Departmental Approver Process

Role: Approver

To take actions via New Pending Email Notification

NOTE: You must first set up your E-mail Approval Code in your user profile using **Change Email Approval Code** in the **Update Security Settings** section (refer to the *Establishing Your Email Approval Code* job aid).

1. Verify the requisition information as detailed in the email notification.
2. Click **Take Action**.
3. Enter your established **Approval Code** in the **Approval Code** field.
4. Type a comment in the **Comment** field (optional).
5. Select **Approve** or **Assign to myself** in the **Actions** section.
    a. Selecting **Approve** will approve the requisition and moves it to the next step in the workflow.
    b. Selecting **Assign to myself** will allow the following options:
        i. **Return to Shared Folder:** Used to return the requisition to its shared approval folder where another approver within the queue can review it.
        ii. **Return to Requisitioner:** Allows Approver to return the requisition to the Requestor to make updates and resubmit.
        iii. **Reject:** Allows the Approver to reject the requisition.
    c. **NOTE:** You must log into iBuy in order to edit or make any changes to the requisition you are reviewing.

To Access the Approvals – Requisitions Screen

1. Log on to iBuy.
2. Click **Orders** on the left navigation bar.
3. Hover over **Approvals** to reveal a menu.
4. Click **Requisitions to Approve**.
    a. **NOTE:** If assigned to multiple approval queues, folders will appear for the specific queues you are assigned to that have an item pending approval.

Assigning a Requisition

Use the Assign feature to prevent another approver within the approval queue from approving the requisition you are reviewing. The Assign feature must also be used to edit or make any changes to the requisition or to return or reject a requisition.

1. Select a requisition that needs approval.
2. Click the **Assign** icon at the end of the row of the requisition to approve.
3. Click **Requisition Number** to open the requisition.
4. Verify the information in the following fields: **General, Shipping, Billing, Accounting Codes, Internal/External Notes and Attachments, Supplier/Line Item Details, Purchasing Requisition Form** responses (make changes as needed).
5. Determine the action to take on the requisition**.** Choices are available from the drop down menu by clicking the down arrow next to the Approve & Next.

Approver Action Options

1. Select the appropriate action from the **Actions** options in the upper right corner of the requisition. **Action** options include:
   a. **Approve:** Approves the requisition and moves it to the next step in the workflow.
   b. **Return to Shared Folder:** Used to return the requisition to its shared approval folder where another approver within the queue can review it.
   c. **Place Requisition on Hold:** Use to indicate that the assigned Approver is reviewing/obtaining additional information/not taking action on the requisition at this time.
   d. **Return to Requisitioner:** Allows Approver to return the requisition to the Requestor to make updates and resubmit.
   e. **Forward to:** allows you to forward the requisition to another approver.
   f. **Withdraw Entire Requisition**: if the issue with the requisitions cannot be resolved with one of the other actions you can withdraw the order.
   g. **Reject Requisition:** Allows the Approver to reject the requisition.
2. Type the reason for the return or reject in the **Reason** field.
3. Click the blue action button.
   a. The blue action button will display the text "**Save Changes"** or **"Reject Requisition"** depending on your previous selections.

To View Requisitions Recently Approved by Me

1. Log on to iBuy.
2. Click **Orders** on the left navigation bar.
3. Hover over **Approvals** to reveal a menu.
4. Click **Requisitions Recently Approved by Me**.
5. Apply the desired **Filters** using **Add Filter**.
    a. **NOTE:** The system default for **Approved Date** is set for Last 30 days.
6. Search and reporting options available:
    a. Use **Save As** to save a specific search under **Favorite Searches**.
    b. **Pin Filters** will set the desired filters as default for when returning to view them.
    c. **Clear All Filters** will return to system default.
    d. **NOTE:** See the *Using Orders Search and Creating Reports* job aid for additional information on the use of search filters and saving searches.