# Approver Acting on a Requisition

## Quick Reference Guide

### 1. Moving a Requisition to “My Assigned Approvals”

Placing a pending document (PR, PO, or Invoice) in My Assigned Approvals signifies that the Approver is responsible for the current workflow step for the item(s).

To move and reserve a requisition,

1. Click **Unassigned Requisitions Needing Approval** under **Action Items**.

2. Click on a folder to display a list of unassigned items.

3. Click **Assign** in the **Action** column.

The document is now in My Assigned Approvals, and the approver’s user name is now listed under the **Approver** column.

### 2. Reviewing Requisitions

1. To view details of a requisition, click **Requisitions to Approve** under **Action Items**.

   The My Assigned Approvals section shows requisitions that you have assigned to yourself.

2. Click on the **Requisition Number** of the document you want to review or, click on the **Quick View** icon.

   *Note*: Clicking on the requisition number enables the edit function. The Quick View does not allow editing.

### 3. Returning a Requisition

To return a requisition,

1. Assign the Requisition to yourself to avoid multiple people acting on the same requisition. Click **Assign**.

   The requisition displays in **Requisitions to Approve**.

2. Click the **Requisition No.** to open the requisition.

3. In the **Available Actions** drop-down, select **Return to Requisitioner**.

4. Enter a comment in the **Reason for return** comment field that lets the Requisitioner know why the requisition is being returned and what they need to change or correct.
4. Forwading a Workflow Requisition

1. Click Requisitions to Approve under Action Items.
2. Select the option from the drop-down box.
3. Click the button.
4. Enter specific user criteria.
5. Click the Search button.
6. Select the appropriate user.
7. Enter a note for the user that describes the reason to forward the requisition.
8. Click the Forward button.

5. Assigning a Substitute Approver

1. Point to the Orders & Documents icon and click Assign Substitute Approvers.
2. Select the checkbox next to the appropriate folders.
   Note: To select all folders, click Assign Substitute to All Requisition Folders.
3. Select Assign Substitute to Selected Folders and click Go.
4. Enter the Substitute Name on the Assign Substitute box and click Assign.
5. To end the substitution, click End Substitute for All Requisition Folders.
# Approver Acting on a Requisition

## Quick Reference Guide

## 6. Rejecting Requisitions

**NOTE:** If the approver enters a rejection note, this information will be sent with the rejection email to the Requisitioner. The requisition will be deleted and will not be available for editing. Use this with **CAUTION**!

To return a requisition,

1. Assign the Requisition to yourself to avoid multiple people acting on the same requisition. Click **Assign**.

   The requisition displays in **Requisitions to Approve**.

2. Click the **Requisition No.** to open the requisition.

3. In the **Available Actions** drop-down, select **Reject Requisition** and click the **Go** button.

4. Enter the reason for rejection in the PR **Reject Reason** field.

## 7. Recent Approvals

1. To view requisitions you have recently approved, point to the **Orders & Documents** icon and click **Approvals**.

2. Click **My Recent Approvals**.

## 8. Adding Comments to a Requisition

1. To add comments to a requisition, click **Requisitions to Approve** under **Action Items**.

2. Click on the **Requisition Number** of the appropriate document,

3. Click the **Comments** tab.

4. Click the **Add Comment** button.

   **Note:** By default, you have the option of sending the comment to yourself or the requisitioner.

5. If you want to send it to someone else, click the **add email recipient...**

6. Enter the desired information into the **Comment** field.

7. Click the **Add Comment** button.