UNIVERSITY OF ILLINOIS SYSTEM

Approver Process

Required Role: Approver

NOTE: If you would like to be able to approve a requisition by email, you must first set up your **E-mail Approval Code** in your user profile using **Change Email Approval Code** in the **Update Security** section (refer to the Establishing Your Email Approval Code job aid).

You will need to log in to iBuy to assign the requisition to yourself if you wish to return, reject or edit a requisition.

Step	Task
1.	Verify all of the requisition information as detailed in the email notification.
2.	Click **Take Action**.
3.	Enter your established **Approval Code**.
4.	Enter a comment in **Comment** (optional).
5.	Select the desired action to perform in the **Actions** section: • **Approve** **OR** • If action is other than Approve, select **Assign to Myself** to display action options. **NOTE**: You cannot edit or make any changes to the requisition.

Access the Approvals – Requisitions Screen:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Approvals**.
3.	Click **Requisitions to Approve**.

Approve a Requisition:

Step	Task
1.	Select the requisition that needs approval.
2.	Click **Assign** next to the requisition.
3.	Click **Requisition Number** to open the requisition.
4.	To assign multiple requisitions: • Select multiple checkboxes • Choose **Assign** • Click **Go**
5.	Verify information: General, Shipping, Billing, Accounting Codes, Internal/External Notes, and Attachments, and Supplier/Line Item Details (make changes as needed).
6.	Select **Approve/Complete Step** in the **Available Actions/Options** list.
7.	Click **Go**.

Return a Requisition:

Step	Task
1.	Click **Assign** next to the requisition.
2.	Click **Requisition Number**.
3.	Select **Return to Requisitioner** in **Available Actions/Options**.
4.	Click **Go**.
5.	Enter the reason for the return in the **Reason for Return**.
6.	Click **Return to Requisitioner**.
7.	Click **Go**.

Reject a Requisition:

Step	Task
1.	Click **Assign** next to the requisition.
2.	Click the **Requisition Number**.
3.	Select **Reject Requisition** in **Available Actions/Options**.
4.	Click **Go**.
5.	Enter the reason for the reject in **PR Reject Reason**.
6.	Click **Reject Requisition**. **NOTE**: Once a requisition is rejected, no further action can be taken. A new requisition will need to be created.

Access Requisitions Recently Approved by Me:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Approvals**.
3.	Click **Requisitions Recently Approved by Me**.

Assign Substitute Approvers:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Approvals**.
3.	Click **Assign Substitute Approvers – Requisitions**.
4.	Click **Assign** next to the queue to specify an alternate approver for each queue (example, you are going to be out of the office).
5.	Enter the **Substitute Approver's Name**. **NOTE**: The individual must have the role of Department Approver in order to be able to be assigned as an alternate approver.
6.	Upon return to the office, return to **Assign Substitute Approvers** to remove the alternate approver.

Approval Notifications:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Approvals**.
3.	Click **Approval Notifications**.

Filter My Recent Approvals:

Step	Task
1.	Go to the **Requisitions Recently Approved by Me** as described above.
2.	Apply the desired filters using **Add Filter** and use **Pin Filters** to set the desired filters as default when returning to view **My Recent Approvals** **NOTE**: The system default for **Approved Date** is set for the last 30 days and **Clear All Filters** will return to system default.
3.	Use **Save As** to save a specific search under **Favorite Searches**