A **Departmental Approver** has the responsibility to approve, reject, or edit a requisition greater than $5000 forwarded by departmental Workflow processes. An approver who is established by signature authority is also automatically set up as a requestor.

Requisitions can be approved, rejected or edited at the header level or the line item level.

Approvers are notified of requisitions requiring their approval by email notification and by opening the **Review Section** on the **Home Page**.

**Note**: Users must have the proper email notifications set up in their profile to receive email notifications for workflow approval. (See the **Email Preferences** section of **Updating Your Profile**)

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To review approval notifications and requisitions that need review and approval, reference the **Review section** on the left-hand side of the **Home page**.

Your approval folders are displayed beneath both **My PR Approvals** and **My PO Approvals**.

**My Approvals** folders display the number of documents currently in the folder (active) as well as the number of notifications (pending).

The **Review** section displays the number of documents that are in the folder (pending) as well as the number of documents that are still waiting for review (not assigned).
Click either **MY Approvals** or a specific folder link in the **Review** section to view the documents in the workflow folder.

Some requisitions requiring review automatically go to your approvals folder. If an approval step can be shared by more than one person, the requisition must be moved to your **My Approvals** folder. Moving the requisition to your **My Approvals** folder signifies that you are responsible for the review and approval of the requisition. Once the requisition is moved to your **My Approvals** folder it cannot be approved by anyone else.

**Note**: Requisitions that require approval by only one specific approver will be automatically sent to that approver’s **My Approvals** folder.

In the **Review** section on the left-hand side of the Home page select either the **My Approvals** (PR/PO) folder to review the requisitions in the workflow folder.
To move a requisition to your approval folder, select a requisition from an approval folder with a state of **Not Assigned**. (Documents that have been assigned will not have the Assign link available) Click the **Assign** link in the **Action** column then select **Assign** in the **Apply Action** drop-down box and click the **GO** button to move the requisition to the **My Approvals** (PR/PO) folder.

The requisition is now in your approvals folder and your name will be listed under the **Approver** column.
To quickly move multiple requisitions to your approval folder, check the Select box for the individual items that you would like to assign to your approvals folder or check the top Select box to enable All available line items. After you have selected the requisitions to assign, select the Assign option from the Apply Action drop-down box. After you have moved the item(s) to your approvals folder, you must review the requisition for processing.

**Reviewing a Requisition**

As an approver it is your responsibility to review a requisition before approving or rejecting for processing. By approving a requisition you are agreeing that the correct departmental and purchasing policies have been followed and that accounting information is correct.

To review a pending Requisition, click on the My PR Approvals folder. Your Requisitions tab will open with your pending approvals at the top. Select the View link to the right side of the requisition number to access the detail of the document.
The requisition looks very similar to the cart view. Review the header, verifying that the following editable items are correct:

- **Ship To** (Your Department) and **Bill To** information (Should be HSC Payables)
- **Accounting Codes** – Fund, Organization, Account and Program codes are required.
- **Internal** and **External** notes
- **Supplier Line Item** detail
After items have been reviewed and edited as necessary click the **Save Updates** button to save all changes.

### Approving a Requisition

Once you have reviewed the requisition, approve for processing. Open the requisition and select the **Approve / Complete** option in the drop down box at the top of the requisition form.
Click on the Go button on the right side of the Available Action drop down box.

The requisition will no longer be in your My PR Approvals folder.
To see the approval workflow routing, click on the PR History tab.
Enter the requisition number in the **Requisition No.** field and click on the **Search** button.

Click on the **red** highlighted requisition number.

Then click on the **PR Approvals** tab. You can see each completed step in the workflow.
Rejecting a Requisition

Open the requisition from your My Approvals folder. Select all line items to reject by clicking the checkbox to the right of the price or click the checkbox in the column header row for each supplier to select all lines for the supplier.
Select the **Reject Selected Items** action from the drop-down box, and click on the **Go** button.

Enter a rejection reason in the comment pop-up box and click on the **Reject Line Item** button to save the comment and reject the line item(s). The rejection is not finalized until each workflow step is complete.

Select the **Approve/Completed** from the **Available Actions** drop-down box.

The requisition is now removed from your **My Approvals** folder.
When an approver rejects a requisition the requestor can see that their requisition has been rejected. The requestor can access their requisition from their My Requisitions folder.

The requestor can open the requisition to view the rejection reason.
Click on History to view the rejection notice.
Rejecting a Line Item in a Requisition

Open the requisition from your **My Approvals** folder by clicking on the red highlighted **View** link.

1. Click on the view link to open the requisition.
To reject a line item in a requisition, click in the check-box to the right of the price.

Select the **Reject Selected Items** action from the drop-down box, and select the **Go** button to reject the line item(s).

Enter a rejection reason in the comment pop-up box. Click the **Reject Line Item** button.
The line item that has been rejected now has a small red X next to the item number. Select the **Approve/Complete** from the **Available Actions** drop-down box and then click the **Go** button to complete the rejection and approval.

The requisition is no longer in your **My Approvals** folder.
To view the progress of the approval workflow, open the requisition and click on the PR Approvals tab.

Forwarding a Requisition

There may be a need to forward a Requisition to another designated person who has approval authority for your department. You can also assign a substitute approver temporary approval authority for your department.

If you want to forward a requisition that has not been reviewed (opened), check the Select checkbox on the far right side of the folder where the document is held. Then select the Forward… option from the drop-down box and click the Go button.
When the User Search box comes up enter the first name and last name of the person who will receive the requisition. Click on the Search button.

Click on the radio button on the left side of the Search Results under the Select column the click on the Choose Selected User button.

When the Add Note – Forward box pops up, enter a message then click on the Forward button.

The requisition is now assigned to another person to approve.
Assigning a Substitute Approver

Sometimes there may be a need to temporarily assign a substitute approver. The substitute approver is able to review requisitions routed to the original approver. Substitutes are assigned at the folder level from the Approvals screen.

Select the Assign Substitute link in the upper left-hand corner of the My PR Approvals section. Substitutes can be assigned to any folder to which the original user has access.

Enter the substitute’s first and last name in the correct fields and click on the Search button.
Click on the radio button on the left side of the Search Results under the Select column then click on the Choose Selected User button.

You can now see that the substitute approver has been assigned.

To end the substitution, click on the End Substitutions link.