1. Receiving Workflow Notifications

The **Approver** is a user that has been given permission in UMass BuyWays to review and approve requisitions. If an approver has an edit role, they can edit a requisition in addition to returning or rejecting one. If their role does not allow edit capabilities, they will only be able to approve or reject or return the requisition to the Requisitioner. Editing a requisition by an Approver does not restart workflow. So, if the edits require approval, you must return the requisition and have the Requisitioner make the edits and re-submit.

*Note:* The Approver(s) are assigned to approve a **requisition** based on their role and dollar threshold. These roles and dollar thresholds vary by campus and type of purchase.

**In-Application or Email Notifications**

Approvers are notified either by in-application **Notifications** or by email when a document has been routed to their personal folder or to one of their assigned workflow folders. This notification contains a link that takes the recipient directly into the appropriate approval area.

**Notifications** are located in the top banner, making them accessible from all areas of the site.

Notifications are clickable and take you to the appropriate area of the application (i.e., the requisition). Newer notifications are highlighted.

You will continue to receive email notifications. See the example email shown below.

![Example Email](image.png)

To set your email preferences, click on your profile and select **View My Profile**.
### 2. Approval Options

As an Approver, you have several options available when viewing a Requisition. Approver options include:

- **Approve** — send an order on for further processing. If no other approvals are necessary, the Purchase Order (s) will be created, sent to the suppliers, and sent to PeopleSoft Finance. There are two (2) types of Approvals:
  1. Quick Approval
  2. Standard Approval

- **Assign to myself** — removes the requisition from the shared folder and places it into your My Assigned Approvals folder (shown below). You should choose this option if you wish to return or reject part of the cart, or if you need to do further research before approving it.

  Once you Assign a requisition to yourself you can return or reject the requisition.

  - **Return to Requisitioner** — sends cart back to owner for editing. If you choose this option, you will be required to enter a comment about why you are returning the requisition.
  
  - **Reject** — cancels orders and no edits will be allowed. If a change needs to be made, you should choose to return the requisition instead. If you choose this option, you will be required to enter a comment about why you are rejecting the requisition.

**Note:** When rejecting a requisition, it is gone and cannot be retrieved. This function should be **USED WITH CAUTION.**

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### Setting Your Email Preferences (continued)

2. Select **Email Preferences** within **My Profile**.

3. Make your selections for the different notifications.

4. Click **Save**.
3. Viewing Approval Queues

1. To view approval queues, click Action Items.

<table>
<thead>
<tr>
<th>Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Assigned Approvals</td>
</tr>
<tr>
<td>Carts Assigned To Me</td>
</tr>
<tr>
<td>Requisitions To Approve</td>
</tr>
<tr>
<td>Unassigned Approvals</td>
</tr>
<tr>
<td>Unassigned Requisitions Needing Approval</td>
</tr>
</tbody>
</table>

The My Assigned Approvals section shows requisitions that you have assigned to yourself. The Unassigned Approvals section contains shared requisitions that have not yet been assigned.

2. To view the requisitions that you have assigned yourself, click Requisitions to Approve.

3. To view requisitions that have yet to be assigned, click Unassigned Requisitions Needing Approval.

4. Approving Requisitions

Quick Approvals

If you do not need to open a requisition before it is approved, you can perform a Quick Approval.

1. Click the Approve button on the requisition.

2. If one or more orders are in a shared folder, select the checkbox to the right of the desired requisitions.

3. Select Approve/Complete from the action drop-down list and click Go.

Standard Approvals

1. To perform a standard approval, open the requisition, review the information, and make updates using the edit buttons as needed.

2. Select Approve/Complete from the action drop-down list and click Go.

Alternatively, you could select Approve/Complete & Show Next to open the next requisition.