve the document.

5.3 The other way to approve the document is to click the checkbox and select Approve/Complete from the dropdown in the top right corner. After selecting Approve/Complete click Go to approve the document(requisition).
5.4 An approver can go directly into the document (requisition) to approve. Once in, go to Document Actions in the top right corner and click Approve/Complete Step. After approving, it will take you back to general Approval page.

5.4 The other option is to go to Document Actions in the top right corner and click Approve/Complete & Show Next. This will approve the item and take you to the next item to approve. After approving, it will take you back to general Approval page.

5.5 When approving a requisition/PO, you are approving the entire document. Not individual lines or items.

5.5 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).

6 Reject a Requisition/PO/Change Request/Invoice

6.1 To reject a Requisition, PO, or Change Request. You must assign the document to yourself. You cannot reject a document from the shared folder.
6.2 Go to Document Actions in the top right corner. A dropdown will populate and just click Reject.

6.3 The reject verbiage will vary if it is a Change Request, Invoice, PO, Requisition, Receipt, or Form.

6.4 If an item is rejected, it CANNOT be re-submitted.
6.5 When reject, a comment/reason is required.

![Add Note](image)

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.

7. Returning a Requisition/PO/Change Request/Invoice

7.1 To return a Requisition, PO, or Change Request. You must assign the document to yourself. You cannot return a document from the shared folder.

7.2 Go to Document Actions in the top right corner. A dropdown will populate, and it will give you two options on returning. You can return to the Shared Folder or back to original requestor/creator of the document.

![Document Actions](image)

7.3 When Returning to the Shared Folder, it will come out of your personal assigned folder. And it will go back into the shared folder queue, where anybody can work on it or approve it.
7.4 If Returning to the original requestor/creator a comment reason is required.

7.5 The comment will be viewable in the Comment section of original document (Cart or Requisition)