

REQUISITION APPROVAL

Before an order can be completed, it will have to go through an approval process. In this process, requisitions are assigned to one or more approvers via steps in the workflow. Approvers review the document and approve or reject the document as a whole.

ABOUT WORKFLOW

The workflow process begins when a cart is submitted and continues through when the purchase order is sent out to the supplier. The goal of workflow is to make sure that all orders sent out are valid. For example, workflow may involve financial approvals. In other cases, it may verify that the certain types of items (such as capital assets) are ordered correctly through the system.

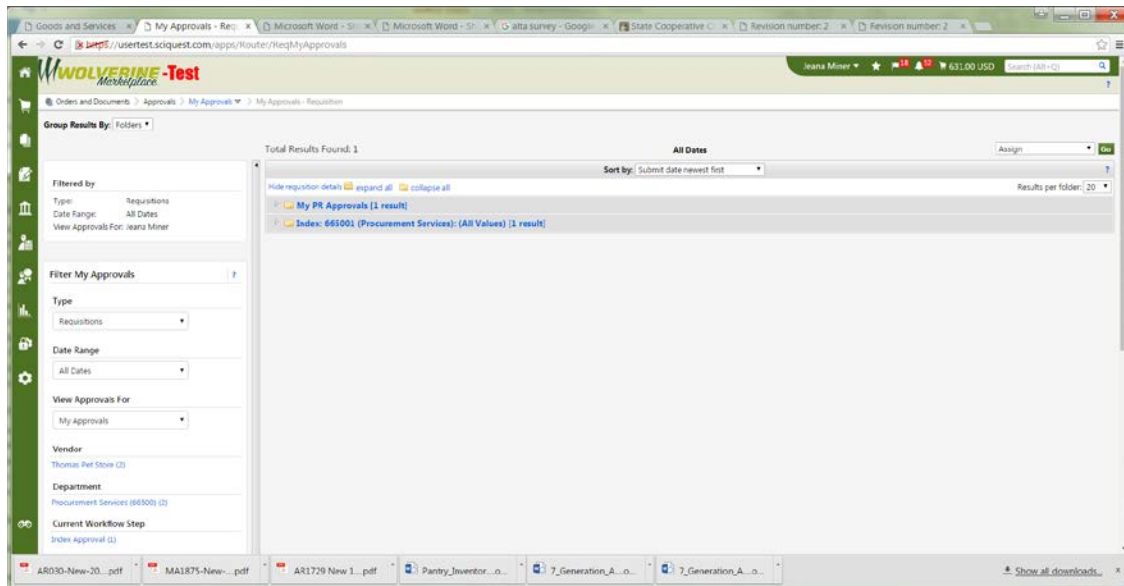
Requisition and Purchase Order Approval Basics

- The term approver is used to describe someone that is responsible for approving purchase requisitions.
- In order to approve requisitions, you must have the appropriate approval permissions. Permissions are granted through role assignment and/or individual permissions being granted by Finance and Business Services.
- Approvers can choose whether or not to receive notification when an order requiring approval lands in their “queue.” This is set up via the user’s profile.
- There are two types of approvals: 1) Manual approvals, requiring human intervention, and 2) System approval, which is automatic.
- An entire requisition can be approved or one or more line items in the requisition can be rejected. If part of a requisition is rejected (one or more line items), the remaining line items continue in the process.
- Comments and attachments can be sent “back and forth” between requisitioners and approvers during the approval process.
- Requisitions can be returned from Banner, to the requisitioner, for updates and re-processing.
- If a line item or the entire requisition is rejected (by an individual or the system), the rejection notice will show up in PR History. If the user is set up to receive notifications for rejections, they will receive an email also. This email contains the rejection note entered by the approver.
- Approvals are directed at a single individual and no one else can approve the order (unless a substitute is set up or the order forwarded).
- Requisition approvals can be done via email.

REQUISITION APPROVAL:

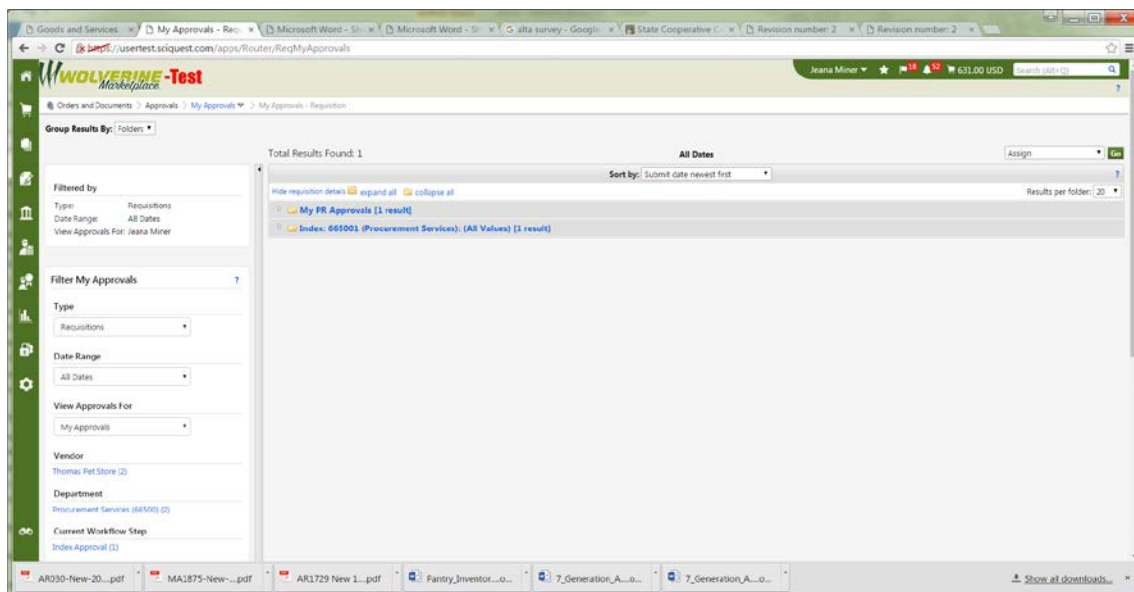
My Approvals

Screen Approval activity is done from the My Approvals screen. From this screen you can access and approve all documents that require your approval.



FOLDER VIEW VS. LIST VIEW

There are two different view options for My Approvals screen. The **Folder** view groups the documents by approval folder. The **List** view displays all documents in a list format. By default, the list will be sorted by date/time but there are several sorting options including document number and document title. The image above shows the **My Approvals** screen in **Folder** view. The image below shows the **My Approvals** screen in **List** view.



DOCUMENT TYPE

The My Approvals screen displays requisitions needing your financial approval. There are other document types available on the drop down list that pertain to Procurement functions. You are able to choose them, but you won't see any documents for approval.

FILTERS

Filters are available to help you narrow down the list of documents that are available for approval.

AVAILABLE ACTIONS

There are several actions you can take directly from the **My Approvals** screen:

1. **The Action Button:** A document may have an active button in the **Action** column. Generally, if the document is in your personal approvals folder, the button will default to Approve. You can click the button to approve the document. If the document is in another folder, but is eligible to be assigned to you, the button will default to **Assign**. You can click the button to assign the document to yourself for approval.
2. **The Action Menu:** The action menu allows you to perform an action on one or more documents. Available options include Assign, Approve, Forward and more.

DETAILS AND “TIPS AND TRICKS” FOR REVIEWING DOCUMENTS:

- When a document is in your personal folder, the approver owns it. Only an administrator can move a document out of this folder. Documents can automatically be placed in the in this folder for financial workflow or moved from a shared workflow folder and into your personal folder. When an order is moved from a shared folder to someone's folder, the approver is indicated to all users from the shared folder.
- Shared workflow folders are folders that can be accessed by one or more approvers. In most cases, there will only be one approver per folder. The actual folders that display for an approver is dependent on what they are responsible for approving. Therefore, an approver might see one, two, or twenty folders.
- Click the document number to open and view the document.
- To move multiple documents to your folder, click the Select checkbox to the right of each document, then select Assign in the drop-down box.
- The sort order for documents is remembered when an approver leaves the screen and returns. This affects all workflow queues that the user has access to. For example, if you are responsible for approving orders for three different account codes, you might choose to sort them by department. The next time you log in to approve an order, your sort preference will be remembered.

REQUISITION EMAIL APPROVAL

Email approvals allow an approver to receive an email with important information regarding the order to approve or reject, along with the ability to approve or reject the requisition from the email. Approvers will receive an enhanced approval email containing pertinent order information and a quick action webpage link where action may be taken.

HOW DOES IT WORK?

When email approval is enabled, organizations will, by default, require approvers to enter an email approval code to take action from the webpage link, therefore ensuring the authorized approver is the person taking action on the requisition or purchase order. Approvers maintain an email approval code in their user profile. When the approver accesses the approval webpage, they enter the email approval code and are authenticated as the authorized approver. They may also use the link to log into the system and approve from there.

WHO CAN APPROVE ORDERS BY EMAIL?

- All approvers will be able to approve by email. Only approvers who have set up an approval code in their profile will be able to use that feature.

WHAT INFORMATION IS INCLUDED WITH PURCHASE REQUISITION EMAILS?

- Summary information including Cart Name, Requisition #, Prepared by user, Prepared for user (if different than prepared by user), Workflow Folder, Priority, No. of line items, and Total amount/currency of the requisition.
- Line level information including Supplier Name, Item number (number of the line on the requisition, Item 1, Item 2, etc.), indication if the item is a non-catalog item, indication if the item is rejected or withdrawn, Product Description, Catalog Number, Quantity, Unit Price, Extended Price, Custom Catalog Attributes (if applicable) - Displays if the attribute is active and has a value, Contract number and name (if applicable), Size/Packaging, Taxable, Capital Expense, Commodity Code, Product flags - listed if true for the item, Custom field values – line values or if line is different from header value, Internal Notes - if populated, Internal Attachments - if present, and External Attachments - if present.
- Note: If the requisition contains more than ten lines, a message displays indicating user must login to see the details. If the item was rejected or withdrawn in a previous approval step, only the Product Description and Catalog number displays for that line.
- Form data including the name and type of form that was used to populate the line item(s).
- Account Codes information including the field, value, and description. For example: Project: 123, Services.
- Additional information such as the comments, the list of other approvers, names for internal attachments and supplier attachments, shipping address.
- A hyperlink to take action on the requisition. Note: This link does not display if the approver does not have an approval code set up.

HOW DO I TAKE ACTION

- After reviewing the order details in the email, the approver will select the link to access the secure approval webpage.

- The webpage that launches will render in the approver's site colors, and will display limited document information to confirm the approver has landed on the appropriate approval page.
- The approver will have the same actions that are available to them in the site, for taking action on entire documents. Possible actions include: approve, reject, assign to myself, and return to requisitioner.
- The approver will select the desired action and enter a comment if they choose. Approvers must enter their email approval code to submit the action for organizations where it is required.
- Once the action is complete, the approver receives a confirmation webpage. The action is logged in history as having been taken via email. Comments are also logged to Comments and history.

If action has already been taken by another approver in a shared folder, the approver will receive a message that action has already been taken on the document.